


Document roles

Document roles link specific people with specific documents and can give those people certain permissions for the document. The level of permissions given (for example, to read or edit) is determined by the role. Document roles are part of a document's Properties.

In addition to the two author roles, Contact Person and Author, Archie includes several other Document roles that can be assigned to people in relation to reviews (for example, Contact Editor or Referee).

Document roles are assigned and edited under the People tab of the document's Properties. Super Users can assign Document roles in Archie.


Assigning a document role

1. Open the document's Properties and go to the People tab.
2. Click New. This will open the Document Role window.
3. Click  to pick the person to assign the role to. See [Choosing a person or date](#) for details.
4. Use the Role pull-down list to choose the Document role you wish to assign. The available roles will depend on the document type.
5. Click OK.


Tip: the Document Role window also includes a Notes tab, where you can record notes relevant to that particular document role. However, since these notes require you to open the individual role, you may find it easier to simply use the Notes tab on the documents Properties for all notes.

The Document Role window for reviews has an Address tab that lets you assign a different address than the person's default contact address for use in a particular review. See [Contact details in reviews](#) for instructions on this feature.

Editing a document role

1. Open the document's Properties and go to the People tab.
2. Click the role you wish to modify.
3. Click Edit. This will open the Document Role window.
4. Depending on whether you wish to change the person or the role, either
 - Click  to choose a new person for the role (see [Choosing a person or date](#) for details), or
 - Use the Role pull-down list to choose the new Document role you wish to assign to the person.
5. Click OK.

Assigning a new Contact Person

1. Open the document's Properties and go to the People tab.
2. Click the role you wish to modify.
3. Click Edit. This will open the Document Role window.
4. Click  to search for a new person for the role (see [Choosing a person or date](#) for details)
5. Select the new person for the role
6. Document Role window for the new Contact person appears.
7. Click OK. You will see an Archie notification that the role has been reassigned.

Review roles and permissions

The table below shows the permissions associated with the Document roles for reviews. The top row of the table summarizes whether a role gives access in the [Authoring or Editorial phase](#).

| Phase | Authoring | | Editorial | | |
|-------------|--|--------------------------|--|-------------|--|
| Role(s) | Contact Person | Author Author Support | Contact Editor Editor Editor Support Information Specialist | Copy Editor | Statistician Feedback Editor Referee |
| Permissions | View Published versions View versions to be published View shared draft versions | | | | |
| | View author draft versions Write during authoring phase | | | | |
| | | | View during editorial phase (open the review in RevMan Web) | | |
| | | | Write during editorial phase (open and edit review in RevMan Web) | | |
| | | | View editorial* roles | | |
| | Assign author roles | | | | |

Note:* 'Editorial' roles are all the roles associated with the editorial phase, so this includes Referees.

All users have the View permission which allows a user to see a document in Search Results or under Resources, and open its Properties to view author roles.

The remaining review permissions, such as Revert, Delete document or Publish, are assigned through Group roles, see [Permissions linked to Review Group roles](#).

Relationship to Group roles

Most Document and Group roles (see exception below) work independently of each other. However if you delete the last Document Role a person has in your group, and the person still has one or more Group Roles, an message will notify you of this. You can then decide if the Group Roles should also be modified.

The Author role is a special case: a person with the Document Role must have the corresponding Group Role. This has the following consequences:

- If you add the Author Document Role for a person who does not yet have the Group Role, Archie will create that automatically.
- You cannot delete the Author Group Role if the person has the Document Role for a review in your Group.

See also [Permissions](#).