Assigning roles to people

Only users with maximum permissions to edit person records (e.g. group Super Users) can assign roles.

- Managing Editor Support assign and remove/deactivate the Managing Editor role. Please inform support@cochrane.org of any changes to this role.

How do you choose the correct role?

Each group type has a a defined list of roles available. Each role comes with specific permissions to access certain resources, web pages or software. You should use the role that corresponds to the appropriate permission levels for that person. See Access to Archie: group roles and permissions.

Assign a group role

1. Find the relevant person in Archie.
2. Double-click on the name to open the person properties pop-up.
3. Click on the Roles tab (see screenshot below).
4. Click New. This opens the Group Role window.
5. If you have permissions for assigning roles in more than one group, select the relevant group from the Group pull-down list.
6. Select the relevant role from the Role pull-down list.
7. If you wish to add additional information about this particular person's role, use the Role Specification field.
8. Click OK.

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Edit a group role

1. Find the relevant person in Archie.
2. Double-click on the name to open the person properties pop-up.
3. Click on the Roles tab.
4. Select the role to be edited.
5. Click Edit. This opens the Group Role window.
6. Select the relevant role from the Role pull-down list.
7. If you wish to add additional information about this particular person's role, type this in the Role Specification field.
8. Click OK.

For information on marking roles Active or Inactive , see Group roles.

Assign a role to a person from the resources tree

1. Locate the role in the group's People folder in the Resources tree.
2. Right click the role name, and choose Assign Role to > Person. The Assign to Person window opens.
3. Click the [image] button to find the person you wish to assign. See Choosing a person or date.
4. If you wish to record additional information about this particular person's role, type this in the Specification field.
5. Click OK.

You can use the role's Resources tree entry to assign the same role to a number of people.

Assign a role to multiple people

1. Add the relevant persons to your Selection. See About search and Search results for more information.
2. Locate the role in the group's People folder in the Resources tree.
3. Right click the role name, and choose Assign Role to > Selection.
4. If you wish to record additional information about these persons' roles, type this in the Specification field.
5. Click OK. The role is assigned to all the selected persons, with the exception of any who already had the role.
6. Click Close.

Removing roles

To remove a role from a person's Properties

1. Go to the Roles tab.
2. Click the role, and then click Delete.
3. Click OK to confirm.

To remove a role from a person using the resources tree

1. Locate the role in the group's People folder in the Resources tree.
2. Right click the role name, and choose Remove Role From.
3. Select the person from the pull-down list

4. Click Remove.

To make a role inactive

1. Go to the Roles tab.
2. Click the role, and click Edit.
3. Group Role window opens.
4. Remove mark from the Active check box and click OK.
5. Remember: If the last role is marked inactive, the person will also be marked as inactive.

See also Group roles, About People, Inactive status