Account Module

Agenda

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Introduction

Account Module Functions and Permissions

Account
Management

- 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.
2. 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.