Automated Consent Management system - User Guide

USER ROLES and MANAGEMENT:

Admin:
- ● ***Amount of users with this role***: at least 1.
- ● ***Role combinations***: this role can be combined with any other role.
- ● ***Possible replacement conflicts***: the only conflict this role might have is if there is only one admin in the system and he/she wants to be removed from this charge. The admin must be replaced, only then the edition of the role will be complete.

DAC Member:
- ● ***Amount of users with this role***: at least 4.
- ● ***Role combinations***: this role can only be combined with the Admin role.
- ● ***Possible replacement conflicts***: when trying to edit his/her role to became a chairperson, an alumni or a researcher, conflicts may appear if:
- - This user has pending cases in which the total amount of members in those elections are less than 4 (Every opened election must have at least 4 members assigned to vote on), the admin must delegate his/her responsibilities in some other member already cataloged in the system (but not assigned in the conflict elections). If there are no other members in the system to cover his/her position, a new member should be added in the system first.
- - This user wants to became a Chairperson (read Chairperson's conflicts).

Chairperson:
- ● ***Amount of users with this role***: only 1.
- ● ***Role combinations***: this role can only be combined with the Admin role.
- ● ***Possible replacement conflicts***: when trying to edit his/her role to became a member, an alumni or a researcher, conflicts may appear if:
- - This user has pending cases, in order to be able to change the Chairperson role, every opened election will be canceled, another user must be selected for the role and these canceled elections will be re-opened with the new chairperson and all the DAC members logged in the system at that moment will have to vote on these cases. Ideally, in order to gracefully make this transition preventing loss of work before replacing a chairperson ,the chairperson would complete vote collection on all open cases.

Alumni:
- ● ***Amount of users with this role***: undefined.
- ● ***Role combinations***: this role can be combined with the Admin and the Researcher role.

● ***Possible replacement conflicts:*** conflicts may appear only if this user wants to became a Chairperson (read Chairperson's conflicts).

Researcher:
● ***Amount of users with this role***: undefined.
● ***Role combinations:*** this role can be combined with the Admin and the Alumni role.
● ***Possible replacement conflicts:*** conflicts may appear only if this user wants to became a Chairperson (read Chairperson's conflicts).

Instructions for user management:

- **Add a User**: the admin can add a user from his/her "My Console" page on "Add a User button" or from button placed on the top right corner of the Manage Users page. The admin should fill the form with a name, google account id and role/s that this user is going to have (all fields are required).

- **Edit a User**: the admin can edit a user from the Manage Users page, clicking on the "Edit" button placed in the user's row. Edition can be done one user at the time and will only happen if no conflicts appear or are already solved, otherwise the "Edit" button will be enabled.

When trying to change some user's role we strongly recommend this user to finish all his/her pending cases or responsibilities first, in order to avoid conflicts by having to delegate those responsibilities in someone else.