

## Detailed Guidance on Dealing with Contact Details and Contact IDs in Phase 2

### Set-up/preparations

1. Clean up contact details in Archie as described in the Phase 1 User Guide. Specifically, make sure that all your Group's authors have a record in Archie, that they have been assigned the Entity role 'Author' in your Group, and that their most up-to-date contact information is in Archie. In cases where you are not the primary entity, use Suggest changes to inform the primary entity of any edits that need to be made.
2. Remove any reviews currently in RevMan 4.3 (by checking in to Archie or exporting).
3. Delete all contact details in RevMan 4.3 except your own (which cannot be deleted). To do this, go to Action > Compact and repair database and click Yes when you are asked whether you want to delete contacts that are not linked to a review. Use View > Show reviewers to confirm that yours is the only contact record left.
4. In Archie run an Advanced Search for all Authors in your CRG (Role in entity / Author / in [your CRG]). Select the records identified and export them (Tools > Export and Labels) in RevMan/HIREx format.
5. In RevMan 4.3 import the contact details exported above (File > Import > Contact details).
6. Using the View > Show reviewers tree view in RevMan 4.3, check and, if necessary, edit the contact IDs brought into RevMan to match your list of unique IDs for your CRG. [Tip: To do this, either print off your CRG's list of contact IDs or, if you have maintained them in RevMan 4.2, print them off from there (View > Show reviewers, then File > Print tree view) and compare them to the list (View > Show reviewers) brought into RevMan 4.3 from Archie.] Make any corrections that are needed in RevMan 4.3.

### Contact IDs

Once you have completed the steps described above, you should be able to forget about contact IDs, which are not used for publication in Phase 2. When you add a new author to Archie (e.g., in connection with a title registration), there is no need to enter a contact ID in Archie. An ID unique to your Group will be created within RevMan 4.3 the first time you check out a file containing the new author's contact details from Archie.

Until review authors move over to using the new IMS, they may still send you RevMan files in which they use contact IDs that are not the ones assigned in your Group. The review/contact detail import routine in RevMan 4.3 should protect against the creation of duplicate records with two IDs, provided you do NOT choose the option to "Use the new information with the new Contact ID" on the contact details

comparison screen. If you try to import contact details with an ID already assigned in RevMan 4.3, you will be alerted to this and will be able to assign a new ID to the incoming details.

Using this system, the View > Show reviewers tree view in RevMan 4.3 should display a list of all the authors in your Group, with the contact IDs assigned to them in your Group.

## Contact details

*When importing an rm4 file from outside the system into RevMan 4.3, you will get a comparison screen showing any discrepancies between contact details in the incoming file and those stored in RevMan 4.3 (imported from Archie). Choose the most complete and up-to-date details, making a note of any cases where the details in the incoming rm4 file are *better* than those in RevMan 4.3/Archie (just noting the name, not the detailed discrepancies). [Tip: Remember that authors often send RevMan files containing out-of-date or incorrect contact information. Do not assume that information in the import file is correct.]*

*When checking an rm4 file into Archie, do **NOT** tick the “Update contact database” box. (To eliminate confusion, this box will be deleted in a future deployment of RevMan 4.3.)*

At the end of the check-in procedure, note what the check-in report says about discrepancies between contact details in Archie and those in the file you've just checked in. [Note: By “check-in report”, we mean the little grey window that pops up at the end of the check-in routine informing you of actions taken vis-à-vis contact details, document roles, etc. It is a current wish list item that this window be printable; for now, you will need to make notes separately.]

After check-in, and within Archie, investigate any discrepancies in contact details noted in the check-in report. To do this:

1. In the Resources tree view, right-click the review you just checked in and choose View > Latest version.
2. Within the viewing window, choose the “Full text view” (upper left, pull-down menu), which will display contact details for the contact author and co-authors on the Cover sheet; minimize the viewing window.
3. Search for the record of the person whose details you need to check (using Quick Search or by scrolling through the Resources tree view); open their Properties.
4. Maximize the review viewing window, navigate to the cover sheet/contact details section, and compare the details there with those in the person’s Properties, side-by-side, line-by-line, and make edits if necessary to the person’s Properties. The revised contact details will be picked up and attached to the review the next time you check it out from Archie. **Remember that contact details should always be edited in Archie, not in RevMan.** Use Suggest changes where you are not able to edit a record directly.

*When marking a review for publication, you should normally choose the option (on the first screen of the Publication Wizard) to include contact details from the contact database (Archie) in the published review. The only exceptions would be a few*

special cases, e.g., if you discovered at the last moment that another primary entity had not been able to correct an address for one of your authors that you knew to be out of date, or to add a secondary address you wanted to use for publication. (See the Phase 2 User's Guide for discussion of such exceptions.) Remember that you can always use the View button in the Publication Wizard to confirm that the contact details you are about to publish are correct.

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