CHAPTER 3

USER ACCOUNT MANAGEMENT

This sectionchapter describes the process used by administrators for creating and managing accounts for users and groups of collaborators in caArray.

Note: The options for performing user management tasks are visible in caArray on the left sidebar of the browser only if you have these Admin privileges. true?

Topics in this sectionchapter include:

Initial questions

Do I need to address anything here about the System Admin needing to be set up to perform these functions?

The UC doc says “To execute this use case (Manage Users), a system admin. is logged in and can manage accounts of a given institution,...” This sounds like only the SA can perform these management tasks--or is it anyone with Admin permissions?

The UC doc indicates the installer determines whether “they want to use LDAP or the db authorization and authentication method”. If that is all determined ahead of time for a system, perhaps I should add qualifications when discussing filling out the new user form. I’d like to talk through this LDAP authorization so I understand it thoroughly. I don't think we should assume that an admin user will automatically know about this for caArray.

Roles in caArray

When a new user account is created withing caArray, the user can be assigned one or more roles that then determines that user's access to specified private data.

Role	*Description*	*Permissible Actions*
Anonymous User **Note:** Not listed under Roles	User without a caArray account or a non-logged in user	Browse and Search tasks
System Administrator	Person responsible for the effective operation of caArray	Manages users Manages user groups Provides for overall management and quality of caArray ??
Principal Investigator [PI]	Owns experiments and studies and/or projects	Submit data Review of experiment designs Submission of quality control metadata Upload of normalized data Annotation of parameters used
Lab Administrator	Same as PI in caArray 2.0	Same as PI in caArray 2.0
Lab Scientist	Same as PI in caArray 2.0	Same as PI in caArray 2.0
Biostatistician	Same as PI in caArray 2.0	Same as PI in caArray 2.0
External System **Note:** Not listed under Roles	Systems other than caArray from which caArray data can be extracted programmatically using an API.	For more informations, see *Extracting Data Programmatically by API* on page 79.

Please modify these desriptions as appropriate for the context of this manual. I based the descriptions on what you said in email this week about roles.

Permissions

This seems to now be obsolete for 2.0. Revise it? Also, not sure where it belongs. The

caArray	Roles (Actors)

Table 1:

		Anonymous User	Principal Investigator	Research Scientist	Lab Administrator	Lab Scientist	Biostatistician	System Administrator	Collaborator	System Time	External System
Use Cases	Acquire Experiment Data via API										
	Manage Experiment Data Files										
	Import Experiment Data										
	Submit Experiment Proposal										
	Download Experiment Data										
	Manage Experiment Permissions										
	Import Array Designs										
	Login										
	Manage Users										
	Navigate Repository										
	Search Repository										
	Search Using Filters										
	Manage Collaborators										
	Register for an Account										
	Report on Work Accomplished										
	Update Experiment Proposal										
	Import Data Files										
	Validate Experiment Data Files										

Table 1:

information is important.

When the account is registered and roles are defined, the UserID and password assigned to the user determines access rights for the user.

Managing User Accounts

Managing user accounts includes creating, updating, resetting and disabling user accounts. All registered users can manage their own account data but not their role.

System admins can be assigned to "logical institutions" by CBIIT admins. What does this mean??

Registering a User Account

Covered in the Getting Started chapter. This has a brief explanation and a cross-reference to the other chapter. A person who wants to be caArray user can request a user account from the Welcome/Login page of caArray (see *Requesting a User Account* on page 16). A new user can also be added by a caArray user with Admin privileges. This section covers creating a new user by Admin user.

Before creating a new user account in caArray, you should perform a search to ascertain whether the user already has an account. I can't see an intuitive way to launch such a search. Is this true in 2.0?? Or just review names in user account table? For more information, see *Searching for a User* on page 32.

Creating a New User--this was written from the description of Registering a New User in the Getting Started chapter because...see next red text.

It is advisable, before creating a new user account in caArray, to perform a search to ascertain whether the user already has an account. I can't see an intuitive way to launch such a search. Is any or all of this paragraph true in 2.0??

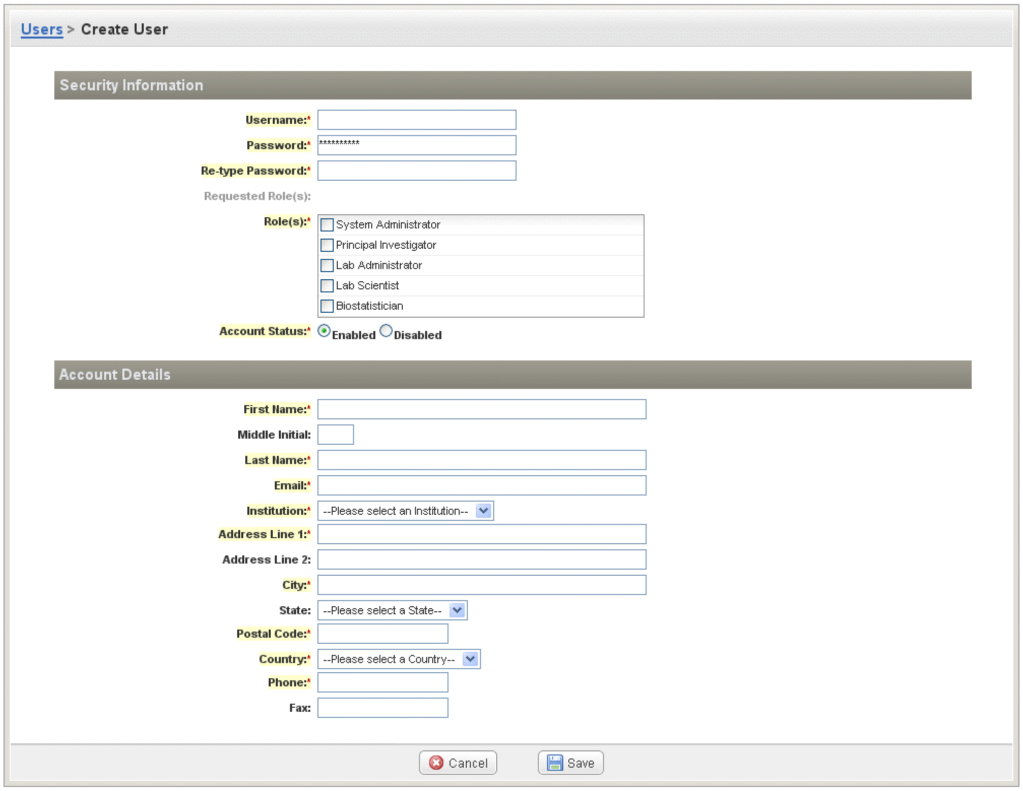
To create a new user account, as a user with Admin privileges, follow these steps:

1. Log in on caArray login page http://array.nci.nih.gov.
2. On the Welcome to caArray page, click **Manage Users** in the left sidebar. This option is no longer there. Can an admin add a new user? Looks like not.

   No longer can see a way to open this page. The Users page that opens displays a listing of current users organized by last name, first name, organization, email address, account status (Enabled or Disabled) and the user's ability to Edit an Account. For more information about editing, see *Editing User Accounts by an Administrator* on page 31.

3. In the upper right corner of the page, select the **Add a New User** button (

). This opens the user account registration form (*Figure 3.1*).



4. In the Become a caArray User form, enter the appropriate information[2].
   - Security Information
     - **Do you have an LCDAP account?**

       If Yes, enter the username and password for the purposes of verifying that it is correct. If validated, the user will be granted limited access to the application immediately as a "caArray User"; this will still require confirmation from the NCICB support teams.

       If No then what?
     - **Username***
     - **Password***
     - **Requested role(s)***--Select one or more of the roles. Roles are described in Table *3.1*. Any limits when submitting this for a new user?. If what you said this week is true about permissions in 2.0, ("all roles

2. Items with an asterisk or highlighted are required.

(except Anon. User) mirroring capabilities of PI") then can every user do everything? Visiblity/accessibility would just be set per experiment?

Role	***Description***	***Permissible Actions***
System Administrator	Person responsible for the effective operation of caArray	Manages users Manages user groups Provides for overall management and quality of caArray ??
Principal Investigator [PI]	Owns experiments and studies and/or projects	Submit data Review of experiment designs Submission of quality control metadata Upload of normalized data Annotation of parameters used
Lab Administrator	Same as PI in caArray 2.0	Same as PI in caArray 2.0
Lab Scientist	Same as PI in caArray 2.0	Same as PI in caArray 2.0
Biostatistician	Same as PI in caArray 2.0	Same as PI in caArray 2.0

Table 3.1 caArray role descriptions

- Account Details
  - First Name*
  - Middle Initial
  - Last Name*
  - Email [address]*
  - Organization*
  - Address [Lines 1* and 2}
  - City Why is this not a required field?
  - State No longer listed--is this an oversight?
  - Postal [or Zip] Code Why is this not a required field?
  - Country*--Select from the drop-down list
  - Phone*
  - Fax

5. Click **Submit Registration Request** to execute the request, or click **Cancel** to halt the registration.

Once the request for a new account is sent to NCICB, it takes 24-72 hours to process. You will receive an email response when the account has been activated.

Note: Once you register, you have immediate accessibility to caArray, although your new account takes a period of time to process.

6. Once all required information is entered, click **Save** Does Save submit the request?, or click **Cancel** to cancel the registration.

caArray validates the new user submission (including the LSAP, the username/ password uniqueness) and opens a confirmation page containing all data entered displays . Does this happen when new user requests or when Sys Admin requests, or both? Does this happens at same time system validates LSAP info? At this point, you as the administrator verify the information and submit it to the system. Is there a **Submit** button on that confirmation screen? Or how does SA submit?

caArray adds the new user and sends two distinct emails both to the new user?:

1. An email containing an introduction message containing the username, a description of the role(s) assigned the user and a link to the application's URL.
2. An email containing the password assigned to the new user. Can a new user reset the password?

When the account is registered, the UserID and password assigned to the user determines access rights for the software, based on roles assigned by the Admin User who created the account.

Editing User Accounts by an Administrator

Note: The options for performing user management tasks are visible in caArray after login, only if you have these Admin privileges. Is this still true?? I can't see any way to launch this, so I couldn't check it out. What will one see?

To modify the details for a registered caArray user, with Admin permissions, follow these steps:

1. Log in on caArray login page http://array.nci.nih.gov.
2. On the Welcome to caArray page, click **Manage Users** in the left sidebar.
3. Click the user name for the user of interest. The name is a hypertext link that opens the user profile.
4. Click the **Edit** button () at the bottom of the page. This opens the user details page.

   The following fields are editable: In the forms that I opened, it looked like everything was editable. In 11/21 tag, none of this was available.

   a. Username and Password (The password is double entry and only available to Database management. This is not available for users with LDAP Authentication.) Are you saying the Editor cannot reset the password by a person with Admin permission?
   b. Current assigned role
   c. Organization Information
   d. Enable or Disable the account
5. Modify the editable information appropriately.
6. Click **Save**, and confirm the action at the prompt.

CaArray commits the change, and sends an email notification to the user of the edited account regarding the edit.

When a user without Admin privileges logs in, does he see the Users and Groups left sidebar menu option?

Editing One's Own Account

Could see no way of doing this in 11/21 tag. Perhaps does not belong in Admin chapter, but after Registration/Login section of the Getting Started chapter.

I'm confused about how and where a basic user launches this process. I take it that it's a different process than that launched through the User Management feature.

During the Proposal entry process or using the separate feature of a registered user's list of functions--where are these?, the ability to edit organization or username/password characteristics can be performed.

To edit your own user account, follow these steps:

1. Select **Edit Registration**. Where does this appear?
2. Some of the information that displays is not editable, Editable information is indicated by???
   a. For Database Authentication: you can edit the password (double entry)
   b. For LDAP Authentication: neither username nor password are shown nor are they editable
   c. Current and Desired Role(s) are editable (UC doc says only by SA)
   d. Organization information is editable
3. Make the appropriate edits in the information.
4. Click WHAT?? to submit the changes or click **Cancel** to abort the edit process.
5. Verify the information in the confirmation screen that opens.
6. Confirm the changes by clicking WHAT?.

caArray commits the changes and sends an email notification to user of the edited account. It also notifies the installation system administrator, and displays a status of action in caArray?

Searching for a User

Viewing User Details

Creating a New User Account

Managing a Group

Viewing Group Details

Creating a Group

Managing a Group

Searching for a User

Can see no way to launch this in 11/21 tag.

In caArray 2.0, searching for a user involves the Filter feature on the Manage User's page. You can filter the user list based on organization, role, account status,or last name. If you submits the filter request with all defaults, all users are presented.

Notes

- This search feature is a part of User Management, accessible only to Admin Users. If you do not have these privileges, you cannot see the options and features described in this section. For more information, see *User Management* on page 26.
- This user search is to locate a person with an existing user account in caArray. This search is completely different than a Person search, described in *Contacts* on page 33, which searches for persons identified with key roles in Protocols, Arrays, Experiments, and so forth. How about these bullets?? Is any or all of this information true in 2.0??

To search for a user in caArray, follow these steps:

1. Click the **Manage Users** option on the left sidebar in the caArray portal.
2. The User form that opens (*Figure 3.1*), displays all valid caArray users by Last Name, Organization, and email address.

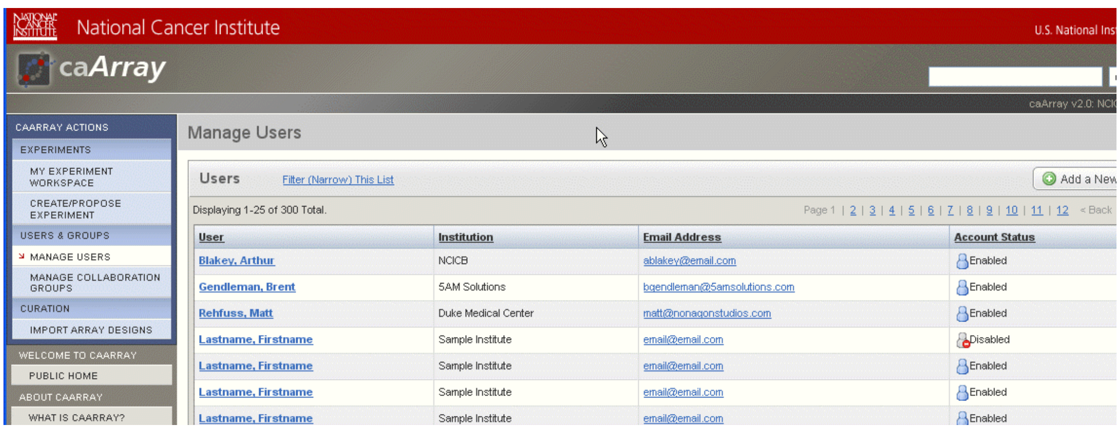


Figure 3.1 Users page

3. You can scroll through the list to find a user

   or

4. Click the **Filter (Narrow) This List** hypertext link at the top of the page.

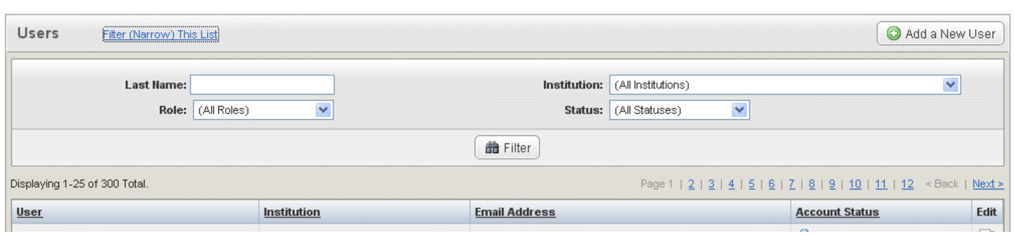


Figure 3.2 Filter users section of the Users page

5. In the new section of the page that opens (*Figure 3.2*), enter or select the following fields that identify the user for whom you are searching:
   - **Last Name**

- **Role**
- **Institution**
- **Email address**

Note: The search is case insensitive; wild cards are always implied on both sides of the query string. True?

6. Click the **Filter** button 

.

Note: By clicking the **Filter** button without setting parameters, the search is unrestricted; all Users then display on the **Users** page.

Search results display on the same page. For more information see *User Search Results.* If you do not locate the User you want, you can click the **Add a New User** button (

) on the upper right of the page to create a new user account. For more information, see *Creating a New User Account* on page 33.

User Search Results

Viewing User Details

Creating a New User Account

Disabling a User Account

Activating a User

User Search Results

User search results display a list of users meeting the search criteria on the Users page. If no criteria were entered, a list of all the users in the system is returned. The initial list is sorted in ascending order of users' last names. All columns in the search results are sortable. Both last 2 statements true?

- To view details for a filtered result, click the hypertext link in the **User** column.
- To send an email to the user, click the corresponding email address.
- If the appropriate user is not found in the search, you as an Admin User can create a new user by clicking the **Add a New User** button 

in the upper right corner of the page. For more information, see *Creating a New User Account* on page 33.

Searching for a User

Viewing User Details

Disabling a User Account

Activating a User

Viewing User Details

From a list of users on the User page, a logged in Admin User can view any user details. To do so, click the hypertext link in the **User** column, as described in the *User Search Results*.

The User Details page displays user information in read-only format (*Figure 3.3*).

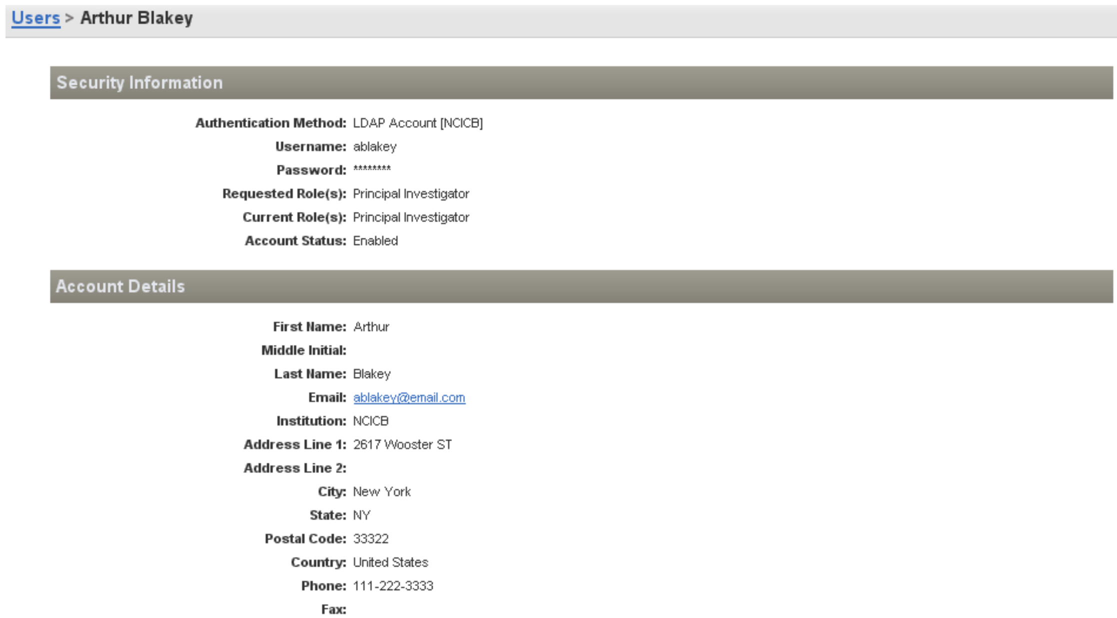


Figure 3.3 User details page

7. Click the **Back** key in your browser to close the page.

Searching for a User

User Search Results

Activating a UserRequesting an Account Through NCICB Application Support

Creating a New User Account

Disabling a User Account

Activating a UserRequesting an Account Through NCICB Application Support

Viewing User Details

Activating a UserRequesting an Account Through NCICB Application Support

Disabling a User Account

Activating a User

Requesting an Account Through NCICB Application Support

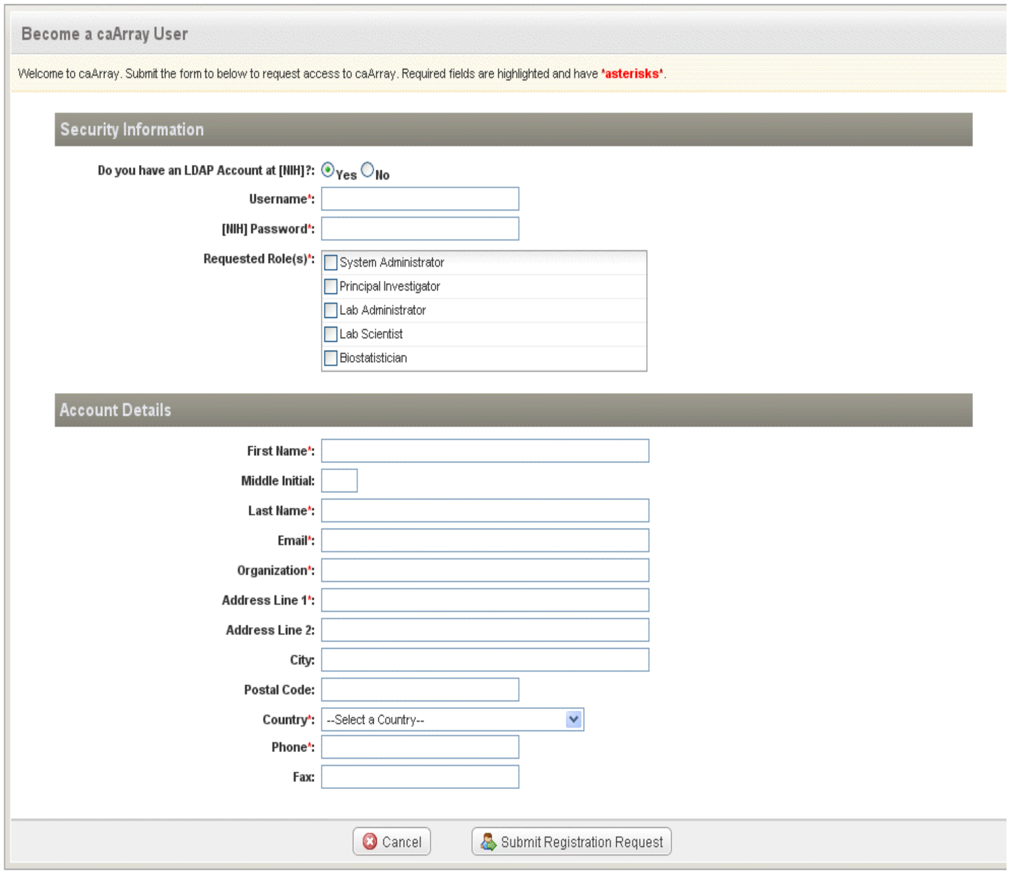
Is this still possible in 2.0? To request a caArray user account from NCICB Application Support, complete one of the following steps:

1. Contact NCICB Application Support:
    - NCICB@pop.nci.nih.gov
    - Phone at 888-478-4423 (toll-free) or 301-451-4384 (local)

OR

2. Go to the NCICB caArray login page https://caarraydb.nci.nih.gov/caarray/ and click the **Register** button. Enter the requested information, as displayed in

Figure 3.4 and itemized as follows below the figure. Follow the screen prompts to complete the registration.


Become a caArray User

Welcome to caArray. Submit the form to below to request access to caArray. Required fields are highlighted and have *asterisks*.

Security Information

Do you have an LDAP Account at [NIH]?: Yes No

Username*:

[NIH] Password*:

Requested Role(s)*: System Administrator, Principal Investigator, Lab Administrator, Lab Scientist, Biostatistician

Account Details

First Name*:

Middle Initial:

Last Name*:

Email*:

Organization*:

Address Line 1*:

Address Line 2:

City:

Postal Code:

Country*: --Select a Country--

Phone*:

Fax:

Cancel | Submit Registration Request

Figure 3.4 User account registry form

3. You must provide the following information in order to obtain a caArray account[3]:

- *Institution
- *First and Last Names
- *Complete Address, including country
- *Telephone number
- *Email address

Disabling a User Account

An Admin User can disable a caArray user account. This does not remove the underlying record, but after performing this task, the user account status will display on the Modify User Details page as disabled. true??

To disable a user, follow these steps:

1. Perform a search to locate the user. For more information, see *Searching for a User* on page 32.

3. Items with an asterisk are required fields.

2. Click the user name link in the search results to open the User Details page.
3. Click the **Edit** button (Edit) in the lower page center to open the User Details page.
4. Click the **Disabled** button next to **Account Status**.
5. Click **Save**. Upon a successful save, the user account is disabled immediately.

Searching for a User

User Search Results

Viewing User Details

Activating a UserRequesting an Account Through NCICB Application Support

Creating a New User Account

Activating a User

Activating a User

An Admin User can activate a caArray user account. The user account is noted on the Modify User Details page as **Active**.

To activate a user, follow these steps:

1. Perform a search to locate the user. For more information, see *Searching for a User* on page 32.
2. Click the user name link in the search results to open the User Details page.
3. Click the **Edit** button (Edit) to open the User details page.
4. Click the **Enabled** button next to Account Status.
5. Click **Save**. Upon a successful save, the user account is immediately activated, indicated on the User Details page by ???.

Managing Collaboration Groups

A registered user any?? or just Admin?? in caArray, can create, edit and delete collaboration groups and the users within them. This set of users ("collaborators") can then be given access by a Data Owner (define i.e. the user who created the object, project, samples, etc??) to a project, set of projects or particular samples and their underlying array data. To be assigned to a collaboration group, a user must have a caArray user account.

Note: The options for performing collaboration group management tasks are visible in caArray only if you have these Admin privileges. Is this still true??

Move somewhere else: A good rule of thumb to follow is if you can see an **Edit** button or **Delete** option, then you can modify or delete an object. If you cannot see those options, then you cannot edit or delete the object. Is this true in 2.0??

Note: To add a collaborator (user) to a group, the user must have a valid caArray user account.

Managing a Group

Group Search Results

Creating a Group

Viewing Group Details

Managing a Group

Creating a Group

A group can be created as a response to a request submitted to the NCICB Application Support (ncicb@pop.nci.nih.gov) or by an Admin User.

If you are an Admin User, before creating a new group in caArray, you should perform a search to ascertain whether the group already exists. For more information, see *Managing a Group* on page 38. Still true in 2.0??

To create a group, as an **Admin User** follow these steps:

1. Click the **Manage Collaboration Groups** option on the left sidebar.
2. On the Manage Collaboration Groups page, click the **Add a New Collaboration Group** button (Add a New Collaboration Group) in the upper right corner of the page.
3. On the Add Group Member page, enter the **Group Name** in the appropriate text box.
4. Scroll through the list of all valid caArray users below the text boxes.

   or

5. Perform a search for users using the filter option. Enter the user's last name, and/or select the role category the user may assigned, or the user's institution. You can also select the status of the user, with an enabled or a disabled account.
6. For each member to be added to the group, click the **Add** icon (in the far right column of the screen.
7. Click the **Save** button to save the group information. or click **Cancel** to abandon creation of the group.
8. Confirm the organization of the collaboration group and click What?? to confirm.

caArray saves the group and lists all of the registered users by name, organization and email address. Upon a successful save, does a Group Details page display? does this reopen the Group Search screen by default?*Managing a Group*

Group Search Results

Viewing Group Details

Modifying Collaboration Group Details

Creating a Group

Managing a Group

Searching for a Group

Could see no way to launch such a search in 11/21 tag.

This search feature is a part of User Management, accessible only to Admin Users.

To ascertain whether a particular collaboration group already exists in caArray, follow these steps:

1. Click the **Manage Collaboration Groups** option on the left sidebar, under **Users & Groups**.
2. On the Collaboration Groups page that opens (*Figure 3.5*), click the hypertext link, **Filter (Narrow) this List**.
3. In the new section of the page that opens, enter the name of the group for which you are searching, the group owner's last name or a group member's last name.

   Note: The search is case insensitive; wild cards are always implied on both sides of the query string. True?

4. Click the **Filter** button (

).

Figure 3.5 Search Results display on the same page as the Search Groups form

Search results display on the same page. Anything else I should add about how they display? For more information see *Group Search Results*. If you do not locate the group you want, you can click the **Add a New Collaboration Group** hyperlink on the upper right corner of the page to create a new group.

Group Search Results

Viewing Group Details

Creating a Group

Managing a Group

Group Search Results

Group search results display below the Search Groups form, displaying a list of groups meeting the filter criteria (*Figure 3.5*). Anything else I should add about how they display?If no criteria were entered, a list of all the groups in the system is returned. The initial list is sorted in ascending order of group names. Columns are sortable.

To view details for a search hit, click the hypertext link in the **User Name** or **Login Name** columns corresponding to the result.

If the appropriate group is not found in the search, you as an Admin User can create a new group by clicking the **New Group** link on the left navigation sidebar. For more information, see *Creating a Group* on page 37.

Managing a Group

Viewing Group Details

Managing a Group

Viewing Group Details

From a list of groups on the Collaboration Groups page, as a logged in Admin User, you can view the group details. To do so, click the hypertext link corresponding to the group. The group details lists all collaborators in the group, along with their corresponding Institution and email address.

The group details page displays group information in read-only format. You can however, launch an email to a collaborator by clicking the email address.

Click **....?? (use back arrow??)** to close the page. Click the **Edit** button (

) to open the page with edit features.

Managing a Group

Group Search Results

Creating a Group

Modifying Collaboration Group Details

Managing a Group

Modifying Collaboration Group Details

To modify collaboration group details, follow these steps:

1. From the Manage Collaboration Groups page, click the hypertext link corresponding to the group you select.
2. On the details page for the group, click the **Edit** button (

). t
3. The page that opens lists group members, their institution and email address. On this page, as an Admin User, you can perform the following edits:
   - Edit the Group Name. (A Group Name should be unique within the system.)
   - View users within the group.
   - Add or delete group members.
   - View user details using the hypertext link corresponding to a user in the group.
   - Delete the group.

4. To perform these edits, do the following: I may change this format later. Please check for accuracy though.

Edit the group name	Enter new name in the Group Name text box. **Note:** The new member must already have a valid caArray user account.
Add a new group member	**Note:** The new member must already have a valid caArray user account. Click the **Add a New Group** Member button at the top right of the page. In the new section of the page that opens, you can search for the group member using one or more criteria. true?? Enter the last name, select the Role category, the Institution, and the Status to be searched. Click the Filter button.
Remove a group member	On the Collaboration Group page, in the **Remove** column, click the icon ( ) that corresponds to the group member.
Review group member details	Click the name of the group member. The page that opens displays security and user account information about the group member, but this is not editable. To edit *individual* user details, you must return to the Manage Users feature. (See *Editing User Accounts by an Administrator* on page 31)
Delete the group	To delete the entire Collaboration Group, click the **Delete** button (Delete) at the bottom center of the page.

Managing a Group

Group Search Results

Creating a Group

Viewing Group Details

Managing a Group