

## Top Tips for Authors using Archie and RevMan 5

**Background:** Archie is the Internet-based server where your review(s) are stored and where you can read, print and compare current and past versions of your review. Archie also contains the contact details for contributors to the Cochrane Collaboration. RevMan 5 is the software you use to write and edit your review(s). Together, Archie and RevMan form the Cochrane Information Management System (IMS), which is designed to enable contributors to the Cochrane Collaboration to meet the demands of producing high quality systematic reviews of the evidence of the effects of healthcare and deliver these for publication in *The Cochrane Library* and elsewhere.

### 1. GETTING STARTED

- Download RevMan 5 from <http://ims.cochrane.org/RevMan>
- On this page is a link to 'Authors' on the left hand Navigation panel, which will take you to an information page for authors (<http://ims.cochrane.org/authors>). This is an excellent resource page providing information on Archie, RevMan 5, GRADEProfiler and how to start using them.
- Take the time to complete the RevMan 5 Tutorial located in the RevMan 5 Help file.
- Before you can start to work on your review in RevMan 5, you will need a user account to access Archie (where your review is stored). With this user account, you can update your own contact details and access reviews and other files for which you have permission to access. To request a user account, go to the Archie log in page (<http://archie.cochrane.org>) and click 'Not a User? Request a User Account'. You will be sent a Registration email and need to follow the instructions provided in order to activate the account. Once the account is activated, you can access your review and your contact details.
- **Tip:** The window for activating your Archie user account is limited to two weeks after your Registration email is sent. If you are not able to activate your account within this time frame, you should contact the Review Group Co-ordinator at your Group's editorial base or go to the Archie log in page (<http://archie.cochrane.org>) and click 'Not a User? Request a User Account' again.
- **Tip:** If you encounter difficulties with using Archie you should contact your Review Group Co-ordinator, who will be able to assist in setting up user accounts, unlocking reviews, and general management of the review process.

### 2. SETTING UP YOUR PREFERENCES IN REVMAN 5

When you first begin using RevMan 5, set up your preferences. To do this, go to Tools > Preferences.

- On the General tab fill in your name in the User's Real Name boxes so if you use Track Changes, your comments will be linked to you by your initials.
- Still on the General tab, in the Miscellaneous box select 'Every session' for when you want to 'Check for updates to RevMan'.
- Tick the three boxes at the bottom of the same Miscellaneous box (two warnings and one validation check). This will assist you to maintain version control by ensuring you do not mix up the latest version and back-up copies of your review.

- Now go to the Connection tab and enter your Archie User Name and Password and tick the box next to 'Save user name and password when RevMan is closed' – unless you share your computer with others, in which case you would not want to do this.
- Still on the Connection tab, check the Server address is set to Archie Server and click Test to check the connection.
- To protect against accidental data loss, RevMan will automatically save a local backup of your review at regular intervals. The default is every 10 minutes, but this can be changed in your Preferences (Tools > Preferences: Files tab). The backup file is saved by default to your computer's temporary folder, but you can specify a different location on the same tab (Files) of your Preferences.
- **Tip:** If your computer (or RevMan) crashes while you are working on a review, you will be given the option to open the latest backup of the review the next time you open RevMan.
- **Tip:** If a RevMan update has been released, and you have set your Preferences as indicated above, the next time you open RevMan it will bring up a box saying 'An update to RevMan is available from...' - click on 'download' and follow the installation prompts.
- **Tip:** You can specify the maximum number of recent files to be listed on under Tools > Preferences: Files tab.

### 3. CHECKING YOUR REVIEW OUT FOR EDITING

- When you are ready to begin work on a new or existing review, you will need to check the review out from Archie to RevMan 5. To do this, go to File > Check Out or click the Check Out button on the main toolbar. In the Check Out window, click the review you want to edit and click OK. A Confirm Action window will open – click Check Out to confirm that you want to check the review out. This will prevent others from accessing the review while you are working on it.
- **We recommend that you check the review back into Archie at the end of each editing session** but you can also save the review locally in between editing sessions (see '6. Saving reviews locally', below).
- **Tip:** If you just want to read your review or print a copy (without editing), you do not need to check it out to RevMan 5 (see '7. Accessing your review...', below).

### 4. CHECKING A DRAFT OF THE REVIEW BACK INTO ARCHIE BEFORE IT IS READY FOR EDITORIAL CONSIDERATION

- To check a review into Archie from within RevMan 5, go to File > Check In or click the Check In button on the main toolbar to activate the Check-in Wizard.
- If the draft you are checking in is not yet ready for editorial consideration, enter a Version Description (e.g. 'RoB tables finished, data entered') on the first screen of the Wizard so that you and your co-authors will remember/know what you did, then click Finish. You should get a message saying the draft was successfully checked in. If the check-in report suggests there was any problem with the check-in, please contact your Review Group Co-ordinator.
- **Tip:** You have the option of submitting the review for 'Editorial approval' when you check drafts into Archie; if you are intending to keep the review available for you and your co-authors to access, you should **not** select this option.

## 5. CHECKING A DRAFT OF THE REVIEW BACK INTO ARCHIE FOR EDITORIAL APPROVAL

- If you are ready to check in the draft to your Review Group for editorial review, in RevMan 5 go to File > Reports > Validation Report and check and fix all the 'Errors' and as many 'Warnings' you can.
- Go to File > Check In and enter a Version Description (see above example), then click Next. On the second screen, tick the box 'Submit for editorial approval' and click Next. Check each box to confirm the listed tasks have been completed and click Next.
- You can type a message in the Message box, thus alleviating the need to send a separate email to the Review Group, unless you have an attachment you also wish to send.
- When you have completed all the above steps, click Finish.
- **Tip:** You can check a draft in for Editorial approval with 'Warnings' but not 'Errors'. Any significant missing information (for example, missing links for figures) will be flagged as an Error and will prevent the review from being checked in for Editorial approval.
- **Tip:** Once a draft has been checked in for Editorial approval you will not be able to check the review back out again until the Review Group has completed its editorial review.

## 6. SAVING REVIEWS LOCALLY

**We recommend that you check reviews back in to Archie at the end of every editing session**, but there may be situations where this is impossible or unnecessary; for example, you may be unable to access the Internet while you are working on a review, or you may be certain that no one else will need to access the review for some time. In such cases, saving your RevMan files to your computer is an option.

- **To save a review locally from within RevMan**, use File > Save or click the Save button on the main toolbar. If this is the first time you have saved the review, a 'Save' dialog will open asking you to confirm: (a) the directory on your computer where the file should be saved; and (b) the file name. If you have previously saved the review, re-saving will automatically overwrite the existing file in the same location. **To re-save to a different location, or using a different filename**, use File > Save As..., and change the suggested option(s) as desired. When you are finished with your editing session, save the file and then click the X in the upper right corner of the review window to close the review.
- To open a file saved to your computer for further editing, use File > Open ..., or File > Recent Files.
- **Tip:** Closing the review without saving will mean that you will lose all changes since your last save or the last automatic local backup.
- **Tip:** Unless absolutely necessary, don't store your review for a long time on your computer. **Check it back into Archie so the most recent version is always stored there.**

## 7. ACCESSING YOUR REVIEW FROM WITHIN REVMAN VERSUS BY LOGGING IN TO ARCHIE

- You need to check your review out to RevMan from Archie **only** if you plan to make changes to it.
- Do you just want to have a look at your review without editing it? If so, you can read it directly in Archie by logging into Archie (<http://archie.cochrane.org>), right-clicking the title in the Resources folder view, and selecting View to read the latest or published version. You can save, print or produce a PDF of the version you are viewing by clicking the appropriate button in the upper left of the document viewer.
- Otherwise, you can download a (read-only) copy of your review from within RevMan. To do this, go to File > Check Out or click the Check Out button on the main toolbar. In the Check Out window, click the review you want to download and tick the box marked 'Download a copy of the review without locking it for others (not for editing)' (bottom left-hand corner of the Check Out window).
- You don't have to log in to Archie to access your review. As long as you have Internet access, from RevMan 5 on your computer you can:
  - Check out your review from Archie
  - Edit your review
  - Check your review back in to Archie
  - Download a read-only copy of your review
- You only need to go into Archie to check and change your contact details, to read earlier versions of your review, to compare different versions of your review, or to access a PDF version of your review.
- **Tip:** Once you (or anyone else) have checked out a review, no one else can access it until you check it back into Archie again. Checking out the review locks it on the server, preventing anyone from making changes to the document until you have checked the review back in.
- **Tip:** If you checked out a review from Archie then decided you didn't have to make any edits, you do not have to check it back into Archie in order to unlock it allow others to access it. Instead, you can undo the check out by exiting RevMan (File > Exit) or close the review in RevMan 5 by clicking on the Close button on the right-hand side of the screen opposite the review title. You will then be prompted to 'Confirm Undo Check-out' and should answer 'Yes'. Alternatively, you can undo the checkout in Archie (right click on the review title > Undo check out).

## 8. HELPFUL DOCUMENTS AND RESOURCES

- Archie Help file
- RevMan 5 Help file
- RevMan 5 Tutorial
- RevMan 5 FAQ (<http://ims.cochrane.org/RevMan/faq.htm/>)
- RevMan 5 Quickstart for Authors (<http://ims.cochrane.org/authors>) or (<http://www.cc-ims.net/Projects/newIMS/Training/Quickstart-for-Authors.pdf>)
- RevMan 5 installation and connection settings (<http://ims.cochrane.org/RevMan/RevMan5/RevMan5-installation-and-connection.pdf>)
- Information and links to software related resources relevant for Cochrane authors (<http://ims.cochrane.org/authors>)
- Introductory presentation on Archie for Authors and editors (PowerPoint presentation) (<http://ims.cochrane.org/authors>)