

Account Module



Agenda

Introduction to Account module

Capabilities of Account module

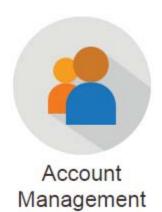
Demonstration of Account module

Account module exercises



Introduction

Account Module Functions and Permissions



- Update your profile
- Change your password
- Upload documentation
- Request privileges



Account module capabilities

As a non-admin Account module user, you can:

- View your own user profile and privileges
- Update your own information (e.g., email, address, password)
- Upload supporting documentation (e.g, data submission request, data access request)
- Request additional privileges

As an admin Account module user, you can do all of the above, plus:

- View a list of all accounts in the system
- View a list of all account groups in the system
- View a list of current accounts/users in the system
- Reset a password for a user
- Deactivate a user
- Create an account for a new user
- Create an account group



<Account Module Demonstration>



Change your password

- 1. Click "Change Password" from the "Account Management" section.
- 2. Enter your current password.
- 3. Enter a new password.
- 4. Retype the new password.
- 5. Click "change password".

Note that passwords:

- Are case sensitive
- •Must contain three different kinds of characters: a capital letter, a lowercase letter, numbers and/or special characters.



Reset a user's password (admin)

- 1. Click "Account List" from the "Account Admin" section.
- Search and select the user name you wish to reset the account password for.
- 3. Click the "Reset Password" link under the "Account Information" heading.
- 4. An email will be sent to the user's email address on file with instructions on how to change their password.



Request additional privileges

- 1. Click "Request Additional Privileges" from the "Account Management" section.
- 2. Under the "Request Additional Privileges" heading, select the permissions you would like to request.
- 3. Under the "Specific Permissions Groups" heading, select the permission groups you would like to request (if available).
- 4. Click the "Request Privileges" button.



Approve new account/privileges requests (admin)

- 1. Click "Account List" under "Account Admin" in the left navigation.
- 2. Select "Status: Requested" from the drop down menu to view accounts awaiting approval requests for additional privileges.
- 3. Click on the desired user. The "Account Request" page will display.
- 4. View the "Requested System Privileges" table.
- 5. Use the radio buttons to approve/deny privileges and enter expiration date if needed.



View all accounts (admin)

1. Click "Account List" under "Account Admin" in the left navigation.



Create a new user account (admin)

- 1. Click "Create User" under "Account Admin" in the left navigation.
- 2. Fill out all fields and click "create" button at the bottom.



Create a new account group (admin)

- 1. Click "Create Account Group" under "Account Admin" in the left navigation.
- 2. Fill out required fields and click "create" button at the bottom.

Account Groups:

•Use to create groups of users that you want to add to a study, draft form structure, datasets, and eForms.



Deactivate/reactivate a user (admin)

- 1. Click "Account List" under "Account Admin" in the left navigation.
- 2. Click on user you want to deactivate/reactivate or use search box to search by account name.
- 3. Click the "deactivate" button. A pop-up window will ask if you are sure you want to deactivate the user.

*If deactivated and you wish to reactivate the user, the "deactivate" button in step 3 will change to a "reactivate" button.



<Account Module Exercises>



Account Module Exercises

- 1. Create a new account for yourself.
- 2. Change your password.
- 3. Request additional privileges.

