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Chapter

2

Account Management

CHAPTER 2 – ACCOUNT MANAGEMENT

The Account Management module provides tools for managing individual user accounts, profiles, privileges, roles, and passwords. The module also provides access to the Order Management tool that is designed to help researchers create and/or manage BioSample orders. This module also allows users with "*administrative*" account privileges to perform certain administrative functions.

2.1 Objective

This chapter provides information for users on how to:

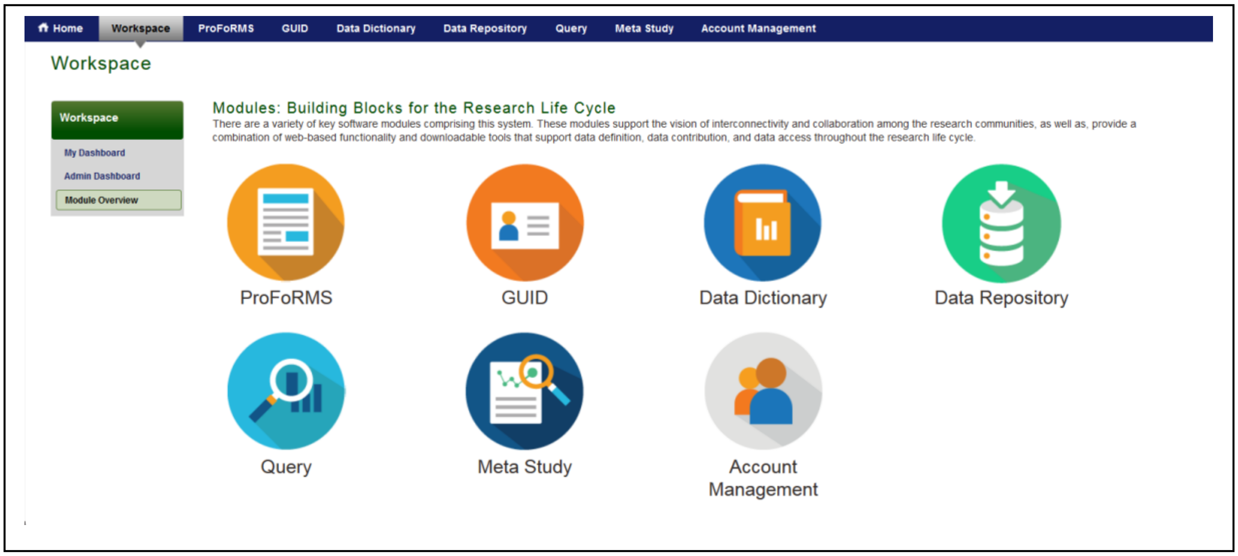
- Account Management:
  - View My Profile
  - Edit My Profile
  - Change Password
  - Upload Documentation
  - Request Additional Privileges
- Account Administration:
  - View Account List
  - Reset User Account Password
  - Deactivate User Account
  - Reactivate User Account
  - View, Approve, or Reject User Account Request
  - View or Edit Account Group List
  - Create Account Group
  - View User Log
  - Create or Edit Account Guidance Emails
- Account Reviewer:
  - View, Approve, or Reject Account Requests
  - View, Approve, or Reject Account Renewals
  - View Account Reporting Dashboard

2.2 Module Navigation

The **Account Administration** tools (including study administration) are available within the Account Management module.

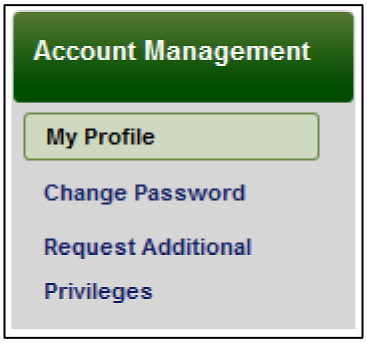
To access the **Account Management** module, perform the following actions:

1. Log in to the system.
2. Navigate to the **Workspace** landing page.



3. Click the **Account Management** module icon.

4. Click the **Account Management** menu using the left side menu to navigate through the sub-menus. With the **Account Privileges** available to all users, the following is displayed::



ICON KEY

Notes

Important Information

Things to Note:

Use the left side menu to navigate through the module.

2.3 Account Management

The **Account Management** module houses the features to:

- ❖ View My Profile
- ❖ Edit My Profile
- ❖ Change Password
- ❖ Upload Documentation
- ❖ Request Additional Privileges

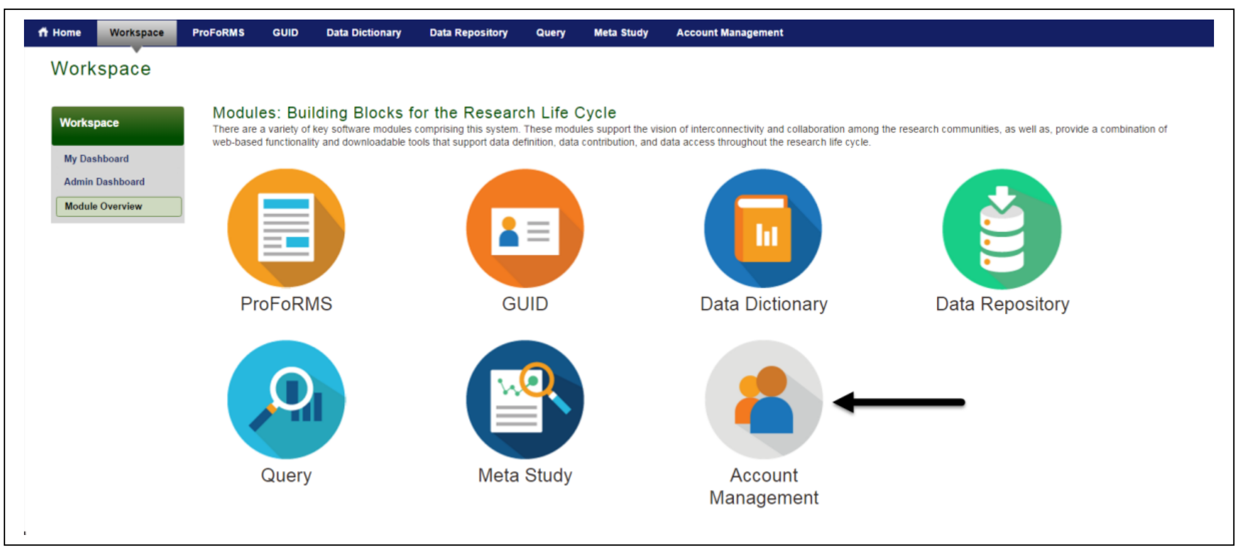
All BRICS users have access to the Account Management module; however, your role determines what you can and cannot do within the module.

2.3.1 View My Profile

When logged into the system, a user may access the My Profile page at any time.

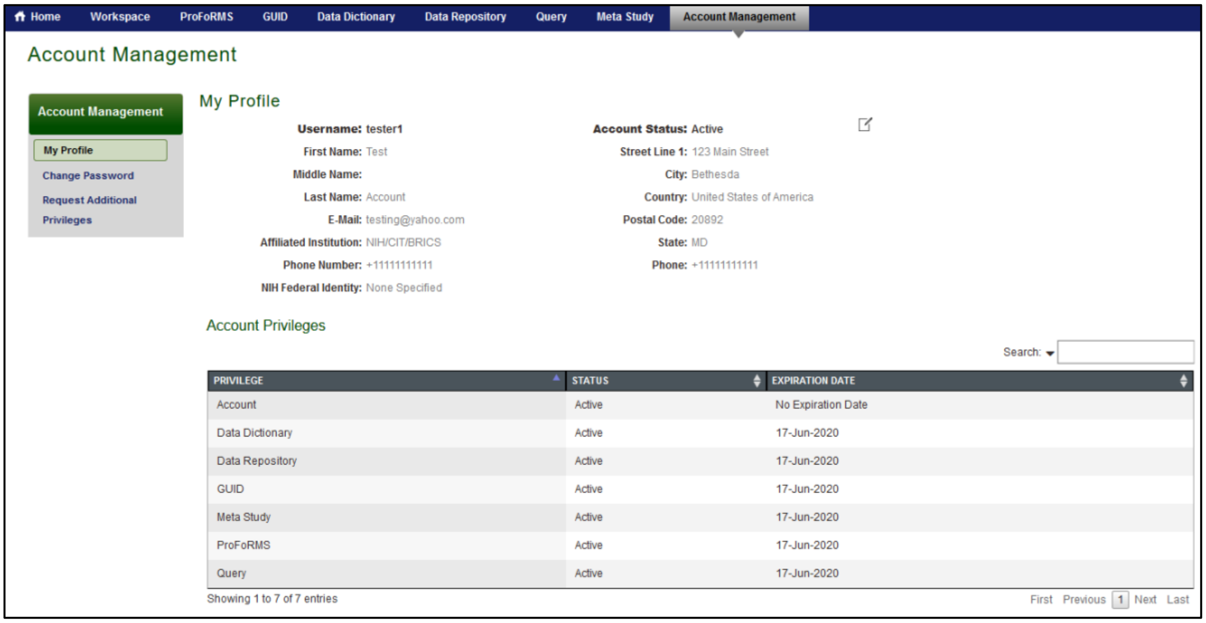
To display **My Profile,** perform the following actions:

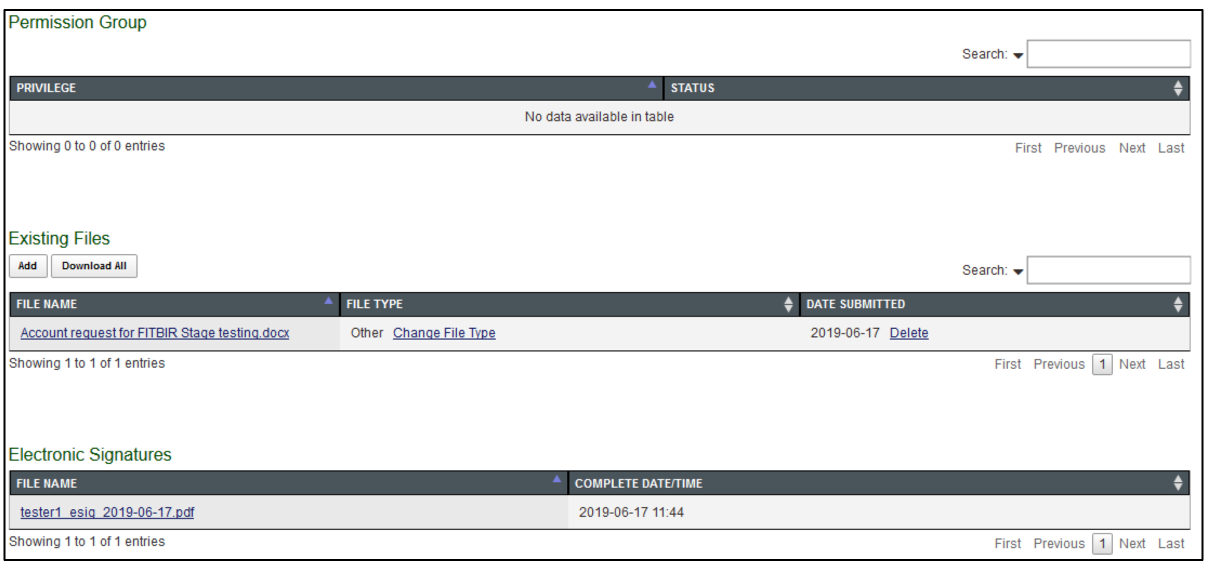
1. Log in to the system.
2. Navigate to the **Account Management** module from your **Workspace**.



3. Click on the **My Profile** link to display your Account Profil**e.**

4. The **My Profile** page displays as seen below.



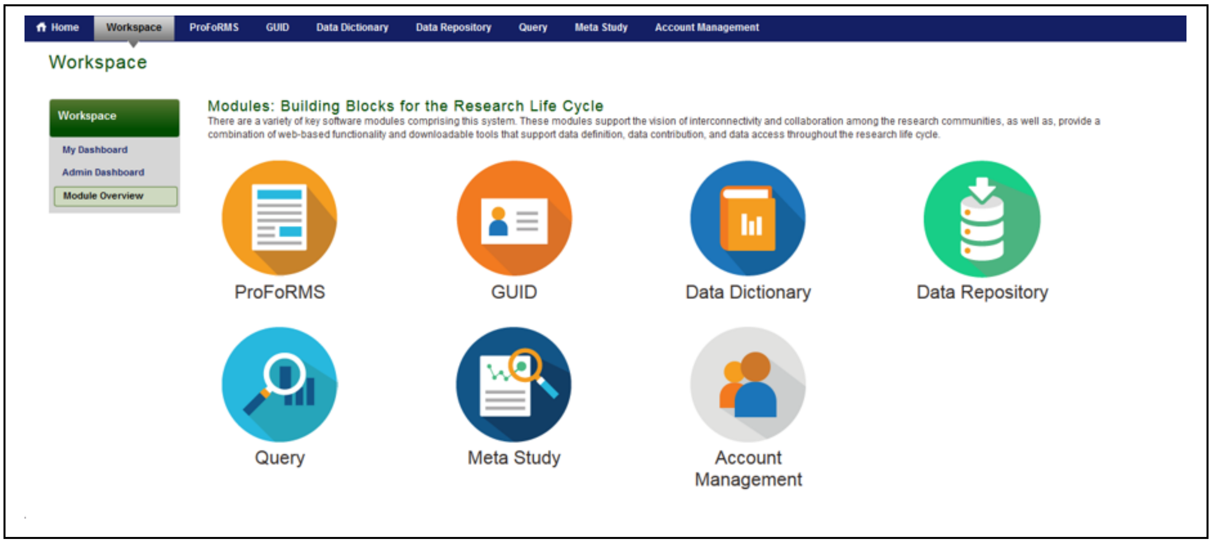


2.3.2 Edit My Profile

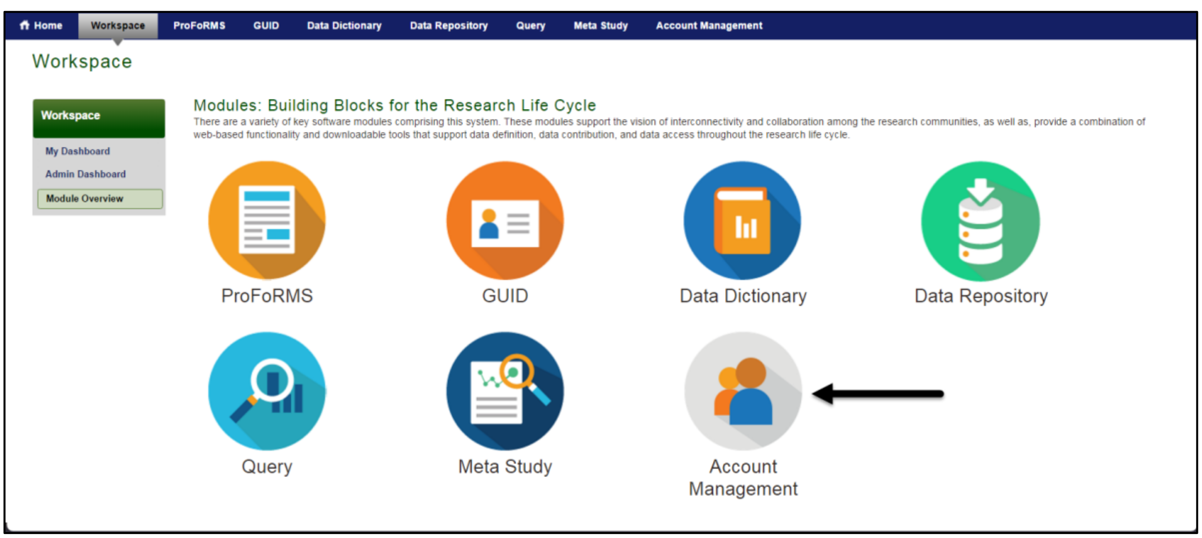
When logged into the system, a user's account profile can be changed using the **Edit My Profile** option.

To edit your profile, perform the following actions:

1. Log in to the system.
2. Navigate to the **Workspace**.

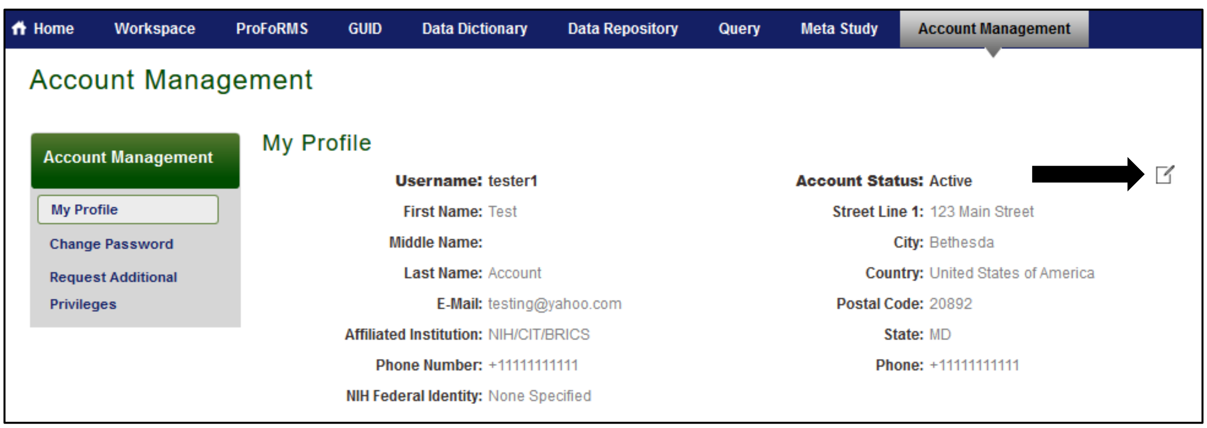


3. Select the **Account Management** module.

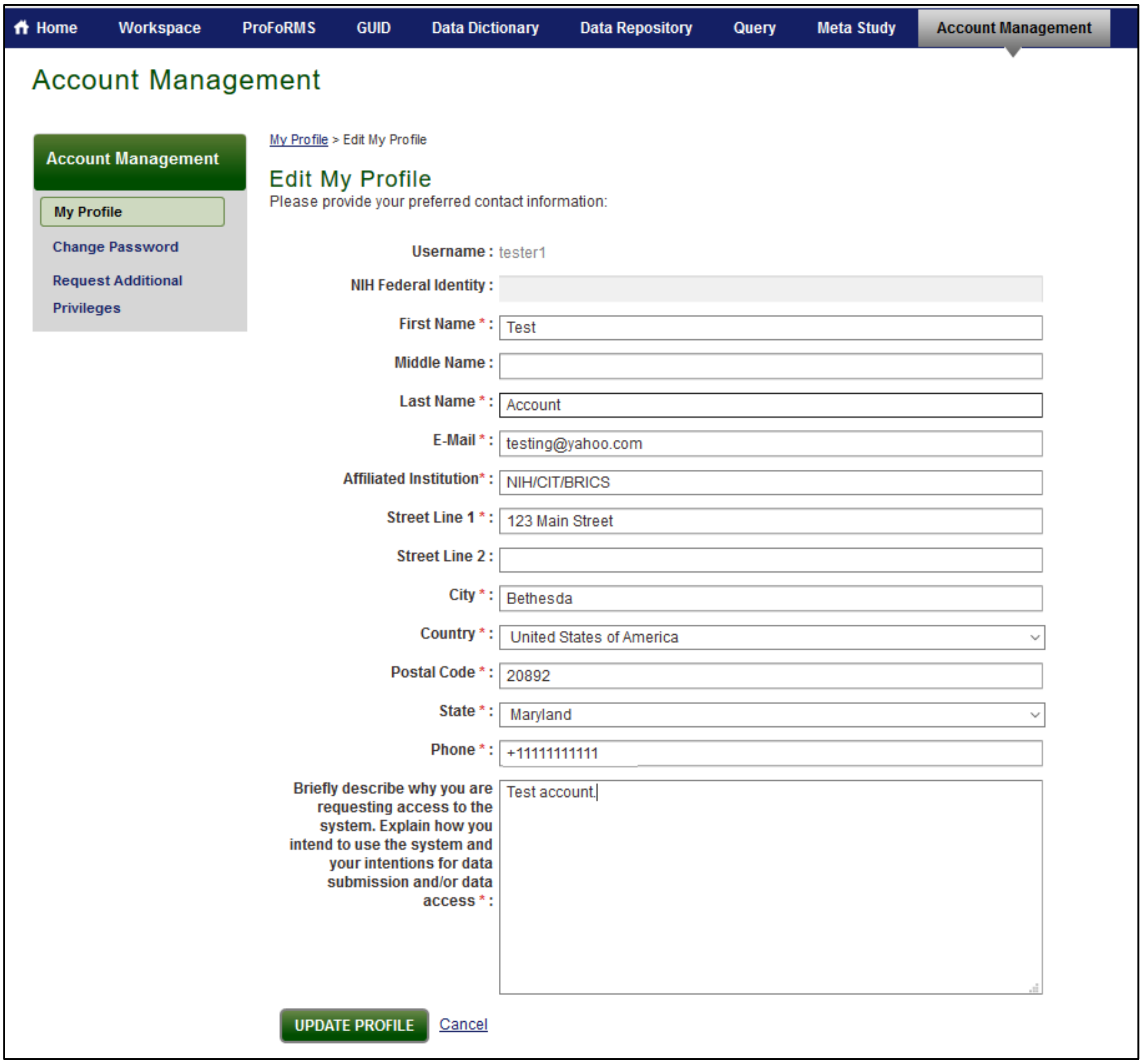


4. Click the **My Profile** link.

5. Click on the **Edit My Profile** icon to display the **Edit My Profile** page.



6. Enter the profile information you wish to edit including any contact information as needed and click the **Update Profile** button to update your profile.

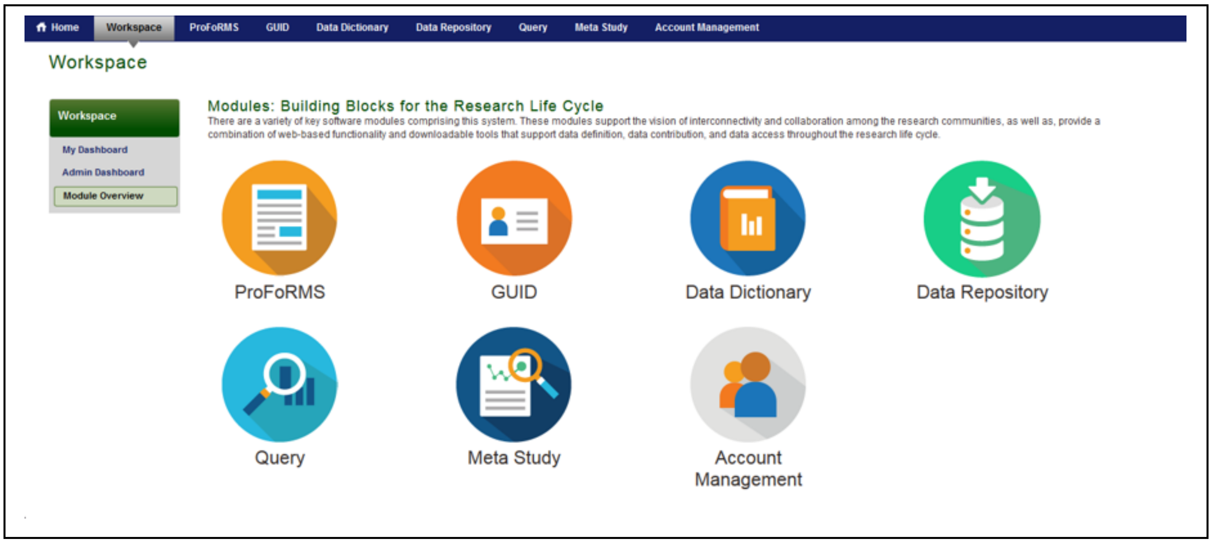


2.3.3 Change Password

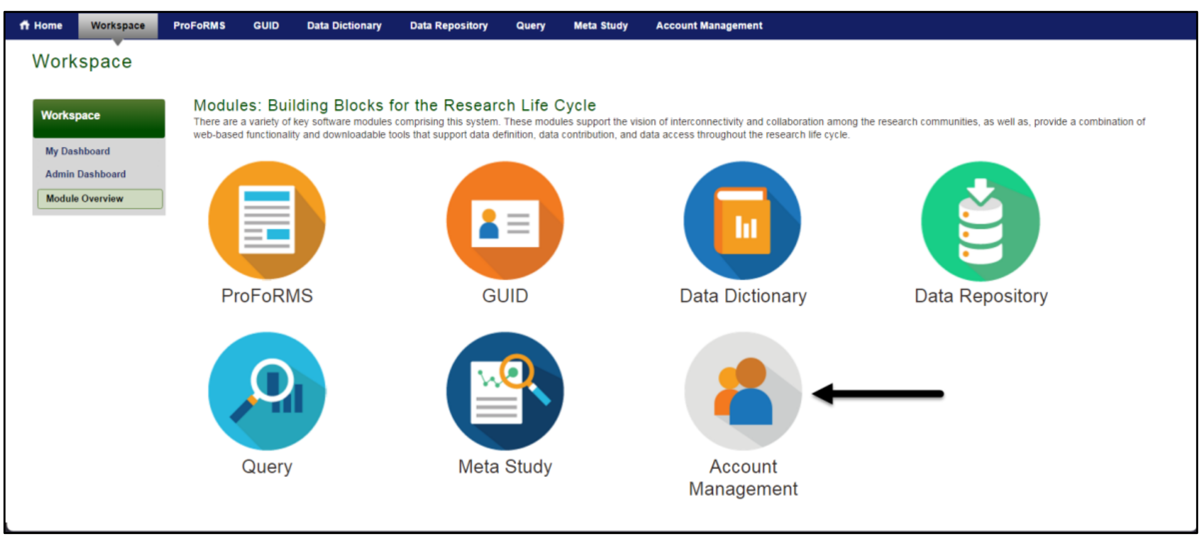
When logged into the system, a user's account password can be changed using the *Change Password* link on the left side menu. This may be performed at any time to enhance security as necessary or for any other personal reason you would like to change your password.

To change your password**,** perform the following actions:

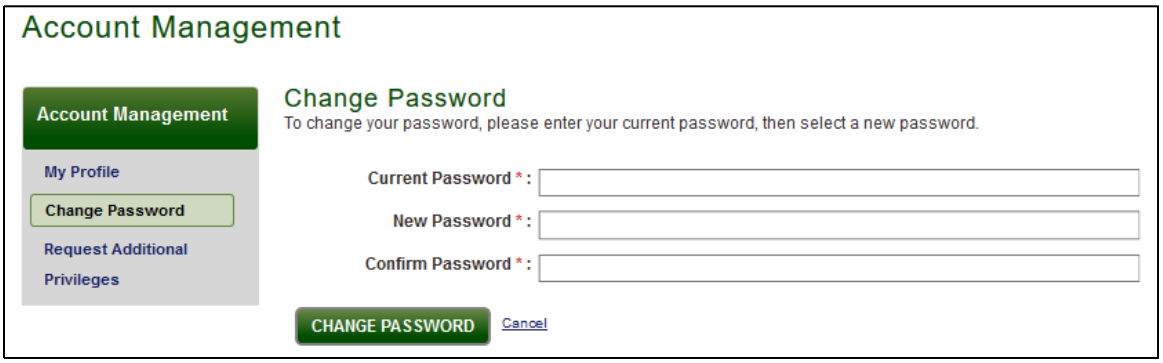
1. Log in to the system.
2. Navigate to the **Workspace**.



3. Select the **Account Management** module.



4. Select the **Change Password** tab.
    a. The **New Password** textbox expands to display the password creation standards that must be followed when choosing a new password.
5. Enter your **Current Password**, **New Password**, and **Confirm Password** in the text boxes to confirm your new password.
6. Click the **Change Password** button.
    a. The password change takes effect immediately and must be used when logging into BRICS again.



7. If you decide to leave your change password screen without submitting a new password request, click on the **Cancel** button.

ICON KEY

Notes

Important Information

Things to Note:

- Passwords are case sensitive and consist of 8-15 alphanumeric characters including at least 3 of the following different kinds of characters: capital letters, lowercase letters, numbers, and/or special characters.
- Passwords display as dots for security purposes. Make sure to enter your password carefully.
- Your old password may re-appear in the Password field if you have not cleared your browser's cache/history, especially if you had previously opted to save the password in the field. Make sure you are entering the new password before you attempt to log in. If unsure, clear the cache/history and log in again with the new password.

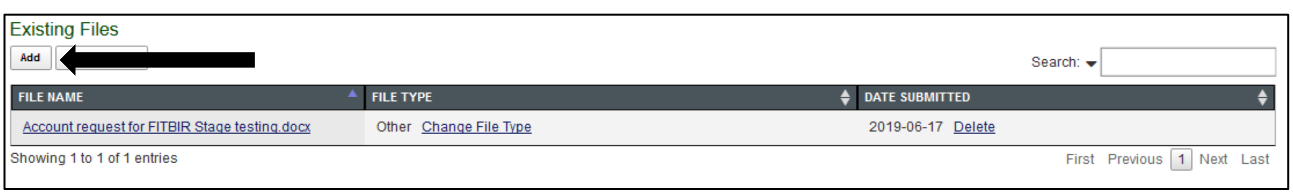
2.3.4 Upload Documentation

To upload documentation, perform the following actions:

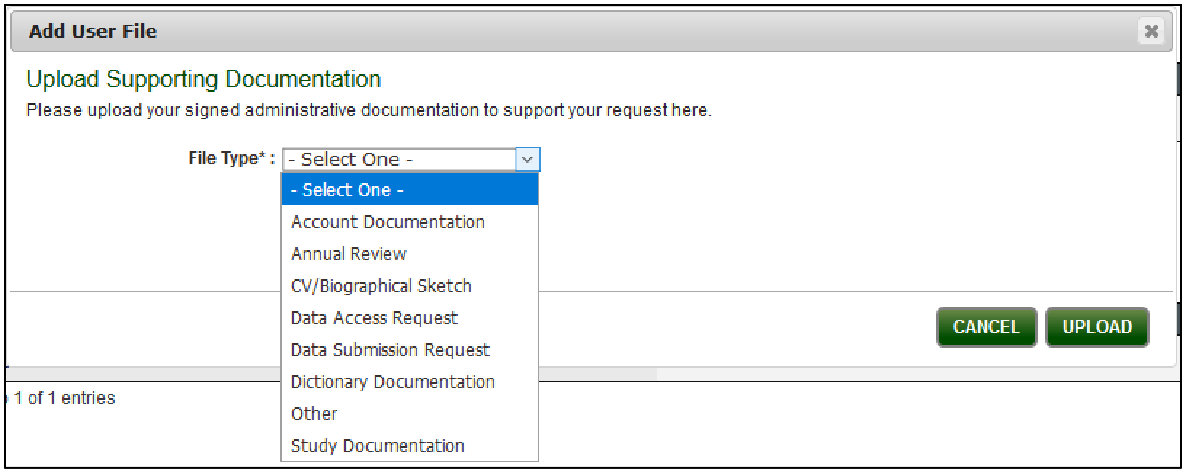
1. Log in to the system.
2. Navigate to the **Workspace** and select the **Account Management** module.

3. Click the **My Profile** link.

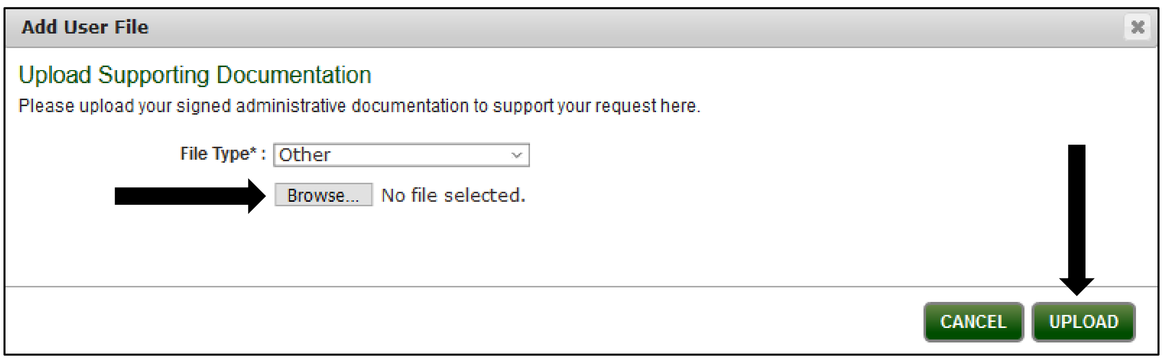
4. Select the **Add** button in the **Existing Files** group.



5. Select the **File Type** from the drop-down menu.



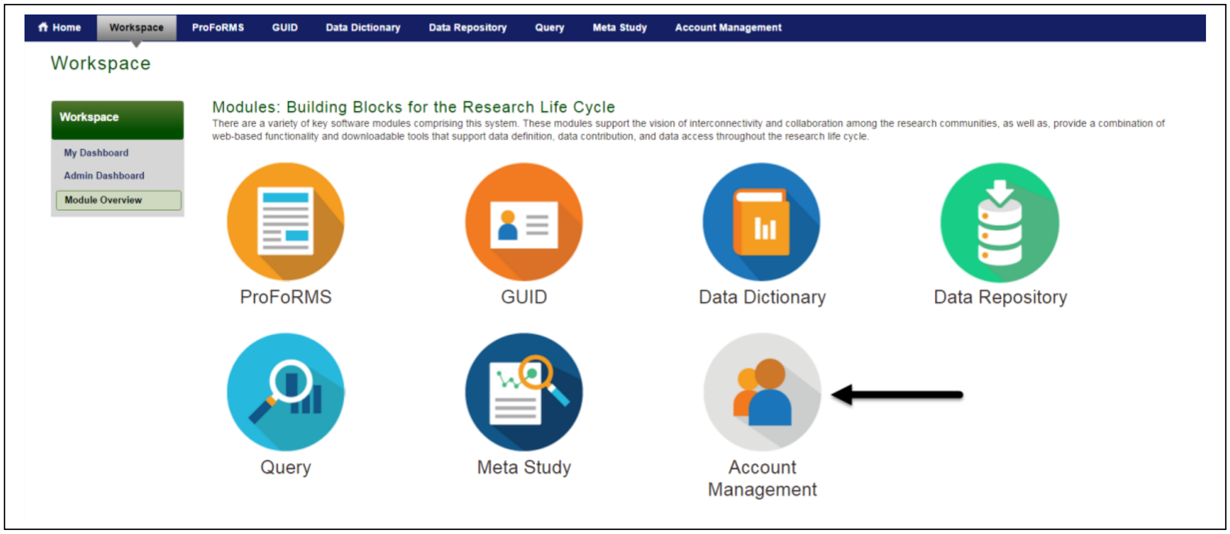
6. Click on the **Browse** button to select the documentation from the desired location on your computer and then click the **Upload** button to complete the document upload process.



2.3.5 Request Additional Privileges

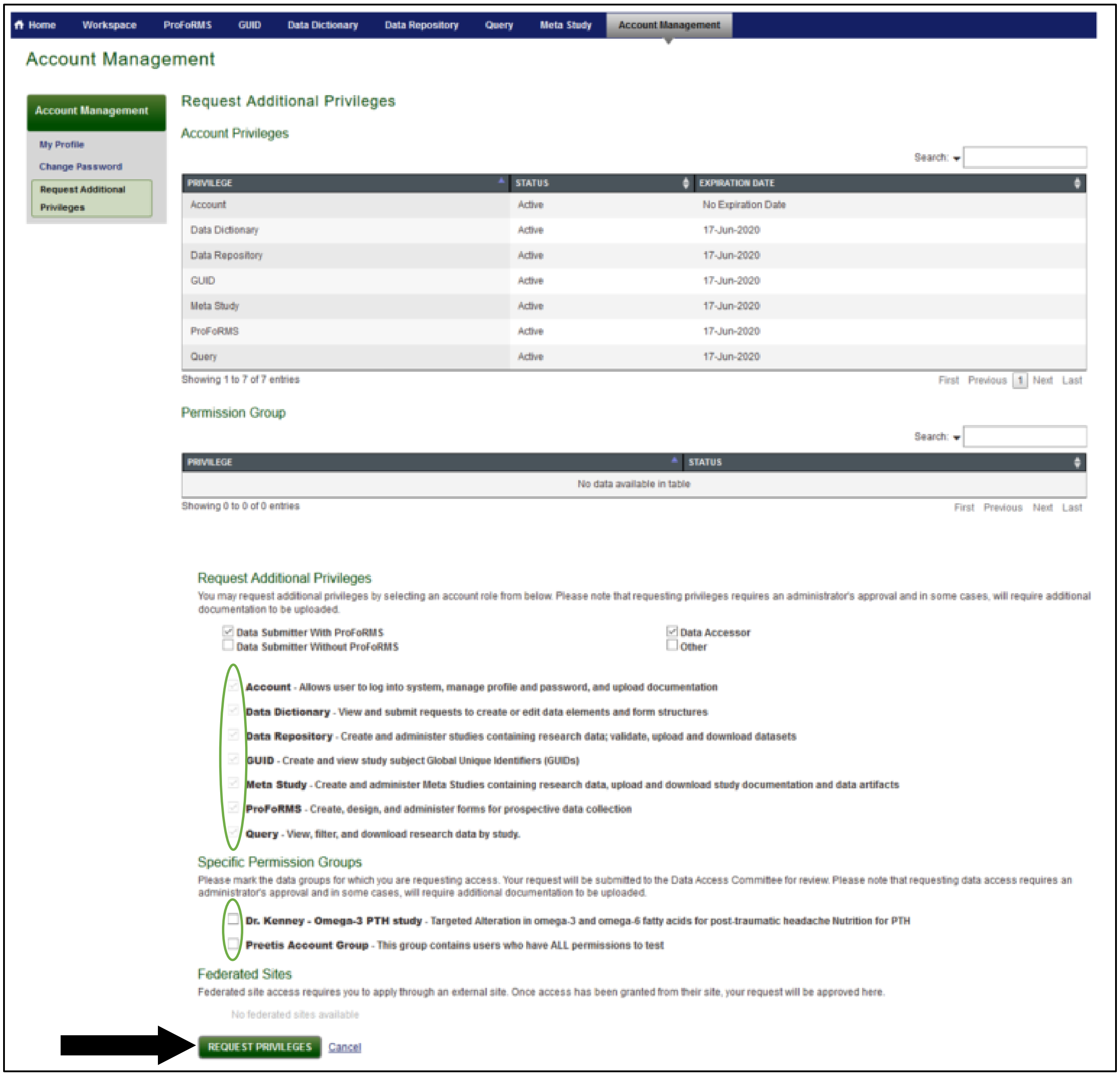
To request additional privileges, perform the following actions:

1. Log in to the system.
2. Navigate to the **Workspace** landing page.



3. Select the **Request Additional Privileges** link on the left side menu.

4. Select the desired permission by clicking on the check box beside the specific privilege and then select **Request Privileges.**



2.4 Account Admin

The **Account Admin** sub-module houses the features to:

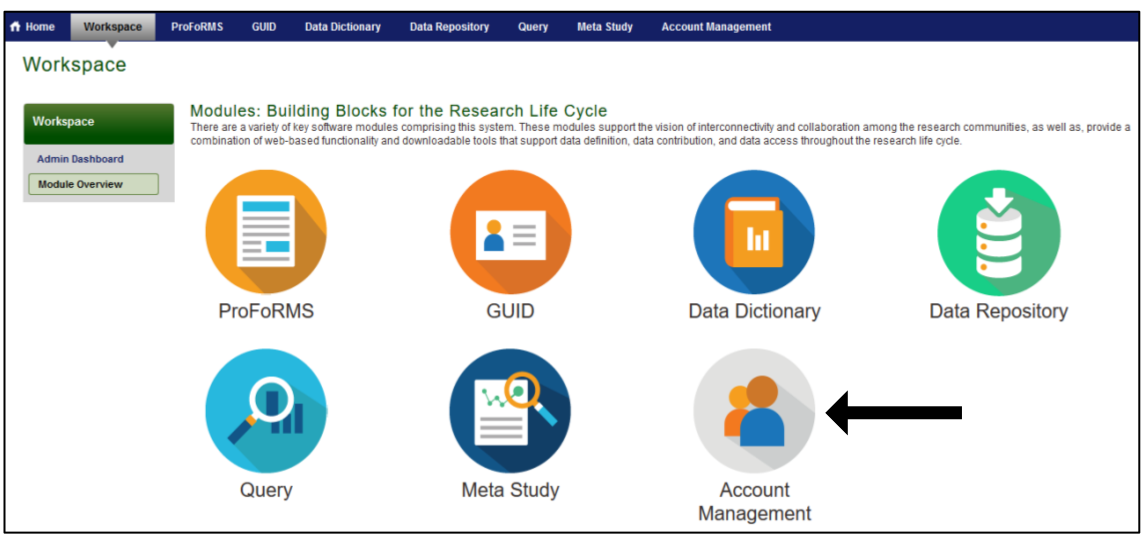
- View Account List
- Reset User Account Password
- Deactivate User Account
- Reactivate User Account
- View, Approve, or Reject User Account Requests
- View or Edit Account Group List
- Create Account Group
- View User Log
- Create or Edit Account Guidance Emails

All BRICS users **DO NOT** have access to the **Account Admin** sub-module. The **Account Admin** sub-module ONLY shows up for users with administrative right privileges.

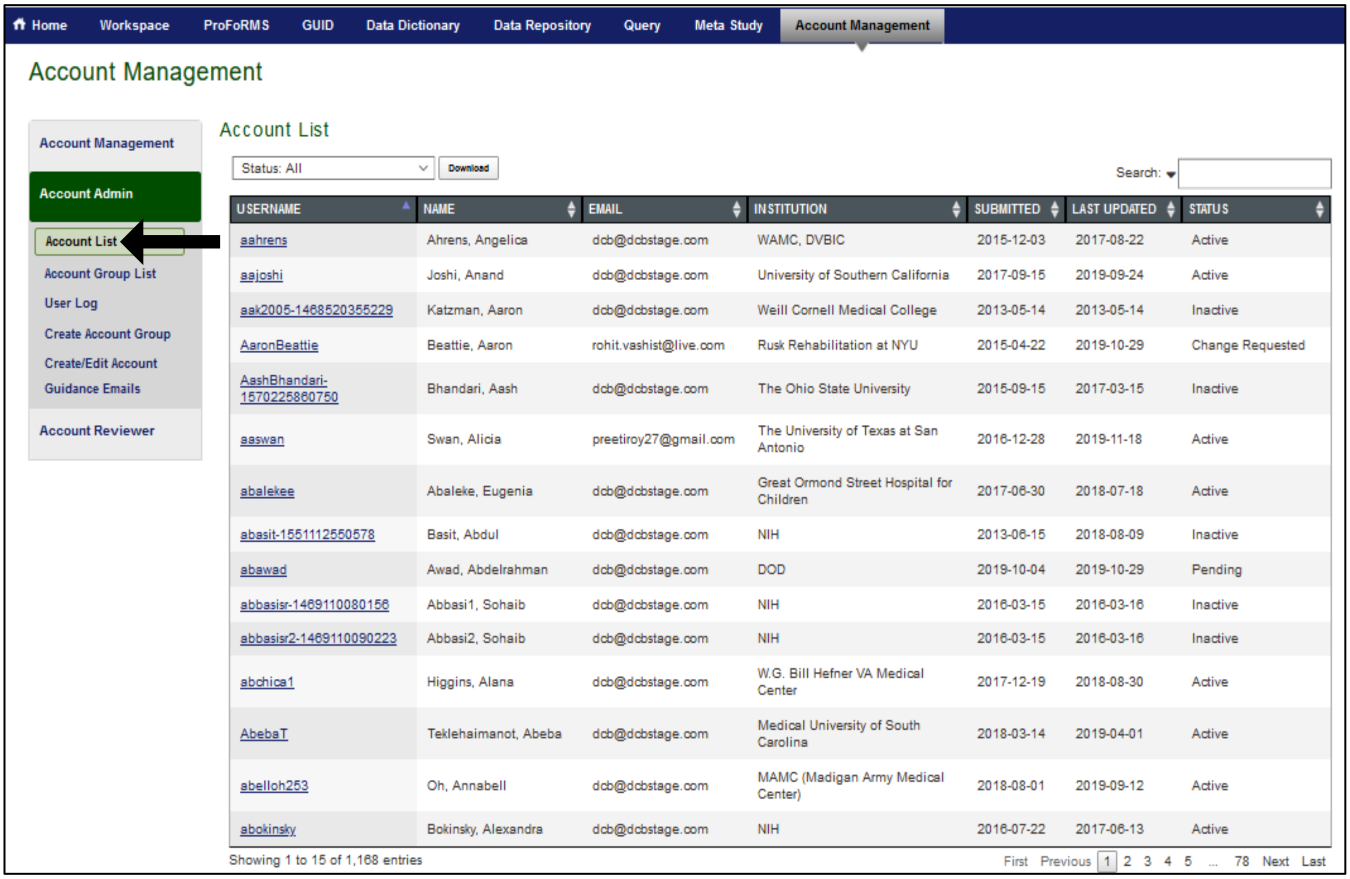
2.4.1 View Account List

To view account lists, perform the following actions:

1. Log in to the system.
2. Navigate to the **Account Management** module.



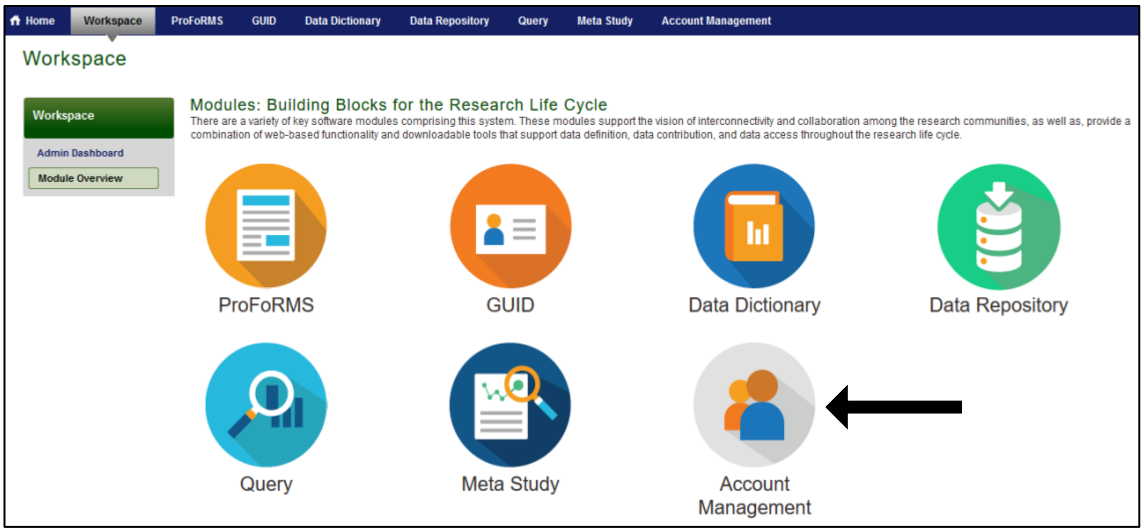
3. Select the **Account Admin** tab on the left.
4. Click on the **Account List** sub-menu on the left. The account list will display.



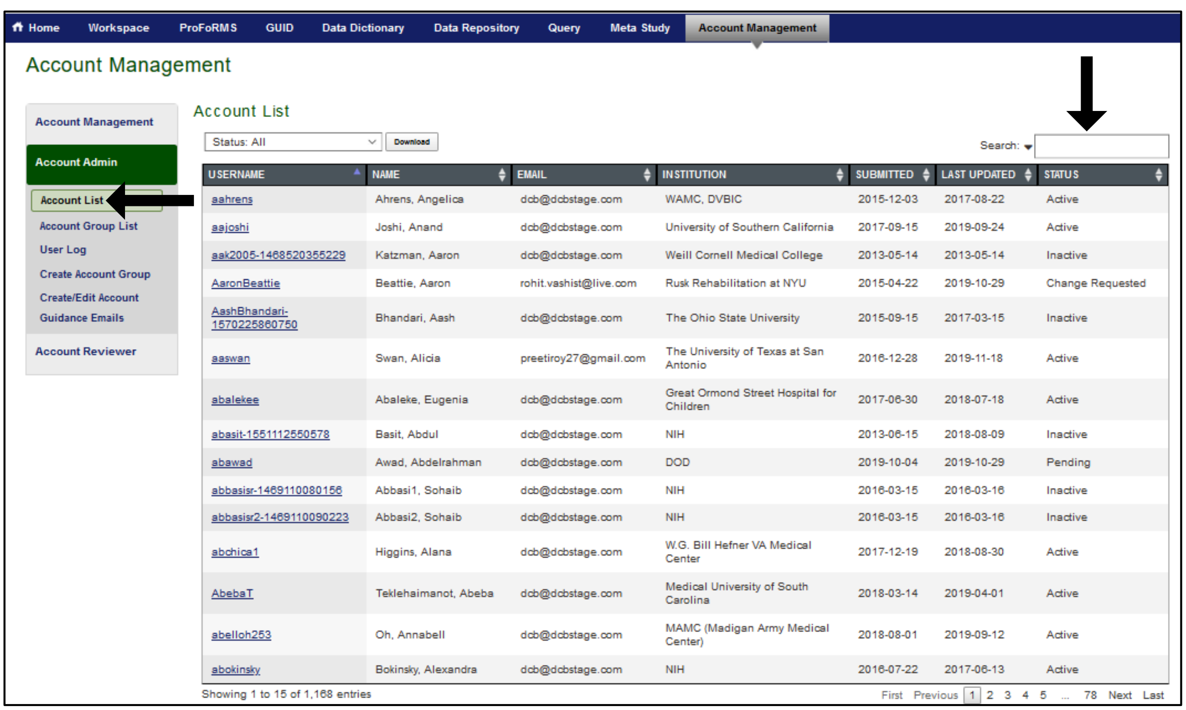
2.4.2 Reset User Account Password

To reset a user account, perform the following actions:

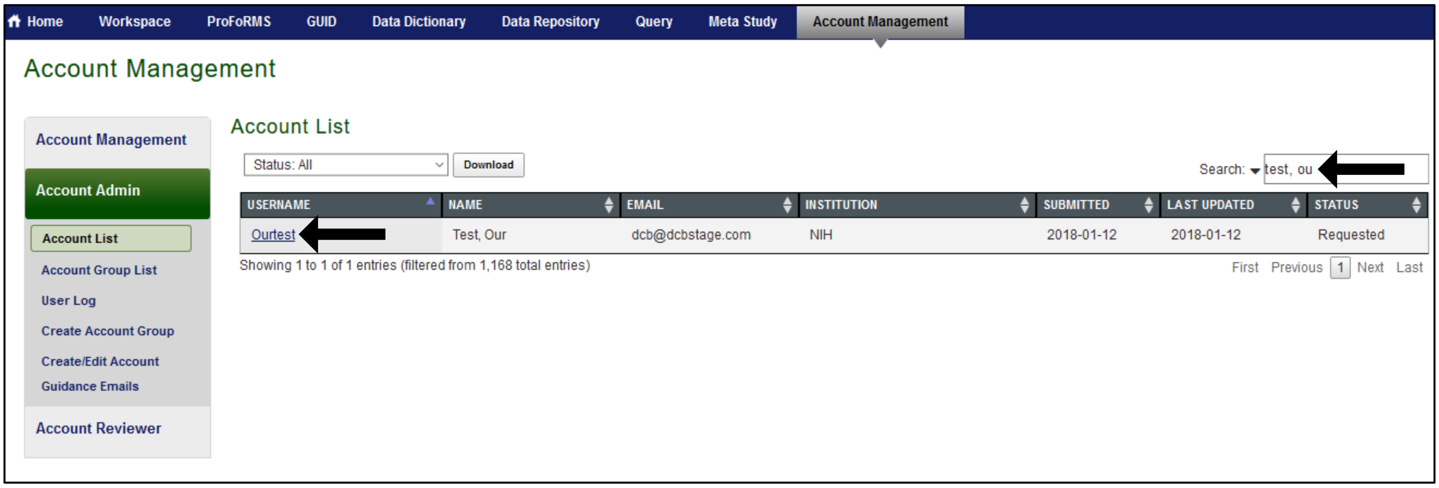
1. Log in to the system.
2. Navigate to the **Account Management** module.



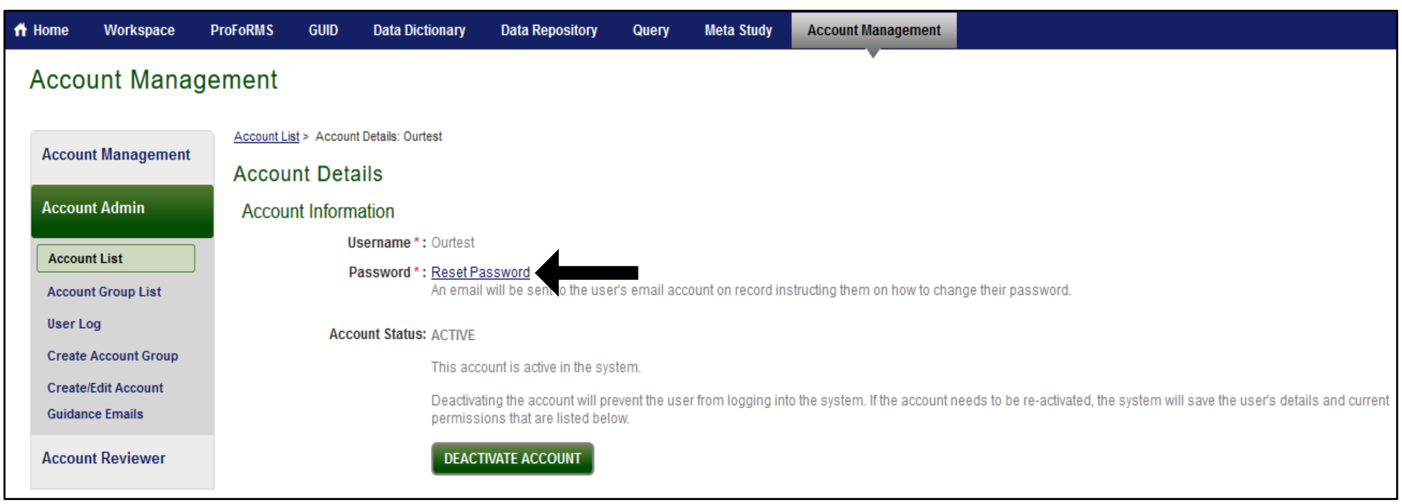
3. Select the **Account Admin** tab on the left.
4. Click on the **Account List** sub-menu on the left. The account list will display.
    a. From the account lists displayed, search for and select the **User Account** name for which you wish to reset the password.



5. You may use the **Search** text box located in the upper right corner to search for the user account name.
6. Click on the **Username**.



7. Click the **Reset Password** link to reset the password.



This action will generate a password reset link, which is sent to the email address contained in the profile. This temporary password link will get the user into the system, where the user can select a new password of their choosing.

ICON KEY

📖 Notes

🗁 Important Information

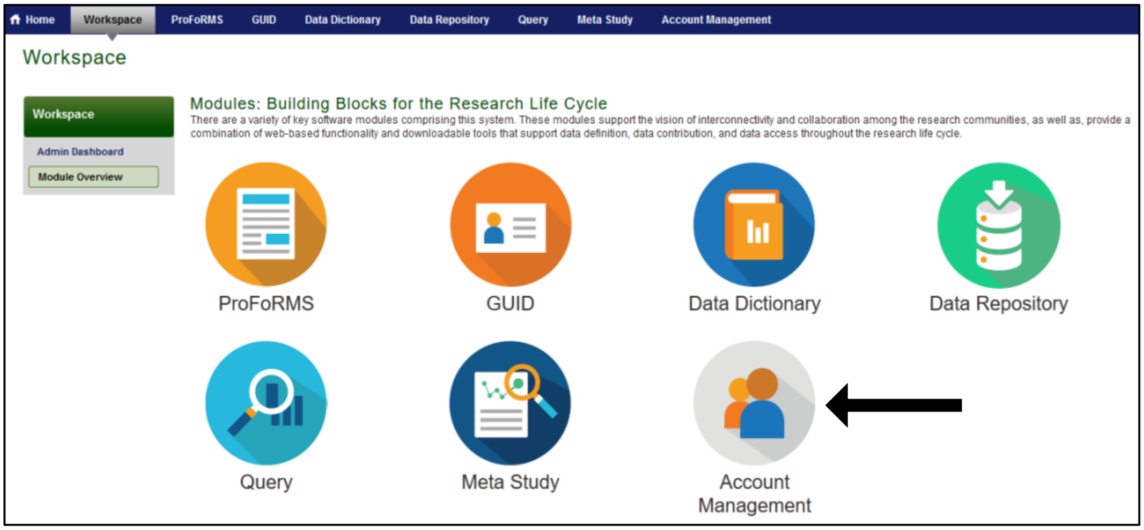
Things to Note:

🗁 Please note that your password recovery link will expire in approximately two hours. Therefore, you must be able to access that email account to change your account password.

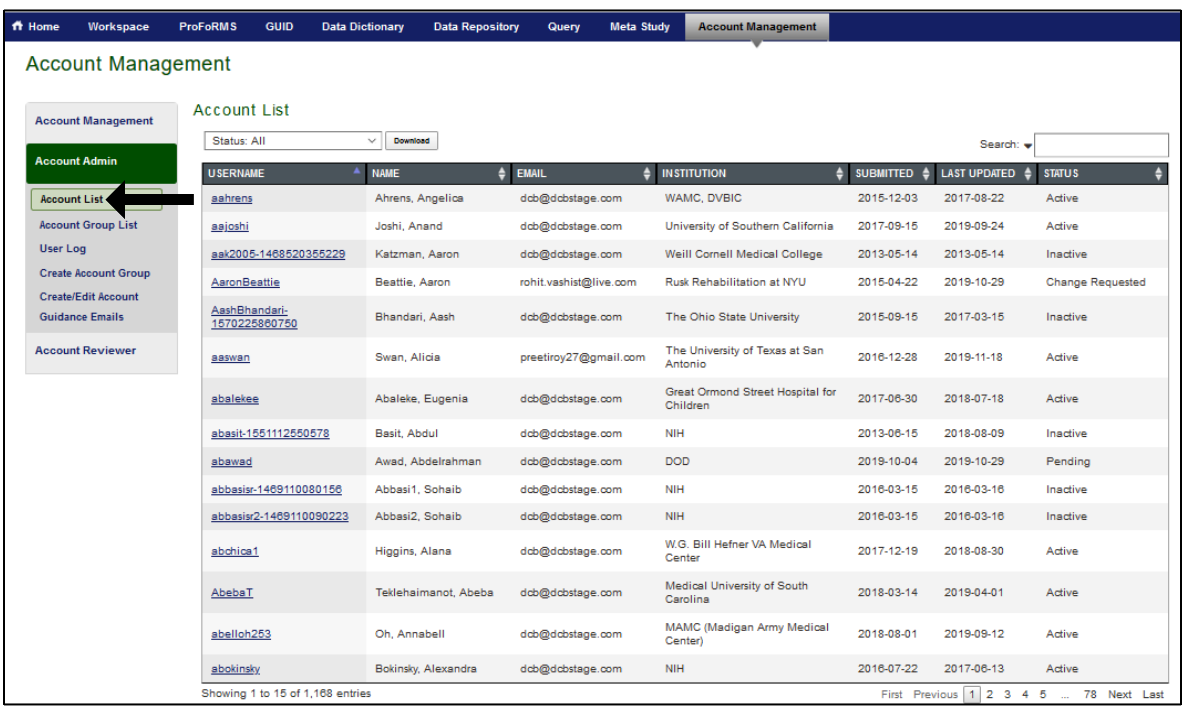
2.4.3 Deactivate User Account

To deactivate a user account**,** perform the following actions:

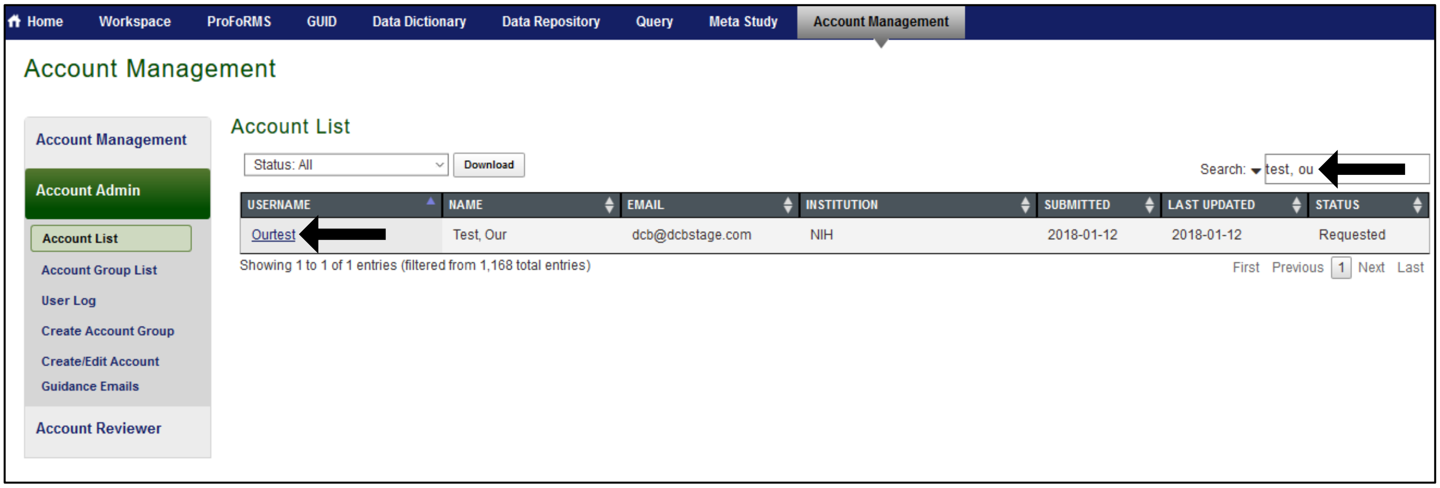
1. Log in to the system.
2. Navigate to the **Account Management** module.



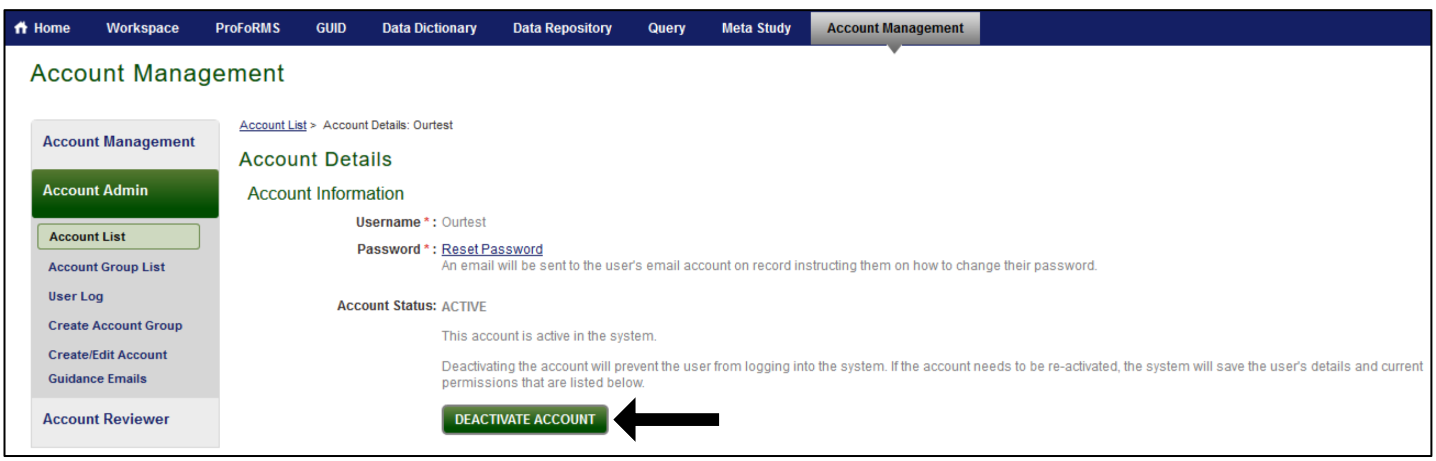
3. Select the **Account Admin** tab on the left.
4. Click on the **Account List** sub-menu on the left. The account list will display.



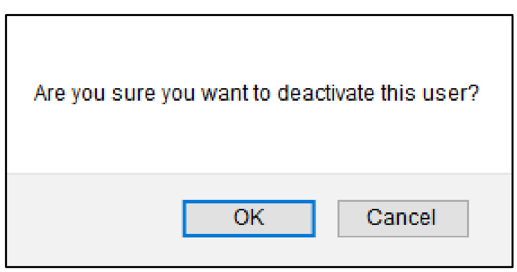
5. From the **Account List** displayed, select the user account name you wish to deactivate.
   a. You may use the **Search** text box located in the upper right corner to search for the user account name.



6. Click on the **Username**.
7. Click the **Deactivate Account** button. A pop-up window will appear.



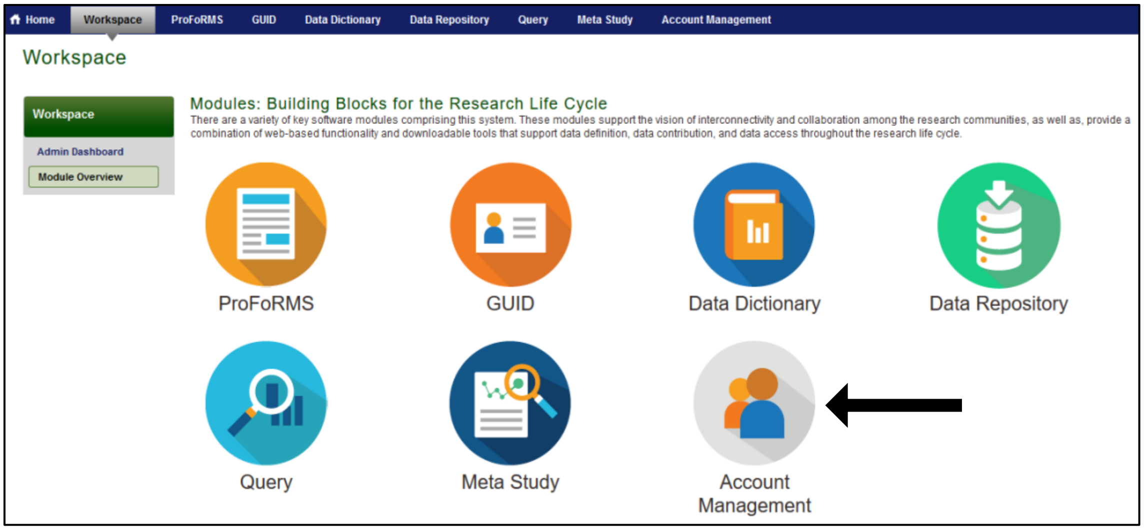
8. Click **OK** to deactivate the account.
   a. This action will deactivate the user account from the system and the account will immediately become inactive.



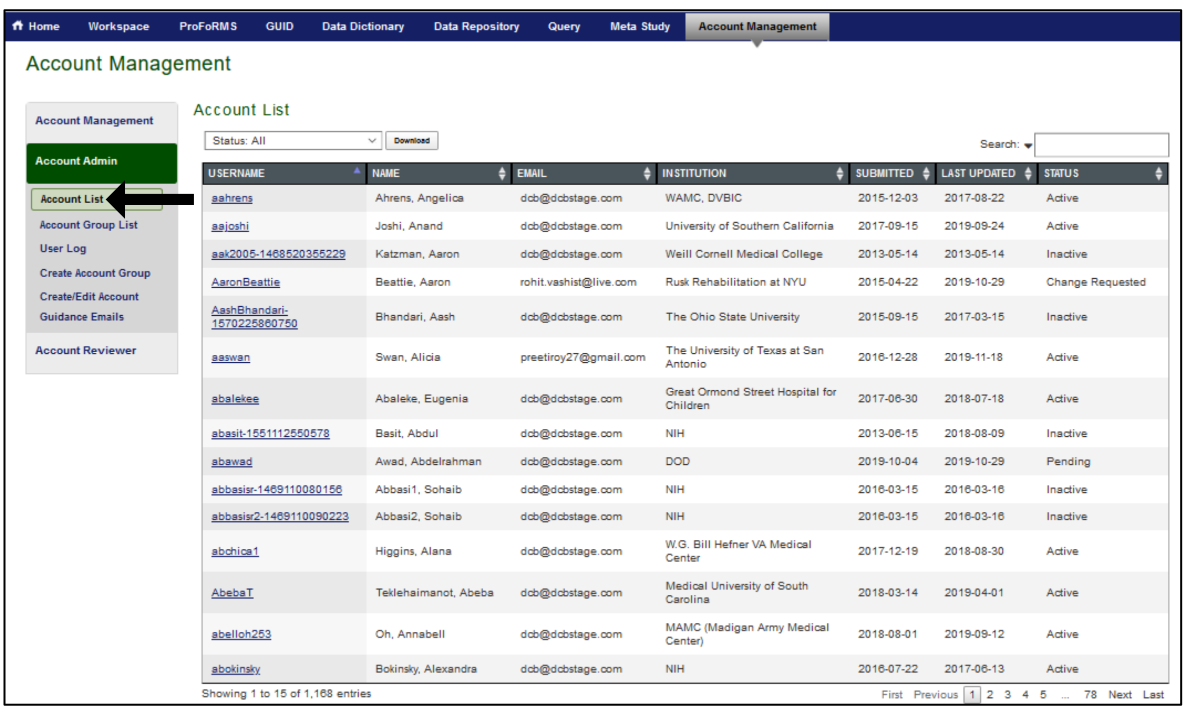
2.4.4 Reactivate User Account

To reactivate a user account, perform the following actions:

1. Log in to the system.
2. Navigate to the **Account Management** module.



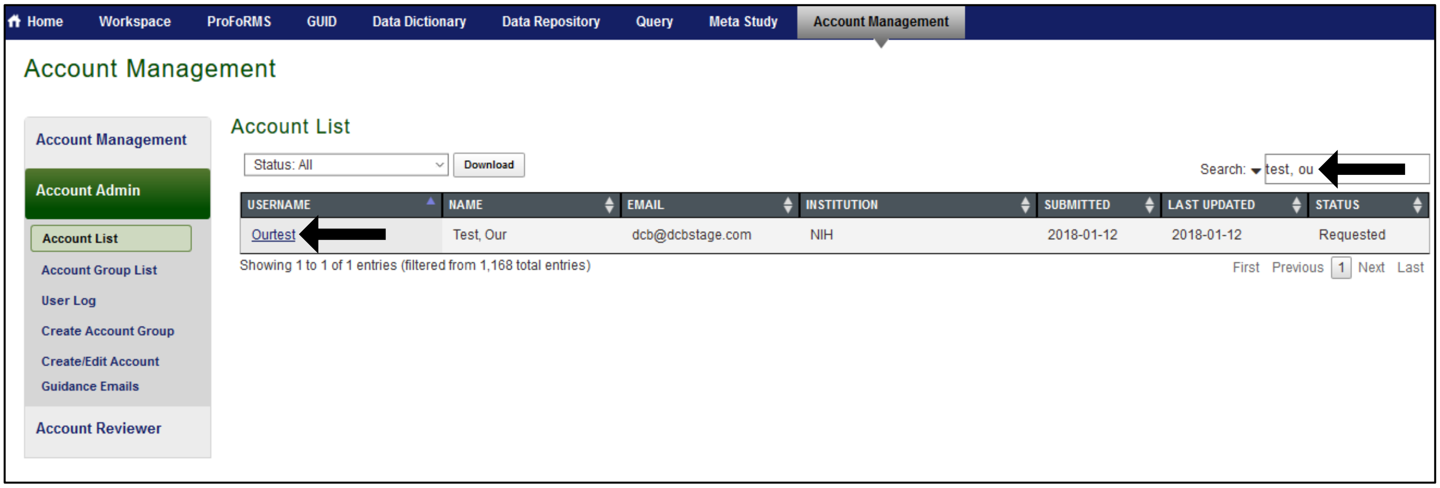
3. Select the **Account Admin** tab on the left.
4. Click on the **Account List** sub-menu on the left. The account list will display.



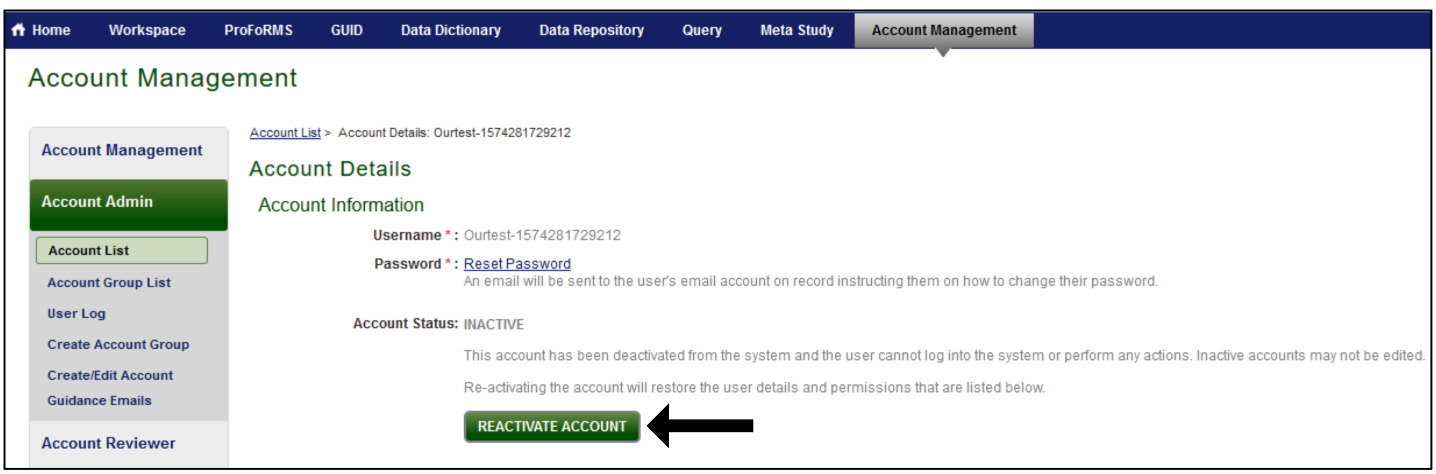
USERNAME	NAME	EMAIL	INSTITUTION	SUBMITTED	LAST UPDATED	STATUS
aahrens	Ahrens, Angelica	dcb@dcbstage.com	WAMC, DVBIC	2015-12-03	2017-08-22	Active
aajoshi	Joshi, Anand	dcb@dcbstage.com	University of Southern California	2017-09-15	2019-09-24	Active
aak2005-1468520355229	Katzman, Aaron	dcb@dcbstage.com	Weill Cornell Medical College	2013-05-14	2013-05-14	Inactive
AaronBeattie	Beattie, Aaron	rohit.vashist@live.com	Rusk Rehabilitation at NYU	2015-04-22	2019-10-29	Change Requested
AashBhandari-1570225860750	Bhandari, Aash	dcb@dcbstage.com	The Ohio State University	2015-09-15	2017-03-15	Inactive
aaswan	Swan, Alicia	preetiroy27@gmail.com	The University of Texas at San Antonio	2016-12-28	2019-11-18	Active
abalekee	Abaleke, Eugenia	dcb@dcbstage.com	Great Ormond Street Hospital for Children	2017-06-30	2018-07-18	Active
abasit-1551112550578	Basit, Abdul	dcb@dcbstage.com	NIH	2013-06-15	2018-08-09	Inactive
abawad	Awad, Abdelrahman	dcb@dcbstage.com	DOD	2019-10-04	2019-10-29	Pending
abbasisr-1469110080156	Abbasi1, Sohaib	dcb@dcbstage.com	NIH	2016-03-15	2016-03-16	Inactive
abbasisr2-1469110090223	Abbasi2, Sohaib	dcb@dcbstage.com	NIH	2016-03-15	2016-03-16	Inactive
abchica1	Higgins, Alana	dcb@dcbstage.com	W.G. Bill Hefner VA Medical Center	2017-12-19	2018-08-30	Active
AbebaT	Teklehaimanot, Abeba	dcb@dcbstage.com	Medical University of South Carolina	2018-03-14	2019-04-01	Active
abelloh253	Oh, Annabell	dcb@dcbstage.com	MAMC (Madigan Army Medical Center)	2018-08-01	2019-09-12	Active
abokinsky	Bokinsky, Alexandra	dcb@dcbstage.com	NIH	2016-07-22	2017-06-13	Active

Showing 1 to 15 of 1,168 entries   First Previous 1 2 3 4 5 ... 78 Next Last

5. From the **Account List** displayed, select the user account name you wish to reactivate.
    a. You may use the **Search** text box located in the upper right corner to search for the user account name.



6. Click on the **Username**.
7. Click the **Reactivate Account** button to reactivate the account.
    a. This action will reactivate the user account from the system and the account will immediately become active.



ICON KEY

🕮 Notes

🗁 Important Information

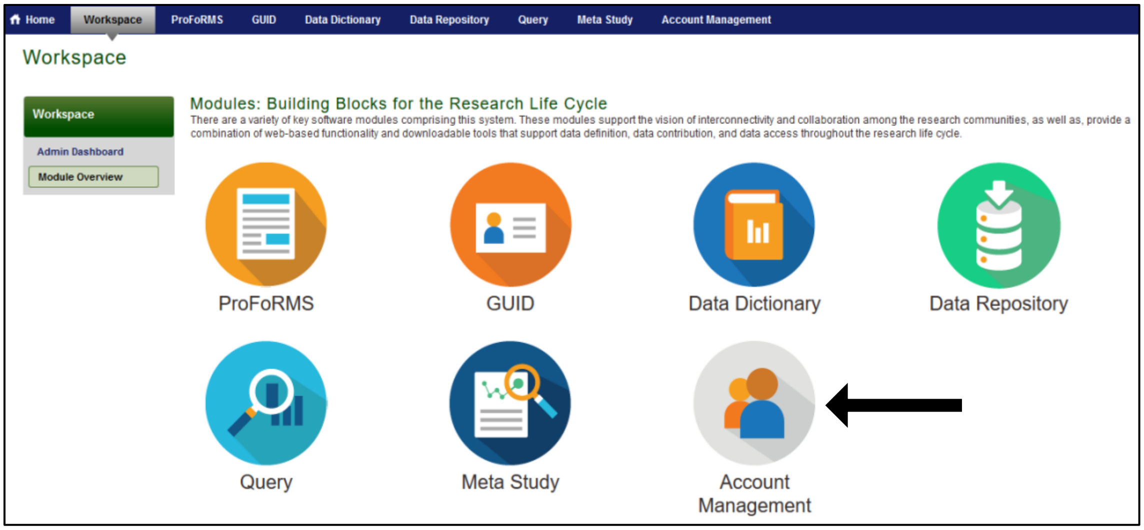
Things to Note:

🗁 This action will reactivate the user account from the system and the account will immediately become active. Ensure you have selected the appropriate account before clicking the "reactivate" button.

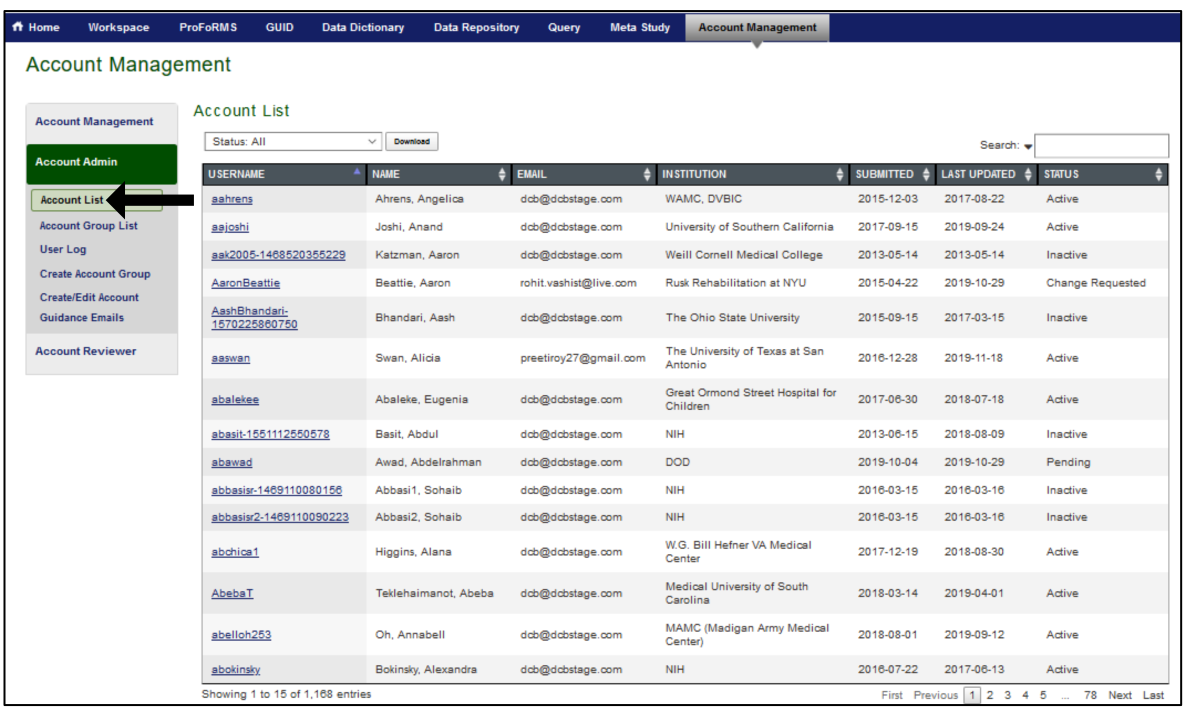
2.4.5 View, Approve, or Reject User Account Requests

To view, approve, or reject user account requests, perform the following actions:

1. Log in to the system.
2. Navigate to the **Account Management** module.

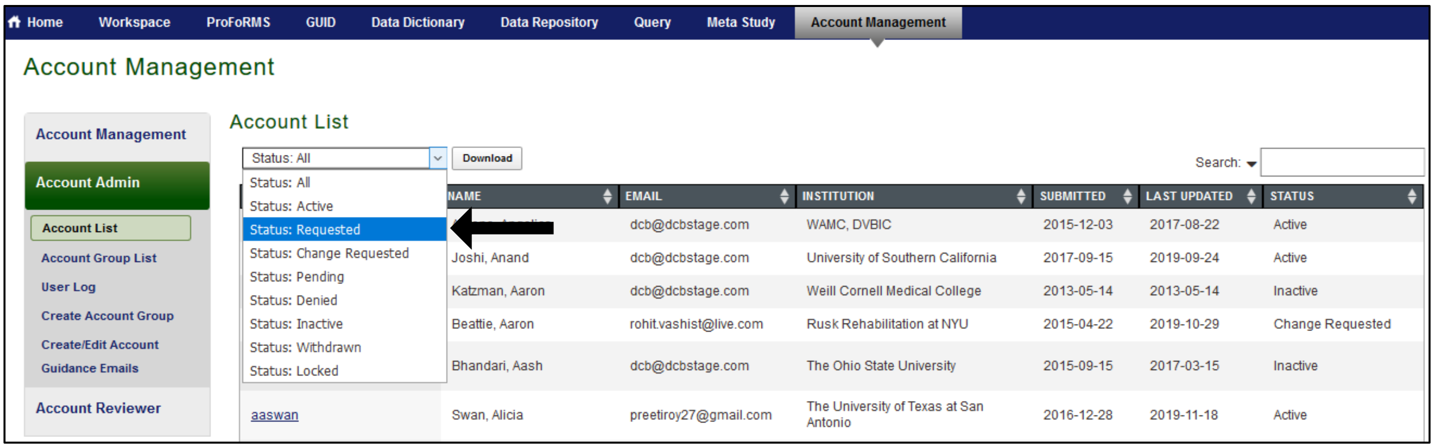


3. Select the **Account Admin** tab on the left.
4. Click on the **Account List** sub-menu on the left. The account list will display.

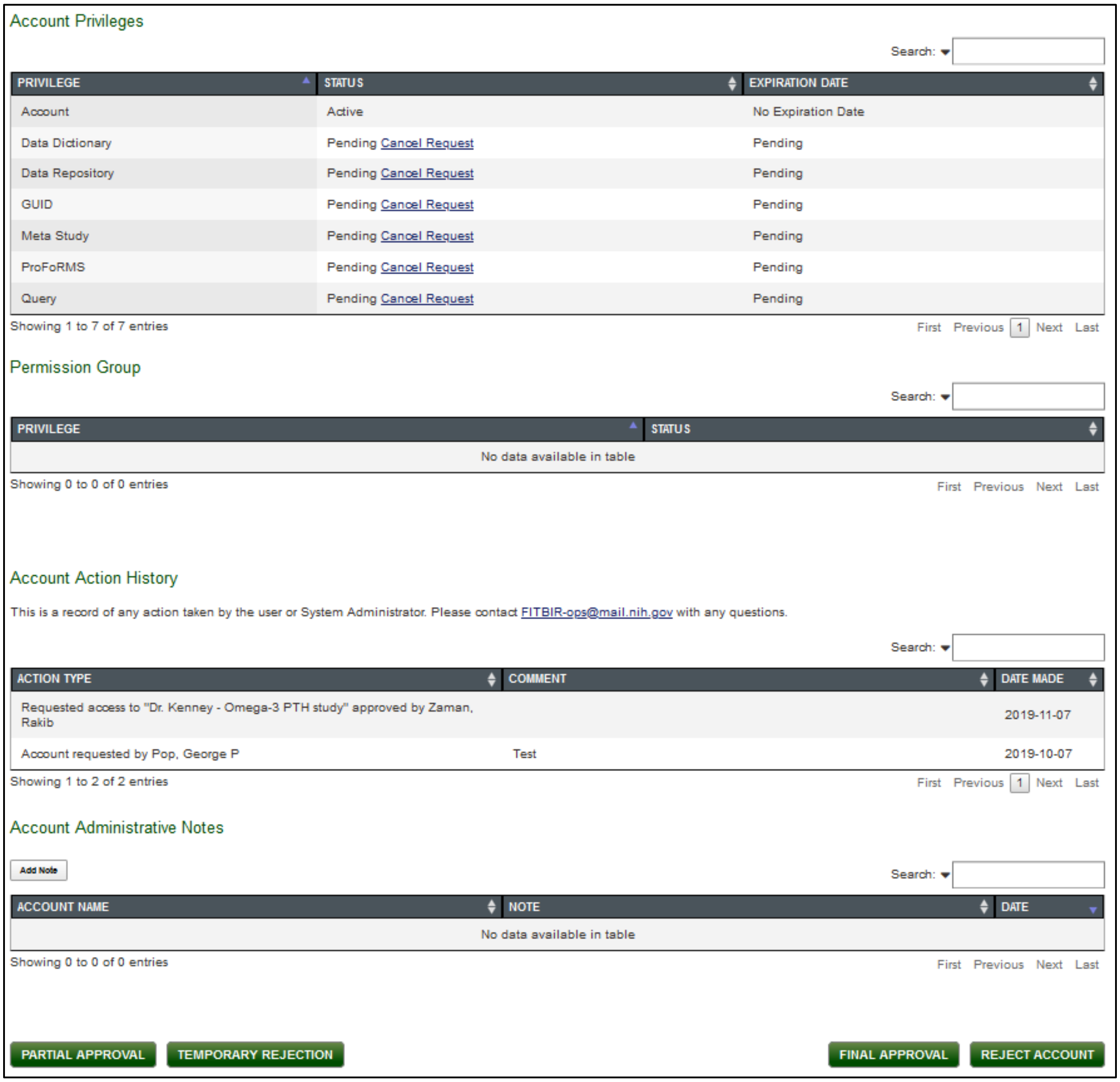


5. On the **Account List** page, click on the drop-down menu and select the **"Status: Requested"** option to view user accounts that are awaiting approval.

6. Click on the desired user account name from the **Account List** page. The **Account Request** page appears displaying the user information.

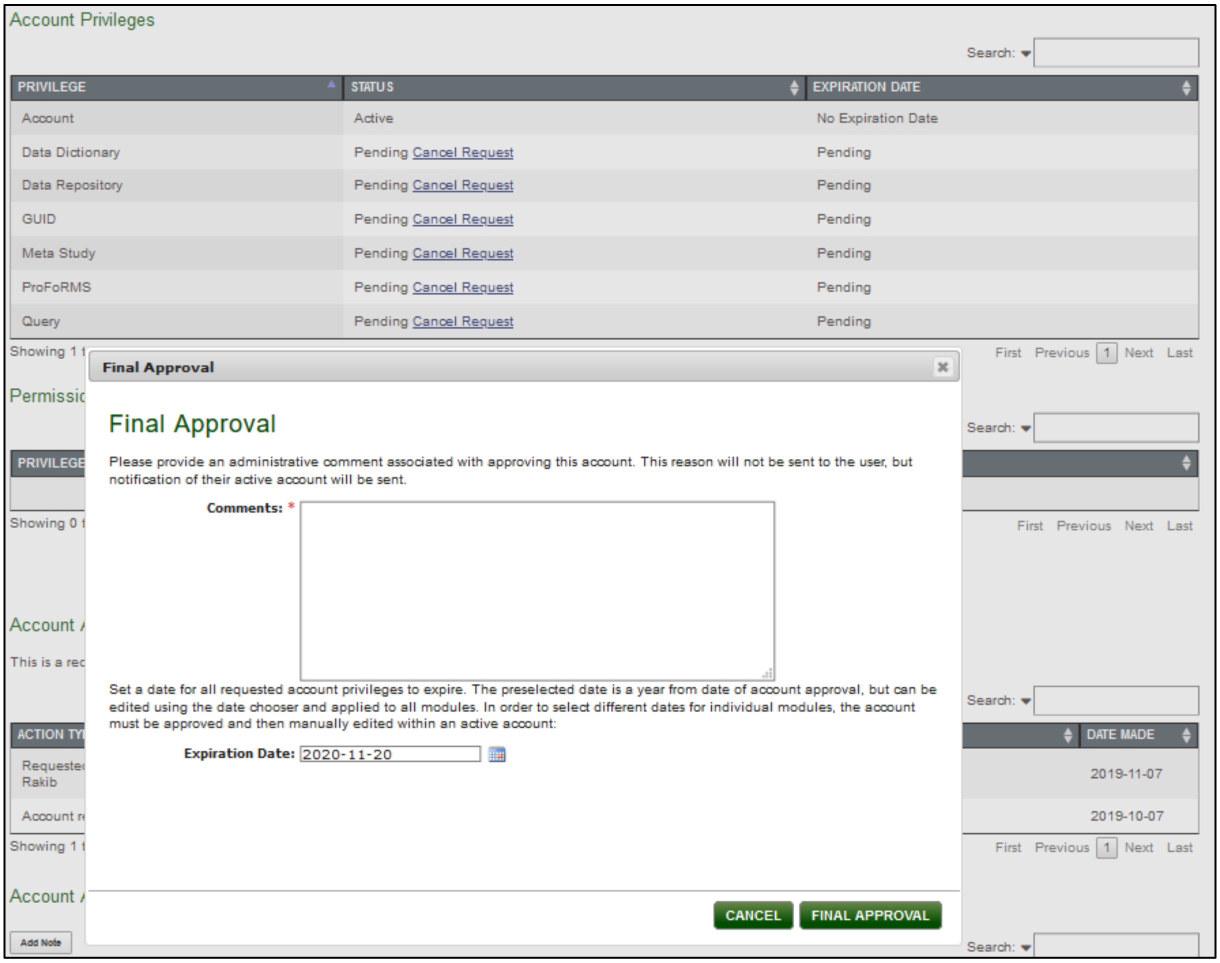


7. Navigate to the **Account Privileges** section and look at the requested privileges in the table. The table lists the requested system-wide privileges, including those that are pending approval.

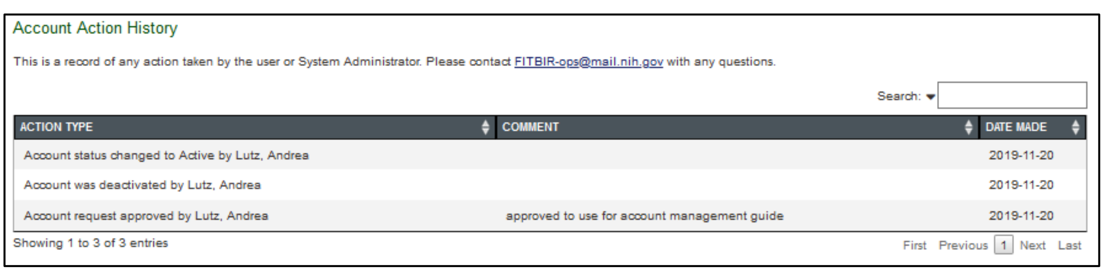


8. Use the **Cancel Request** links to deny any individual, unapproved, requested privileges.
9. Select the **Reject Account** to reject the entire account request.
10. Select the **Final Approval** button to approve requested privileges.

11. A **Final Approval Comments** box will appear.
    a. In this box, explain why the user was approved and select the **Final Approval** button.



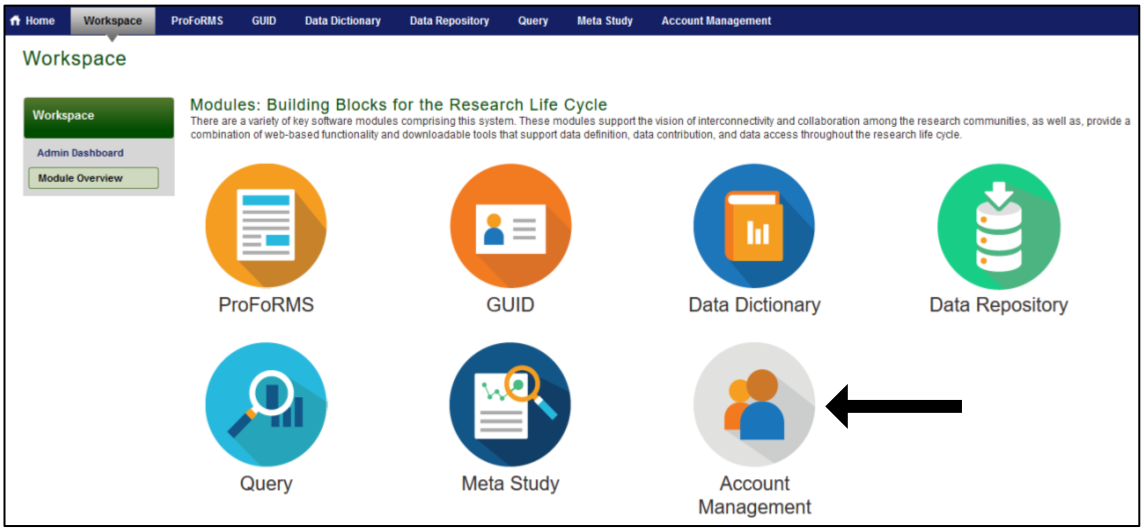
12. The **Final Approval Comments** will appear in the **Account Action History** table for documentation/administrative records.



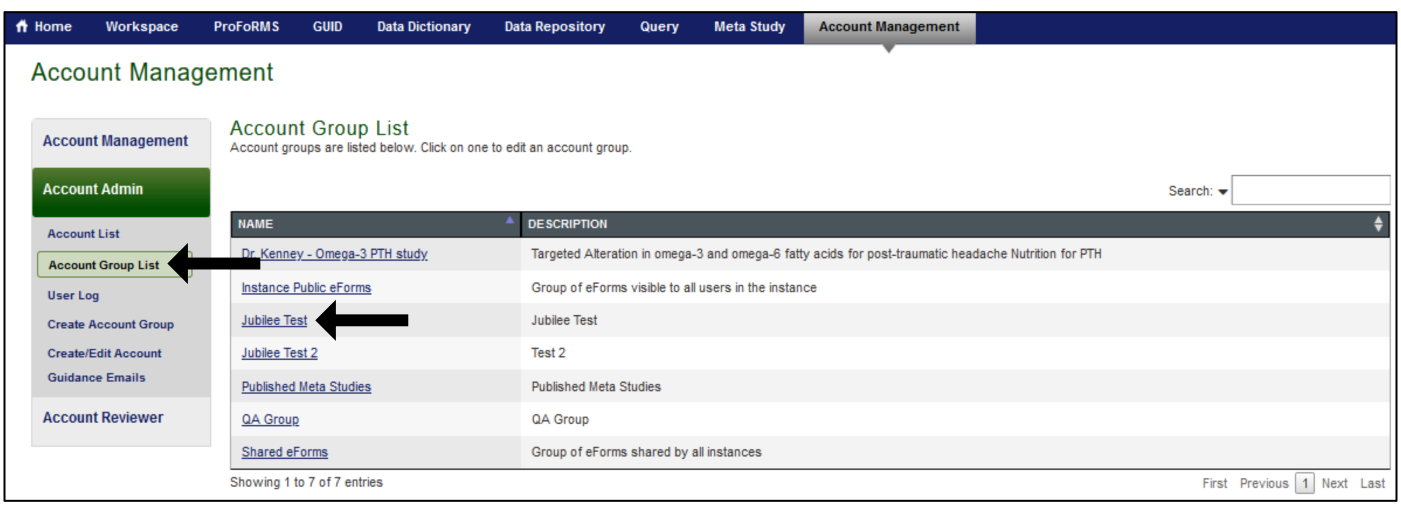
2.4.6 View or Edit Account Group List

To view or edit **Account Group Lists**, perform the following actions:

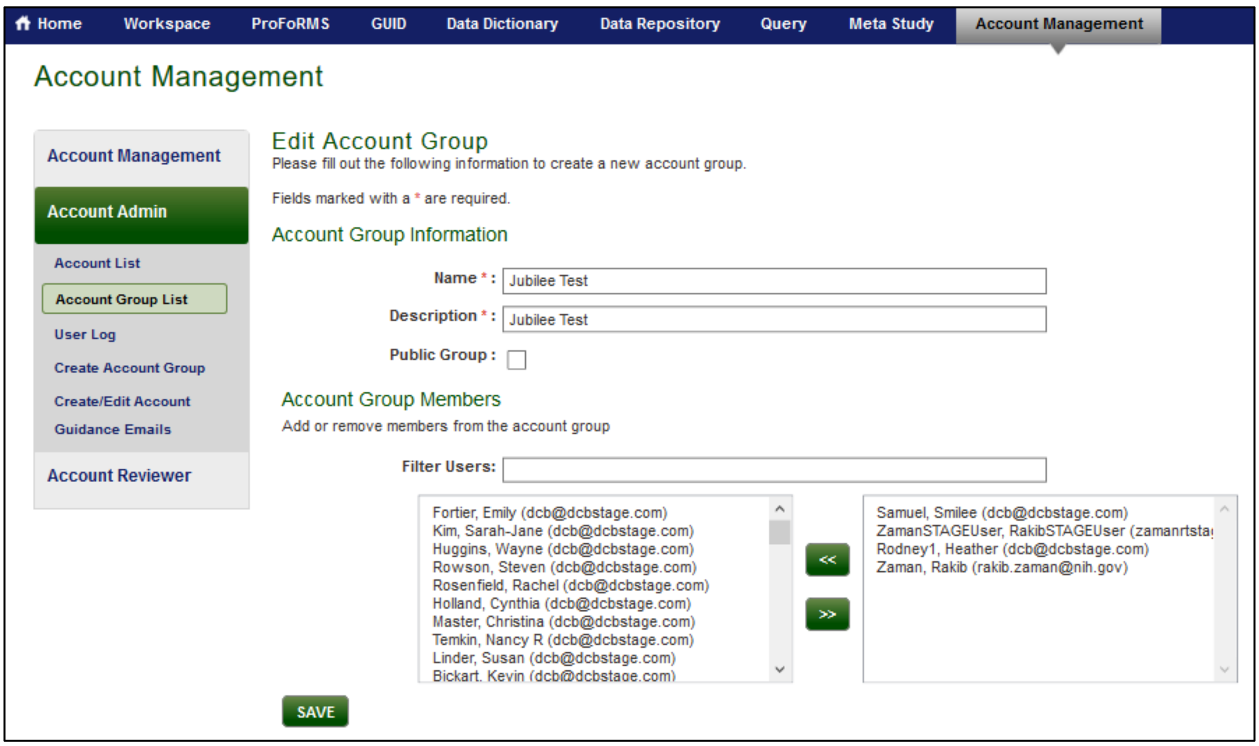
1. Log in to the system.
2. Navigate to the **Account Management** module.



3. Select the **Account Admin** tab on the left.
4. Select the **Account Group List** and select the **Account Group** to edit.



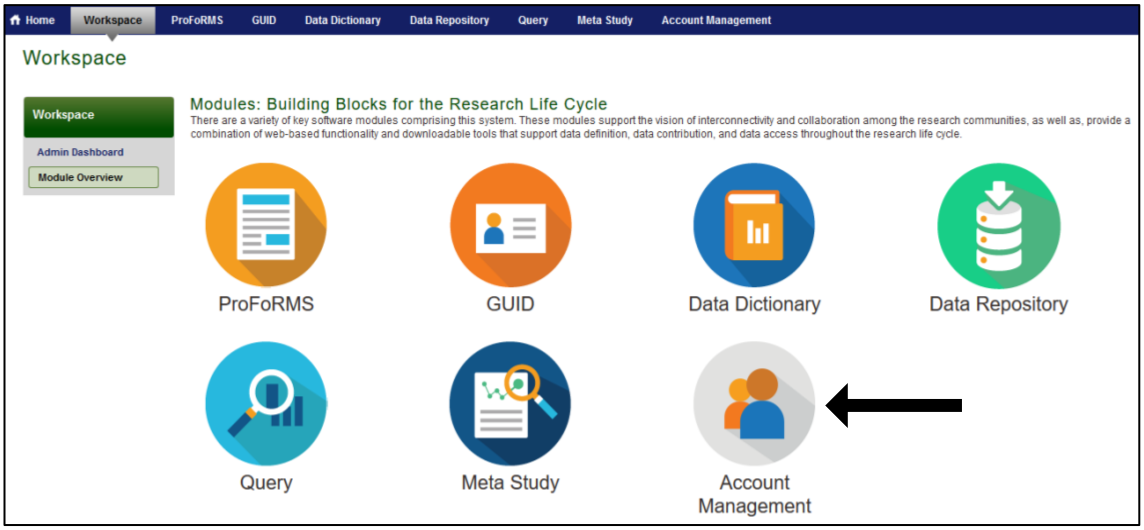
5. Edit the account group as desired and click on the **Save** button.
    a. To add a user to the list, select the user from the left box in the **Account Group Members** section and use the arrow pointing to the right box to add them to the group.
    b. To remove a user from the list, select the user from the right box in the **Account Group Members** section and use the arrow pointing to the left box to remove them from the group.



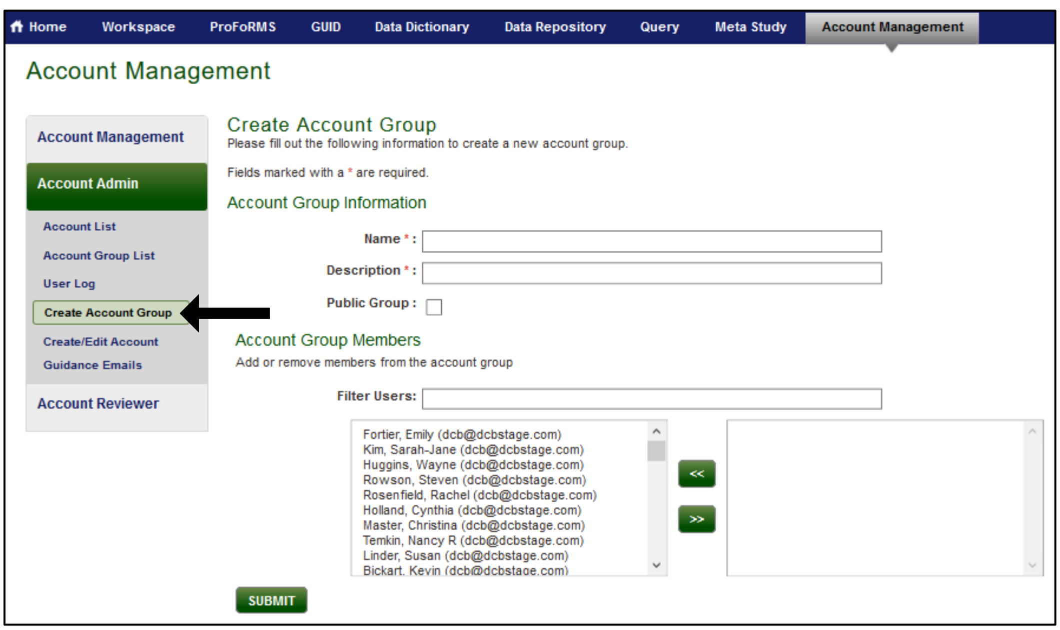
2.4.7 Create Account Group

To create an **Account Group**, perform the following actions:

1. Log in to the system.
2. Navigate to the **Account Management** module.



3. Select the **Account Admin** tab on the left.
4. Select the **Create Account Group**, complete all required fields, add members, and **Submit.**

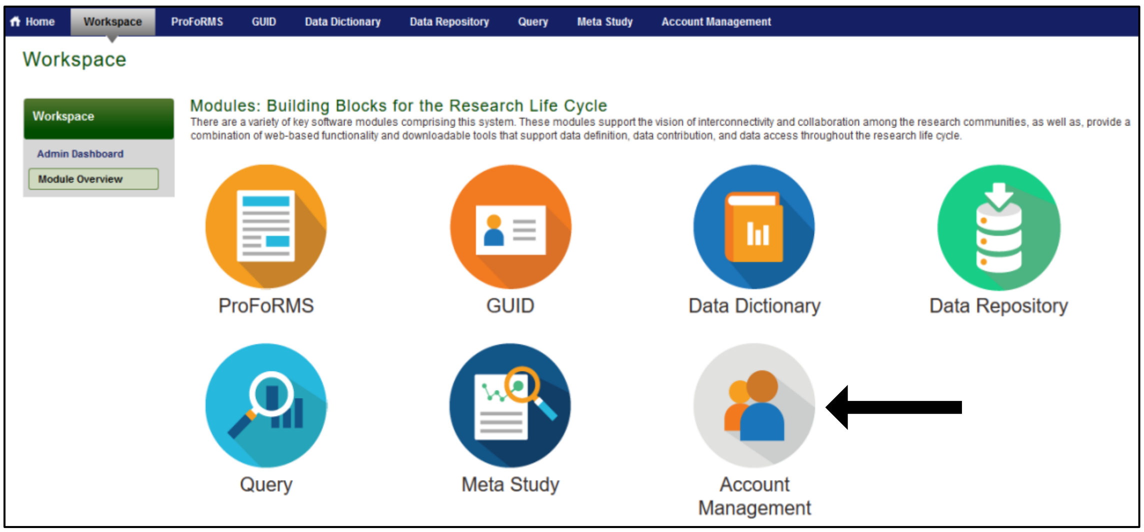


2.4.8 View User Log

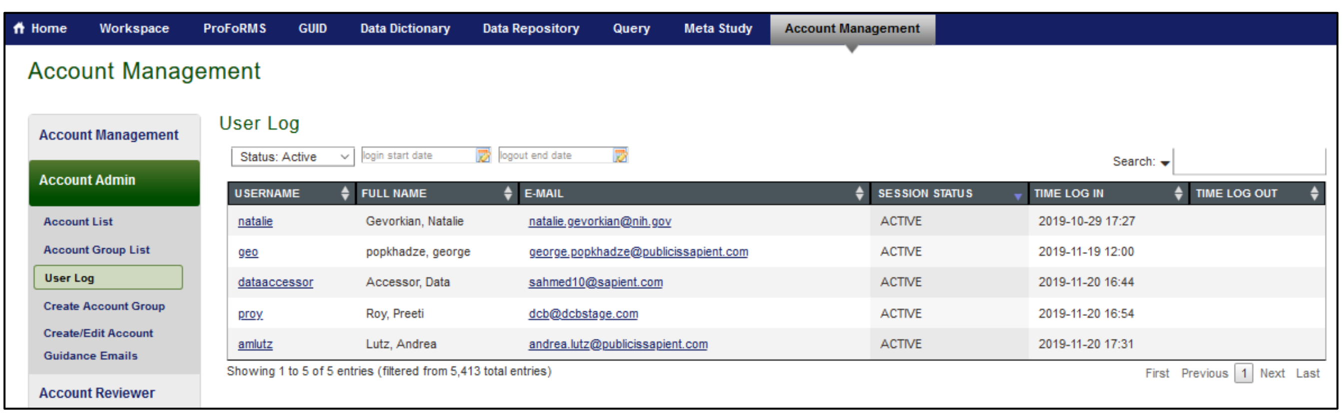
When logged into the system, users with admin privileges can view the **User Log**. The **User Log** displays all current and previous users sessions, including information about whether individual sessions are still active or have expired.

To view the **User Log**, perform the following actions:

1. Log in to the system.
2. Navigate to the **Account Management** module.



3. Select the **Account Admin** tab on the left.
4. Select the **User Log** link on the left to display the **User Log List**.
5. The **User Log** displays All, Active, or Expired user sessions in the system.

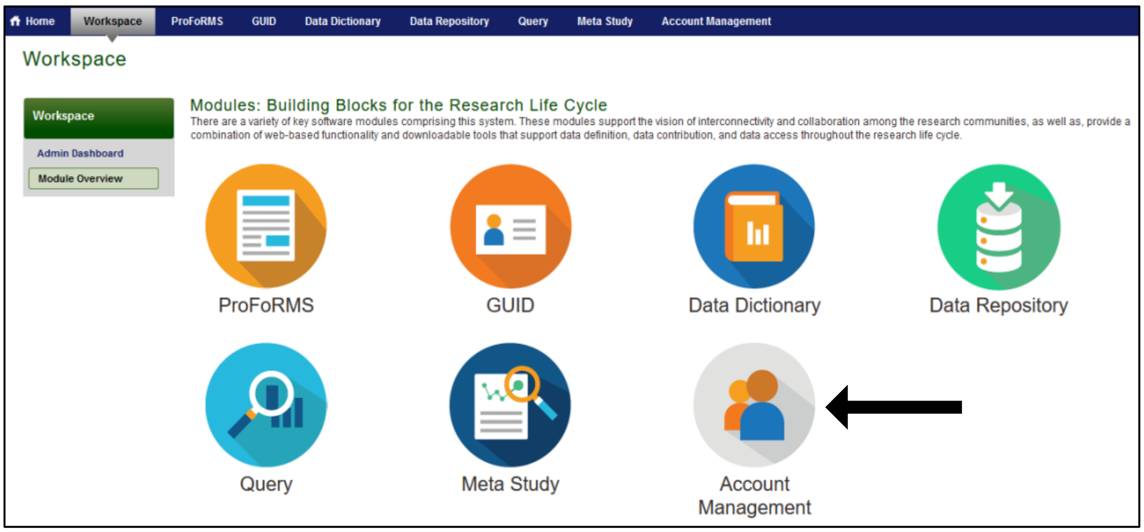


2.4.9 Create or Edit Account Guidance Emails

When logged into the system, users with admin privileges can view the **Create/Edit Account Guidance Emails.** The **Account/Edit Account Guidance Emails** displays general response emails that are sent to users placing an Account Request or Account Renewal in the system.

To view the **Create/Edit Account Guidance Emails**, perform the following actions:

1. Log in to the system.
2. Navigate to the **Account Management** module.
3. Select the **Account Admin** tab on the left.



4. Select the **Create/Edit Account Guidance Emails** link on the left to display the Account Requests and Account Renewal email messages.
5. Create, Edit or Delete the Account Guidance Emails as desired and **Save** or **Add** changes.

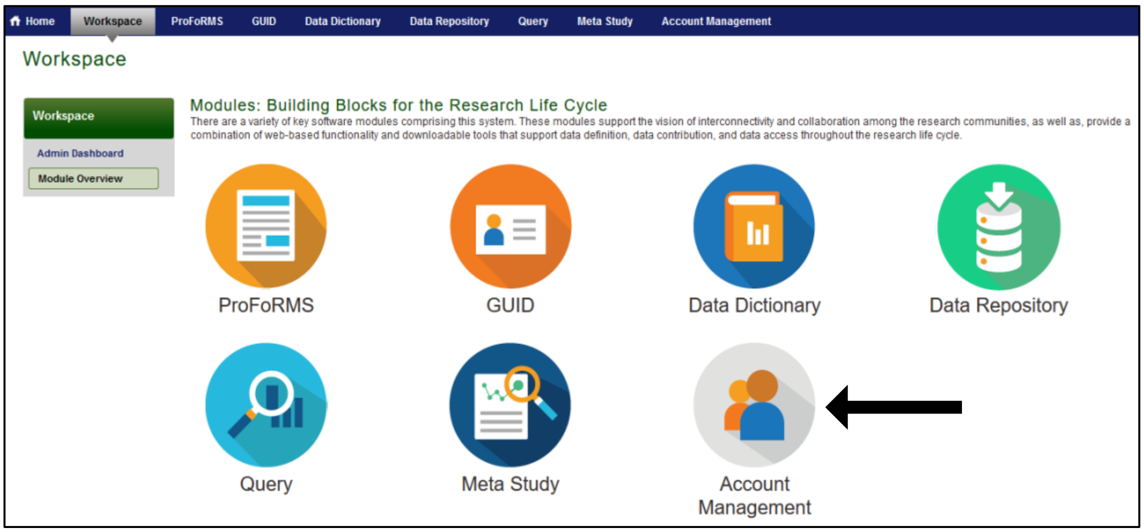
2.5 Account Reviewer

2.5.1 View, Approve, or Reject Account Requests

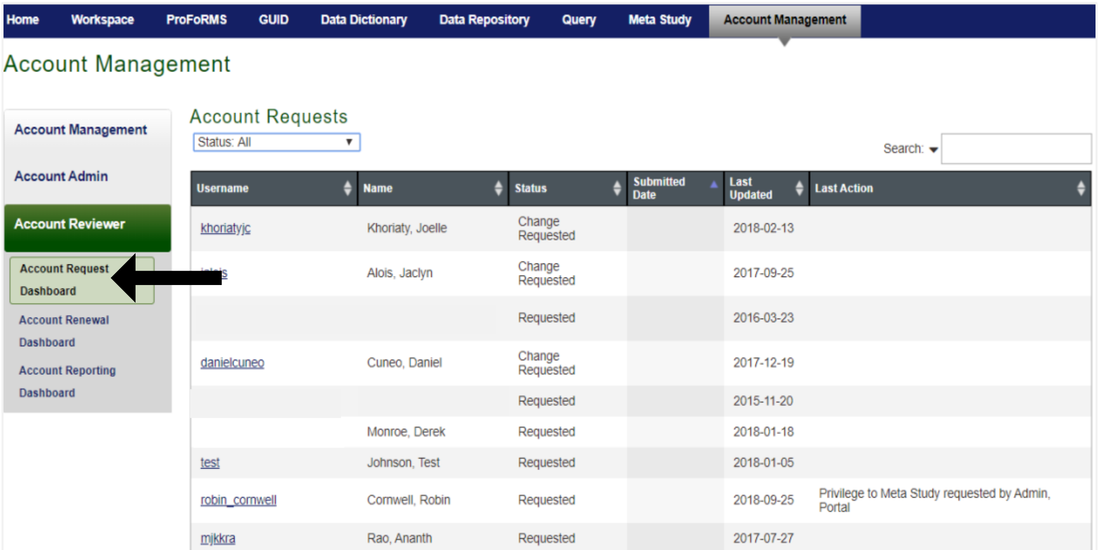
When logged into the system, users with Account Reviewer privileges can view, approve, and reject account requests in the **Account Request Dashboard.**

To view the **Account Request Dashboard**, perform the following actions:

1. Log in to the system.
2. Navigate to the **Account Management** module.

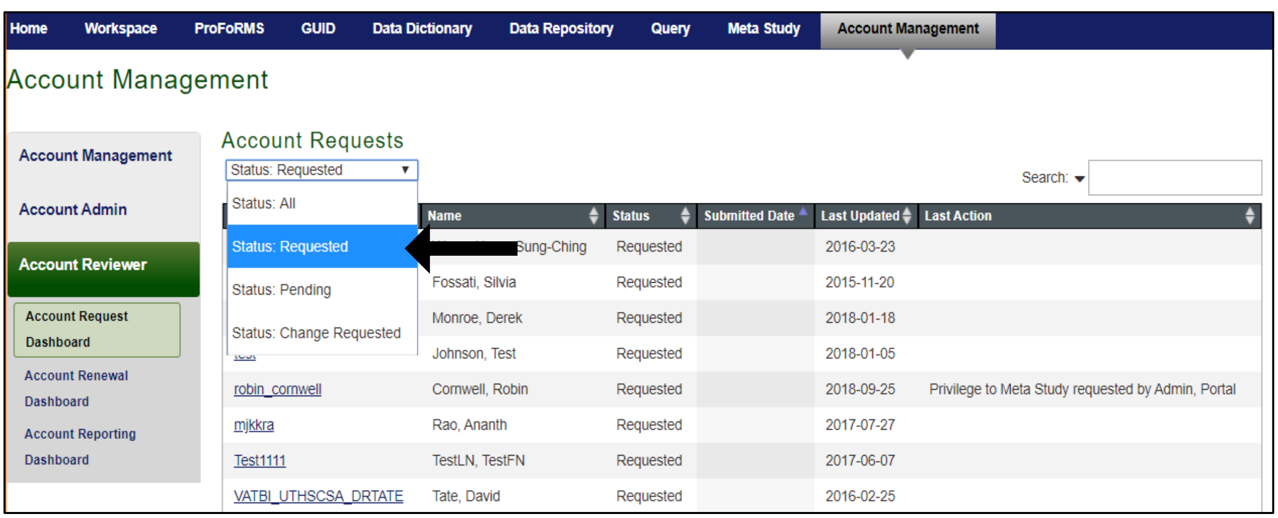


3. Select the **Account Reviewer** tab on the left.
4. Click on the **Account Request Dashboard** sub-menu on the left. The Account Requests list will display.

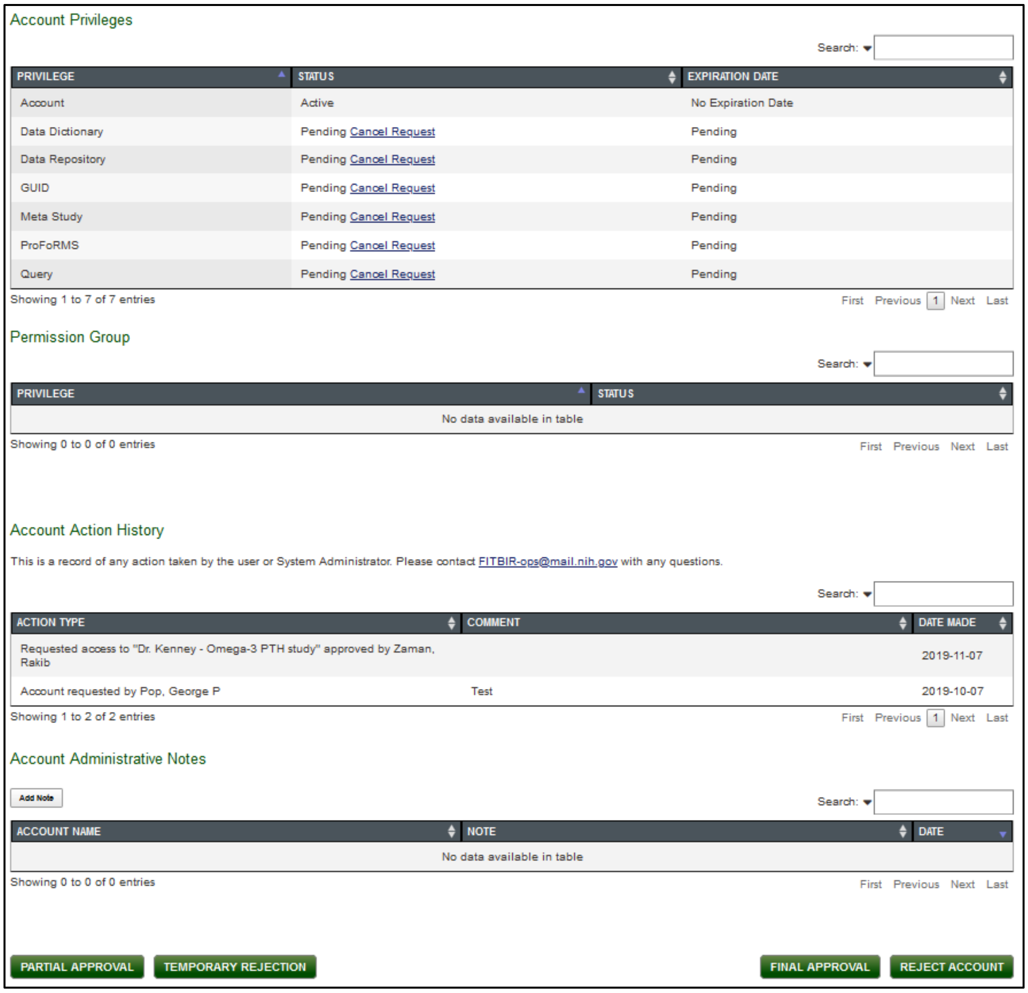


5. On the **Account Requests** page, click on the drop-down menu and select the **"Status: Requested"** option to view user accounts that are awaiting approval.

6. Click on the desired user account name from the **Account Requests** page. The **Account Requests** page appears displaying the user information.

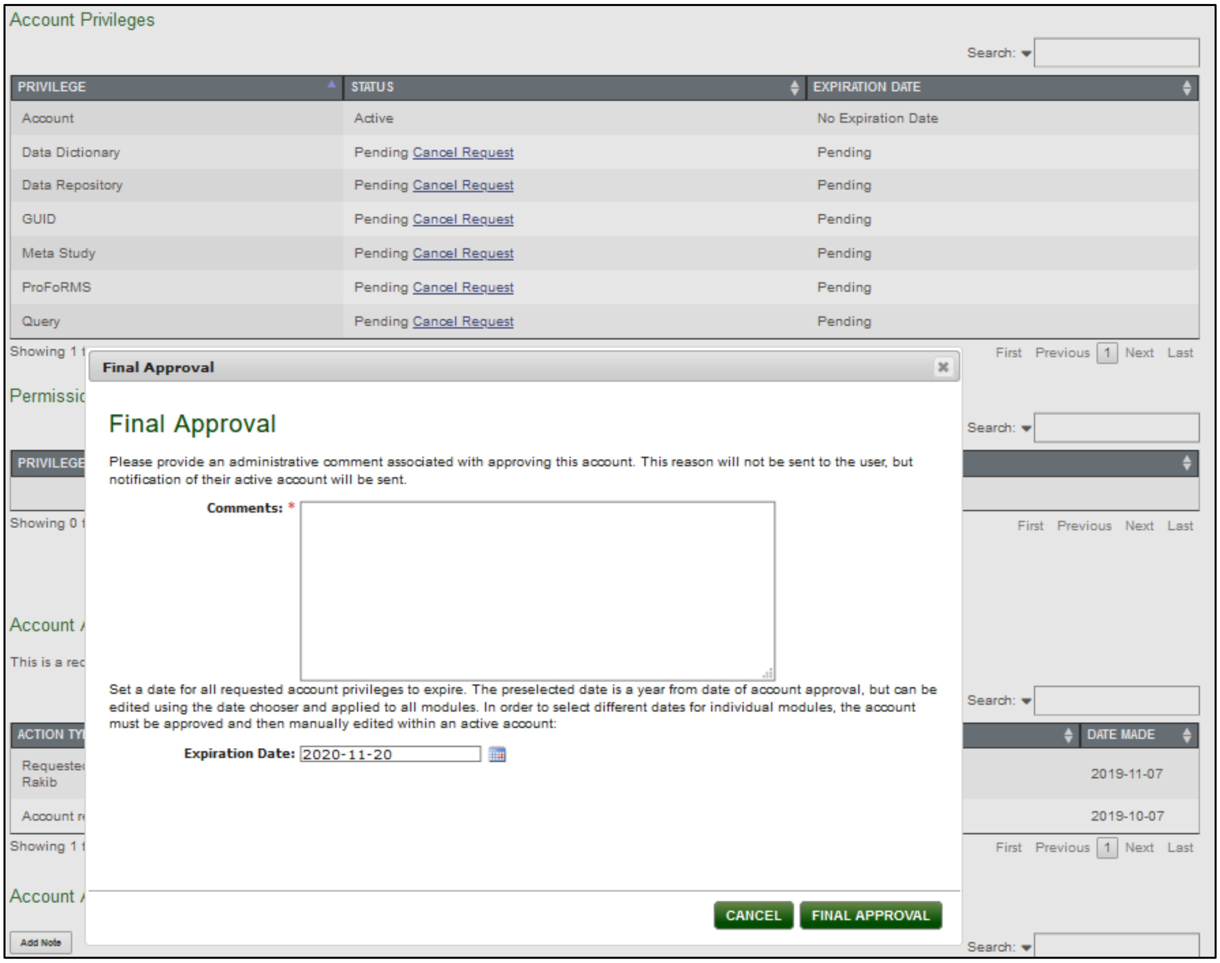


7. Navigate to the **Account Privileges** section and look at the requested privileges in the table. The table lists the requested system-wide privileges, including those that are pending approval.

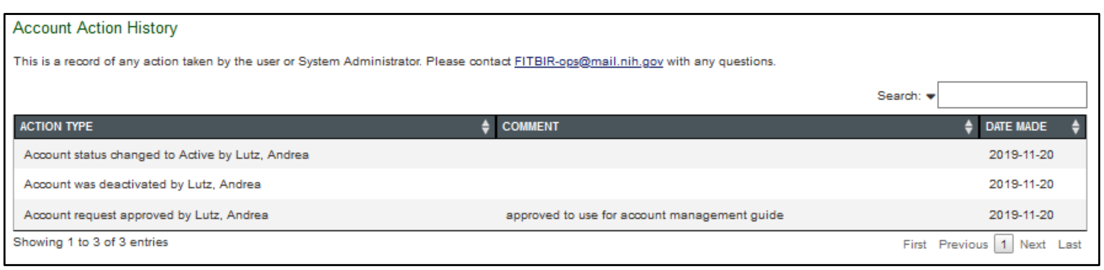


8. Use the **Cancel Request** links to deny any individual, unapproved, requested privileges.
9. Select the **Reject Account** to reject the entire account request.
10. Select the **Final Approval** button to approve requested privileges.

11. A **Final Approval Comments** box will appear.
    a. In this box, explain why the user was approved and select the **Final Approval** button.



12. The **Final Approval Comments** will appear in the **Account Action History** table for documentation/administrative records.



Account Action History

This is a record of any action taken by the user or System Administrator. Please contact FITBIR-ops@mail.nih.gov with any questions.

Search:

ACTION TYPE	COMMENT	DATE MADE
Account status changed to Active by Lutz, Andrea		2019-11-20
Account was deactivated by Lutz, Andrea		2019-11-20
Account request approved by Lutz, Andrea	approved to use for account management guide	2019-11-20

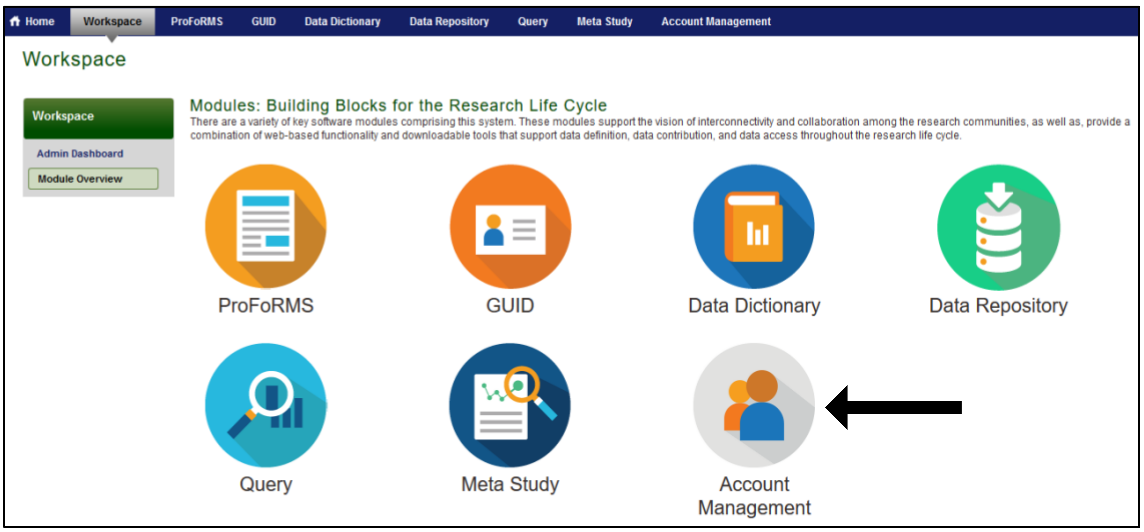
Showing 1 to 3 of 3 entries First Previous 1 Next Last

2.5.2 View, Approve, or Reject Account Renewals

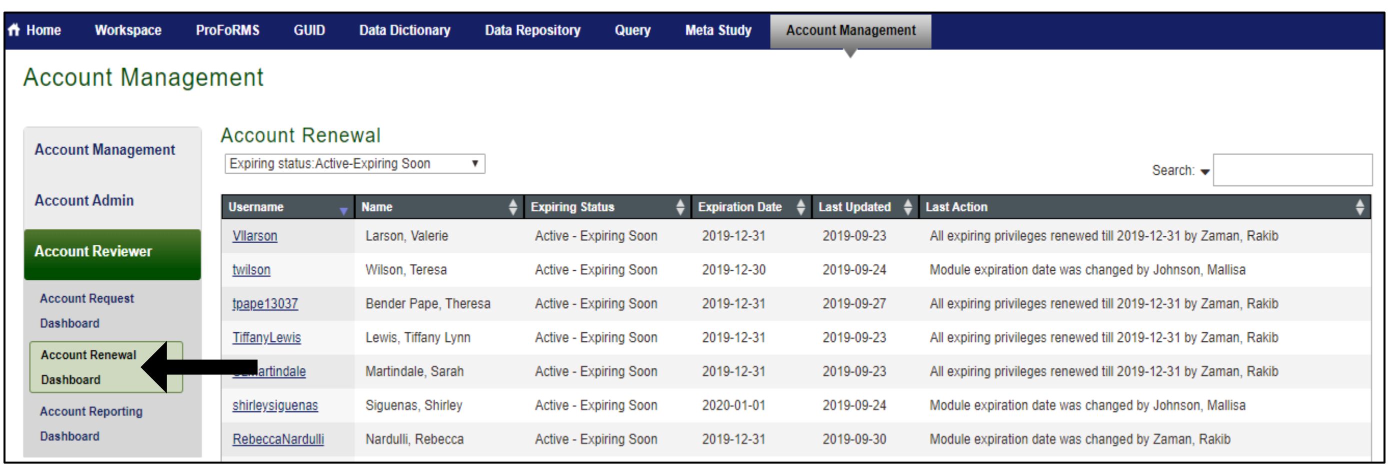
When logged into the system, users with Account Reviewer privileges can view, approve, and reject account renewal requests in the **Account Renewal Dashboard.**

To view the **Account Renewal Dashboard**, perform the following actions:

1. Log in to the system.
2. Navigate to the **Account Management** module.

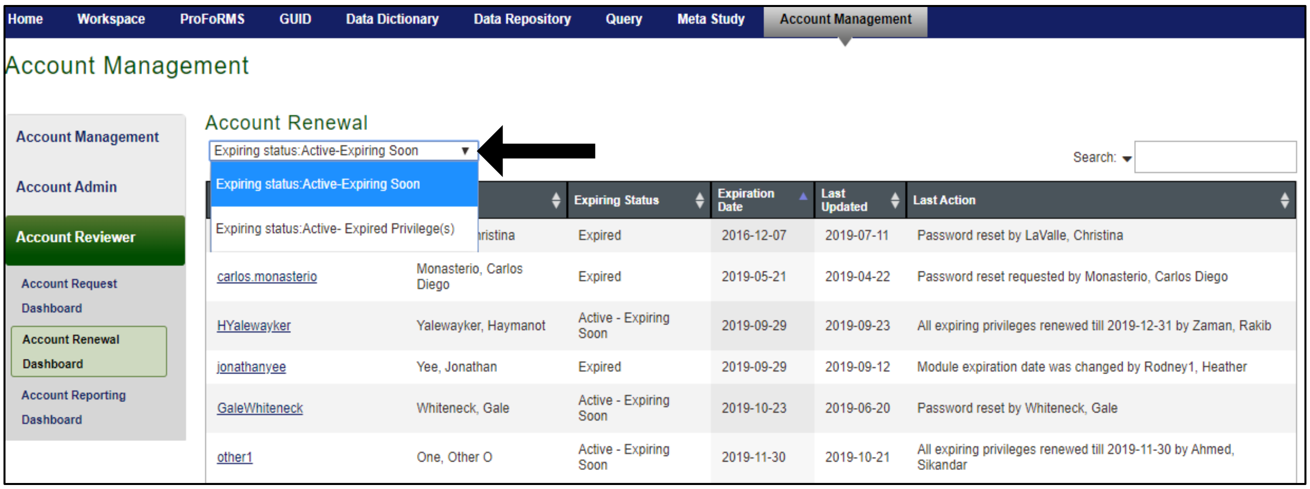


3. Select the **Account Reviewer** tab on the left.
4. Click on the **Account Renewal Dashboard** sub-menu on the left. The Account Renewals list will display.

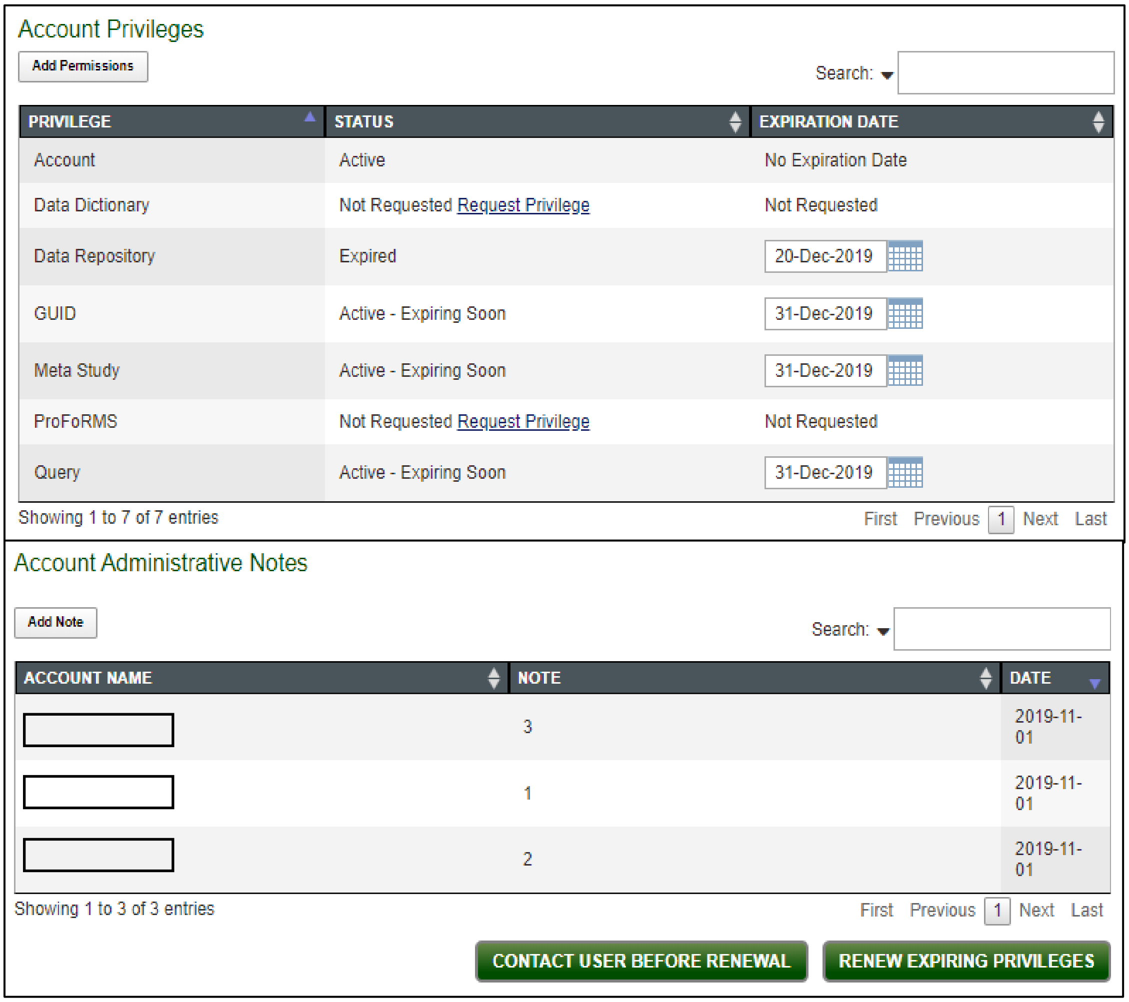


5. On the **Account Renewal** page, click on the drop-down menu and select the desired status, Expiring Soon or Expiring Privileges.

6. Click on the desired user account name from the **Account Renewal** page. The **Account Renewal** page appears displaying the user information.

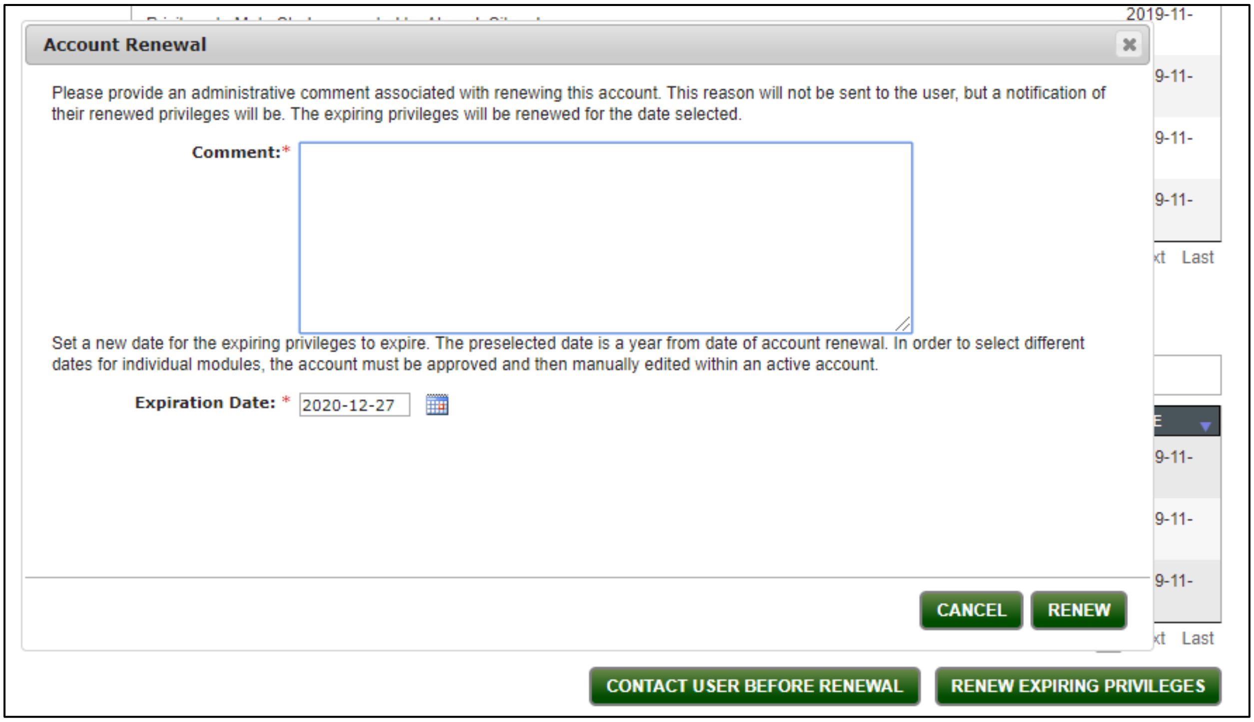


7. Navigate to the **Account Privileges** section and look at the expiring privileges in the table. The table lists the requested system-wide privileges, including those that are Active - Expiring Soon.

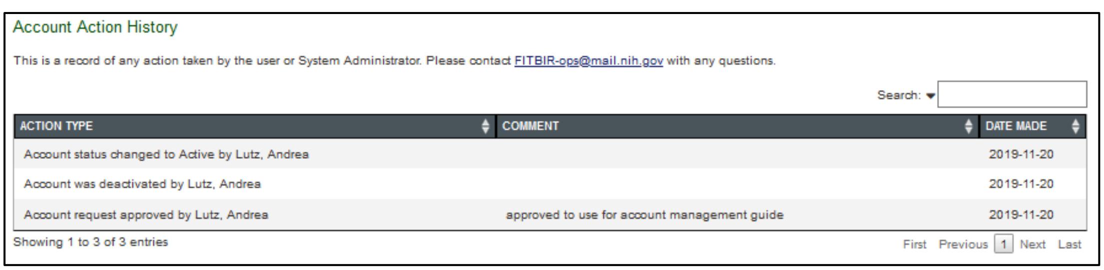


8. Use the **Contact User Before Renewal** button if there are any questions regarding the renewal request.
9. Select the **Renew Expiring Privileges** button to renew the privileges.

10. An **Account Renewal Comments** box will appear.
    a. In this box, explain why the user account was renewed, select a new expiration date, and select the **Renew** button.



11. The **Final Approval Comments** will appear in the **Account Action History** table for documentation/administrative records.

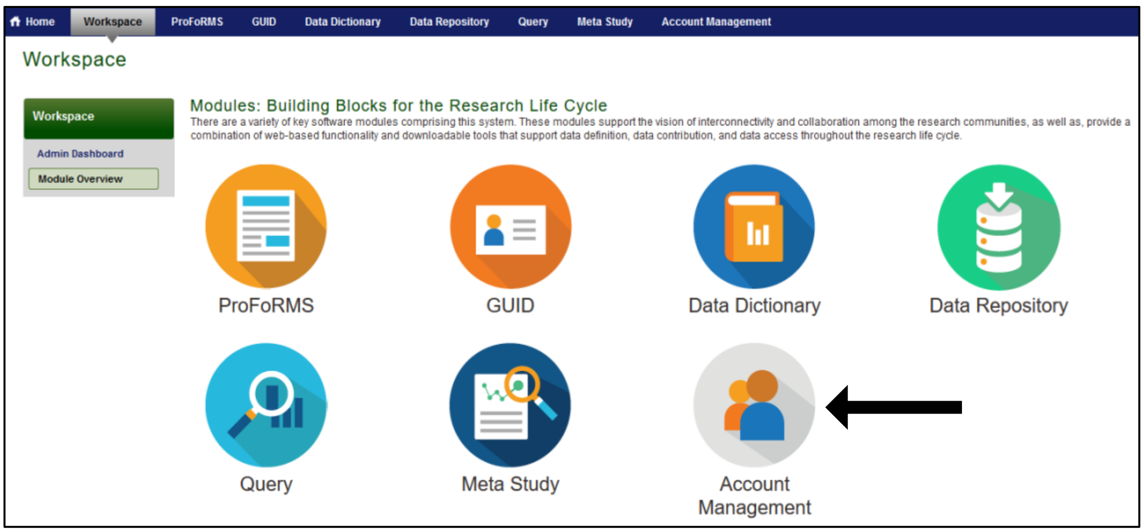


2.5.3 View Account Reporting Dashboard

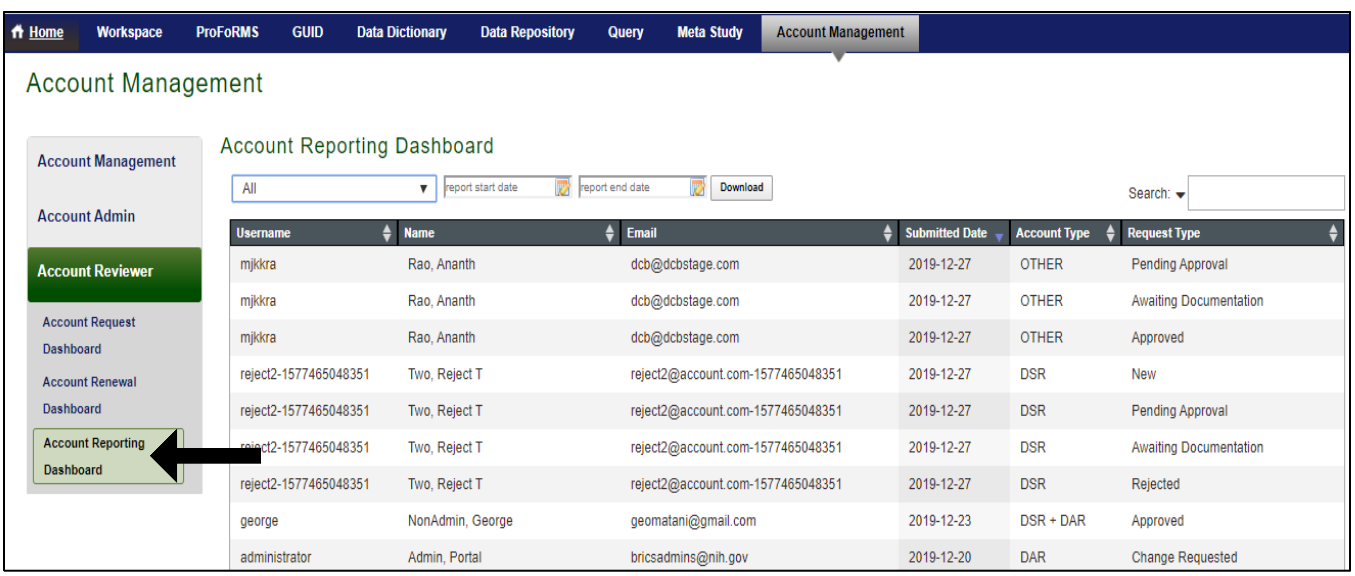
When logged into the system, users with Account Reviewer privileges can view the **Account Reporting Dashboard.** In the **Account Reporting Dashboard**, a user can view the following: New Account Requests, Approved Account Requests, Rejected Account Requests, Awaiting Documents Request, and Pending Approval Requests.

To view the **Account Reporting Dashboard**, perform the following actions:

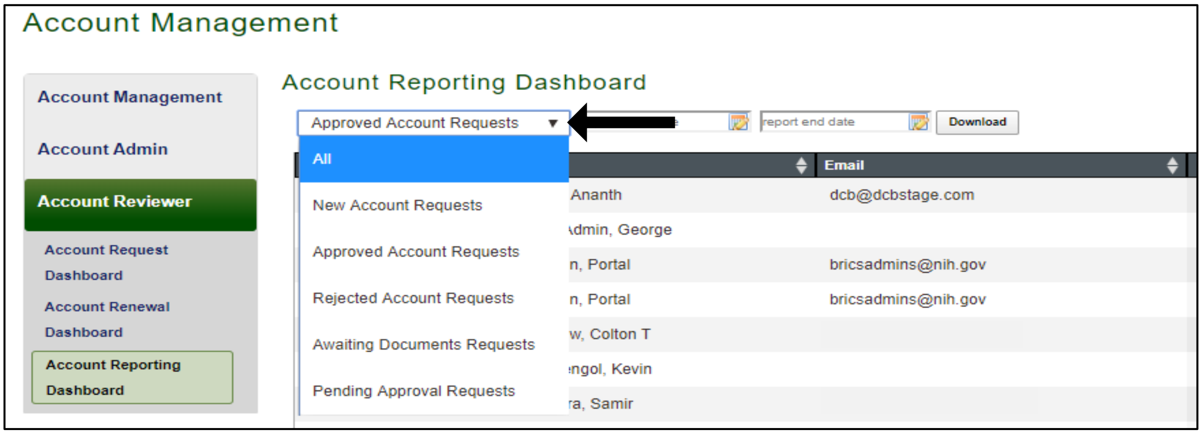
1. Log in to the system.
2. Navigate to the **Account Management** module.



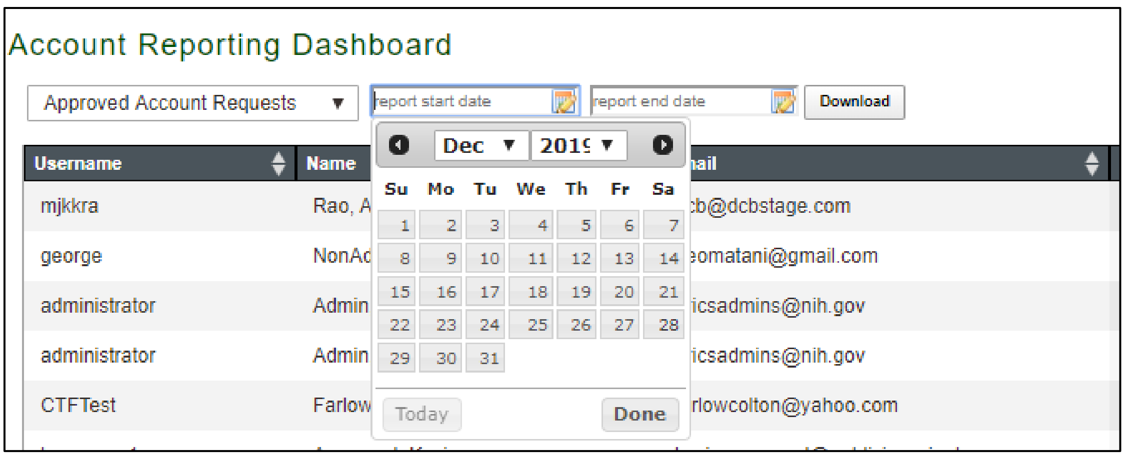
3. Select the **Account Reviewer** tab on the left.
4. Click on the **Account Reporting Dashboard** sub-menu on the left. The **Account Reporting Dashboard** list will display.



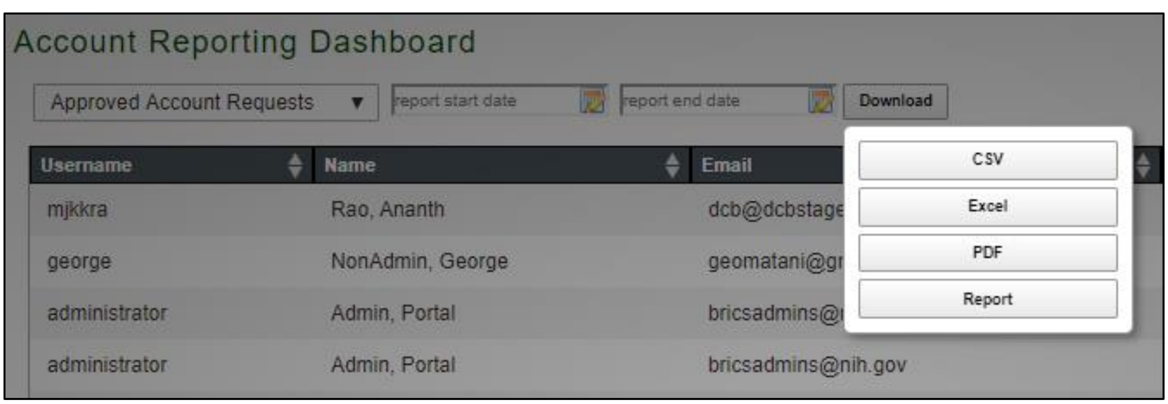
5. On the **Account Reporting Dashboard** page, click on the drop-down menu and select the desired status to view.



6. To narrow down a time point of interest, enter the desired Report Start Date and Report End Date in the date fields.



7. Select the **Download** button to download a report of the data of interest.



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