Logging in to the CRS

Single vs. multiple users

When first connecting to a Cochrane Review Group (CRG) database, it is possible to choose one of three installation types.

★*Tip*: *This pop-up box will only appear in the first time the CRS is accessed to create the CRG's database.*
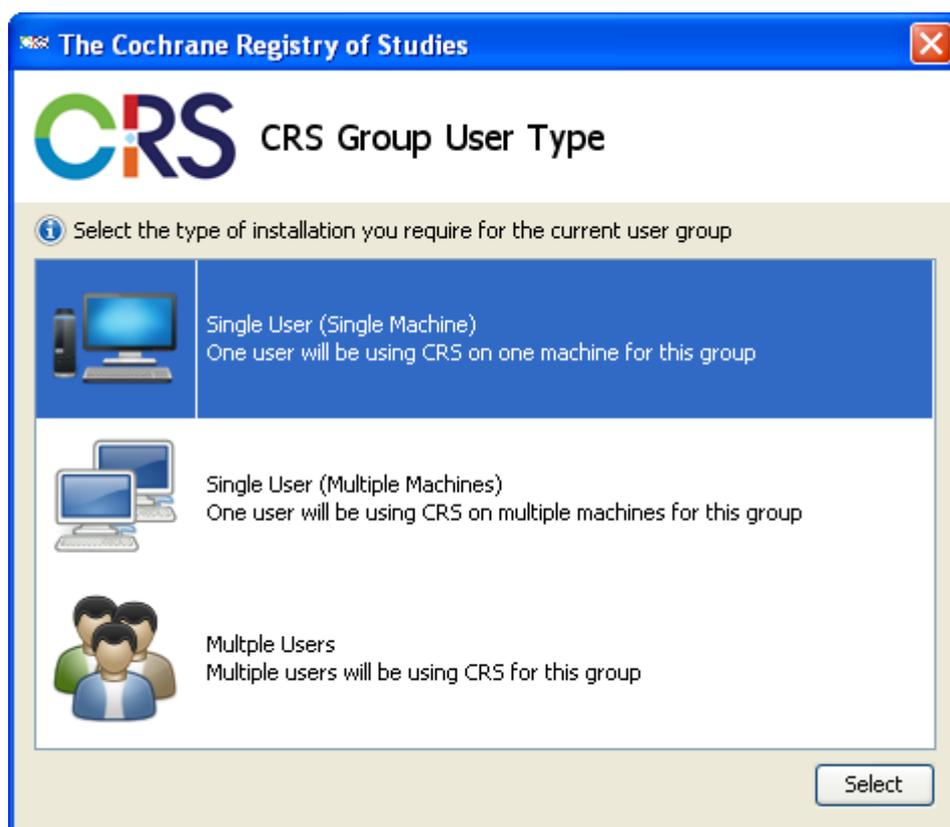
- Single User (Single Machine) – This option should be chosen if the CRS will only be installed on one computer and there will only be one person from the CRG editing the database.
- Single User (Multiple Machines) – This option should be chosen if the CRS will need to access the same database from different locations (e.g. from a home computer and an office computer).

- Multiple Users – This option should be chosen if there will be more than one person from the CRG editing the database.

The installation type can be changed at a later point in time.

★ *Tip*: *When setting up the database and creating new fields, etc., it is recommended that the first option (i.e. Single User (Single Machine)) is chosen as everything will happen locally, except for the synchronisation process, which means the CRS is more responsive and requires fewer record locks to stop two people working on the same record at the same time.*

Internet access

An Internet connection is <u>not</u> required to log into and use the CRS, however it is important to note that changes will only be saved locally (i.e. only on the computer the CRS is accessed from). When an Internet connection is available synchronisation can take place and the changes will be saved to the main server.

Proxy settings

If a proxy server is required for connecting to the Internet, this can be configured before logging on.

To define the proxy settings:
1. Click on the **Proxy settings** button in the CRS login prompt box
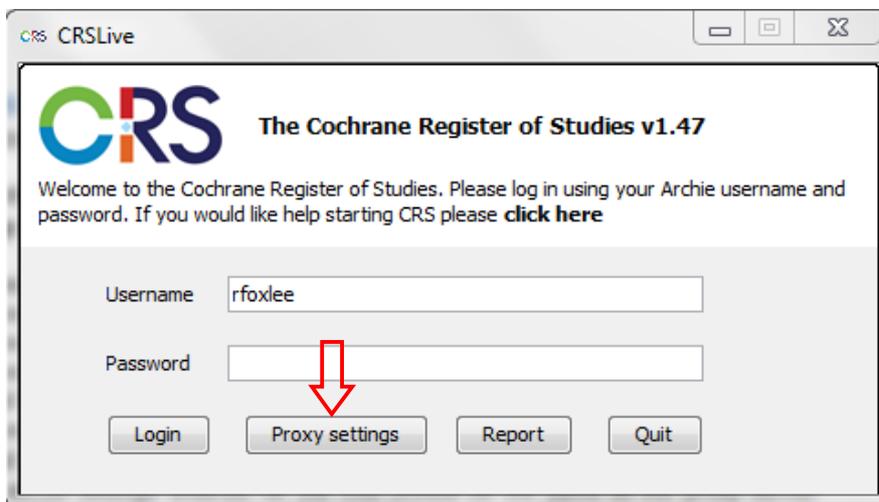
2. The **Proxy Settings** pop-up box will appear and the required proxy server details can be entered:
   - Proxy Server Name – The host name or IP address of the proxy server used.
   - Proxy Server Port – The port number of the proxy server used.
   - Proxy Server Username – If the server requires a username to allow access, then this can be entered here.
   - Proxy Server Password – If the server requires a password to allow access, then this can be entered here.

★ *Tip*: *The proxy server settings entered for the CRS should be the same as the proxy server settings entered for Review Manager if the CRS is installed on an office computer.*
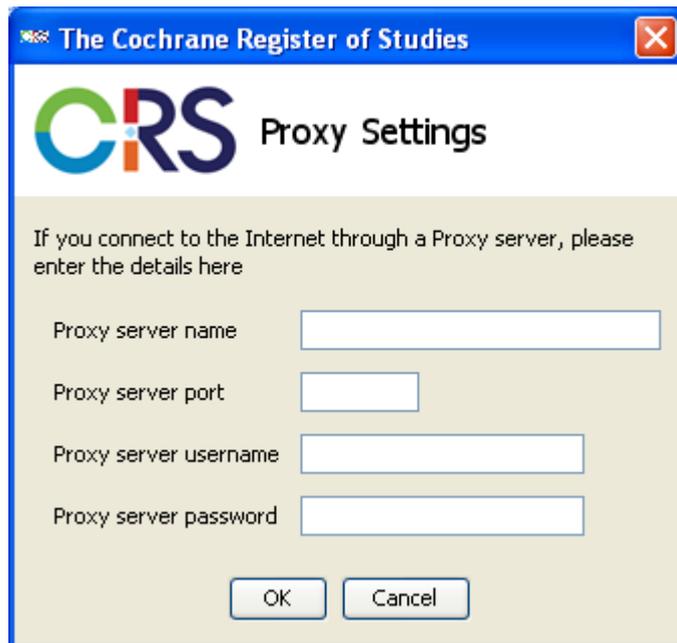
3. Click on the **OK** button to return to the CRS login prompt box.

Report a login problem

Occasionally some institutions may prevent programs from accessing the Internet. If there any problems encountered when logging into the CRS:

1. Click on the **Report** button in the CRS login prompt box. A text box will appear at the bottom containing the error message(s) regarding the failed login attempt.
2. Copy the information from the text area.
3. Paste the copied information into an email and send it to crshelp@cochrane.org
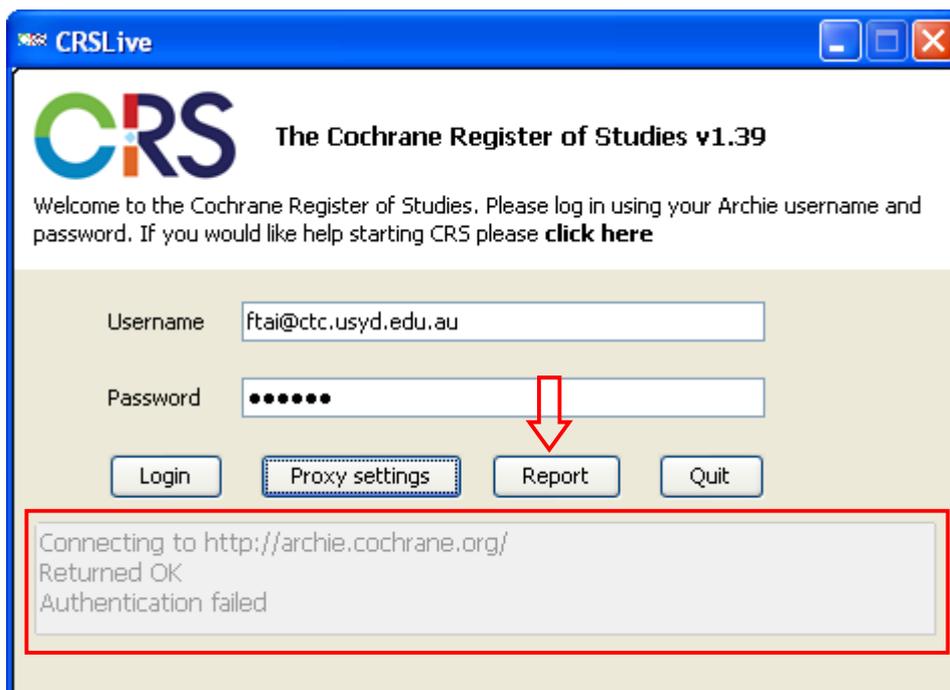
Logging in to an existing CRS database

A current Archie username and password is required to login to the CRS. The CRS will store cached Archie login credentials which allow the user to access CRS at any time. To log in and access the CRS:

1. Enter Archie username and password in the CRS login prompt box.
2. Click on the **Login** button.
3. Once logged in successfully, the CRS will display a list of databases the user has access to. Select the desired database to be opened from the drop-down list.
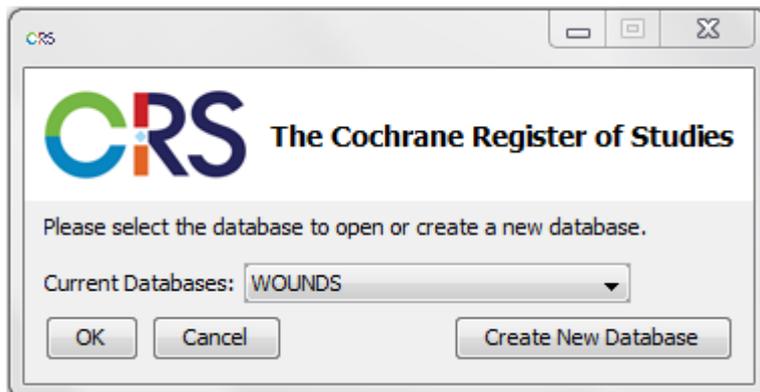
★ *Tip: The list of databases includes those supplied to the CRS by Archie when a user logs in, usually named with the Cochrane Review Group's (CRG's) identifier associated with the logged in user's associated group(s), plus any other databases created locally by the logged in user.*
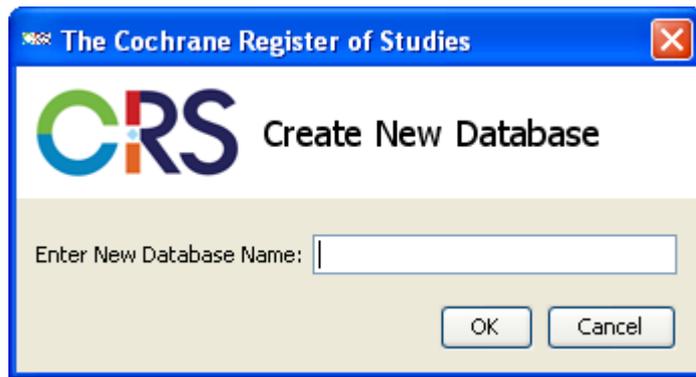
Creating a new database

A new database that does not link to any Group databases can be created.

1. Click on the **Create New Database** button.

2. Enter the name of the new database when prompted by the **Create New Database** pop-up box.
3. Click on the **OK** button.

4. Click on the **OK** button.
5. Once the desired database to be accessed has been selected, the CRS will begin to load it. A loading dialog pop-up box will appear when the loading process begins.
6. When the login process is complete, any initial installations of a CRG database will be taken to the **Synchronise** tab to allow the user to synchronise all the current CRG group records on the server database including CENTRAL records and Cochrane reviews and protocols. Users will be taken to the **Homepage** tab for subsequent installations and for when databases have been created locally.

★ *Tip*: *The loading process for a database selected for the first time may take a long time as the CRS will also need to load standard data tables such as the MeSH thesaurus and the Journal Authority list.*

Reporting an error loading a database

If there is a problem with the loading of the selected database:
1. Click on the ⚠ *Alert* button to view the error log.
2. Copy the information in the error log.
3. Paste the copied information into an email and send it to crshelp@cochrane.org
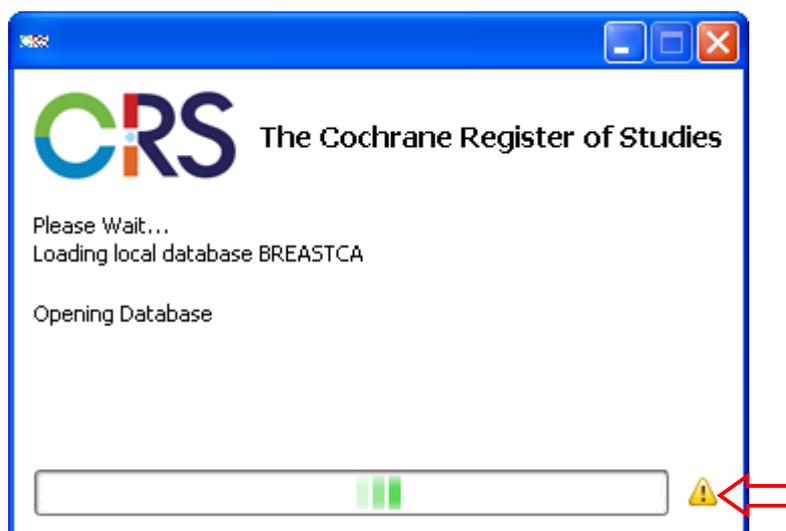
Login permissions

Access to the CRS software application is restricted to Cochrane editorial base staff with the following roles, as defined in Archie:
- Trials Search Co-ordinator
- Assistant Trials Search Co-ordinator
- Managing Editor
- Assistant Managing Editor
- Editorial Assistants
- Co-ordinating Editor

Trials Search Co-ordinators have the maximum level of access to the CRS, whilst all other roles listed above have been given medium level access.

All users of the CRS software application will be considered as 'editor' i.e. they have access to all records in their group's CRS segment. They will also have access to the records shared in the main dataset – that is, the aggregated records from all group segments that are marked 'for publication' or 'unpublished'. No user can edit the records of another group, and data marked as 'private' in a group segment will not be accessible to users outside that group.

Permission levels
There are 5 permission levels that can be assigned to CRS users:
- Maximum – Allows the user to view, read, edit, create and delete records.
- High – Allows the user to view, read, and edit records.
- Medium – Allows the user to view list of records and read (see) individual records.
- Low – Allows the user to view a list of records only but not see individual records.
- Minimum – No access permissions granted.

Adding, removing or changing permission levels
An Archie Super User can add, remove or change the permission levels. To do this:
1. From the entity's Properties, click on the **Roles** tab.

2. Click on the role you wish to modify (it will be highlighted in blue). Click on the **Edit** button.

3. Under the **CRS** tab, select the permission level to be assigned for the selected role.

4. Click the **OK** button to confirm the selection.