User Guide for Archie and Review Manager 5

The Cochrane Airways Group
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Introduction to User Guide

This guide is intended to be used in the process of retrieving and uploading reviews and protocols from the Cochrane Collaboration’s online review management system, Archie. It is aimed to introduce Cochrane review authors and editors to the features and functions of the information management system (IMS). Fuller, more detailed guidance on the features contained in Review Manager 5 and Archie are available within Review Manager (see ‘Help’), and online (see Additional resources).

This guide does not contain instructions on how to do your review. It is primarily aimed at people who have recently registered a title with a Cochrane group, and would like some understanding of the basic functions of the web-based system for producing their reviews.
Preliminary details

‘Archie’ is a server which contains an online system for managing the systematic review process and the contact details for contributors to the Cochrane Collaboration. Its release in March 2008 coincided with the launch of a new software programme for writing Cochrane reviews, Review Manager 5 (RevMan 5). These new features of the Cochrane Collaboration form an information management system (IMS). Archie and Review Manager 5 will enable contributors to the Cochrane Collaboration to meet the demands of producing high quality systematic reviews of the evidence of the effects of healthcare.

If you have received this guide from your editorial base, you will also have been sent an automated email inviting you to set up a user name and password for your user account. In order to begin using the server to access and store work you need to activate your account and ensure that your contact details are correct. The window for activating your account is limited to two weeks, so you should contact your editorial base in order to re-set your activation email if this deadline has passed.

Your contact details are important in the process of producing your review and you should ensure that these are current, and that your departmental and organizational affiliation is correct.

Your default user name is your email. If you would like an alternative user name, or if you mislay this information, please inform your RGC/managing editor and they will be able to reset your user name and password.

If you encounter difficulties with using the server you should contact your RGC. They will be able to assist in undoing the check out process and they have special permissions for the general management of the review process.

Managing your contact details

When you activate your account on the server the first task you should perform is to read your contact details, and correct any inaccuracies.

After logging in you can view your contact details record by clicking on your name which should appear in the top right hand corner of the screen, above the Cochrane group who have set up your user account:

This generates a pop-up window; the ‘General’ tab holds your contact details:
Your email address is shown in the top field. You can add a second email address by clicking the drop down menu in the ‘Email’ box. By selecting the ‘Edit’ function on the left hand side of the contact details tab; you can then change the departmental and organizational affiliations of your work address, or change the address stored as being your work or home address.

If you are the contact author for the review, the details contained in all these fields will be published. If you are listed on the author byline, the citation will draw on the details contained in the department, organisation, city and country fields. It is worthwhile familiarizing yourself with how to edit these details: once the review is published it will be three months until any inaccuracies can be changed.

You can use the database of contact details to search for details of other contributors; for example you can search for members of the Cochrane Collaboration based in your city, region or country.
Principles of Review Manager 5 and Archie

Archie and connectivity

Having a user account will enable you to view, share, archive and submit drafts of your review: the server is a tool for you and your co-authors or editors to read your review. In order to write or amend the review you will need to have installed Review Manager 5. This software programme is available from http://www.cc-ims.net/RevMan.

RevMan 5 is now compatible with both PC and Mac computers. However, using Archie will require either one of two web browsers: Mozilla Firefox version 2 or later, or Internet Explorer version 6 or later.

One of the main strengths of using Review Manager 5 is its connection with the server. You can retrieve and upload work through RevMan 5 offline. This is made possible by storing your user name and password in the ‘Settings’ property of the programme. This points your RevMan at the server, and enables you to access documents (protocols or reviews) for which you have been assigned a role.

Document roles

In order to access work, you will need a document role on a specific review. This will typically be as an author, author support, contact person, or editor (referees, statisticians and copyeditors can also be given document roles).

Checking in, checking out and downloading

The principal features of ‘Archie’ are version control and secure storage of work. These help to protect reviews against confusion over primary and secondary versions, and loss of data.

When you wish to write the review, you will need to check out the review from the server. This locks the review and prevents anyone else making changes to the review (they can still view the draft you have checked out, and download a copy, but they will not be able to check in that version). Only you will be able to check in the review again. Checking in the review creates a draft that is
viewable at any time, and becomes the latest draft available to authors or editors. Earlier versions will still be available to view and compare.

Reviews will be available to authors or editors according to the writing phase. The authoring and editorial phases prevent different users from checking the review out and amending it. When you submit work for editorial review you will not be able to access the review again until you are notified. You will need to ensure that you are releasing the review to the correct phase when you check it in and this is done during the check-in process. You have the option of submitting the review for editorial approval when you check work in to the server; if you are intending to back up the review or to make it available for review authors you should not select this option.
Establishing a connection with Archie

Connecting to the server through RevMan will enable you to access your work quickly. We have two servers: a live server, which we use to generate all the published reviews on the Cochrane Library, and a test server for training and other purposes. It is always important to ensure that you are connected to the live server for accessing and submitting work. This information is stored in the preferences section under the ‘Tools’ tab:

Now you need to access the settings tab to make sure that the server address is correct and that your profile will automatically be recognized by the server:

The destination is indicated in the ‘Server’ field. You can choose from the list of servers, but the live server (i.e. the one with publishable versions of your review) is listed with a web address of: archie.cochrane.org).

If you save your user name and password when RevMan is closed you will not need to enter it again the next time you launch RevMan 5. Clicking on ‘Test’
will generate a short message, indicating whether you have been recognised correctly, and which server your RevMan currently points to.

If you are unable to store your user name and password in your RevMan, or if there are problems with accessing reviews from Archie via RevMan, you can still check reviews out, but in order to do so you will need to log in to Archie (see below).

**Checking Out Protocols and Reviews**

*Checking out a document within RevMan*

Once you have established that the correct username and password are entered, and that you are connected to the right server, you will now be able to access your review. You should check out a review because you intend to make a change to the document, be it adding a full-stop or creating a new comparison for study data.

Checking out the review locks it on the server, preventing anyone else from making changes to the document until you have checked the review back in. It is advisable to consider a strategy to ensure that your work is backed-up if you do not check the review in at the end of the RevMan session, for example a local server, or your own disk. However, it is advisable to be in the habit of checking in when you have finished a session of work on your review.

You are prompted to check out a review when you launch RevMan; but you can also use the check out function from the toolbar within RevMan at anytime (the button with the downwards-pointing blue arrow see below):
Clicking on this button generates a list of reviews that you will be able to access (i.e. you have a document role on them). Carefully check the review title and whether the review is currently available to you:

Simply click on the relevant review and select ‘OK’. The review will then be retrieved from the server and will appear in RevMan.

If the review is checked out already, or you are anticipating a check out from a co-author, click the radio button next to the text: ‘Download a copy of the review without locking it for others’. This will enable you to have a version of the review on your machine, but you should avoid making changes to this version of the review as you will not be able to check the review back in.

Cont./
Checking out a document from Archie

You are also able to check a review out from Archie directly. You will need to log in to do this since a record of the check out will need to be made. To check out a review from Archie you will need to go to the log in page of the server, (located at http://130.226.106.162/index.jsp):

When you have logged in you will be able to see all the reviews you have a document role for listed under the ‘Resources’ tab, under the review groups you are affiliated with.

You should right click on the title of the review you want to check out. When you do this several options from a picking list appear:

Cont./
You should select the Check Out (XML format) option if you want to make changes to the document (as with the download option above, the ‘Download (XML format)’ option will enable other users to check out the document).

Once the review has downloaded to your desktop, double click on the file and RevMan 5 will automatically launch.
Checking In Protocols and Reviews

Checking in your work

Generally there will be three reasons for checking in a review document: you want to archive a version for safety or to access again at a later date; to share the review with other authors; or to submit the review for editing. For editors, the check in process may necessitate the review being sent back to authors for revision or for formal submission for peer review, copyediting or publication.

If you are checking in a draft for comments from authors, you will need to inform the other authors on the review that the draft is ready for them to access. As with the ‘Check out’ options you can check in via RevMan 5, or through Archie.

From within RevMan 5, you need to select the ‘Check-in’ button, located on the toolbar; it is the button with the blue upwards-pointing arrow on it:

You will then be asked to assign a version description (e.g. data added, discussion amended). Your name and the date of check in will be attached to the draft automatically in Archie, so you do not need to add this information. If you do not intend to submit the review for editorial approval, select ‘Finish’. The review will disappear from your RevMan when the review has been checked in, and you will receive a confirmation message. If you have saved a copy of the review during the session to a destination on your computer, you will be asked whether you want to save a copy locally. This is advisable at most stages of the review but might be particularly worthwhile if the review is at an advanced stage, or if you intend to return to work on the review the same day. Once you
have checked the review in you should inform your co-authors that the review is ready for them to access.

**Submitting for editorial approval**

When you want to submit a review for editorial approval, the review must contain certain pieces of information. Any significant missing information (contact details or missing links for figures) will be flagged as an error and will prevent the review from being submitted for editorial approval. This kind of missing information or missed link will be listed as an ‘error’, so it is advisable to run a report on the review before you intend to submit a review. In order to validate the review go to ‘File’ in the top left of the screen, and select the Validation Report option as below:

![Review Manager 5 interface](image)

The report will tell you whether there is currently any missing information that will prevent the submission of the review. Minor problems such as breaching the recommended abstract length of 400 words will be flagged as ‘warnings’, but will still allow the check-in to take place:

Cont./
In this example the review cannot be checked in as ‘Figure 3’ in the review has not been linked in the text of the review. Other details are also flagged up here, and might be attended to at some point. Correcting the missing link to the figure will enable the review to be submitted for editorial approval and publication.

When you submit a review for editorial approval you will also be asked to verify a certain number of items are correct. These relate to the authors of the review, dates, moving events from ‘What’s New’ to ‘History’, and any additional checks required by your review group. On confirming that these items are correct you should then compose a brief message to the RGC/managing editor indicating that the review is ready for editorial approval. It is also worth emailing the RGC/Managing Editor separately to inform him or her that the review is now ready for editorial processing.
Review History

When a review is checked in, a draft is created and stored. You can view previous versions of your review, and this can be done at any stage of the review process.

This function might be useful if you want to verify that the review you have submitted has been uploaded. In order to view historical versions of a review, click on the review title, then select the History tab:

![Review History Window](image)

Version 2.2

Title: Combined corticosteroid and long-acting beta-agonist in one inhaler versus long-acting beta-agonists for chronic obstructive pulmonary disease

Byline: Namini LJ, Calee CI, Lasserson TJ, Poole P

Publ. status: Draft

Publ. flag: Amended

New citation: No

Read Phase: Authoring

Checked in by: Toby J Lasserson

Description: Conversion
In this example the two hollow circles indicate that there have been two versions of this review that have been checked in to the server since the initial publication of the review.

In order to check that your recent draft has been uploaded, verify that the date of the upload tallies with when you uploaded the review, and also that you were the last person to check the review in (this is in the grey field underneath the list of versions stored under a review).

You can also use the History tab to compare different versions of a review. For example, you might want to see how much a review has changed substantively with the addition of new evidence, or you are concerned about version control issues. In order to do this highlight one version, hold down the ‘control’ button, highlight the version you want to compare it against, and then click on ‘Compare’. Archie will generate a downloadable difference document, which has a similar output to the track changes feature in Microsoft Word:

CONTINUOUS POSITIVE AIRWAYS PRESSURE FOR OBSTRUCTIVE SLEEP APNOEA IN ADULTS [REVIEW]

Gilles TL, Lasserson TJ, Smith RJ, White J, Wright J, Cates CJ, Wright J

ABSTRACT

Background
Obstructive sleep apnoea is the periodic reduction (hypopnoea) or cessation (apnoea) of breathing due to narrowing or occlusion of the upper airway during sleep. The main symptom is daytime sleepiness and although there it has been suggested it is linked to premature death, hypertension, ischaemic heart disease, stroke and road traffic accidents.

Objectives
The main treatment for sleep apnoea is with the use of continuous positive airways pressure (CPAP), (CPAP) treatment, which requires equipment of a flow generator and mask. These are used at night to prevent apnoea, hypopnoea and sleep disturbance. The objective was to assess the effects of CPAP in the treatment of obstructive sleep apnoea in adults.

Search strategy
We searched the Cochrane Airways Group Trials Register and reference lists of articles. We consulted experts in the field. Searches were current to July 2005.

We searched the Cochrane Airways Group RCT register (MEDLINE 1966 to 2000, EMBASE 1974 to 2000, DARE 1992 to 2000) and the reference lists of articles. We consulted experts in the field.

Selection criteria
We included randomised trials comparing nocturnal CPAP with an inactive control or oral appliances in adults with obstructive sleep apnoea (an apnoea and hypopnoea index greater than five per hour). Trials had a minimum intervention period of two weeks.

The text in green shows the text in the version of the review that was selected first (in this case the most recent version). The red text is material that has
been overwritten or deleted from the version that this has been compared against.

**Additional resources**

Your RGC or another person at the editorial base (such as the TSC) will have special levels of access that enable them to publish, revert versions, delete reviews, edit contact details.

Additional documents are available from the IMS website:

**Authors:**
Top tips: [http://www.cc-ims.net/authors](http://www.cc-ims.net/authors)
Quick start: [http://www.cc-ims.net/Projects/newIMS/Training/Quickstart-for-Authors.pdf](http://www.cc-ims.net/Projects/newIMS/Training/Quickstart-for-Authors.pdf)

**Editors:**
Quick start: [http://www.cc-ims.net/Projects/newIMS/Training/IMS-Quickstart-for-Editors.pdf](http://www.cc-ims.net/Projects/newIMS/Training/IMS-Quickstart-for-Editors.pdf)
User guide for editors: [http://www.cc-ims.net/Projects/newIMS/Training/Editors-Guide.pdf](http://www.cc-ims.net/Projects/newIMS/Training/Editors-Guide.pdf) (this refers to RevMan 4.3 which is no longer in use, but the concepts remain the same)