Top tips for using Archie and RevMan

Archie is an Internet-based server which stores Cochrane Reviews. Archie also contains contact details for all Cochrane contributors. RevMan 5 is the software used to write and edit reviews.

1. Getting started

- Download RevMan from http://tech.cochrane.org/revman/download.
- Additional tech support is available from http://tech.cochrane.org/support.
- There is a tutorial on using RevMan located in the RevMan 5 Help menu.
- Before you can start to work on your review in RevMan 5, you will need a user account to access Archie. An email with a link to allow you to activate an account should have been sent to you and each member of your team (unless they already have an account).
- With this account, you can update your own contact details by logging into Archie (www.archie.cochrane.org) and clicking on your name in the top right-hand corner.
- Tip: The window for activating your Archie user account is limited to two weeks after the registration email is sent.
- Tip: If you encounter difficulties with using Archie, contact your Managing Editor 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 top 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 to 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 that 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 review, you will need to check the review out from Archie to RevMan 5. To do this, go to File > My Reviews or click the My Reviews button on the main toolbar. In the My Reviews 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).
- 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.

4. Checking a draft 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 Managing Editor.
- 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, do not select this option.

5. Checking a draft 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, 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 for the Managing Editor in the Message box if you wish
- 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.
- 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 if you don't want to work on it

- 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 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.

8. Comparing versions of your review

- Go to History tab in the Properties of the review in Archie
- Click one of the versions you want to compare
- Holding down the Ctrl key, click on the other version for comparison
- Click Compare

Note: (a) you can print or save the 'comparison' document (diffdoc.htm) using the icon buttons located on the upper left-hand side of the viewing screen; (b) you can view the graphs by changing the view (upper left-hand side of screen) to Graph View.