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:
  o View My Profile
  o Edit My Profile
  o Change Password
  o Upload Documentation
  o Request Additional Privileges

❖ Account Administration:
  o View Account List
  o Reset User Account Password
  o Deactivate User Account
  o Reactivate User Account
  o View, Approve, or Reject User Account Request
  o View or Edit Account Group List
  o Create Account Group
  o View User Log
  o Create or Edit Account Guidance Emails

❖ Account Reviewer:
  o View, Approve, or Reject Account Requests
  o View, Approve, or Reject Account Renewals
  o 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-menues. With the Account Privileges available to all users, the following is displayed:

![Account Management Menu](image)

**Things to Note:**

- Use the left side menu to navigate through the module.

<table>
<thead>
<tr>
<th>ICON KEY</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>📋 Notes</td>
<td></td>
</tr>
<tr>
<td>📋 Important Information</td>
<td></td>
</tr>
</tbody>
</table>
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 Profile.
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.

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.

**Things to Note:**

篑 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.
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.

**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.
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.

![Account Privileges Table]

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.