# User Management

## Roles

The following 3 user roles exist in the Microbial Imaging Facility. The researcher role is a subset of the supervisor role and supervisor role is a subset of the administrator role (i.e.  a supervisor can also do any task that a researcher can do).

| Role | Description |
|---|---|
| Administrator | • Approves or rejects access requests.<br>• Activate and Deactivate users.<br>• Download the summary report of lab usage.<br>• List, View and Edit all user account details.<br>• Modify the supervisor list for researchers.<br>• Modify the text within the footer. |
| Supervisor | • View and Edit all projects they are a supervisor of.<br>• View experiments that belong to projects they supervise. |
| Researcher | • Create and edit projects they have created.<br>• Create and edit experiments they have created.<br>• View projects and experiments they have created.<br>• Register a user account.<br>• Edit their user details. |

## Signing Up

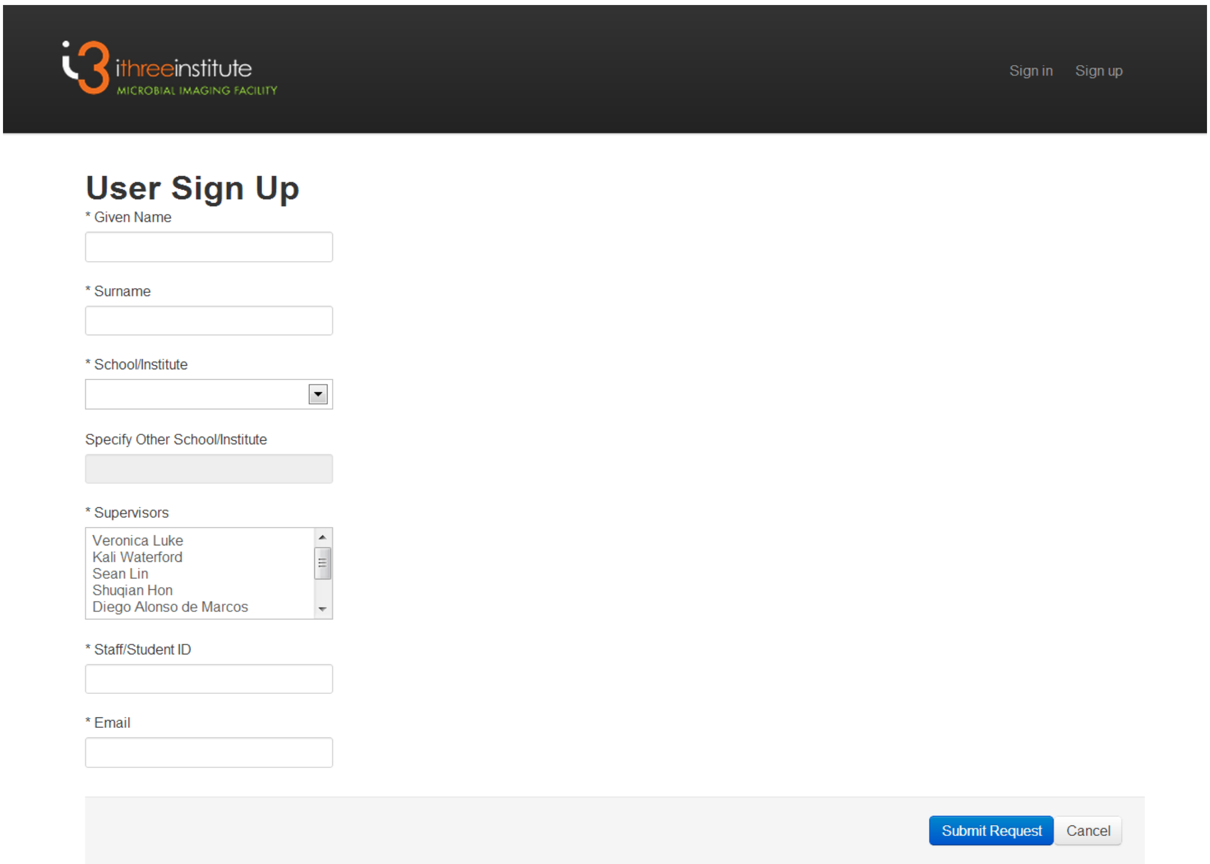

Figure 1 Above is an image of the sign up page.

- The user sign up page is accessible via the “Sign Up” link on the “Login Page”.
- Fields marked with an ‘*’ are mandatory fields that need to filled in before submitting the form.
- At least 1 supervisor must be selected when signing up for a user account. The lists of users in this field are the users that have been assigned the supervisor role.
- The staff/student ID needs to be unique in the system.
- The email needs to be unique in the system.
- Once the form is submitted an automated email will be sent to the administrators to alert them about the new account request.  New users will not be able to access the system until their account request has been approved and an email has been sent to their nominated email address.

## Approving Users

- To approve a user account an administrator must first login.  Then Select Administration > Select Access Requests > Select the approve link for a user> Select a user role> Select Approve.
- A role must be specified when the admin is approving a user account.
- Only administrator users can approve or reject user accounts.
- An automated email will be sent to the user when their account has been approved to let them know they can now access the system.

## Rejecting Users

- To reject a user account an administrator must first login.  Then Select Administration > Select Access Requests > Select the reject link for a user> Enter a reason> Select Reject.
- A reason must be specified by the administrator when they reject a user’s account request.
- Once a request is rejected an automated email will be sent to the rejected user which will include the reason the administrator rejected the user.

## Viewing the List of Users

- To view the list of users an administrator must first login.  Then Select Administration > Select User List.
- Only administrator users can view the list of users.

## Editing a User’s Role

- To edit a user’s role an administrator must first login.  Then Select Administration > Select User List > Select the edit role link for a user> Select Role> Select Save.
- Only an administrator can edit a user’s role.

- If the user is currently assigned the supervisor or administrator role then they cannot be demoted to a researcher. (This has been done to ensure data integrity as supervisors can be in a researcher's supervisors list and can be supervisors to projects.)

## Activating/Deactivating a User's Account

- Once a user's account is deactivated the user will no longer be able to login into the system.
- Only an administrator can activate and deactivate user accounts.
- To deactivate a user's account an administrator must first login. Then Select Administration > Select User List > Select the view details link for a user> Select Deactivate.
- To activate a user's account an administrator must first login. Then Select Administration > Select User List > Select the view details link for a user> Select Activate.

## Editing Account Details

- A researcher and supervisor can only edit their own user details while an admin user can edit all users' details.
- A researcher or supervisor cannot modify their list of supervisors. (A researcher or supervisor must send an email to the administrator as they only have permission to add or remove supervisors from a user's list.)
- To edit your own user details a user must first login. . Then Select first name/last name link > Select Edit My Details > Modify user details> Select Update.
- As an admin to edit other user details you must first login. . Then Select Administration > Select User List > Select the edit details link for a user> Modify User Details>Select Update.
- Fields marked with an '*' are mandatory fields that must be filled before submitting the form.
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# Project and Experiment Management

## Creating Projects

- Administrators, Supervisors and Researchers can create projects.
- To create a project a user must first login. The Select Create Project Button > Enter values for the mandatory fields > Select Create Project.
- The "Project Name" and "Supervisor" are the only mandatory fields and need to be filled before submitting the form.
- The lists of supervisors within the "Supervisor" drop down are the supervisors that have been added to the user's supervisor list.
- The date and the creator of the project are automatically saved in the database.
- The supervisor list for a user can only be modified by the administrator. (A researcher or supervisor must send an email to the administrator as they only have permission to add or remove supervisors from a user's list.)

## Listing Projects

- To list the project a user must first login. The home page of the Microbial Imaging Facility is the project list page.
- A researcher will only view projects they have created.
- A supervisor will only view projects they have created and projects they have been assigned a supervisor of.
- An administrator will be able to view all the projects in the system.
- The columns in the project list table are sortable.

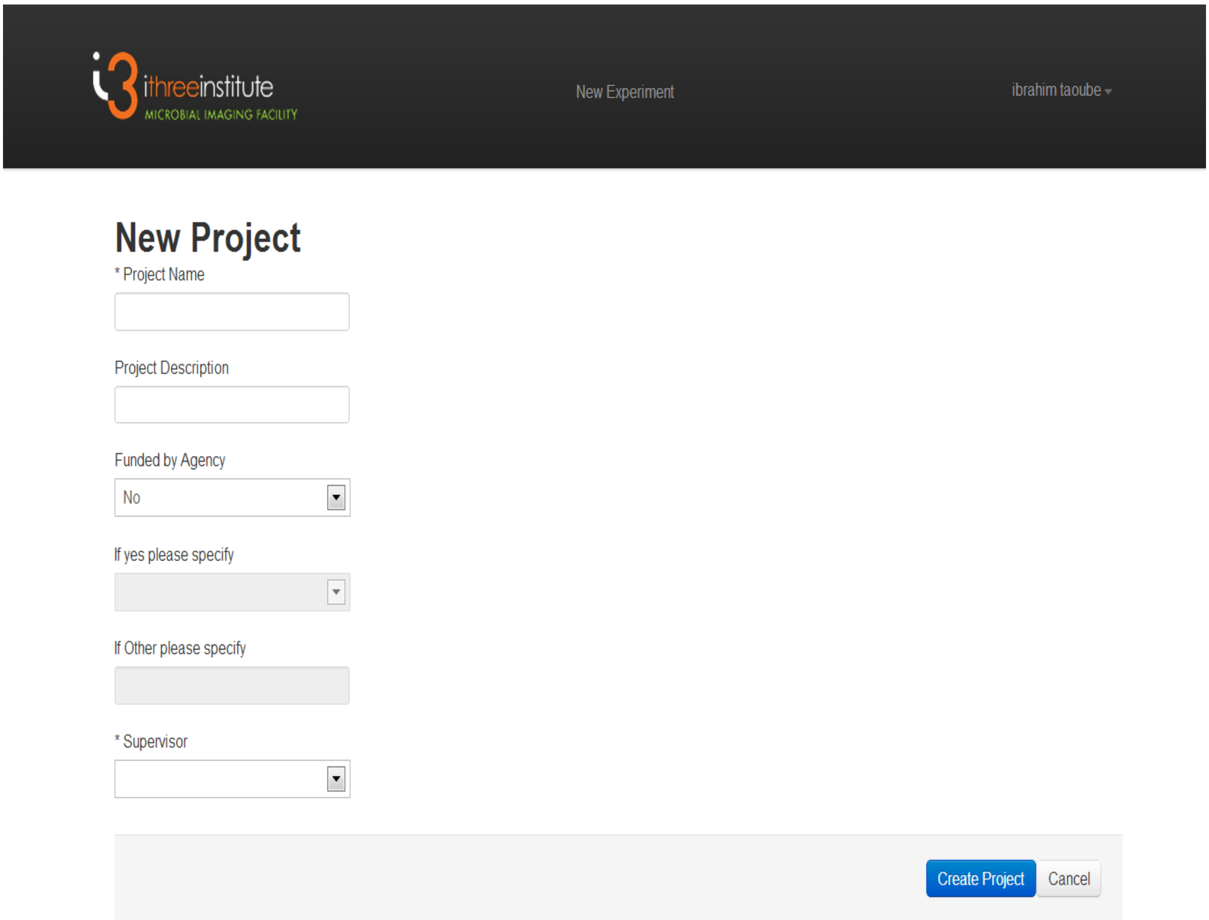
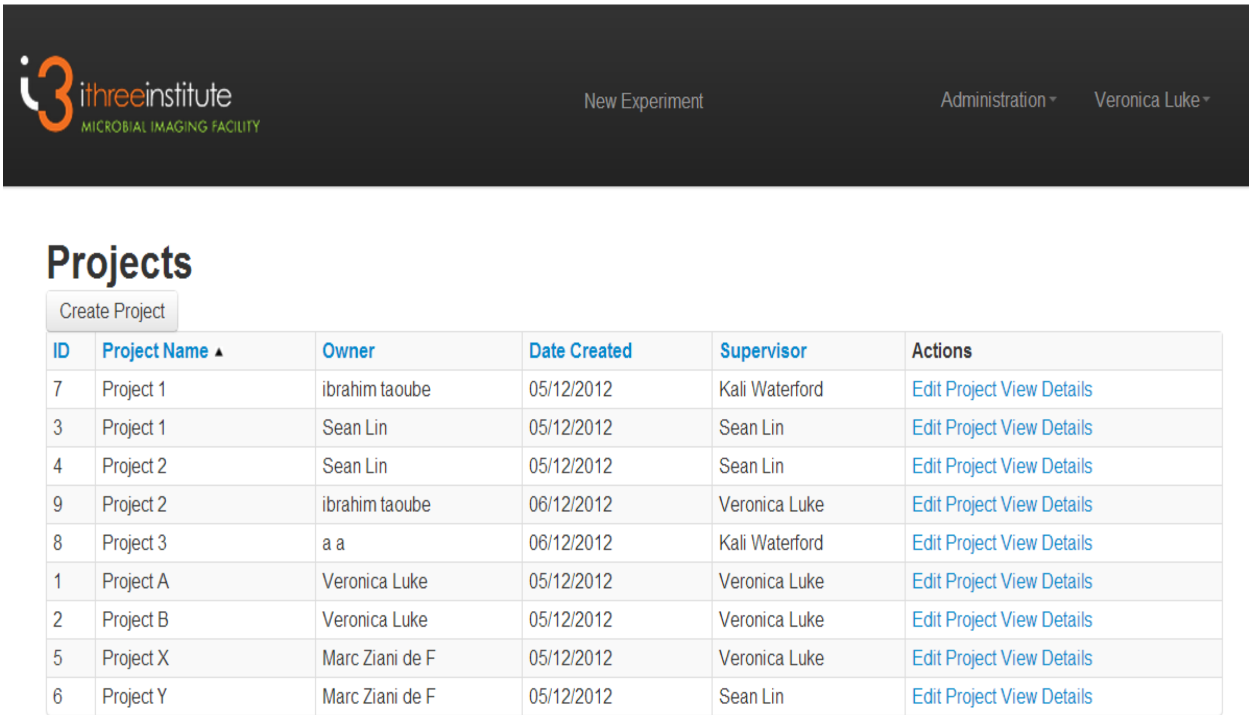



**Figure 2 Above is an image of the project form.**




| ID | Project Name ▲ | Owner | Date Created | Supervisor | Actions |
|---|---|---|---|---|---|
| 7 | Project 1 | ibrahim taoube | 05/12/2012 | Kali Waterford | Edit Project View Details |
| 3 | Project 1 | Sean Lin | 05/12/2012 | Sean Lin | Edit Project View Details |
| 4 | Project 2 | Sean Lin | 05/12/2012 | Sean Lin | Edit Project View Details |
| 9 | Project 2 | ibrahim taoube | 06/12/2012 | Veronica Luke | Edit Project View Details |
| 8 | Project 3 | a a | 06/12/2012 | Kali Waterford | Edit Project View Details |
| 1 | Project A | Veronica Luke | 05/12/2012 | Veronica Luke | Edit Project View Details |
| 2 | Project B | Veronica Luke | 05/12/2012 | Veronica Luke | Edit Project View Details |
| 5 | Project X | Marc Ziani de F | 05/12/2012 | Veronica Luke | Edit Project View Details |
| 6 | Project Y | Marc Ziani de F | 05/12/2012 | Sean Lin | Edit Project View Details |

**Figure 3. Project List Page.**

## Editing Projects

- To edit a project a user must first login. Select the Edit Project Link for one of the projects > Modify the project details > Select Update Project.
- The “Project Name” and “Supervisor” fields are mandatory fields.
- A researcher will only be able to edit projects they have created.
- A supervisor will only be able to edit projects they have created and projects they have been assigned a supervisor of.
- An administrator will be able to edit all the projects in the system.

## Creating Experiments

- Researchers, supervisors and administrators can create experiments.
- The create experiments feature will only be available in the lab. (You cannot create experiments externally.)
- To create an experiment the user must first log into the Windows machine. Once the user logs in they are presented with the create experiment form that is automatically displayed in the browser. The user will automatically be identified by the Microbial Imaging Facility web application based on their windows login details. The user must then Select an existing Project (Or create a new project) > Enter their experiment details > Select Create Experiment.
- The instrument used for the experiment will automatically be identified and saved as part of the experiment details.
- The experiment will be linked to the project that was selected when creating the experiment.
- An experiment id, date and the creator of the experiment will also be automatically saved as part of the experiment details.

## Experiment Feedback

- Once a researcher logs out of the Windows machine within the lab they will be presented with a web page that will display the experiment feedback form.
- None of the fields displayed are mandatory fields.
- The data collected in the form will only be viewable in the summary reports. (Summary reports are only accessible by administrators.)
- If “Instrument Failed” is selected then an automatic email will be sent to all the administrators in the system which will alert them that one of the instruments in the lab is faulty.
- The Windows machine will continue the log off process once the experiment form is submitted and the “Close” button is pressed.
- The time the researcher logs off will be used as the experiment end time that will be viewable in the summary report.

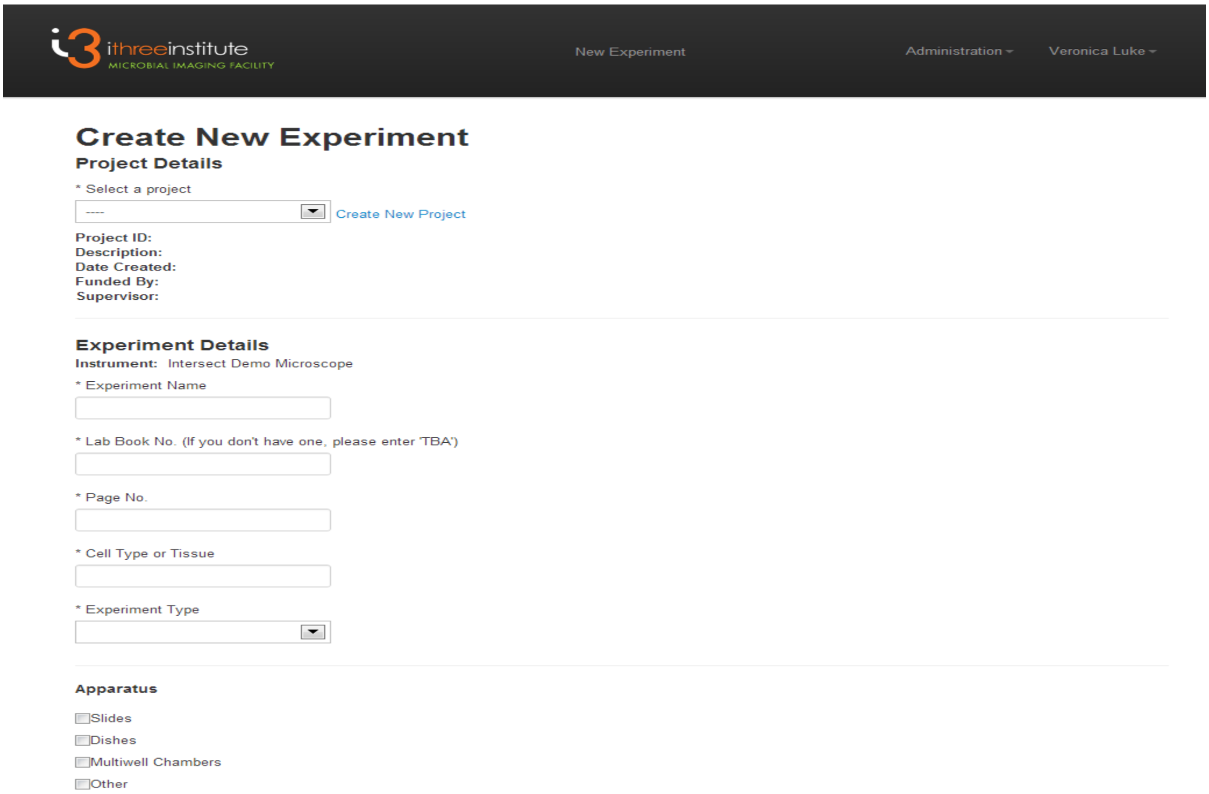



**Figure 4 Create Experiment Form.**

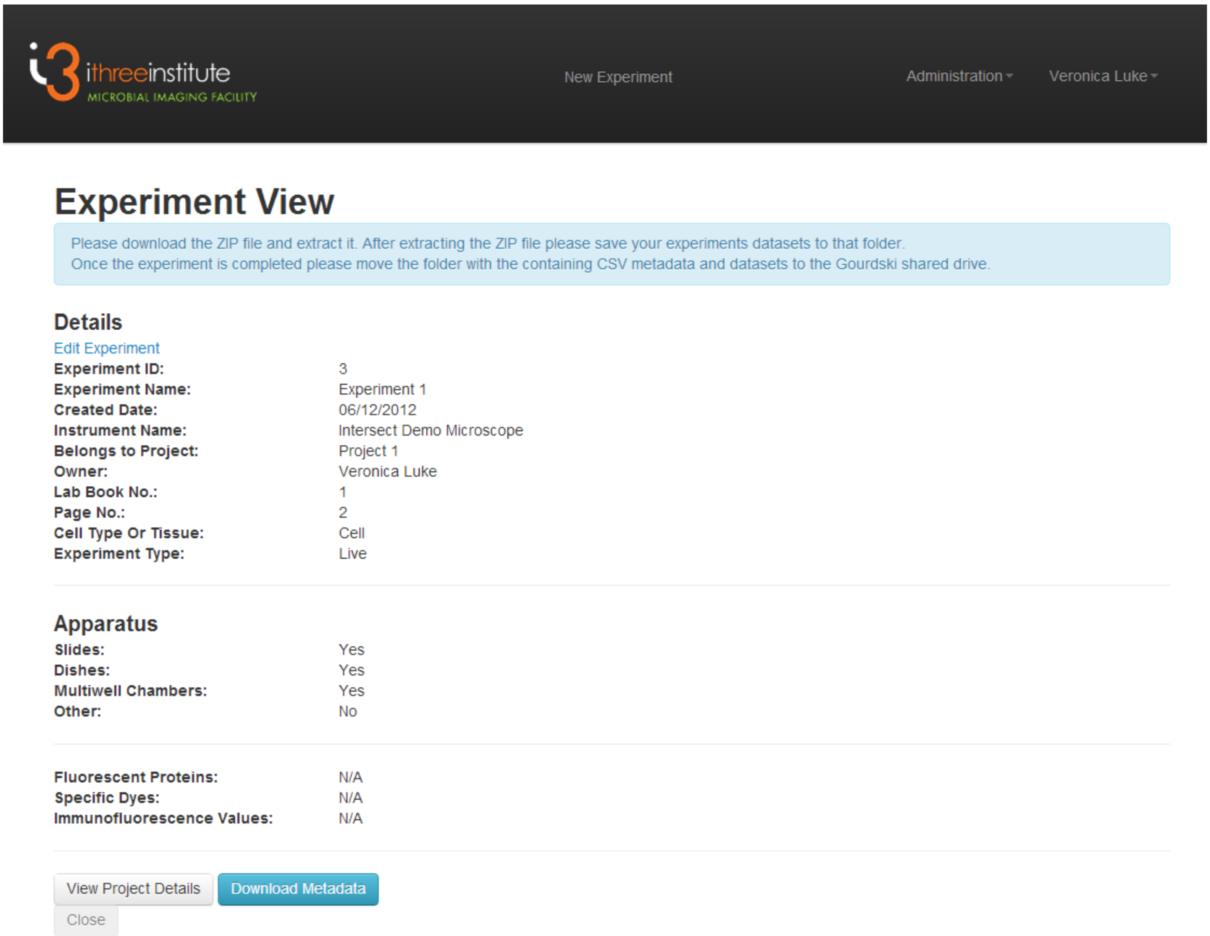



**Figure 5 View Experiment page displayed after creating the experiment.**

## View & Downloading Experiment Metadata

- The metadata for an experiment can be downloaded on the view experiment page via the “Download Metadata” link. (This is the page displayed after you create an experiment).
- The metadata file will be downloaded as a ZIP file and will contain a folder that will hold the experiment metadata as a CSV file. The experiment datasets outputted from an experiment should be saved in the same folder as the CSV file.
- The folder that includes both the experiment metadata and experiment datasets should be moved to the Gourdski network drive once the experiment is completed by the researcher.
- For a previously created experiment the metadata can be downloaded by logging in, Selecting View Details for a specific project > Selecting Download Metadata for a specific experiment.
- A researcher will only be able to download metadata for an experiment they have created.
- A supervisor will be able to download their own experiments and any experiment within a project they have been assigned a supervisor of.
- An admin will be able to download metadata for all experiments within the system.

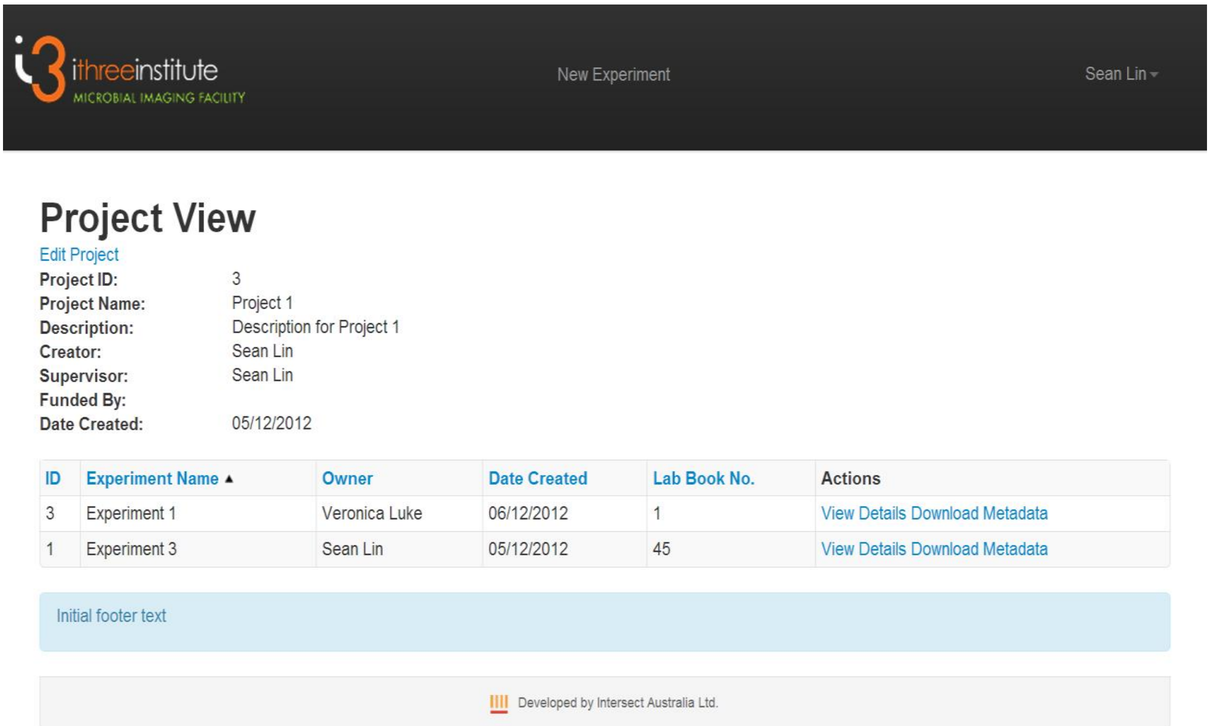



**Figure 6 Project View Page which displays the list of experiments that belong to a project.**

## Listing Experiments

- The experiment list for a project can be accessed via the “View Details” link on the home page.
- A researcher will only view the projects and experiments they have created.
- A supervisor will be able to view their own experiments and any experiment within a project they have been assigned a supervisor of.
- An administrator will be able to view all experiments in the system.

## Editing Experiments

- An experiment can only be edited within the session it was created. Therefore an experiment can only be edited within the lab and just after it was created and can only be edited by the user that created the experiment.
- Once the user logs out of the lab machine the experiment will no longer be editable anymore.

# Administrator Features

## Downloading Summary Reports of Lab Usage

- Only an administrator will be allowed to download summary reports.
- The summary reports will be accessible by the admin logging in, Selecting the Administration link >Selecting Reporting > Selecting the Download Lab Usage Report link.
- The summary report will be a CSV file and contain the following data
    - All the metadata for all the experiments created in the system.
    - The start time and end time of an experiment.
    - The experiment feedback that a researcher entered after they completed their experiment.
- Each record in the CSV file will correspond to a single experiment.

## Modify Text Within The Footer

- Only an administrator can modify the footer text.
- The text within footer can be modified by the admin logging in, Selecting the Administration link > Selecting Edit Footer Text > Modifying the footer text > Selecting Update.
- The footer text cannot be greater than 512 characters.
- The footer text will be displayed on every page in the system.