



BRICS

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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:

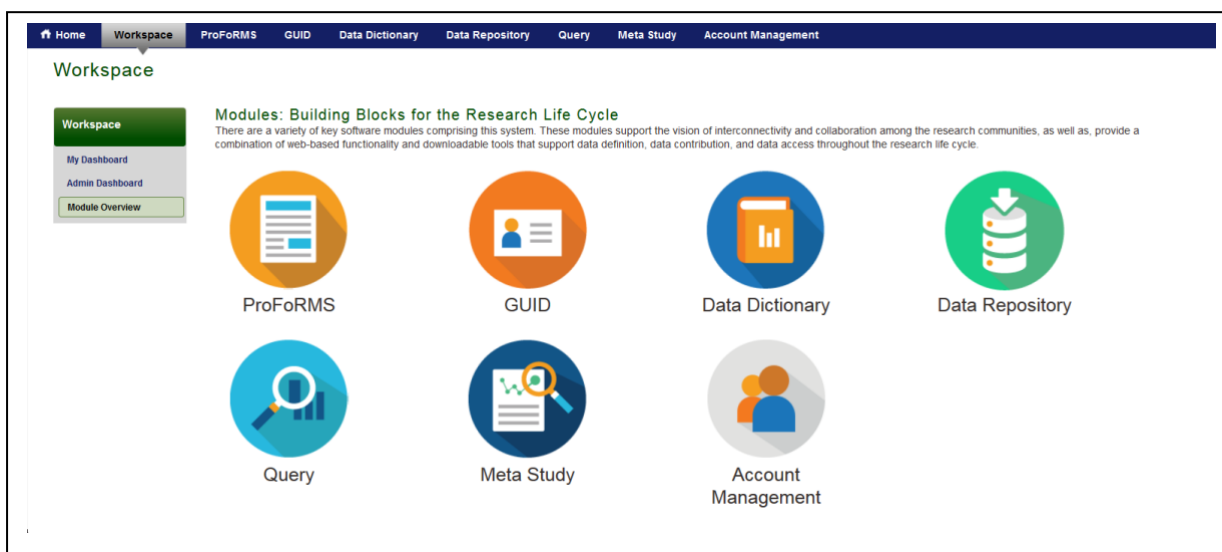
- ❖ Account Management:
 - View My Profile
 - Edit My Profile
 - Change Password
 - Upload Documentation
 - Request Additional Privileges
- ❖ Account Administration:
 - View Account List
 - Reset User Account Password
 - Deactivate User Account
 - Reactivate User Account
 - View, Approve, or Reject User 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

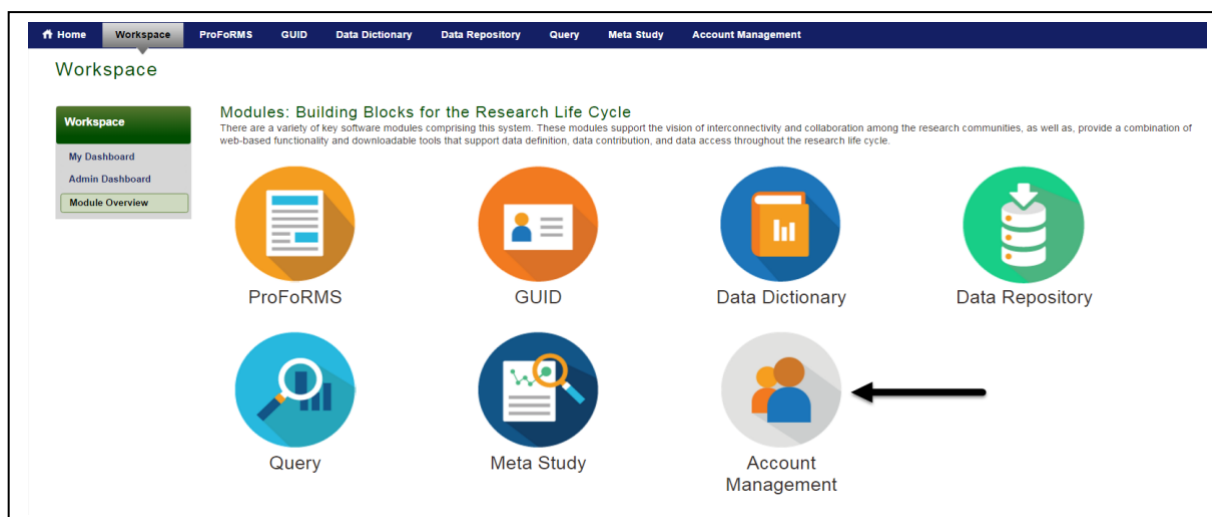
The **Account Administration** tools (including study administration) are available within the Account Management module.

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.




- 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

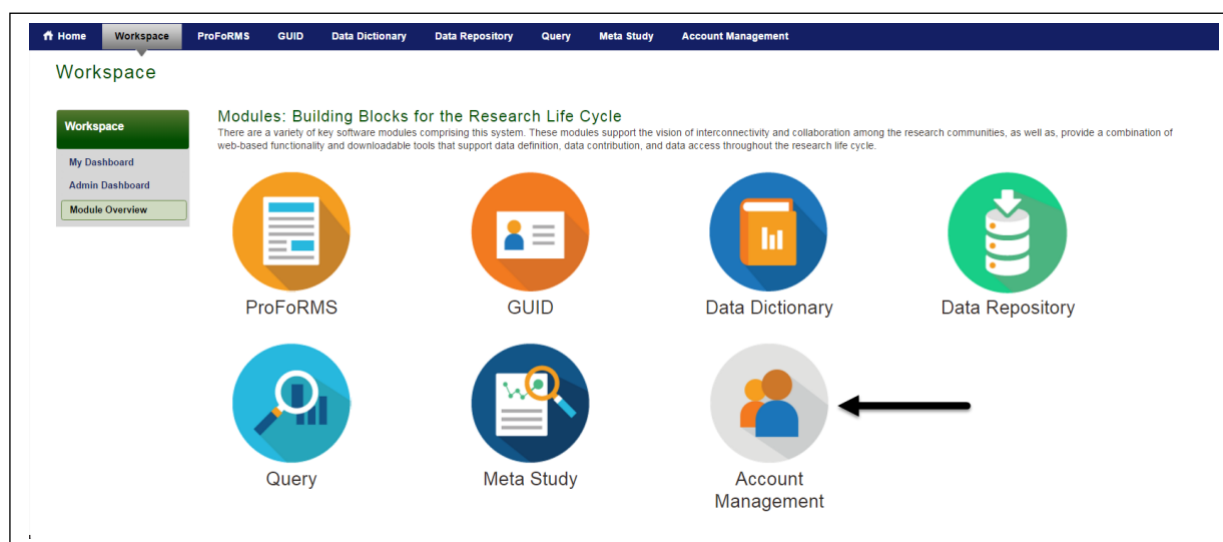
All BRICS users have access to the Account Management module; however, your role determines what you can and cannot do within the module.

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 Profile.



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

[Home](#)
[Workspace](#)
[ProFORMS](#)
[GUID](#)
[Data Dictionary](#)
[Data Repository](#)
[Query](#)
[Meta Study](#)
[Account Management](#)

Account Management

Account Management

[My Profile](#)
[Change Password](#)
[Request Additional](#)
[Privileges](#)

My Profile

Username: tester1
First Name: Test
Middle Name:
Last Name: Account
E-Mail: testing@yahoo.com
Affiliated Institution: NIH/CIT/BRICS
Phone Number: +11111111111
NIH Federal Identity: None Specified

Account Status: Active
Street Line 1: 123 Main Street
City: Bethesda
Country: United States of America
Postal Code: 20892
State: MD
Phone: +11111111111

Account Privileges

Search:

PRIVILEGE	STATUS	EXPIRATION DATE
Account	Active	No Expiration Date
Data Dictionary	Active	17-Jun-2020
Data Repository	Active	17-Jun-2020
GUID	Active	17-Jun-2020
Meta Study	Active	17-Jun-2020
ProFORMS	Active	17-Jun-2020
Query	Active	17-Jun-2020

Showing 1 to 7 of 7 entries

First Previous **1** Next Last

Permission Group

Search:

PRIVILEGE	STATUS
No data available in table	

Showing 0 to 0 of 0 entries

First Previous Next Last

Existing Files

[Add](#)
[Download All](#)

Search:

FILE NAME	FILE TYPE	DATE SUBMITTED
Account request for FITBIR Stage testing.docx	Other Change File Type	2019-06-17 Delete

Showing 1 to 1 of 1 entries

First Previous **1** Next Last

Electronic Signatures

FILE NAME	COMPLETE DATE/TIME
tester1_esig_2019-06-17.pdf	2019-06-17 11:44

Showing 1 to 1 of 1 entries

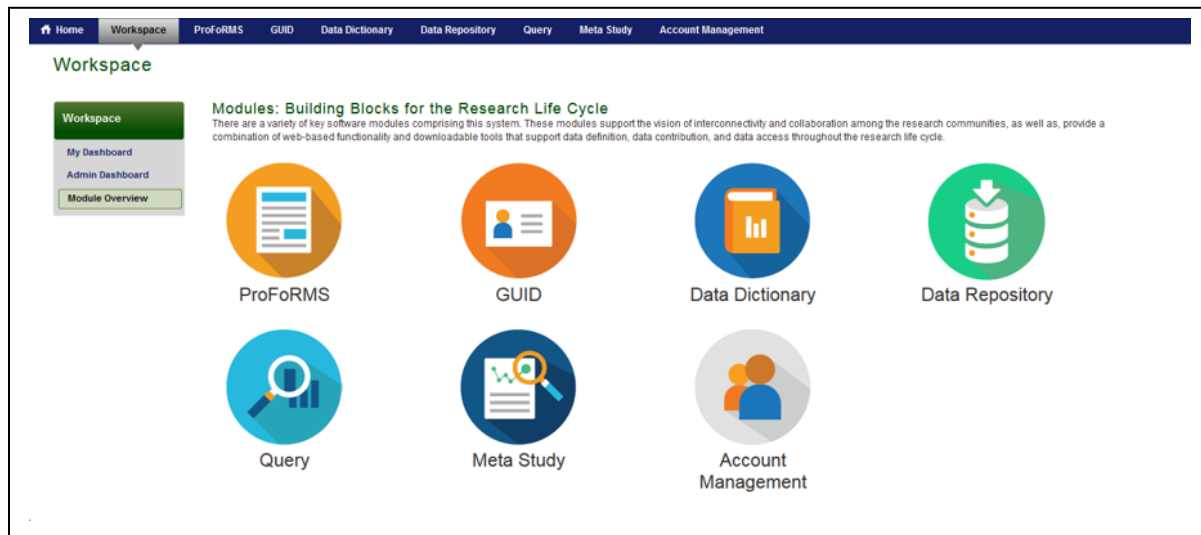
First Previous **1** Next Last

2.3.2 Edit My Profile

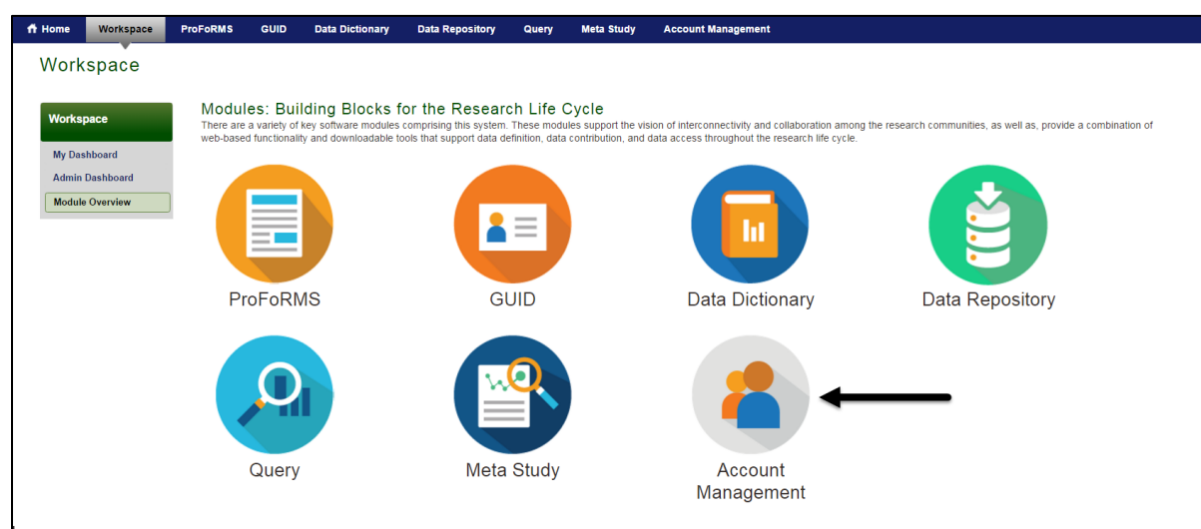
When logged into the system, a user's account profile can be changed using the **Edit My Profile** option.

To edit your profile, perform the following actions:

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



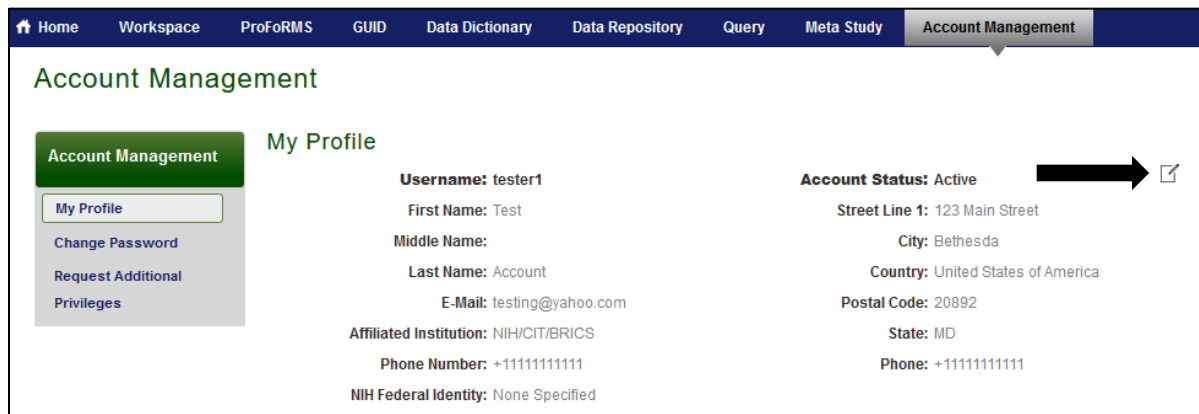
3. Select the **Account Management** module.



- Click the **My Profile** link.



- 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.

[Home](#)
[Workspace](#)
[ProFoRMS](#)
[GUID](#)
[Data Dictionary](#)
[Data Repository](#)
[Query](#)
[Meta Study](#)
[Account Management](#)

Account Management

Account Management

- My Profile**
- Change Password
- Request Additional Privileges

[My Profile](#) > Edit My Profile

Edit My Profile

Please provide your preferred contact information:

Username : tester1

NIH Federal Identity :

First Name * :

Middle Name :

Last Name * :

E-Mail * :

Affiliated Institution * :

Street Line 1 * :

Street Line 2 :

City * :

Country * :

Postal Code * :

State * :

Phone * :

Briefly describe why you are requesting access to the system. Explain how you intend to use the system and your intentions for data submission and/or data access * :

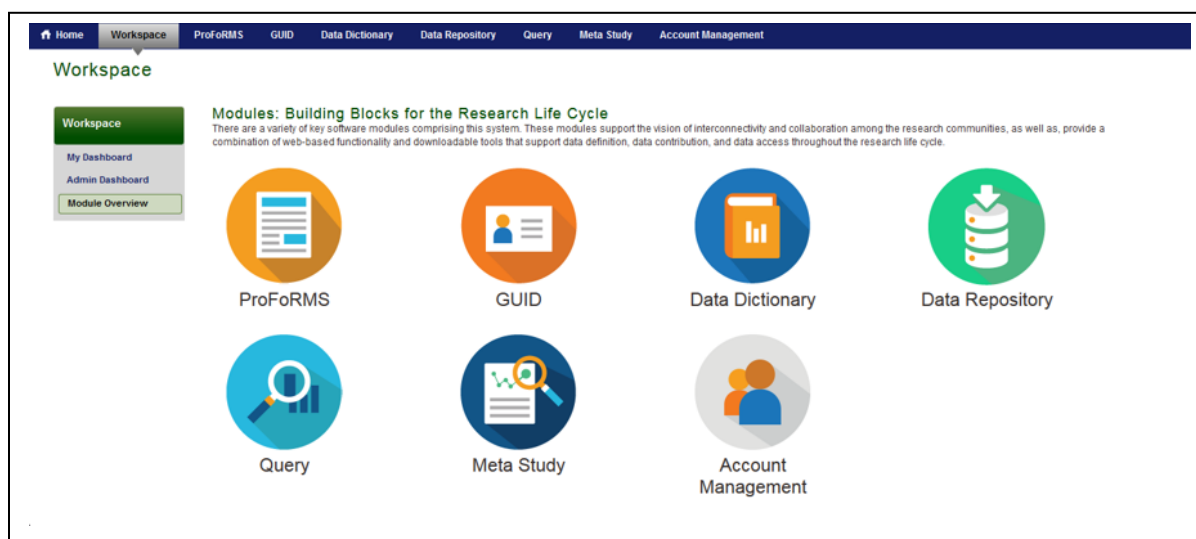
[Cancel](#)

2.3.3 Change Password

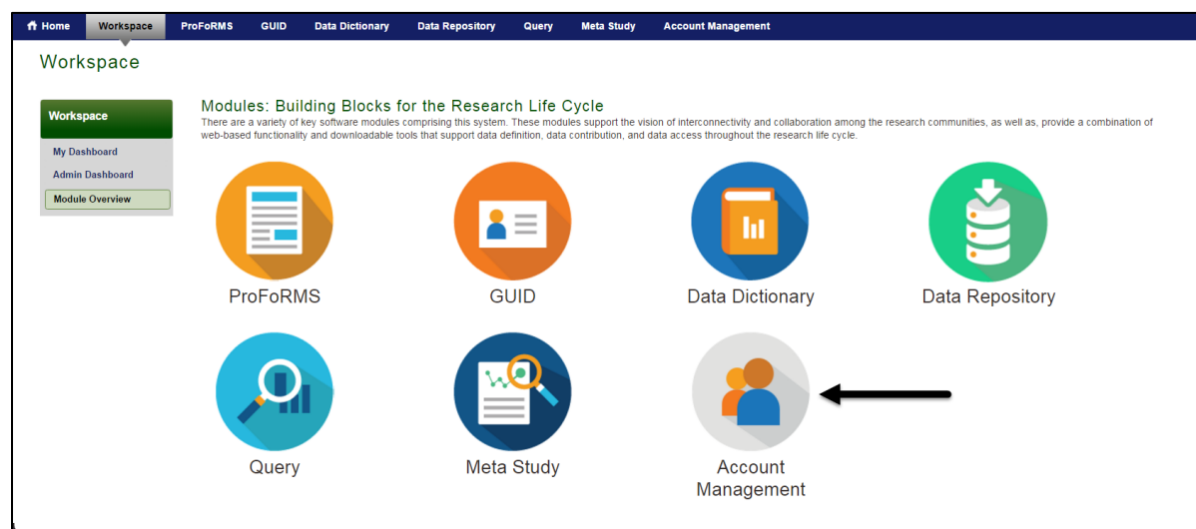
When logged into the system, a user's account password can be changed using the *Change Password* link on the left side menu. This may be performed at any time to enhance security as necessary or for any other personal reason you would like to change your password.

To change your password, perform the following actions:

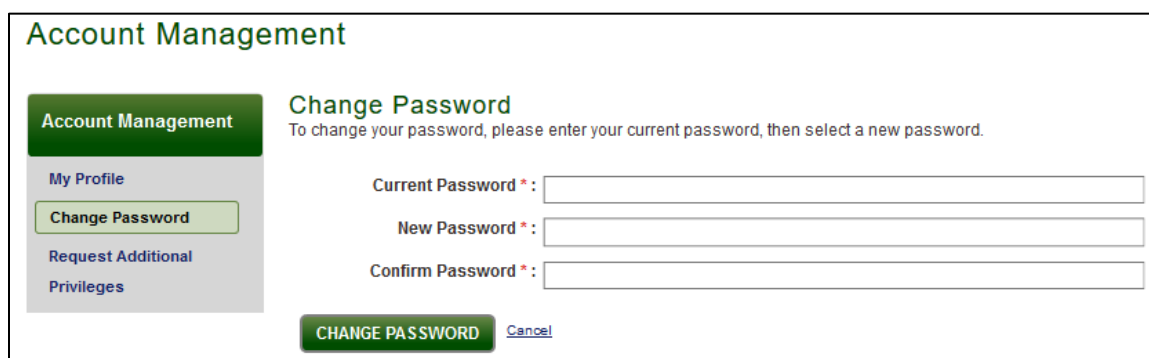
1. Log in to the system.
2. Navigate to the **Workspace**.



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

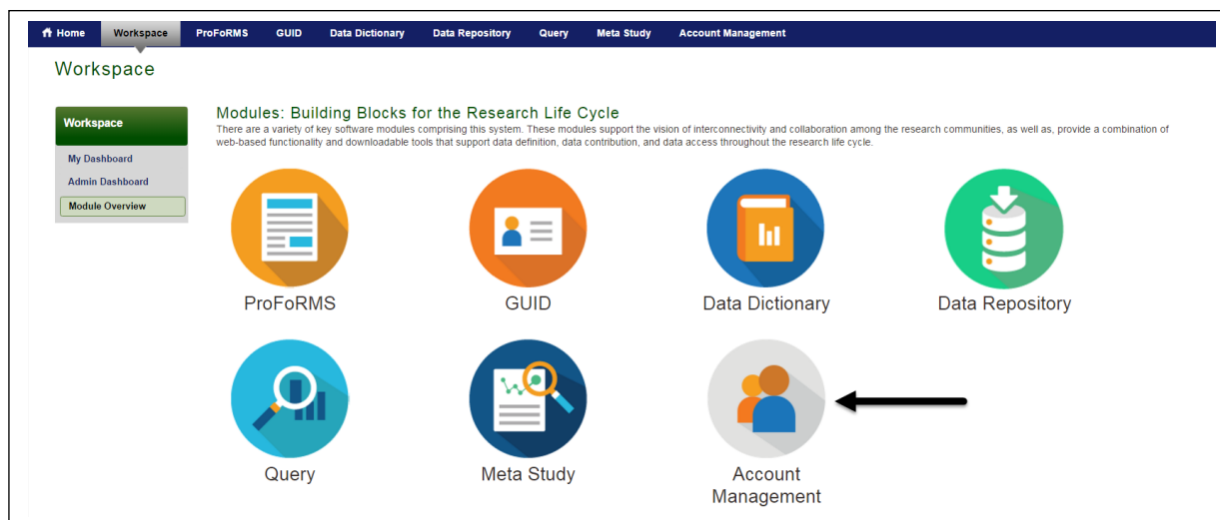
Things to Note:

-  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:

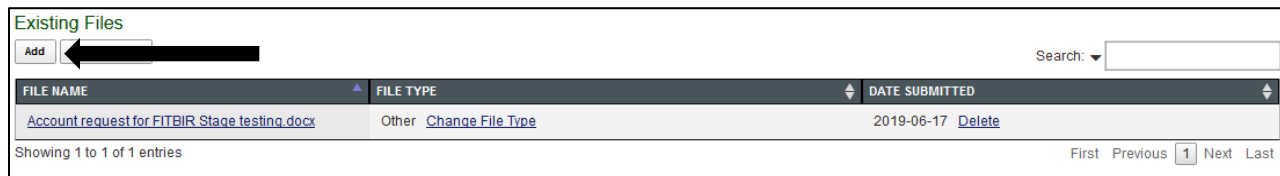
1. Log in to the system.
2. Navigate to the **Workspace** and select the **Account Management** module.



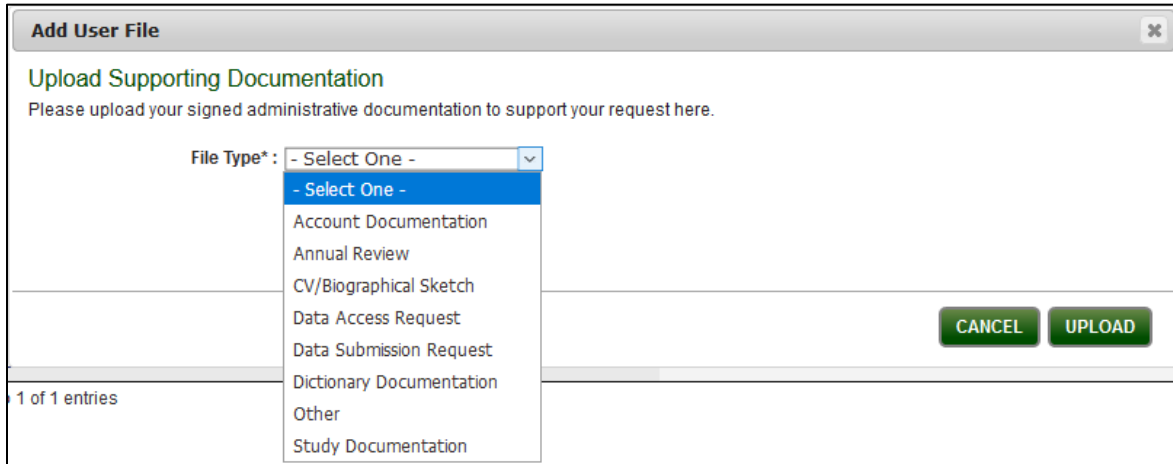
3. Click the **My Profile** link.



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

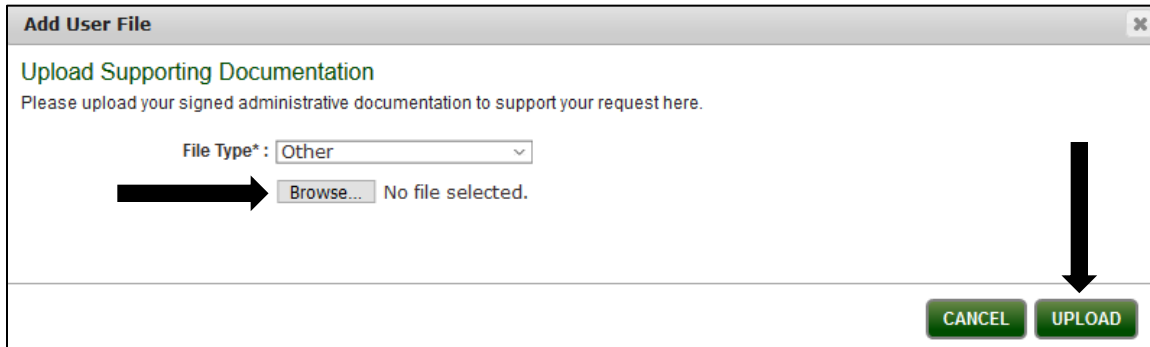


5. Select the **File Type** from the drop-down menu.



The screenshot shows the 'Add User File' dialog box with the title 'Upload Supporting Documentation'. Below the title is the instruction: 'Please upload your signed administrative documentation to support your request here.' The 'File Type*' dropdown menu is open, displaying a list of options: '- Select One -', 'Account Documentation', 'Annual Review', 'CV/Biographical Sketch', 'Data Access Request', 'Data Submission Request', 'Dictionary Documentation', 'Other', and 'Study Documentation'. The 'CANCEL' and 'UPLOAD' buttons are visible on the right side of the dialog box. A status bar at the bottom left indicates '1 of 1 entries'.

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.

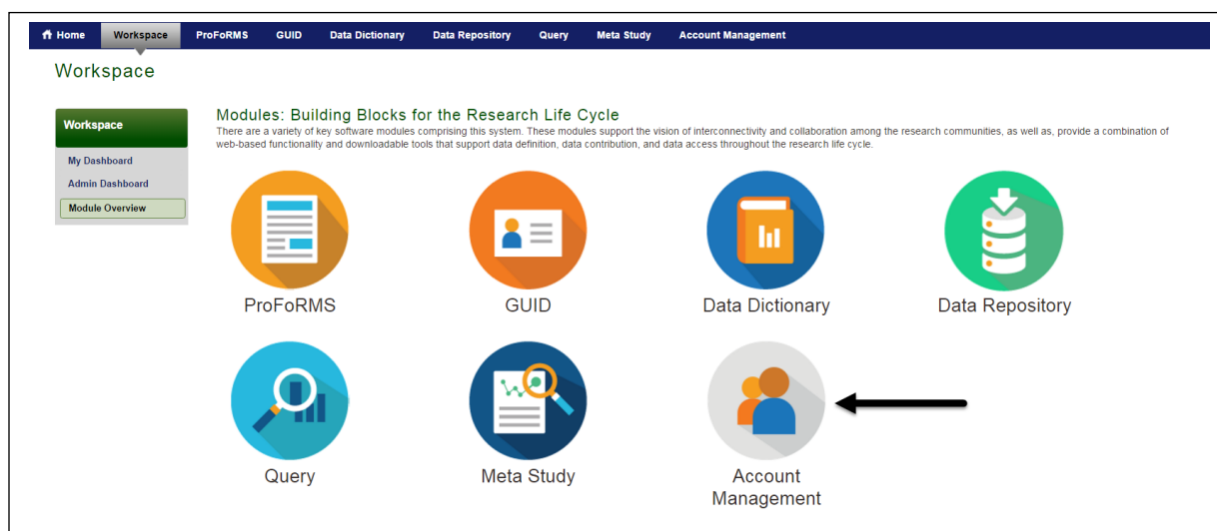


The screenshot shows the 'Add User File' dialog box with the title 'Upload Supporting Documentation'. Below the title is the instruction: 'Please upload your signed administrative documentation to support your request here.' The 'File Type*' dropdown menu is set to 'Other'. A black arrow points to the 'Browse...' button, which is highlighted. The text 'No file selected.' is displayed next to the 'Browse...' button. The 'CANCEL' and 'UPLOAD' buttons are visible on the right side of the dialog box. A black arrow points down to the 'UPLOAD' button.

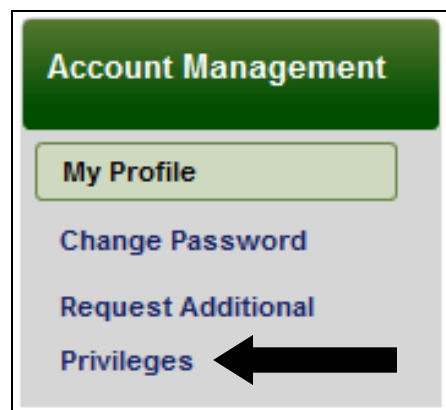
2.3.5 Request Additional Privileges

To request additional privileges, perform the following actions:

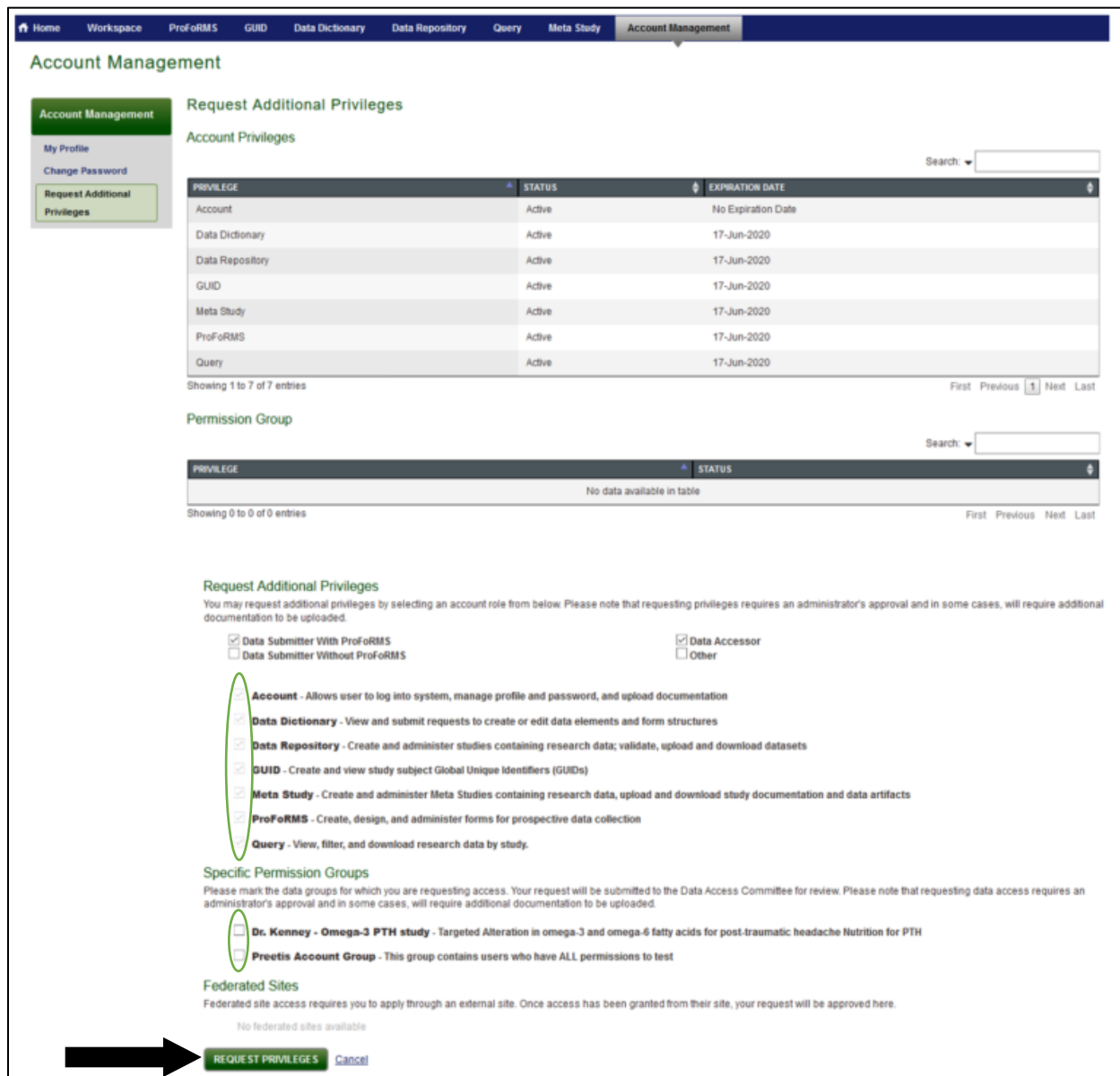
1. Log in to the system.
2. Navigate to the **Workspace** landing page.



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



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



Account Management

Request Additional Privileges

Account Privileges

PRIVILEGE	STATUS	EXPIRATION DATE
Account	Active	No Expiration Date
Data Dictionary	Active	17-Jun-2020
Data Repository	Active	17-Jun-2020
GUID	Active	17-Jun-2020
Meta Study	Active	17-Jun-2020
ProFoRMS	Active	17-Jun-2020
Query	Active	17-Jun-2020

Showing 1 to 7 of 7 entries

First Previous 1 Next Last

Permission Group

No data available in table

Showing 0 to 0 of 0 entries

First Previous Next Last

Request Additional Privileges

You may request additional privileges by selecting an account role from below. Please note that requesting privileges requires an administrator's approval and in some cases, will require additional documentation to be uploaded.

☒ Data Submitter With ProFoRMS
 ☒ Data Accessor
☐ Data Submitter Without ProFoRMS
 ☐ Other

☒ **Account** - Allows user to log into system, manage profile and password, and upload documentation
☒ **Data Dictionary** - View and submit requests to create or edit data elements and form structures
☒ **Data Repository** - Create and administer studies containing research data; validate, upload and download datasets
☒ **GUID** - Create and view study subject Global Unique Identifiers (GUIDs)
☒ **Meta Study** - Create and administer Meta Studies containing research data, upload and download study documentation and data artifacts
☒ **ProFoRMS** - Create, design, and administer forms for prospective data collection
☒ **Query** - View, filter, and download research data by study.

Specific Permission Groups

Please mark the data groups for which you are requesting access. Your request will be submitted to the Data Access Committee for review. Please note that requesting data access requires an administrator's approval and in some cases, will require additional documentation to be uploaded.

☐ **Dr. Kenney - Omega-3 PTH study** - Targeted Alteration in omega-3 and omega-6 fatty acids for post-traumatic headache Nutrition for PTH
☐ **Preetis Account Group** - This group contains users who have ALL permissions to test

Federated Sites

Federated site access requires you to apply through an external site. Once access has been granted from their site, your request will be approved here.

No federated sites available

REQUEST PRIVILEGES Cancel

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.

Home
Workspace
ProFoRMS
GUID
Data Dictionary
Data Repository
Query
Meta Study
Account Management

Account Management

Account Management
Account Admin
Account List
Account Group List
User Log
Create Account Group
Create/Edit Account
Guidance Emails
Account Reviewer

Account List

Status: All
Download
Search:

USERNAME	NAME	EMAIL	INSTITUTION	SUBMITTED	LAST UPDATED	STATUS
aahrens	Ahrens, Angelica	dob@dcbstage.com	WAMC, DVBIC	2015-12-03	2017-08-22	Active
ajjoshi	Joshi, Anand	dob@dcbstage.com	University of Southern California	2017-09-15	2019-09-24	Active
aak2005-1468520355229	Katzman, Aaron	dob@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	dob@dcbstage.com	The Ohio State University	2015-09-15	2017-03-15	Inactive
aaswan	Swan, Alicia	preetroy27@gmail.com	The University of Texas at San Antonio	2016-12-28	2019-11-18	Active
abalekee	Abaleke, Eugenia	dob@dcbstage.com	Great Ormond Street Hospital for Children	2017-06-30	2018-07-18	Active
abasi1551112550578	Basit, Abdul	dob@dcbstage.com	NIH	2013-06-15	2018-08-09	Inactive
abawad	Awad, Abdelrahman	dob@dcbstage.com	DOD	2019-10-04	2019-10-29	Pending
abbasir-1469110080156	Abbas1, Sohaib	dob@dcbstage.com	NIH	2016-03-15	2016-03-16	Inactive
abbasir2-1469110090223	Abbas2, Sohaib	dob@dcbstage.com	NIH	2016-03-15	2016-03-16	Inactive
abhica1	Higgins, Alana	dob@dcbstage.com	W.G. Bill Hefner VA Medical Center	2017-12-19	2018-08-30	Active
AbebaT	Teklehaimanot, Abeba	dob@dcbstage.com	Medical University of South Carolina	2018-03-14	2019-04-01	Active
abellah253	Oh, Annabell	dob@dcbstage.com	MAMC (Madigan Army Medical Center)	2018-08-01	2019-09-12	Active
abokinsky	Bokinsky, Alexandra	dob@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

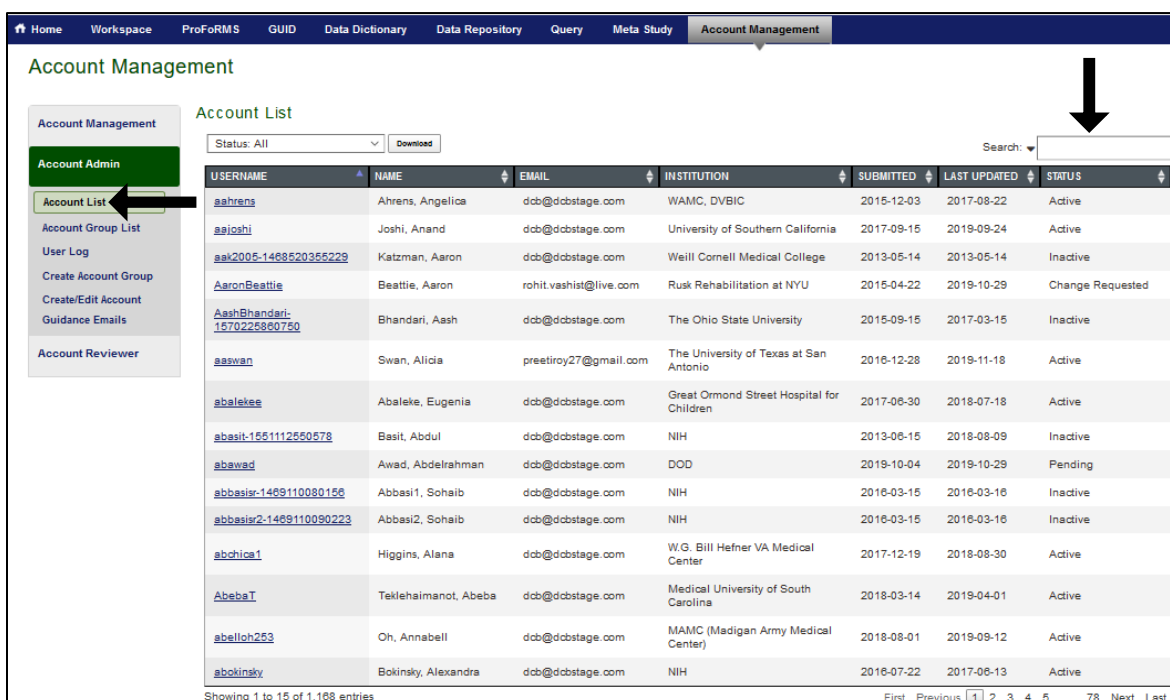
2.4.2 Reset User Account Password

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**.

Account Management

Account List

Status: All [Download](#) Search: test, ou

USERNAME	NAME	EMAIL	INSTITUTION	SUBMITTED	LAST UPDATED	STATUS
Ourtest	Test, Our	dcb@dcbstage.com	NIH	2018-01-12	2018-01-12	Requested

Showing 1 to 1 of 1 entries (filtered from 1,168 total entries) First Previous 1 Next Last

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

Account Management

Account Details

Account Information

Username *: Ourtest

Password *: [Reset Password](#)

An email will be sent to the user's email account on record instructing them on how to change their password.

Account Status: ACTIVE

This account is active in the system.

Deactivating the account will prevent the user from logging into the system. If the account needs to be re-activated, the system will save the user's details and current permissions that are listed below.

[DEACTIVATE ACCOUNT](#)

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.

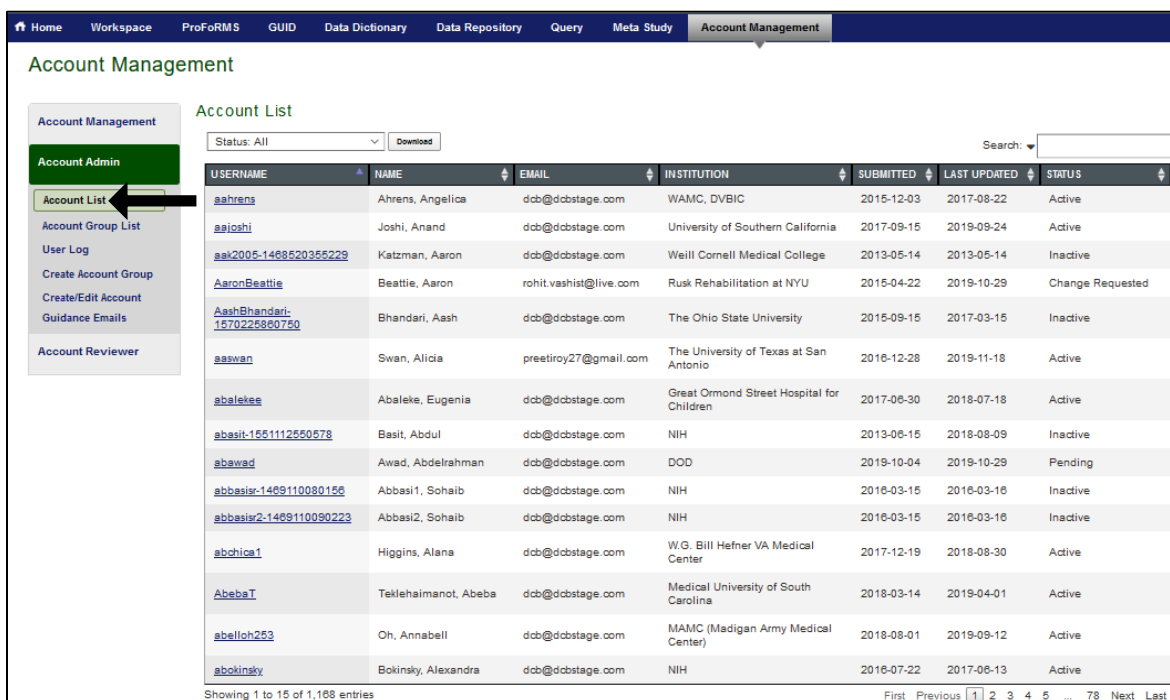
2.4.3 Deactivate User Account

To deactivate a user account, perform the following actions:

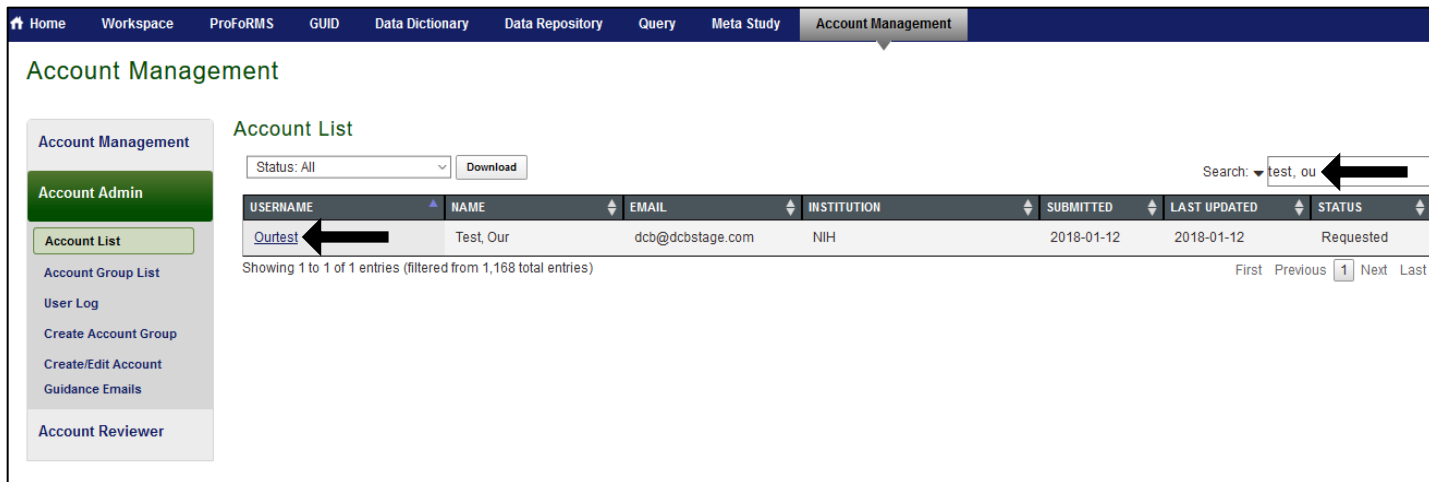
1. Log in to the system.
2. Navigate to the **Account Management** module.



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.



Account Management

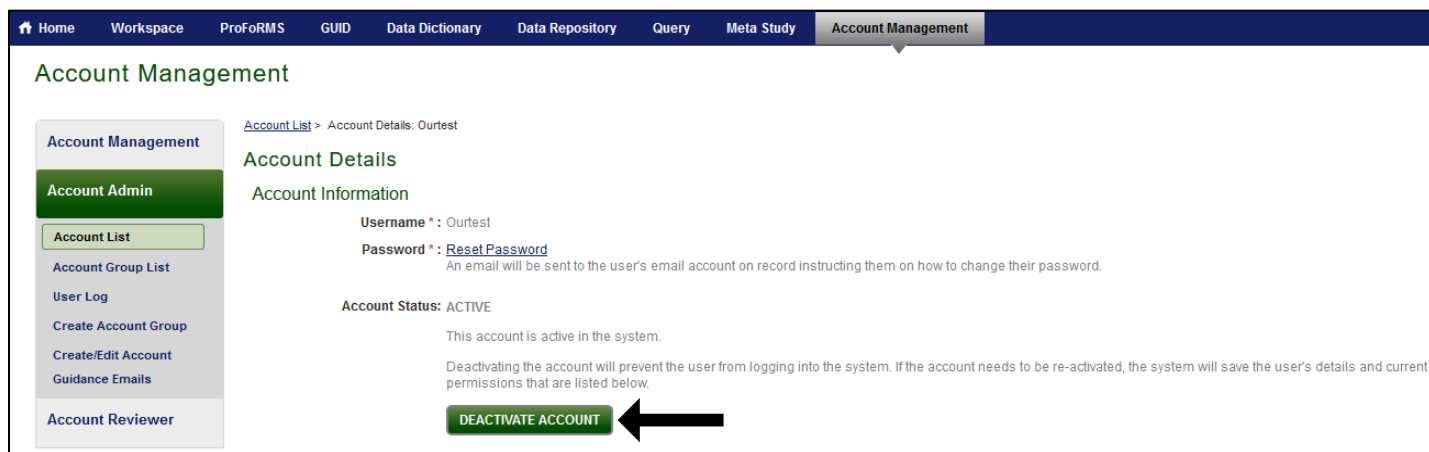
Account List

Status: All [Download](#) Search: test, ou

USERNAME	NAME	EMAIL	INSTITUTION	SUBMITTED	LAST UPDATED	STATUS
Ourtest	Test, Our	dcb@dcbstage.com	NIH	2018-01-12	2018-01-12	Requested

Showing 1 to 1 of 1 entries (filtered from 1,168 total entries) First Previous 1 Next Last

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



Account Management

[Account List](#) > Account Details: Ourtest

Account Details

Account Information

Username *: Ourtest

Password *: [Reset Password](#)
An email will be sent to the user's email account on record instructing them on how to change their password.

Account Status: ACTIVE

This account is active in the system.

Deactivating the account will prevent the user from logging into the system. If the account needs to be re-activated, the system will save the user's details and current permissions that are listed below.

[DEACTIVATE ACCOUNT](#)

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.

Are you sure you want to deactivate this user?

OK
Cancel

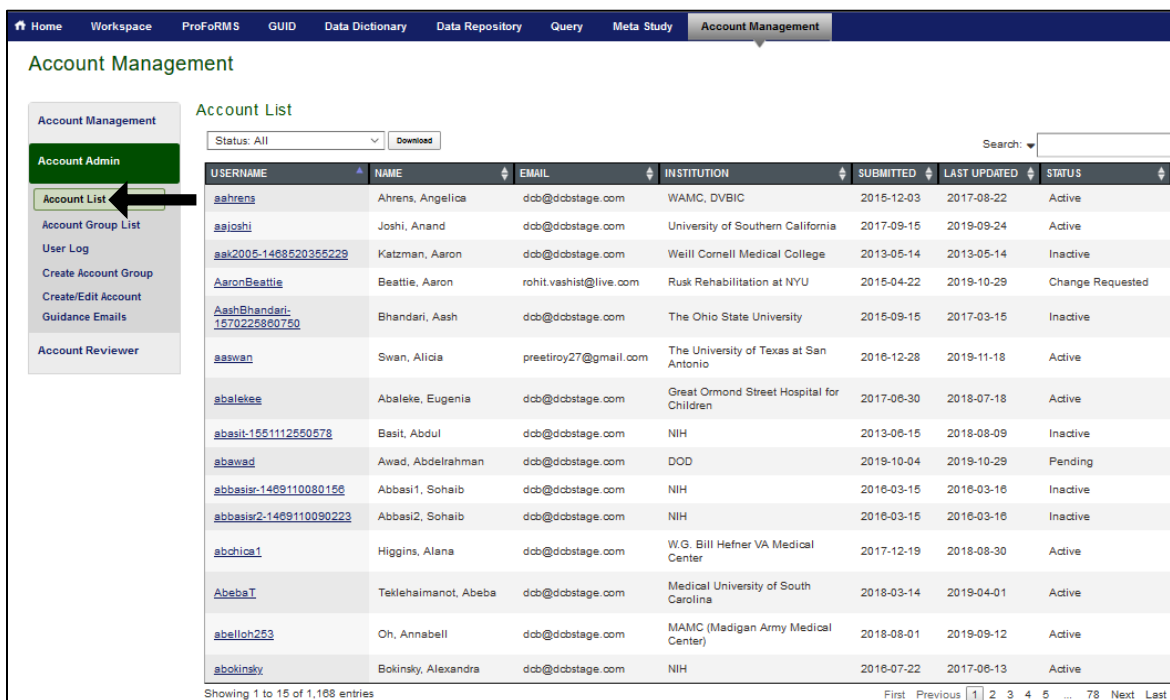
2.4.4 Reactivate User Account

To reactivate a user account, perform the following actions:

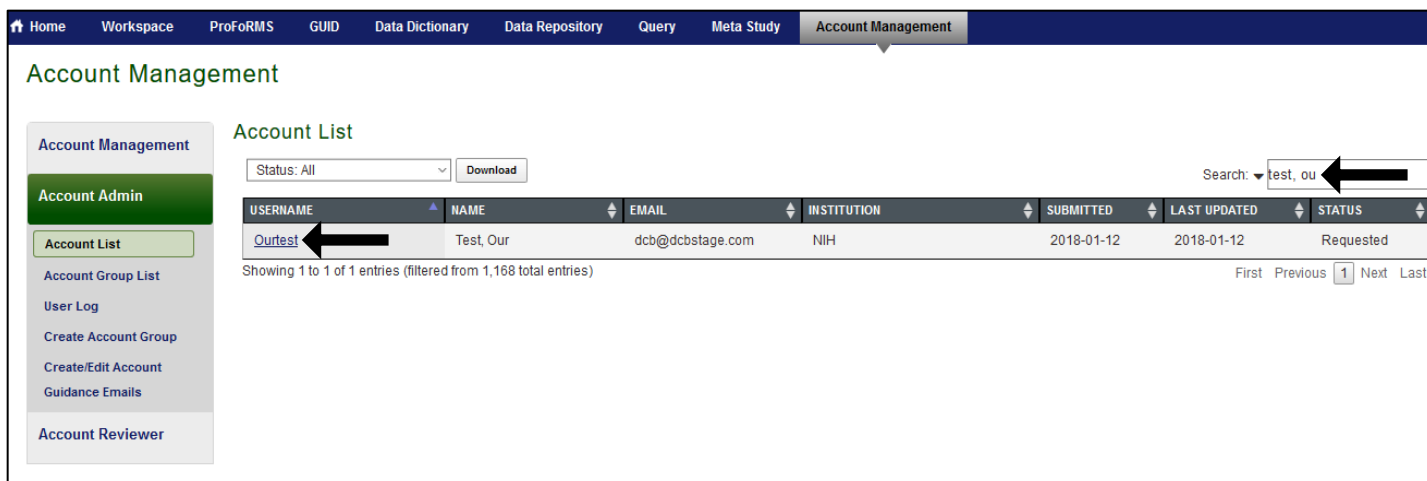
1. Log in to the system.
2. Navigate to the **Account Management** module.



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.



Account Management

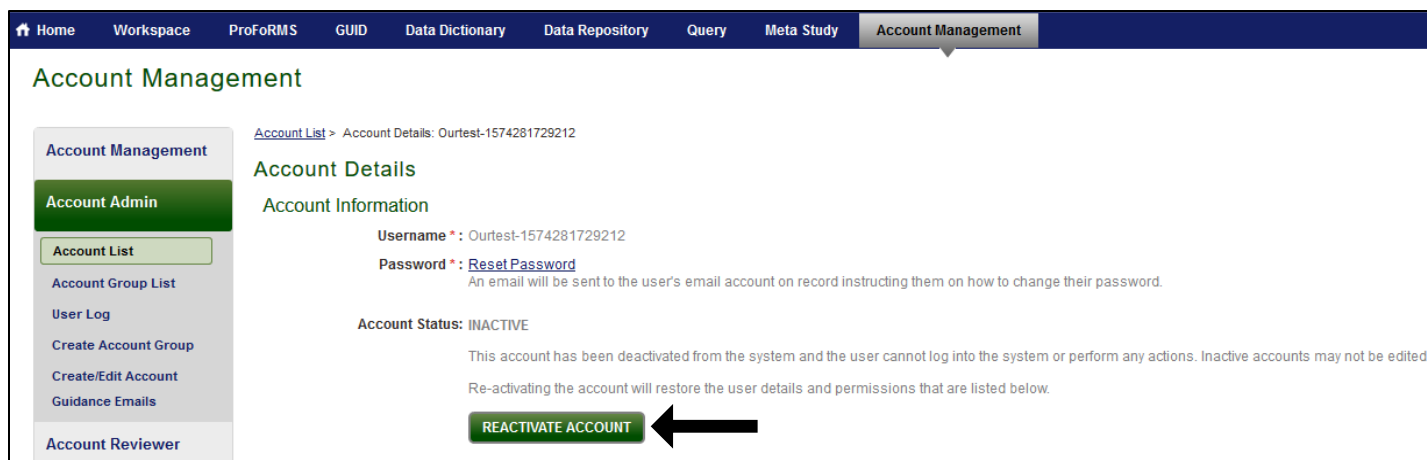
Account List

Status: All [Download](#) Search: test, ou

USERNAME	NAME	EMAIL	INSTITUTION	SUBMITTED	LAST UPDATED	STATUS
Ourtest	Test, Our	dcb@dcbstage.com	NIH	2018-01-12	2018-01-12	Requested

Showing 1 to 1 of 1 entries (filtered from 1,168 total entries) First Previous 1 Next Last

6. Click on the **Username**.
7. Click on 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.



Account Management

Account Details

Account List > Account Details: Ourtest-1574281729212

Account Information

Username *: Ourtest-1574281729212

Password *: [Reset Password](#)
An email will be sent to the user's email account on record instructing them on how to change their password.


Account Status: INACTIVE

This account has been deactivated from the system and the user cannot log into the system or perform any actions. Inactive accounts may not be edited. Re-activating the account will restore the user details and permissions that are listed below.


[REACTIVATE ACCOUNT](#)

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.

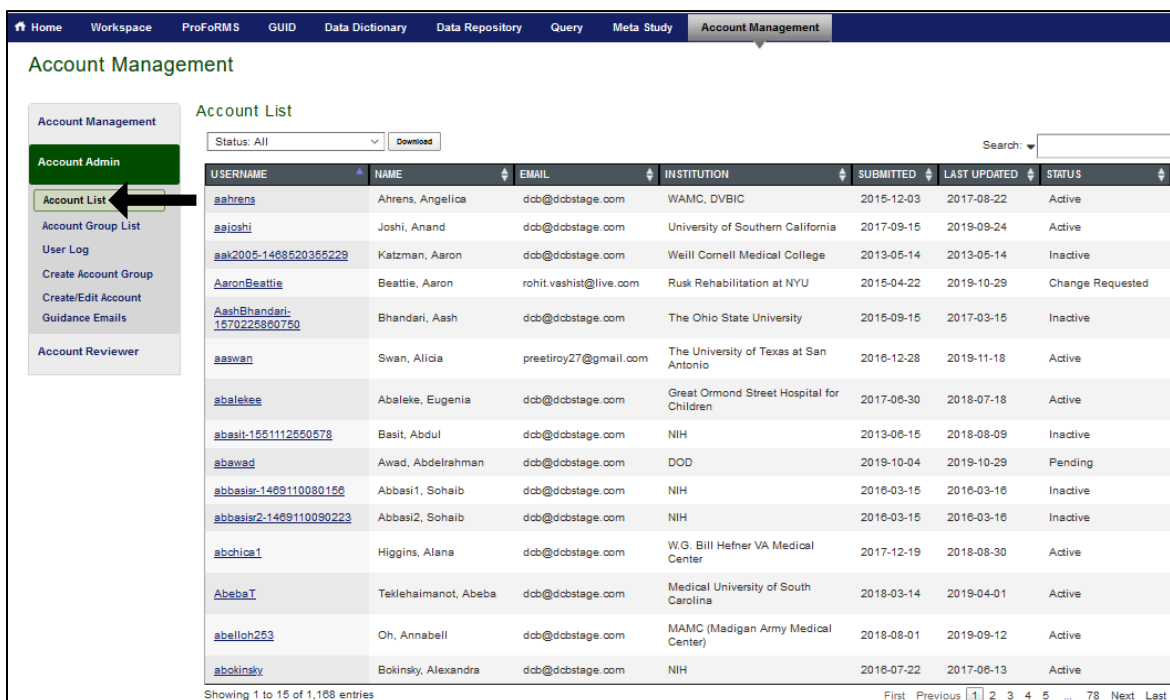
2.4.5 View, Approve, or Reject User Account Requests

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

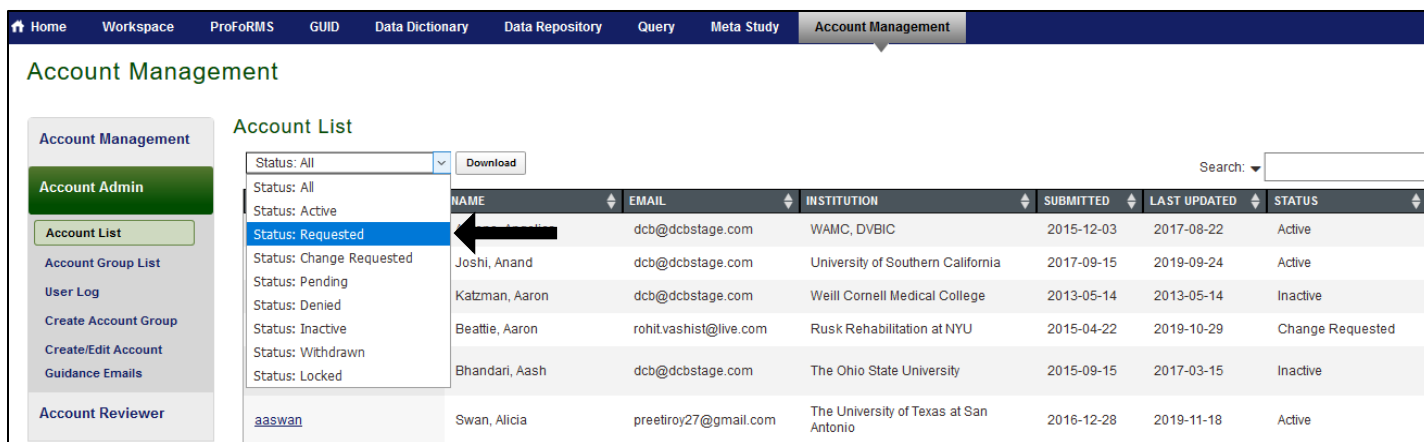
1. Log in to the system.
2. Navigate to the **Account Management** module.



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.



The screenshot displays the BRICS Account Management interface. The top navigation bar includes links for Home, Workspace, ProFoRMS, GUID, Data Dictionary, Data Repository, Query, Meta Study, and Account Management. The left sidebar shows the Account Management menu with options like Account Admin, Account List, Account Group List, User Log, Create Account Group, Create/Edit Account, Guidance Emails, and Account Reviewer. The main content area is titled 'Account List' and features a status filter dropdown menu. The dropdown menu is open, showing options: Status: All, Status: Active, Status: Requested (highlighted with a black arrow), Status: Change Requested, Status: Pending, Status: Denied, Status: Inactive, Status: Withdrawn, and Status: Locked. Below the dropdown is a 'Download' button and a search bar. A table of user accounts is displayed with columns: NAME, EMAIL, INSTITUTION, SUBMITTED, LAST UPDATED, and STATUS. The table contains six rows of user data.

NAME	EMAIL	INSTITUTION	SUBMITTED	LAST UPDATED	STATUS
Swan, Alicia	preetiroy27@gmail.com	The University of Texas at San Antonio	2016-12-28	2019-11-18	Active
Bhandari, Aash	dcb@dcbstage.com	The Ohio State University	2015-09-15	2017-03-15	Inactive
Beattie, Aaron	rohit.vashist@live.com	Rusk Rehabilitation at NYU	2015-04-22	2019-10-29	Change Requested
Katzman, Aaron	dcb@dcbstage.com	Weill Cornell Medical College	2013-05-14	2013-05-14	Inactive
Joshi, Anand	dcb@dcbstage.com	University of Southern California	2017-09-15	2019-09-24	Active
Swan, Alicia	dcb@dcbstage.com	WAMC, DVBIC	2015-12-03	2017-08-22	Active

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.

Account Privileges

Search:

PRIVILEGE	STATUS	EXPIRATION DATE
Account	Active	No Expiration Date
Data Dictionary	Pending Cancel Request	Pending
Data Repository	Pending Cancel Request	Pending
GUID	Pending Cancel Request	Pending
Meta Study	Pending Cancel Request	Pending
ProFoRMS	Pending Cancel Request	Pending
Query	Pending Cancel Request	Pending

Showing 1 to 7 of 7 entries

First Previous **1** Next Last

Permission Group

Search:

PRIVILEGE	STATUS
No data available in table	

Showing 0 to 0 of 0 entries

First Previous Next Last

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
Requested access to "Dr. Kenney - Omega-3 PTH study" approved by Zaman, Rakib		2019-11-07
Account requested by Pop, George P	Test	2019-10-07

Showing 1 to 2 of 2 entries

First Previous **1** Next Last

Account Administrative Notes

Add Note

Search:

ACCOUNT NAME	NOTE	DATE
No data available in table		

Showing 0 to 0 of 0 entries

First Previous Next Last

PARTIAL APPROVAL

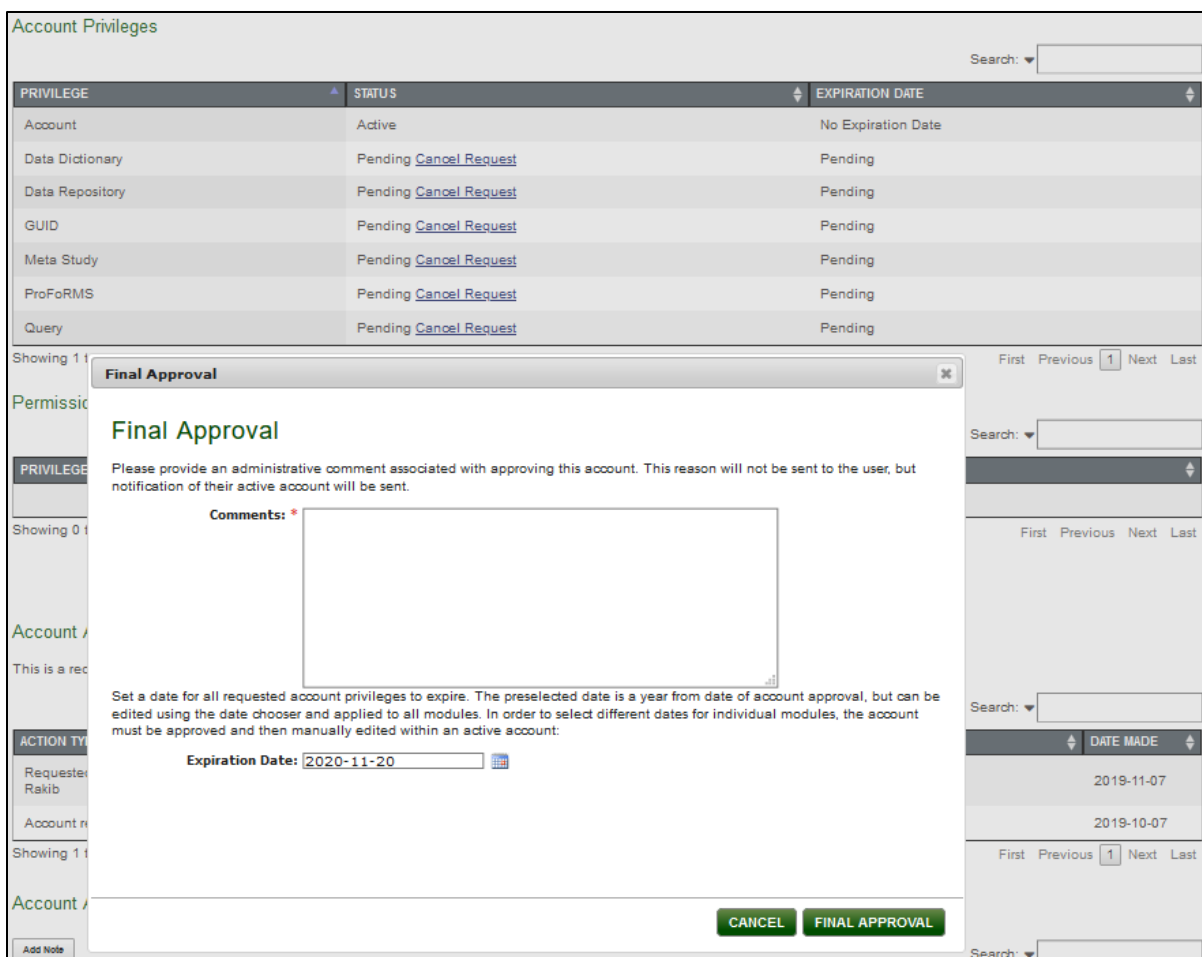
TEMPORARY REJECTION

FINAL APPROVAL

REJECT ACCOUNT

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.



The screenshot shows the 'Final Approval' dialog box overlaid on the 'Account Privileges' table. The dialog box contains the following elements:

- Title:** Final Approval
- Instructions:** Please provide an administrative comment associated with approving this account. This reason will not be sent to the user, but notification of their active account will be sent.
- Comments:** A text area for providing administrative comments.
- Expiration Date:** A date picker set to 2020-11-20.
- Buttons:** CANCEL and FINAL APPROVAL.

The background 'Account Privileges' table is partially visible, showing columns for PRIVILEGE, STATUS, and EXPIRATION DATE.

PRIVILEGE	STATUS	EXPIRATION DATE
Account	Active	No Expiration Date
Data Dictionary	Pending Cancel Request	Pending
Data Repository	Pending Cancel Request	Pending
GUID	Pending Cancel Request	Pending
Meta Study	Pending Cancel Request	Pending
ProFoRMS	Pending Cancel Request	Pending
Query	Pending Cancel Request	Pending

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.

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

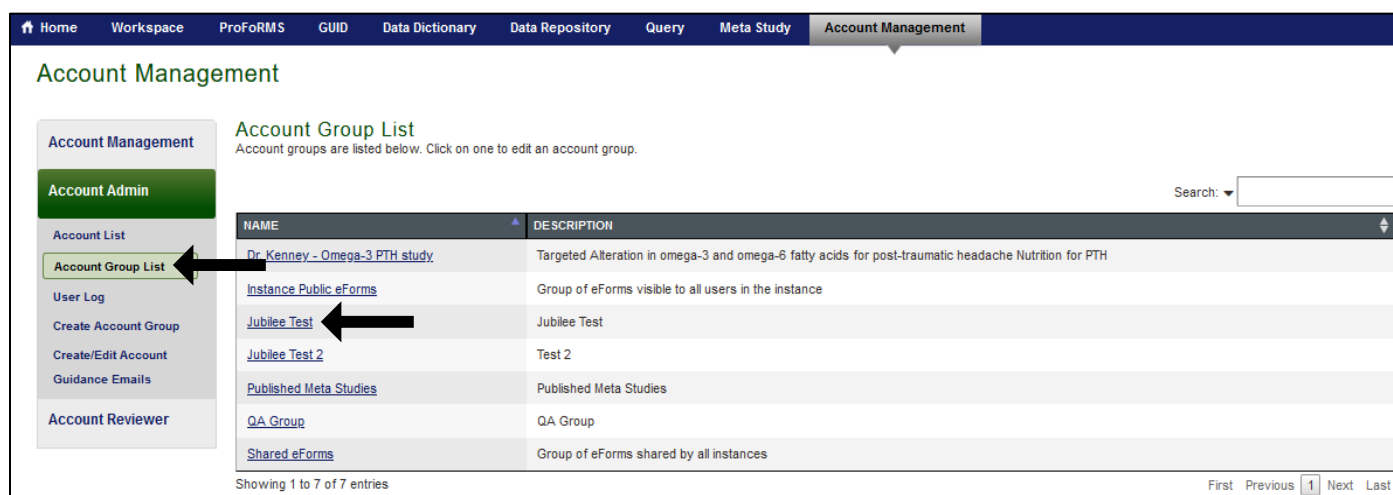
2.4.6 View or Edit Account Group List

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

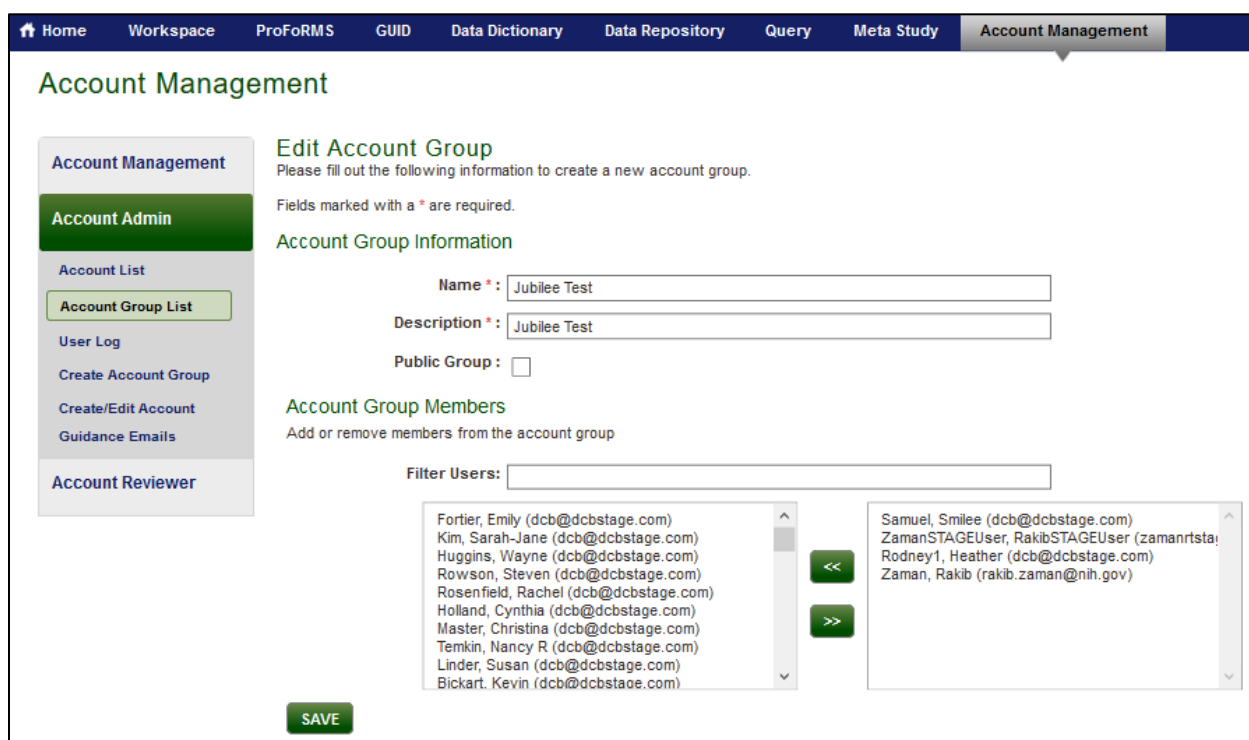
1. Log in to the system.
2. Navigate to the **Account Management** module.



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.



The screenshot displays the 'Account Management' section of the BRICS system. The left sidebar contains a menu with options: Account Management, Account Admin (selected), Account List, Account Group List, User Log, Create Account Group, Create/Edit Account, Guidance Emails, and Account Reviewer. The main content area is titled 'Edit Account Group' and includes a sub-header 'Please fill out the following information to create a new account group.' and a note 'Fields marked with a * are required.'

The 'Account Group Information' section contains the following fields:

- Name ***: Jubilee Test
- Description ***: Jubilee Test
- Public Group**: ☐

The 'Account Group Members' section is titled 'Add or remove members from the account group' and features a 'Filter Users:' search bar. Below the search bar are two lists of users:

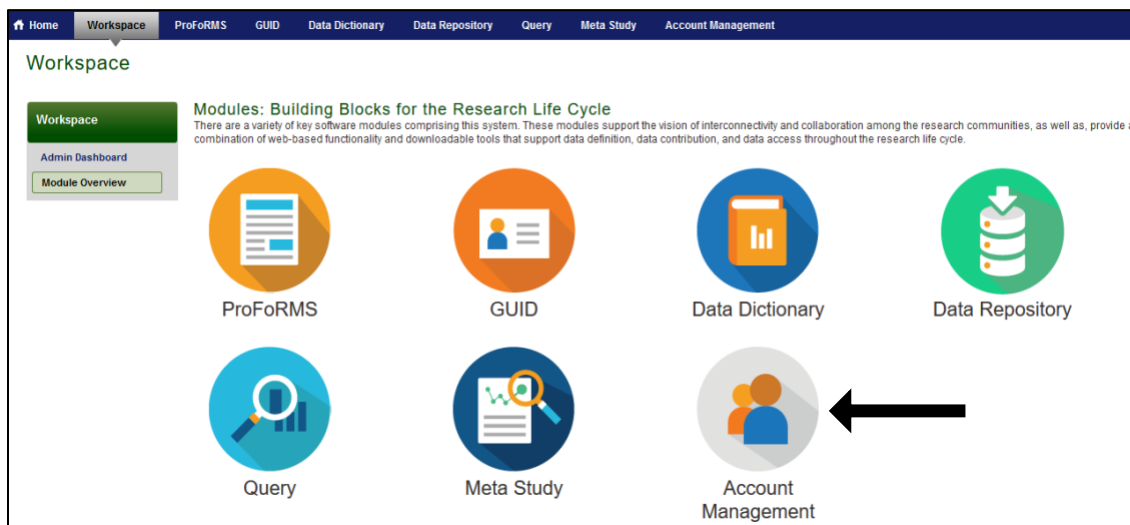
- Left List (Available Users)**:
 - Fortier, Emily (dcb@dcbstage.com)
 - Kim, Sarah-Jane (dcb@dcbstage.com)
 - Huggins, Wayne (dcb@dcbstage.com)
 - Rowson, Steven (dcb@dcbstage.com)
 - Rosenfield, Rachel (dcb@dcbstage.com)
 - Holland, Cynthia (dcb@dcbstage.com)
 - Master, Christina (dcb@dcbstage.com)
 - Temkin, Nancy R (dcb@dcbstage.com)
 - Linder, Susan (dcb@dcbstage.com)
 - Bickart, Kevin (dcb@dcbstage.com)
- Right List (Group Members)**:
 - Samuel, Smilee (dcb@dcbstage.com)
 - ZamanSTAGEUser, RakibSTAGEUser (zamanrtsta)
 - Rodney1, Heather (dcb@dcbstage.com)
 - Zaman, Rakib (rakib.zaman@nih.gov)

Between the two lists are two green arrows: a double left arrow (<<) and a double right arrow (>>). A green 'SAVE' button is located at the bottom left of the form.

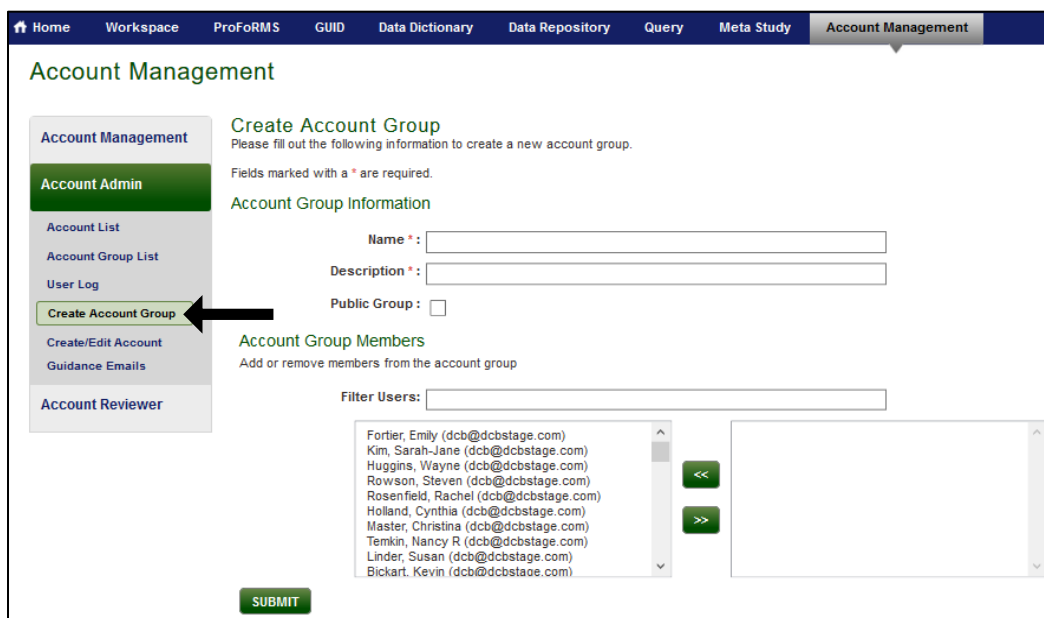
2.4.7 Create Account Group

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**.



Account Management

Create Account Group
Please fill out the following information to create a new account group.

Fields marked with a * are required.

Account Group Information

Name * :

Description * :

Public Group : ☐

Account Group Members
Add or remove members from the account group

Filter Users:

Fortier, Emily (dcb@dcbstage.com)
Kim, Sarah-Jane (dcb@dcbstage.com)
Huggins, Wayne (dcb@dcbstage.com)
Rowson, Steven (dcb@dcbstage.com)
Rosenfield, Rachel (dcb@dcbstage.com)
Holland, Cynthia (dcb@dcbstage.com)
Master, Christina (dcb@dcbstage.com)
Temkin, Nancy R (dcb@dcbstage.com)
Linder, Susan (dcb@dcbstage.com)
Bickart, Kevin (dcb@dcbstage.com)

SUBMIT

2.4.8 View User Log

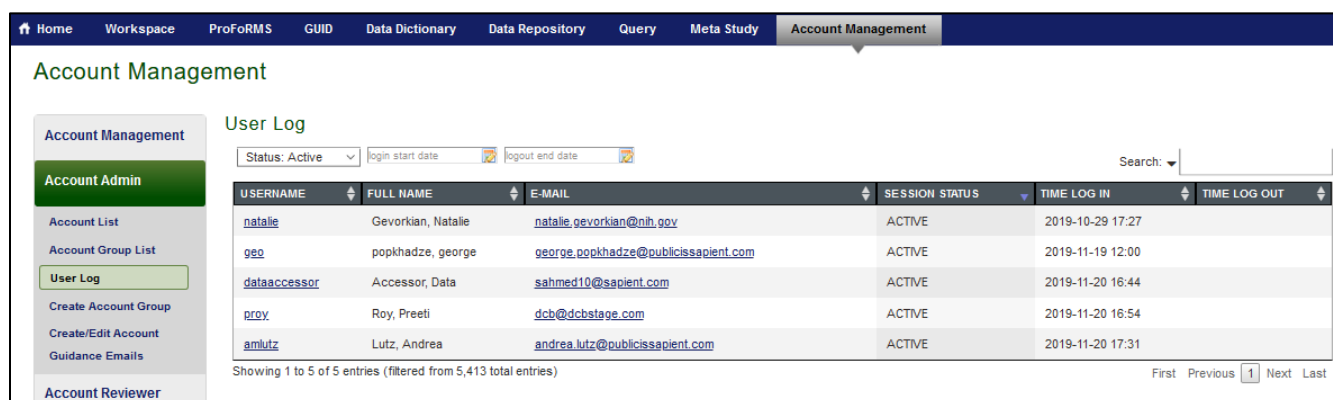
When logged into the system, users with admin privileges can view the **User Log**. The **User Log** displays all current and previous users sessions, including information about whether individual sessions are still active or have expired.

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.



The screenshot shows the 'Account Management' page with the 'User Log' tab selected. The left sidebar contains 'Account Management' and 'Account Admin' tabs. Under 'Account Admin', there are links for 'Account List', 'Account Group List', 'User Log', 'Create Account Group', 'Create/Edit Account', 'Guidance Emails', and 'Account Reviewer'. The 'User Log' section includes a search bar and a table of user sessions.

USERNAME	FULL NAME	E-MAIL	SESSION STATUS	TIME LOG IN	TIME LOG OUT
natalie	Gevorkian, Natalie	natalie.gevorkian@nih.gov	ACTIVE	2019-10-29 17:27	
geo	popkhadze, george	george.popkhadze@publicissapient.com	ACTIVE	2019-11-19 12:00	
dataaccessor	Accessor, Data	sahmed10@sapient.com	ACTIVE	2019-11-20 16:44	
proy	Roy, Preeti	dcb@dcbstage.com	ACTIVE	2019-11-20 16:54	
amlutz	Lutz, Andrea	andrea.lutz@publicissapient.com	ACTIVE	2019-11-20 17:31	

Showing 1 to 5 of 5 entries (filtered from 5,413 total entries)

First Previous 1 Next Last

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.

Home Workspace ProFORMS GUID Data Dictionary Data Repository Query Meta Study **Account Management**

Account Management

Account Management
Account Admin
Account Reviewer
Account Request Dashboard
Account Renewal Dashboard
Account Reporting Dashboard

Account Requests

Status: All Search:

Username	Name	Status	Submitted Date	Last Updated	Last Action
khoriatyjc	Khoriaty, Joelle	Change Requested		2018-02-13	
alois	Alois, Jaclyn	Change Requested		2017-09-25	
		Requested		2016-03-23	
danielcuneo	Cuneo, Daniel	Change Requested		2017-12-19	
		Requested		2015-11-20	
	Monroe, Derek	Requested		2018-01-18	
test	Johnson, Test	Requested		2018-01-05	
robin_cornwell	Cornwell, Robin	Requested		2018-09-25	Privilege to Meta Study requested by Admin, Portal
mjkkra	Rao, Ananth	Requested		2017-07-27	

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

Home Workspace ProFORMS GUID Data Dictionary Data Repository Query Meta Study **Account Management**

Account Management

Account Management
Account Admin
Account Reviewer
Account Request Dashboard
Account Renewal Dashboard
Account Reporting Dashboard

Account Requests

Status: Requested Status: All Status: Pending Status: Change Requested Search:

Name	Status	Submitted Date	Last Updated	Last Action
Sung-Ching	Requested		2016-03-23	
Fossati, Silvia	Requested		2015-11-20	
Monroe, Derek	Requested		2018-01-18	
Johnson, Test	Requested		2018-01-05	
robin_cornwell	Requested		2018-09-25	Privilege to Meta Study requested by Admin, Portal
mjkkra	Requested		2017-07-27	
Test1111	Requested		2017-06-07	
VATBI_UTHSCSA_DRTATE	Requested		2016-02-25	

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.

Account Privileges

Search:

PRIVILEGE	STATUS	EXPIRATION DATE
Account	Active	No Expiration Date
Data Dictionary	Pending Cancel Request	Pending
Data Repository	Pending Cancel Request	Pending
GUID	Pending Cancel Request	Pending
Meta Study	Pending Cancel Request	Pending
ProFoRMS	Pending Cancel Request	Pending
Query	Pending Cancel Request	Pending

Showing 1 to 7 of 7 entries

First Previous **1** Next Last

Permission Group

Search:

PRIVILEGE	STATUS
No data available in table	

Showing 0 to 0 of 0 entries

First Previous Next Last

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
Requested access to "Dr. Kenney - Omega-3 PTH study" approved by Zaman, Rakib		2019-11-07
Account requested by Pop, George P	Test	2019-10-07

Showing 1 to 2 of 2 entries

First Previous **1** Next Last

Account Administrative Notes

Add Note

Search:

ACCOUNT NAME	NOTE	DATE
No data available in table		

Showing 0 to 0 of 0 entries

First Previous Next Last

PARTIAL APPROVAL

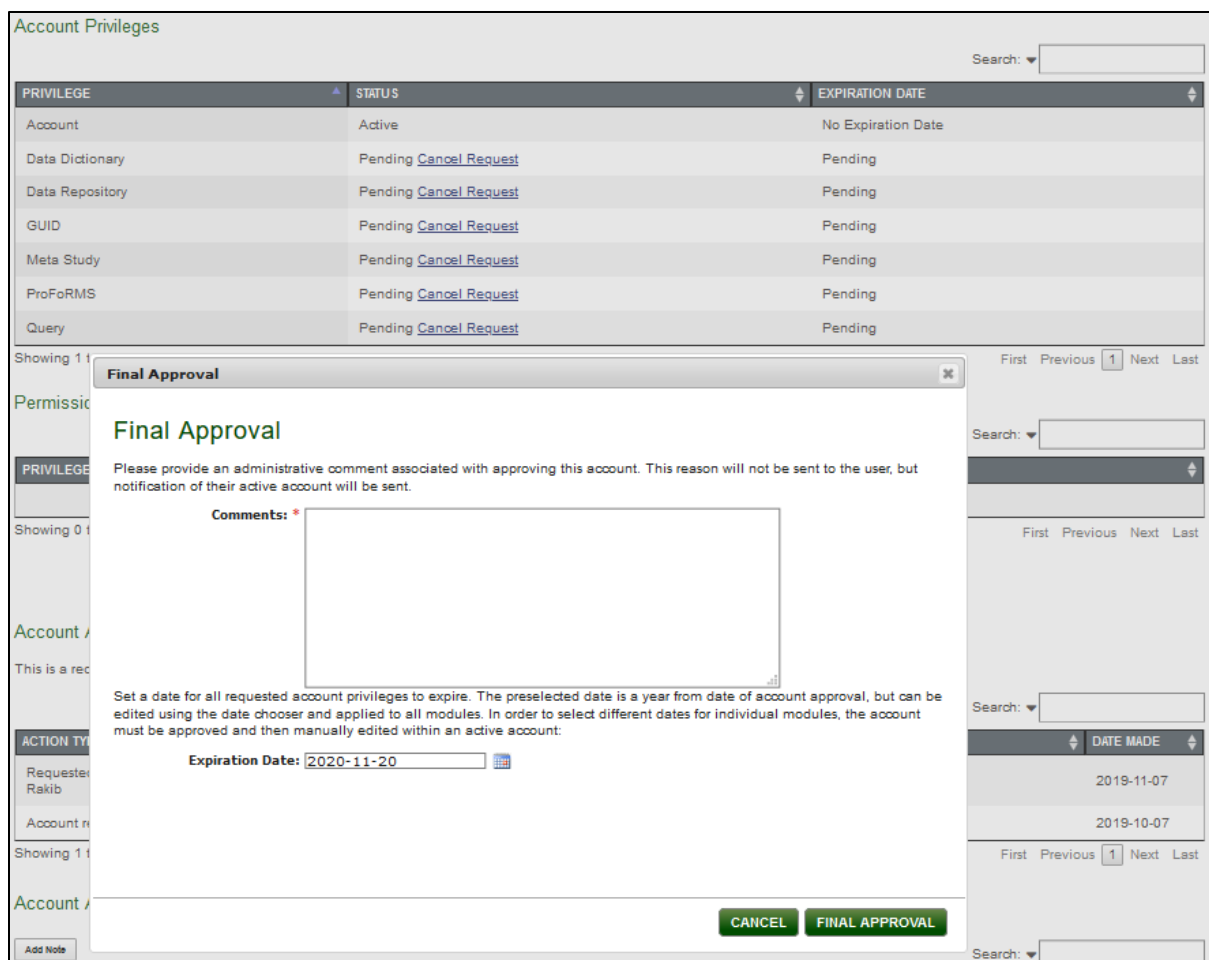
TEMPORARY REJECTION

FINAL APPROVAL

REJECT ACCOUNT

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.

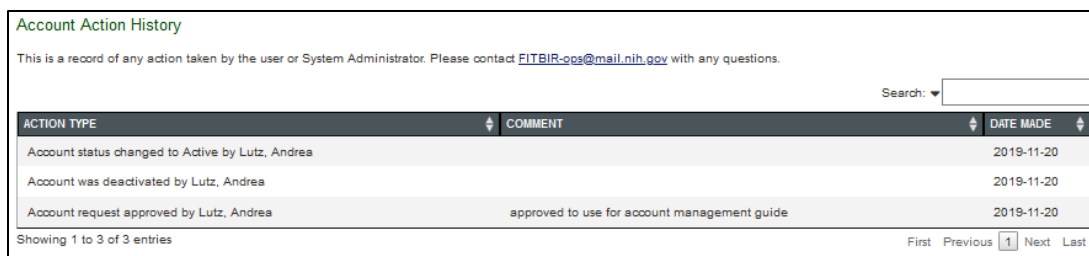
11. A **Final Approval Comments** box will appear.
 - a. In this box, explain why the user was approved and select the **Final Approval** button.



The screenshot shows the 'Account Privileges' page with a modal window titled 'Final Approval' open. The modal contains a text area for 'Comments' and a date picker for 'Expiration Date' set to '2020-11-20'. Below the modal, there are 'CANCEL' and 'FINAL APPROVAL' buttons. The background table lists various privileges and their status.

PRIVILEGE	STATUS	EXPIRATION DATE
Account	Active	No Expiration Date
Data Dictionary	Pending Cancel Request	Pending
Data Repository	Pending Cancel Request	Pending
GUID	Pending Cancel Request	Pending
Meta Study	Pending Cancel Request	Pending
ProFoRMS	Pending Cancel Request	Pending
Query	Pending Cancel Request	Pending

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



The screenshot shows the 'Account Action History' table with three entries. The table has columns for 'ACTION TYPE', 'COMMENT', and 'DATE MADE'.

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

2.5.2 View, Approve, or Reject Account Renewals

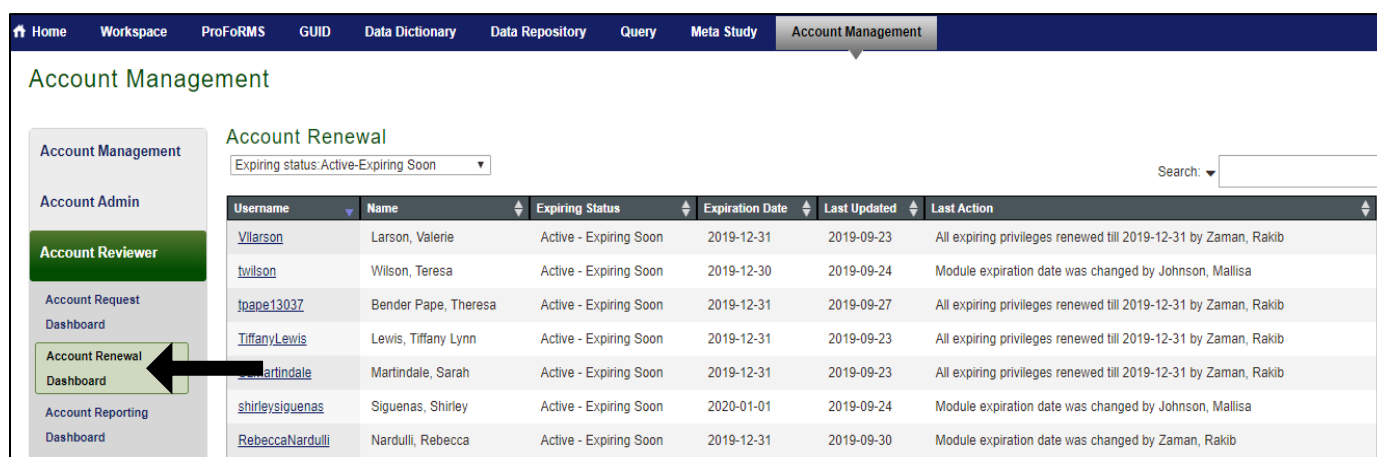
When logged into the system, users with Account Reviewer privileges can view, approve, and reject account renewal requests in the **Account Renewal Dashboard**.

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.

Home Workspace ProFoRMS GUID Data Dictionary Data Repository Query Meta Study **Account Management**

Account Management

Account Management
Account Admin
Account Reviewer
Account Request Dashboard
Account Renewal Dashboard
Account Reporting Dashboard

Account Renewal

Expiring status: Active-Expiring Soon

Expiring status: Active-Expiring Soon
Expiring status: Active- Expired Privilege(s)

		Expiring Status	Expiration Date	Last Updated	Last Action
	ristina	Expired	2016-12-07	2019-07-11	Password reset by LaValle, Christina
carlos.monasterio	Monasterio, Carlos Diego	Expired	2019-05-21	2019-04-22	Password reset requested by Monasterio, Carlos Diego
HYalewayker	Yalewayker, Haymanot	Active - Expiring Soon	2019-09-29	2019-09-23	All expiring privileges renewed till 2019-12-31 by Zaman, Rakib
jonathan.yee	Yee, Jonathan	Expired	2019-09-29	2019-09-12	Module expiration date was changed by Rodney1, Heather
GaleWhiteneck	Whiteneck, Gale	Active - Expiring Soon	2019-10-23	2019-06-20	Password reset by Whiteneck, Gale
other1	One, Other O	Active - Expiring Soon	2019-11-30	2019-10-21	All expiring privileges renewed till 2019-11-30 by Ahmed, Sikandar

- 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

Add Permissions
Search:

PRIVILEGE	STATUS	EXPIRATION DATE
Account	Active	No Expiration Date
Data Dictionary	Not Requested Request Privilege	Not Requested
Data Repository	Expired	20-Dec-2019
GUID	Active - Expiring Soon	31-Dec-2019
Meta Study	Active - Expiring Soon	31-Dec-2019
ProFoRMS	Not Requested Request Privilege	Not Requested
Query	Active - Expiring Soon	31-Dec-2019

Showing 1 to 7 of 7 entries
First Previous 1 Next Last

Account Administrative Notes

Add Note
Search:

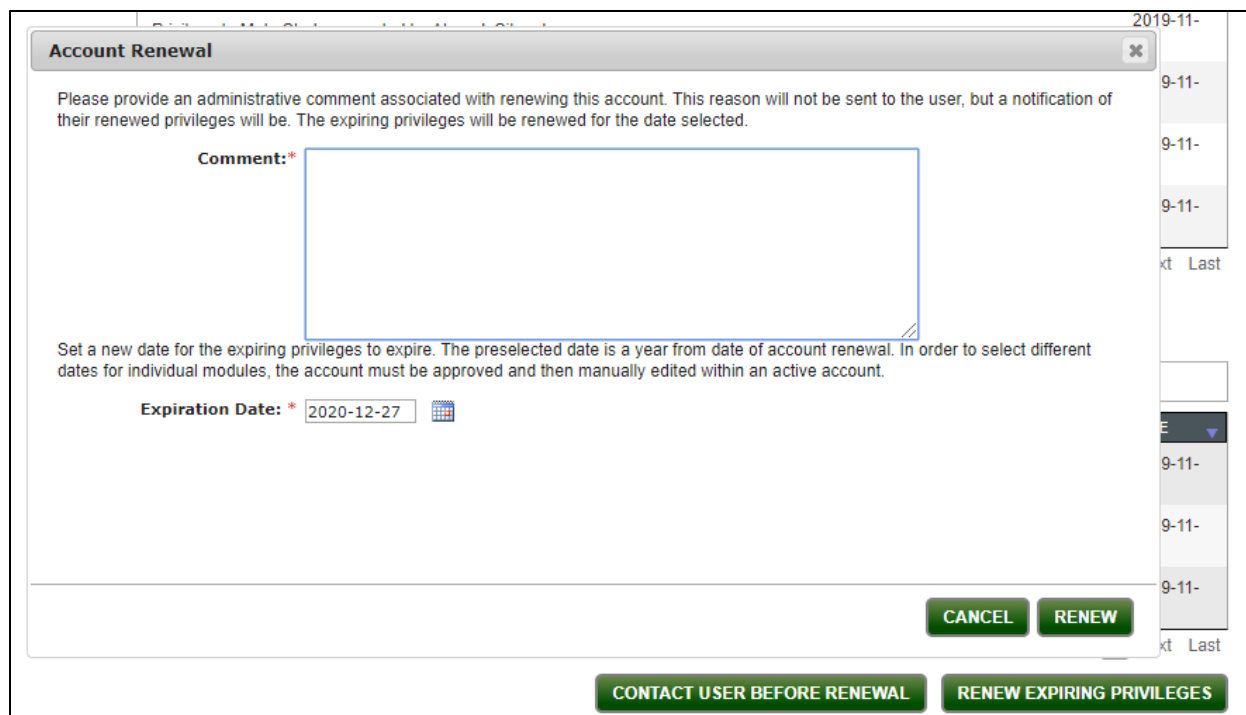
ACCOUNT NAME	NOTE	DATE
	3	2019-11-01
	1	2019-11-01
	2	2019-11-01

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

CONTACT USER BEFORE RENEWAL
RENEW EXPIRING PRIVILEGES

- Use the **Contact User Before Renewal** button if there are any questions regarding the renewal request.
- 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.



Account Renewal

Please provide an administrative comment associated with renewing this account. This reason will not be sent to the user, but a notification of their renewed privileges will be. The expiring privileges will be renewed for the date selected.

Comment: *

Set a new date for the expiring privileges to expire. The preselected date is a year from date of account renewal. In order to select different dates for individual modules, the account must be approved and then manually edited within an active account.

Expiration Date: * 2020-12-27

CANCEL **RENEW**

CONTACT USER BEFORE RENEWAL **RENEW EXPIRING PRIVILEGES**

11. 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

2.5.3 View Account Reporting Dashboard

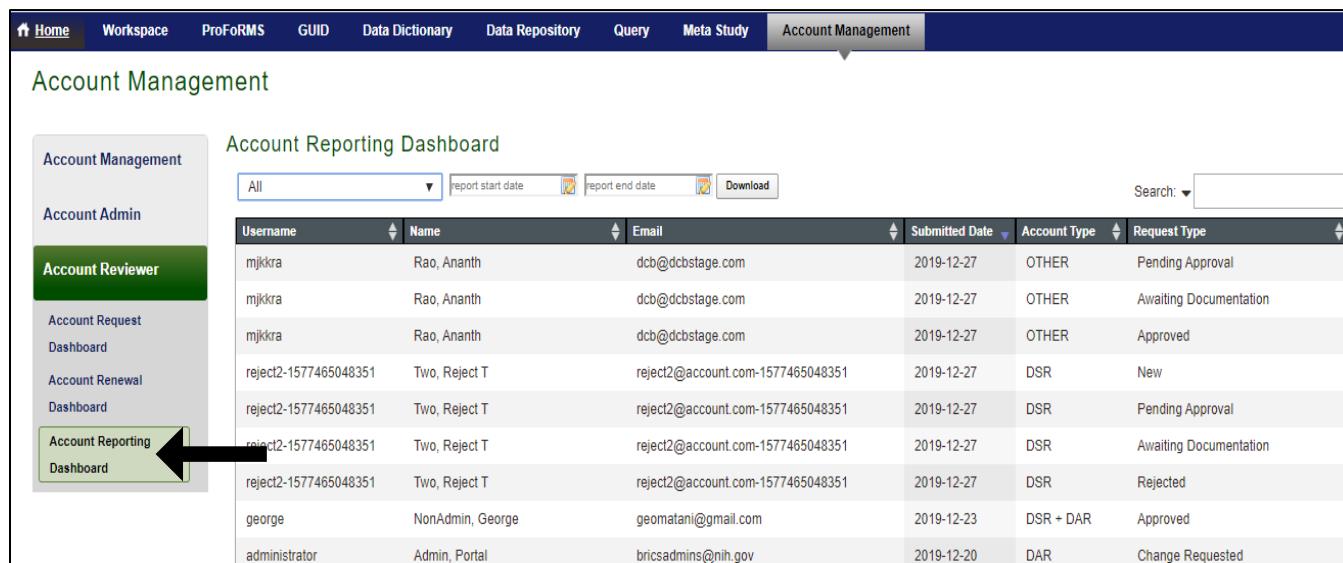
When logged into the system, users with Account Reviewer privileges can view the **Account Reporting Dashboard**. In the **Account Reporting Dashboard**, a user can view the following: New Account Requests, Approved Account Requests, Rejected Account Requests, Awaiting Documents Request, and Pending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



The screenshot shows the BRICS Account Management interface. The 'Account Management' tab is selected in the top navigation bar. On the left sidebar, the 'Account Reviewer' tab is selected, and the 'Account Reporting Dashboard' sub-menu is highlighted with a black arrow. The main area displays the 'Account Reporting Dashboard' with a table of account requests.

Username	Name	Email	Submitted Date	Account Type	Request Type
mjkkra	Rao, Ananth	dcb@dcbstage.com	2019-12-27	OTHER	Pending Approval
mjkkra	Rao, Ananth	dcb@dcbstage.com	2019-12-27	OTHER	Awaiting Documentation
mjkkra	Rao, Ananth	dcb@dcbstage.com	2019-12-27	OTHER	Approved
reject2-1577465048351	Two, Reject T	reject2@account.com-1577465048351	2019-12-27	DSR	New
reject2-1577465048351	Two, Reject T	reject2@account.com-1577465048351	2019-12-27	DSR	Pending Approval
reject2-1577465048351	Two, Reject T	reject2@account.com-1577465048351	2019-12-27	DSR	Awaiting Documentation
reject2-1577465048351	Two, Reject T	reject2@account.com-1577465048351	2019-12-27	DSR	Rejected
george	NonAdmin, George	geomatani@gmail.com	2019-12-23	DSR + DAR	Approved
administrator	Admin, Portal	bricsadmins@nih.gov	2019-12-20	DAR	Change Requested

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

Account Management

Account Admin

Account Reviewer

Account Request Dashboard

Account Renewal Dashboard

Account Reporting Dashboard

Account Reporting Dashboard

Approved Account Requests

All

New Account Requests

Approved Account Requests

Rejected Account Requests

Awaiting Documents Requests

Pending Approval Requests

Ananth

admin, George

n, Portal

n, Portal

w, Colton T

ingol, Kevin

ra, Samir

dcb@dcbstage.com

bricsadmins@nih.gov

bricsadmins@nih.gov

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

Account Reporting Dashboard

Approved Account Requests

report start date

report end date

Download

Dec 2019

Su

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1

2

3

4

5

6

7

8

9

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11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31

Today

Done

Username

Name

Email

mjjkra

Rao, A

dcb@dcbstage.com

george

NonAc

geomatani@gmail.com

administrator

Admin

bricsadmins@nih.gov

administrator

Admin

bricsadmins@nih.gov

CTFTest

Farlow

rlowcolton@yahoo.com

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

Account Reporting Dashboard

Approved Account Requests

report start date

report end date

Download

Username

Name

Email

mjjkra

Rao, Ananth

dcb@dcbstage

george

NonAdmin, George

geomatani@g

administrator

Admin, Portal

bricsadmins@

administrator

Admin, Portal

bricsadmins@nih.gov

CSV

Excel

PDF

Report



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