CHAPTER 3

USER ACCOUNT MANAGEMENT

This chapter 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 User Management tab that displays upon login, only if you have these Admin privileges. true?

Topics in this chapter 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.

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***
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	Owns experiments and studies and/or projects	Submit data
Lab Administrator	Manages laboratory operations	Interacts with submitting investigators, assigns work, runs laboratory management reports.
Lab Scientist	Primary handler of laboratory samples	Runs experiments, collaborates with statisticians. Documents all activities.
Biostatistician	A user who is responsibile for statistical analysis of project data. who submits data	Review of experiment designs Submission of quality control metadata Upload of normalized data Annotation of parameters used

Table 3.1

Please modify these desriptions as appropriate for the context of this manual. (I took the descriptions from your document. It seems to me there is overlap and lack of clear distinctions)

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 user 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

A person who wants to be caArray user can request a user account through NCICB Application Support (see *Requesting an Account Through NCICB Application Support* on page 32). A new user can also be added by a caArray user with Admin privileges. This section covers creating a new user by as Admin user.

If you are an Admin User, before creating a new user account in caArray, you should perform a search to ascertain whether the user already has an account. Is this true in 2.0?? Or just review names in user account table? For more information, see *Searching for a User* on page 30.

Creating a New User

It is advisable, before creating a new user account in caArray, to perform a search to ascertain whether the user already has an account. 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.

   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 29.
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*).

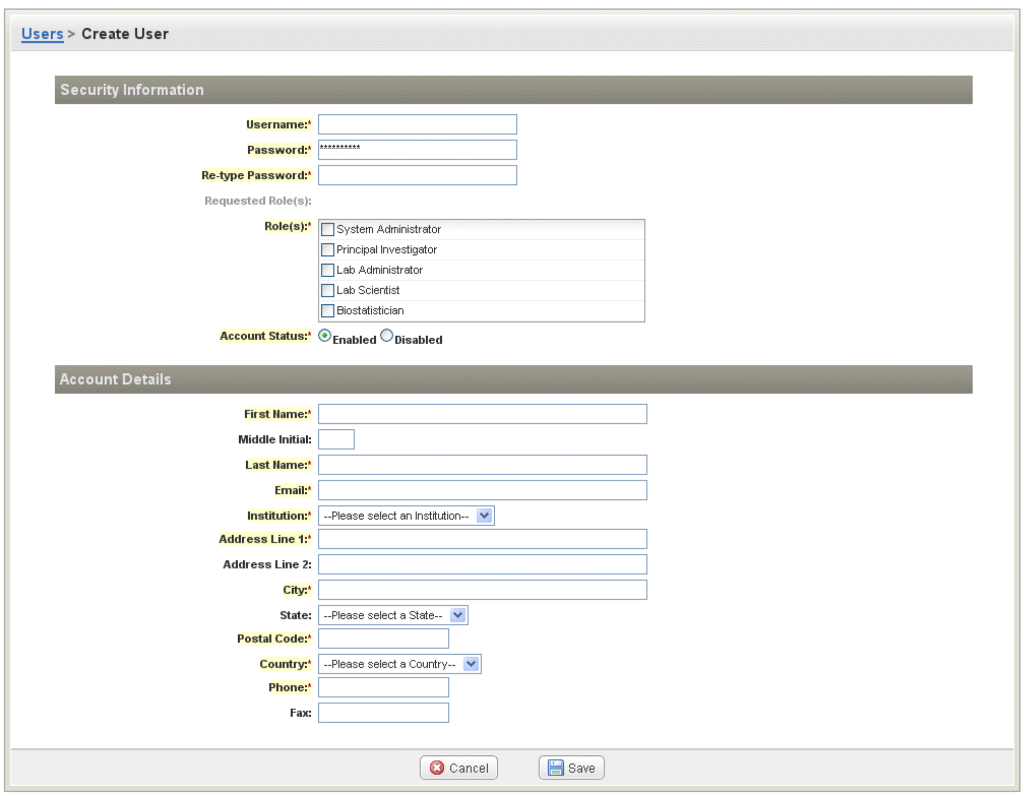

Figure 3.1 New user account registration form for an Admin User

4. In the Create User form, enter the appropriate information[1].

1. Items with an asterisk are required.

- Security Information--as an admin, can bypass this section, if they wish?
  - — If the proposed new user has an NCI LDAP[2] Account, you can choose to enter the username and password into this section of the registration form for the purposes of verifying that it is correct. If validated, the user is granted limited access to the application immediately as a "caArray User"; this will still require confirmation from the NCICB support team.
  - — Local installers can also choose their own LDAP to support authentication – with the appropriate installation team to support those requests directly. What does the last sentence fragment mean? Jill, add, cross ref: For more information, see ????. Does this description change for Admin users
  - — Username Would an Admin have username and password info for another user for whom account is being requested?
  - — Password

Note: The Password and Confirm Password fields are displayed only when the database is being used for authentication. If LDAP authentication is in use, these fields are not displayed and hence, are not required.

  - — Requested role(s). Default for a new user is ???. If you assign either **Lab Scientist**, **Biostatician**, or **Lab Administrator**, caArray displays an additional field for choosing the **Core Facility** or **Lab** of the Institutional Affiliation of the new User. When does this display? After new user form is submitted? The role assigned to the user determines access to restricted features. For more information about Roles in caArray, see ssss.
  - — Account Status--check **Enabled** box for the new user. This activates the user account.
- Account Details
  - — First Name*
  - — Middle Initial
  - — Last Name*
  - — Email [address]*
  - — Institution*--Select from the drop-down list, or click Add New to add a new organization. In the New Institution text box that displays, enter the institution title. Click Cancel to hide the text box without entering the information.
  - — Address [Lines 1* and 2}
  - — City*
  - — State
  - — Postal [or Zip] Codel*
  - — Country*

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2. (Lightweight Directory Access Protocol--see *Appendix B* Glossary)

— Phone*

— Fax

5. 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 SA 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?? 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 (Edit) 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.

   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

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

(Do you want me to use the word "filter" instead of "search"?) I vote for still using the word search at least some of the time.

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 3.2*), displays all valid caArray users by Last Name, Organization, and email address.

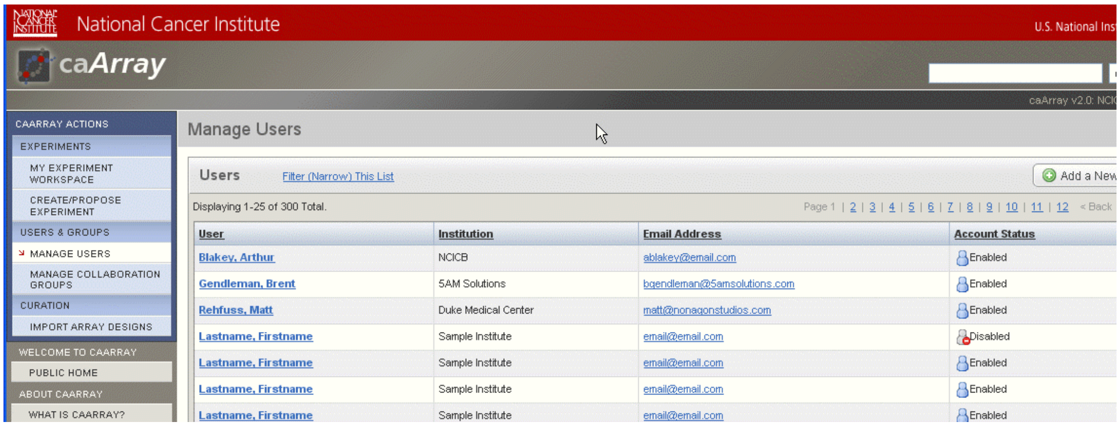

Figure 3.2 Users page

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.

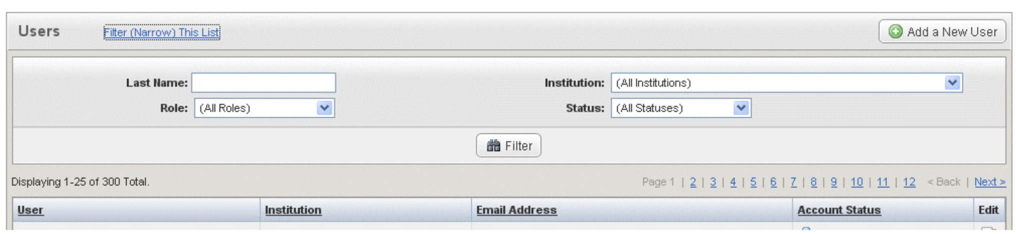

Figure 3.3 Filter users section of the Users page

5. In the new section of the page that opens (*Figure 3.3*), 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. 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

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.

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.

The User Details page displays user information in read-only format (*Figure 3.4*).

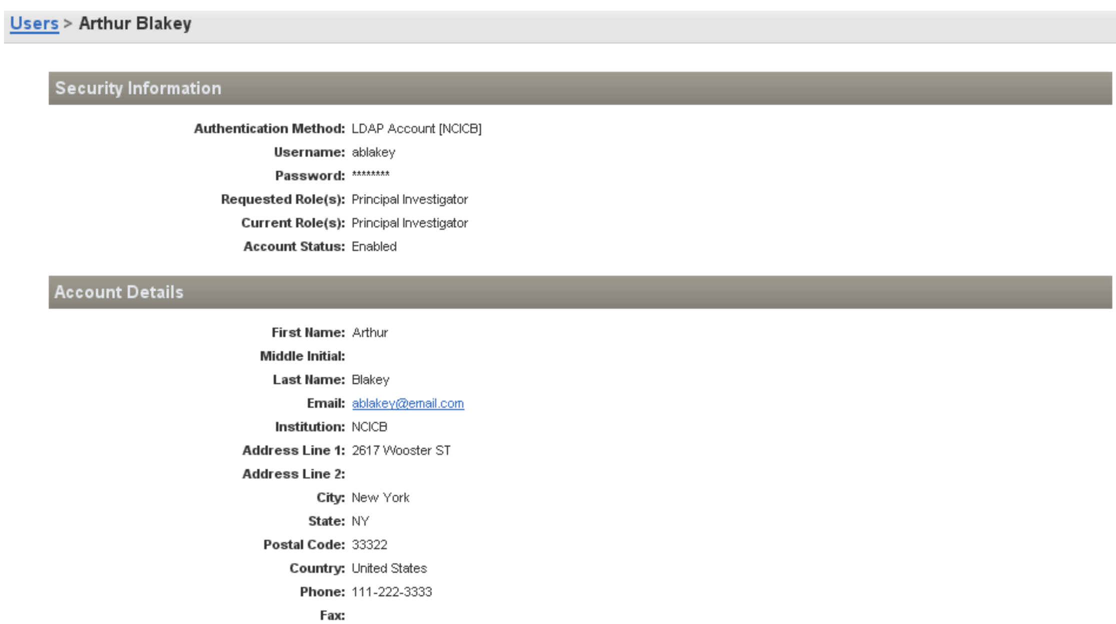

Figure 3.4 User details page

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

Requesting an Account Through NCICB Application Support

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 3.5* and itemized below the figure. Follow the screen prompts to complete the registration.

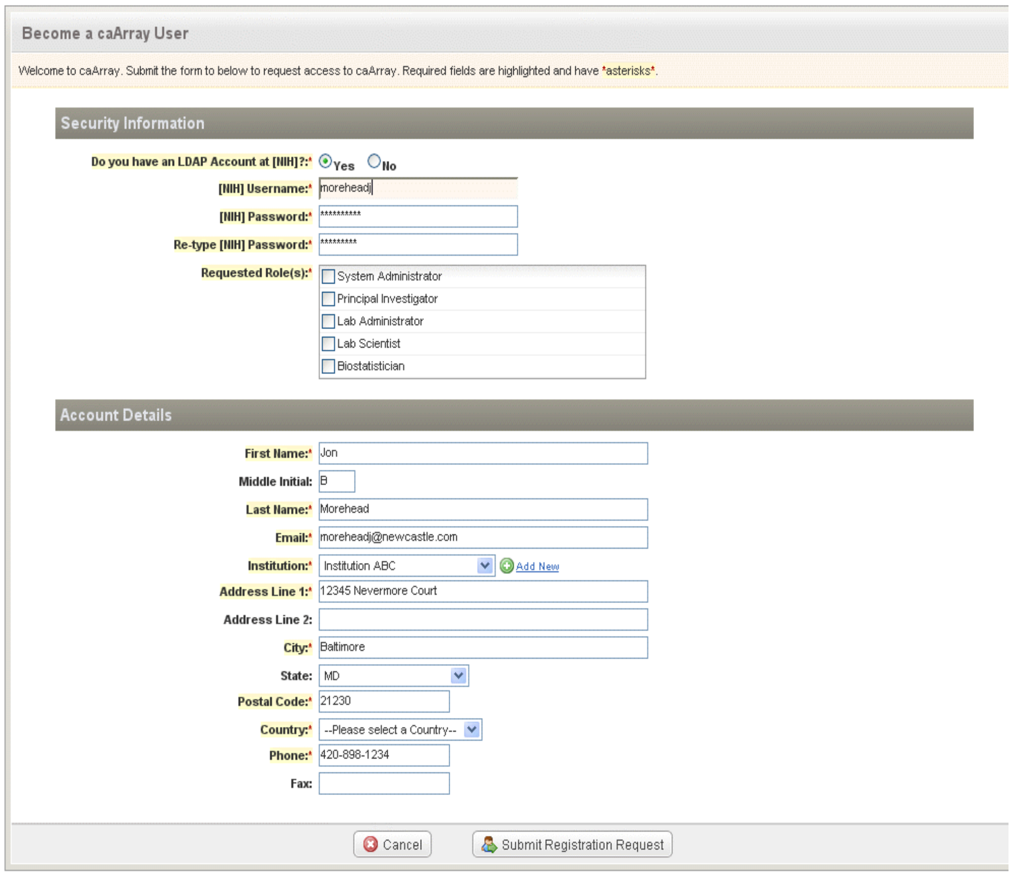

Figure 3.5 User account registry form

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

3. Items with an asterisk are required fields.

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 30.
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.

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 30.
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.

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 *Searching for a Group* on page 36. 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?

Searching for a Group

(Do you want me to use the word "filter" instead of "search"?)

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 3.6*), 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 (Filter).

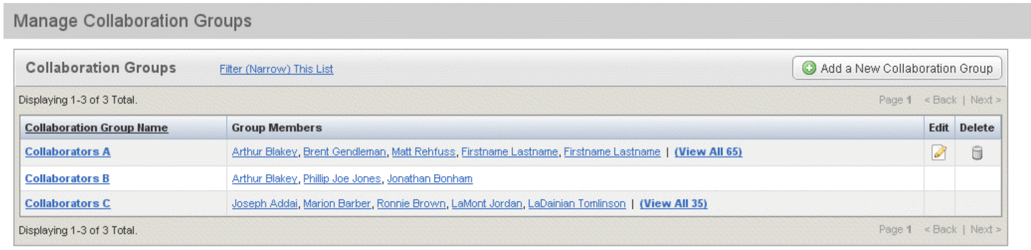

Figure 3.6 Search Results display on the same page as the Search Groups form

Filter results display on the same page. Anything else I should add about how they display? 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

Group search results display below the Search Groups form, displaying a list of groups meeting the filter criteria (*Figure 3.6*). 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.

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 (Edit) to open the page with edit features.

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 (Edit). 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 29)
Delete the group	To delete the entire Collaboration Group, click the **Delete** button ( ) at the bottom center of the page.

Managing Access to caArray Data

This section is from previous user's guide. Don't know if this still applies or not.

Requesting Access to caArray Records

Much of the information provided by others is proprietary, and not yet public. The owner of private data determines who has access to proprietary data.

To request access to caArray records submitted or "owned" by existing caArray Contacts, whether persons or organizations, you must contact NCICB Application Support, ncicb@pop.nci.nih.gov. In your contact email, you must include the following information:

- Your name
- Your email address
- Name of the owner of the information you wish to access (person or organization)
- The specific information you wish to access, indicated by accession numbers or other unique identifying information available in the caArray records.
- A concise but complete statement of the reason you wish to be granted access to this information.

Granting Others Access to Your Work

You can choose to grant others access to your work so that they can review your experiments, compare experimental design, compare results, etc. To assign access to others, you must contact *NCICB Application Support*. In your contact email, you need to include all of the following information:

- Your name
- Your email address
- Your telephone number
- The name(s) of the person or persons, and/or the organization or organizations, to which you wish to grant access and the name of the group with which the new users should be associated
- The contact telephone numbers and email addresses for all persons and organizations to be granted access
- The level of access that you wish to grant to each person/group (**Read only**, **Read and Modify**).

Note: If only certain records are to be accessed, this must be explicitly indicated by accession numbers or other unique information that is part of the caArray records or class of records in question.

Visibility

In caArray, the term "visibility" is used to describe the access to objects granted to logged in users. Table *3.2* describes visibility options and their interpretation.

Note: When specifying visibility, to make multiple selections, press the CTRL key and click on all items you want to select.To deselect a visibility option, press CTRL + click on the item.

Term	***Definition***
Public	Anyone can view all records, with **Read-0nly** access.

Table 3.2 caArray visibility and permission settings

Term	Definition
Private	Can be viewed only by submitter (“owner”) of object. **Private** is assigned by default if no other **Visibility** option(s) are selected when an object is created.
Public + Group	Anyone can view all records, with **Read-0nly** access. Modify privileges are assigned to members of the specified group(s) who are assigned “Curation” privileges. **Note:** The advantage to assigning a group access to data that is already Public, is in being able to isolate objects with that group’s visibilty. For example, the user (with appropriate visibility) could locate from the Public objects, all Experiments tagged with the group’s visibility.
Read-Only	Permission only to view records created by other persons or organizations
Delete	Permission to delete records created by other persons or organizations
Read/Modify	Permission to view and/or modify records created by other persons or organizations

Table 3.2 caArray visibility and permission settings (Continued)

The visibility of items is relevant when a user performs a search. In the list of search results only items are displayed which are "visible" for the user who performed the search.