



2

# BRICS USER GUIDE

## Account Management



# CHAPTER 2 - ACCOUNT MANAGEMENT

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**T**he Account Management module provides tools for managing individual user accounts, profiles, privileges, roles, and passwords. The module also provides access to the Order Management tool that is designed to help researchers create and/or manage Bio Sample orders.

## 2.1 Account Management Features

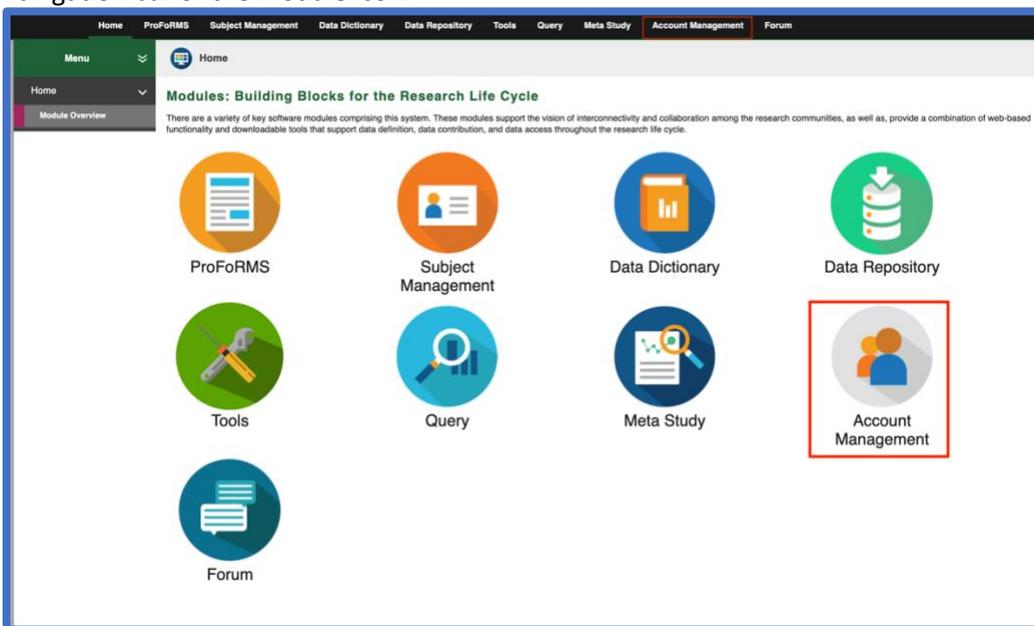
- View My Profile
- Edit My Profile
- Upload Documentation
- Request Additional Privileges

## 2.2 Module Navigation

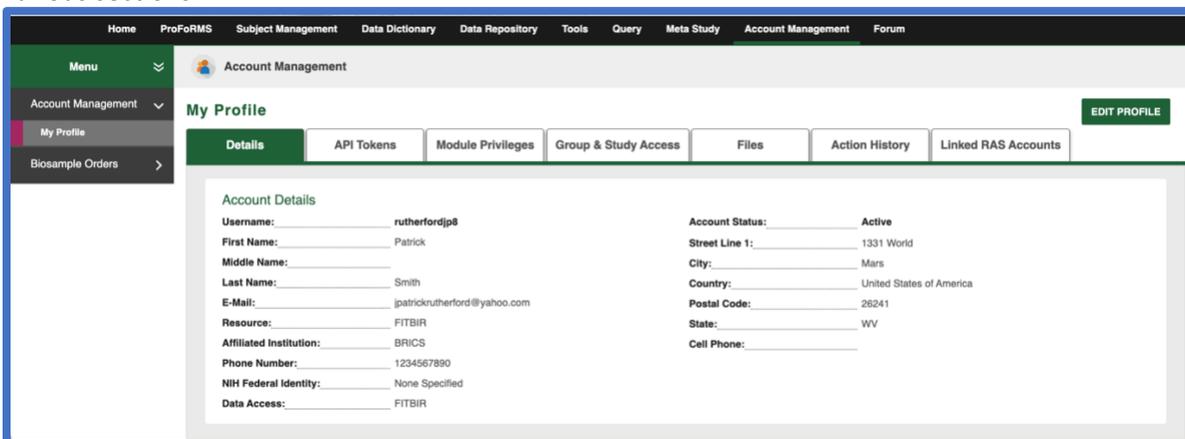
The Account Administration tools (including study administration) are available within the Account Management module.

To access the Account Management module, perform the following actions:

1. Log into your BRICS instance and select the Account Management module from either the top navigation bar or the module icon.

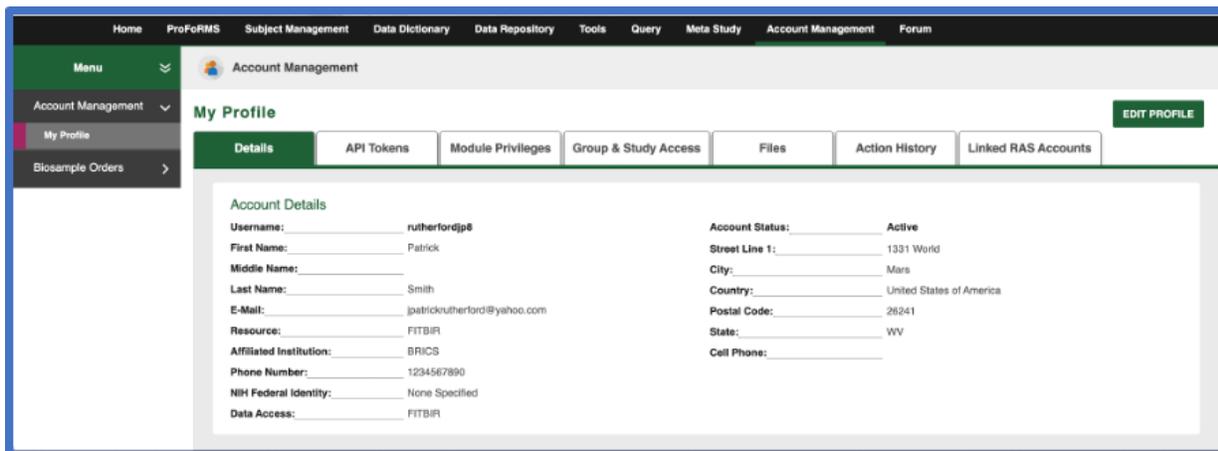


2. Here's the **Account Management's My Profile** page. Use the tabs to navigate through the various sections.



## 2.3 View My Profile

1. Open the **Account Management** module.
2. The My Profile page will display:



Account Management

**My Profile** [EDIT PROFILE](#)

Details | API Tokens | Module Privileges | Group & Study Access | Files | Action History | Linked RAS Accounts

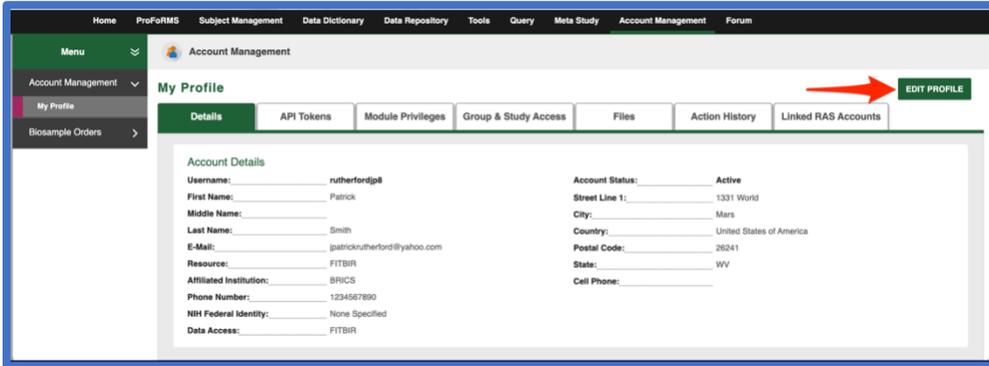
**Account Details**

<b>Username:</b> rutherfordjp8	<b>Account Status:</b> Active
<b>First Name:</b> Patrick	<b>Street Line 1:</b> 1331 World
<b>Middle Name:</b>	<b>City:</b> Mars
<b>Last Name:</b> Smith	<b>Country:</b> United States of America
<b>E-Mail:</b> jpatrickrutherford@yahoo.com	<b>Postal Code:</b> 26241
<b>Resource:</b> FITBIR	<b>State:</b> WV
<b>Affiliated Institution:</b> BRICS	<b>Cell Phone:</b>
<b>Phone Number:</b> 1234567890	
<b>NIH Federal Identity:</b> None Specified	
<b>Data Access:</b> FITBIR	

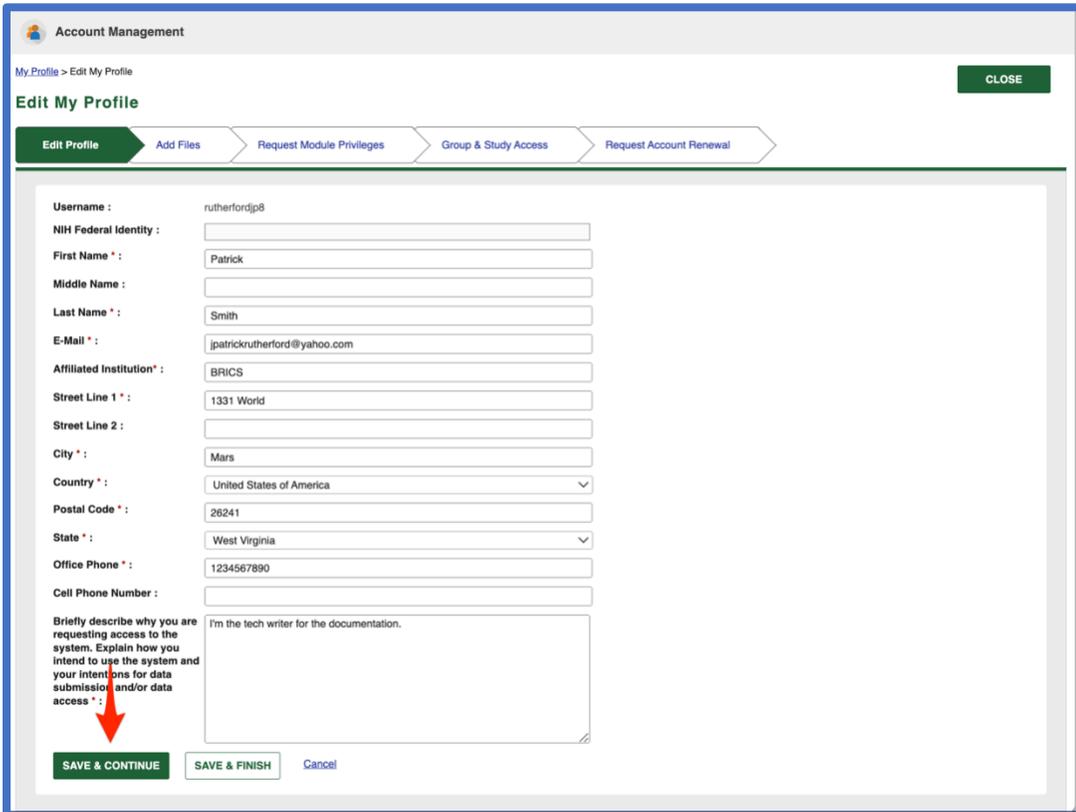
## 2.4 Edit My Profile

When logged into the system, a user's account profile can be changed using the **Edit My Profile** option. To edit your profile, perform the following actions:

1. Log in to the system.
2. Navigate to the Account Management module.
3. Click on the **Edit Profile** button at the top right to display the Edit My Profile page.



4. Enter the profile information you wish to edit including any contact information. Then click the **Save and Continue** button.



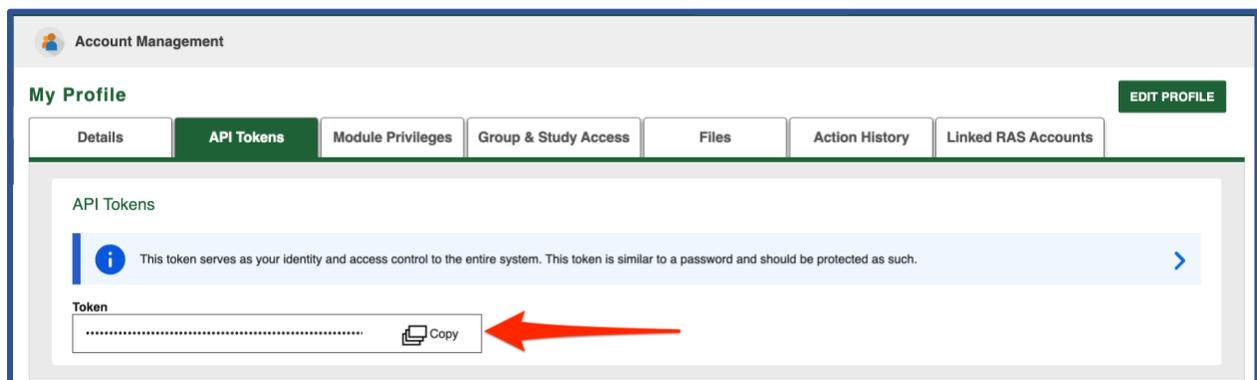
The screenshot shows the 'Edit My Profile' form. The form contains various input fields for user information, including Username, NIH Federal Identity, First Name, Middle Name, Last Name, E-Mail, Affiliated Institution, Street Line 1, Street Line 2, City, Country, Postal Code, State, Office Phone, and Cell Phone Number. A text area for a description is also present. A red arrow points to the 'SAVE & CONTINUE' button at the bottom left.

## 2.5 API Token

The API token serves as your identity and access control to the entire system. This token is like a password and should be protected as such. The token updates every ~30 minutes minimum, on every login, and every session update.

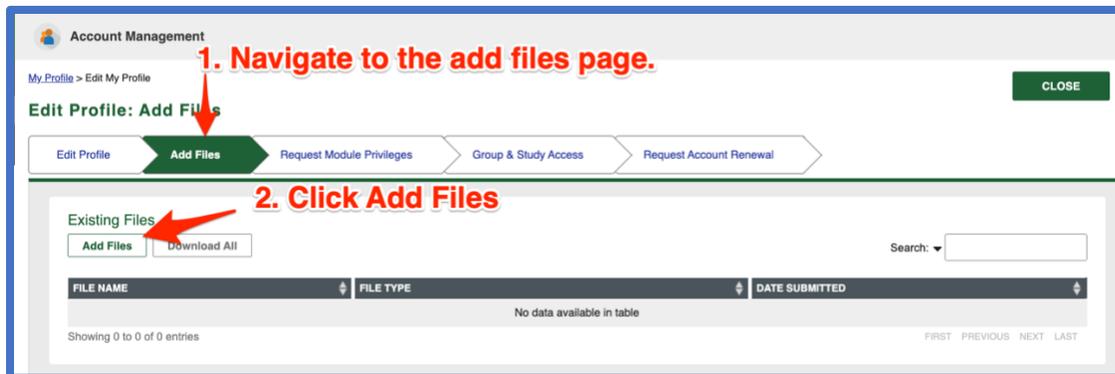
Previously the API token was retrieved by making a request to /auth/login with the user's username/password. However, this has now changed:

For users to retrieve/refresh the API token, they will need to log into BRICS and navigate to the Account Management module. The "My Profile" page will load, and the API token can be accessed from there.

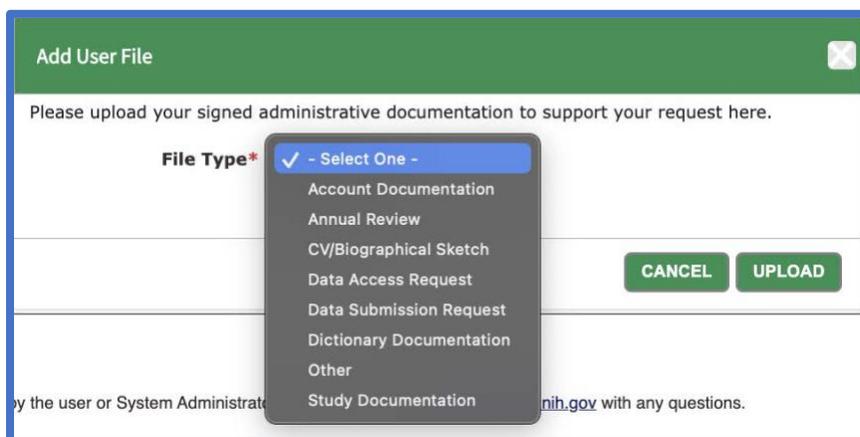


## 2.6 Upload Documentation

1. Navigate to the Account Management module. The My Profile page will open.
2. Select the **Edit Profile** button.
3. Click the **Save and Continue** button or the **Add Files** chevron.
4. Click on the **Add** button to upload more documentation.



5. Select the **File Type** from the drop-down menu.



- Click on the **Browse** button to select the documentation from the desired location on your computer and then click the **Upload** button to complete the document upload process. Users can add a version and expiration date for their document as well.

**Add User File**
✕

Please upload your signed administrative documentation to support your request here.

**File Type\*:** CV/Biographical Sketch

**Choose File** testData.txt

**Version :**

**Expiration Date :**

- Click the **Save and Finish** button:

Account Management
CLOSE

[My Profile](#) > [Edit My Profile](#)

Edit Profile
Add Files
Request Module Privileges
Group & Study Access
Request Account Renewal

**Existing Files**

FILE NAME	FILE TYPE	DATE SUBMITTED
Biographical Sketch.pdf	Annual Review <a href="#">Change File Type</a>	2024-06-25 <a href="#">Delete</a>

Showing 1 to 1 of 1 entries

**Electronic Signatures**

FILE NAME	COMPLETE DATE/TIME
<a href="#">rutherfordjp8_esig_2022-07-14.pdf</a>	2022-07-14 23:18

Showing 1 to 1 of 1 entries

**Administrative File Templates**

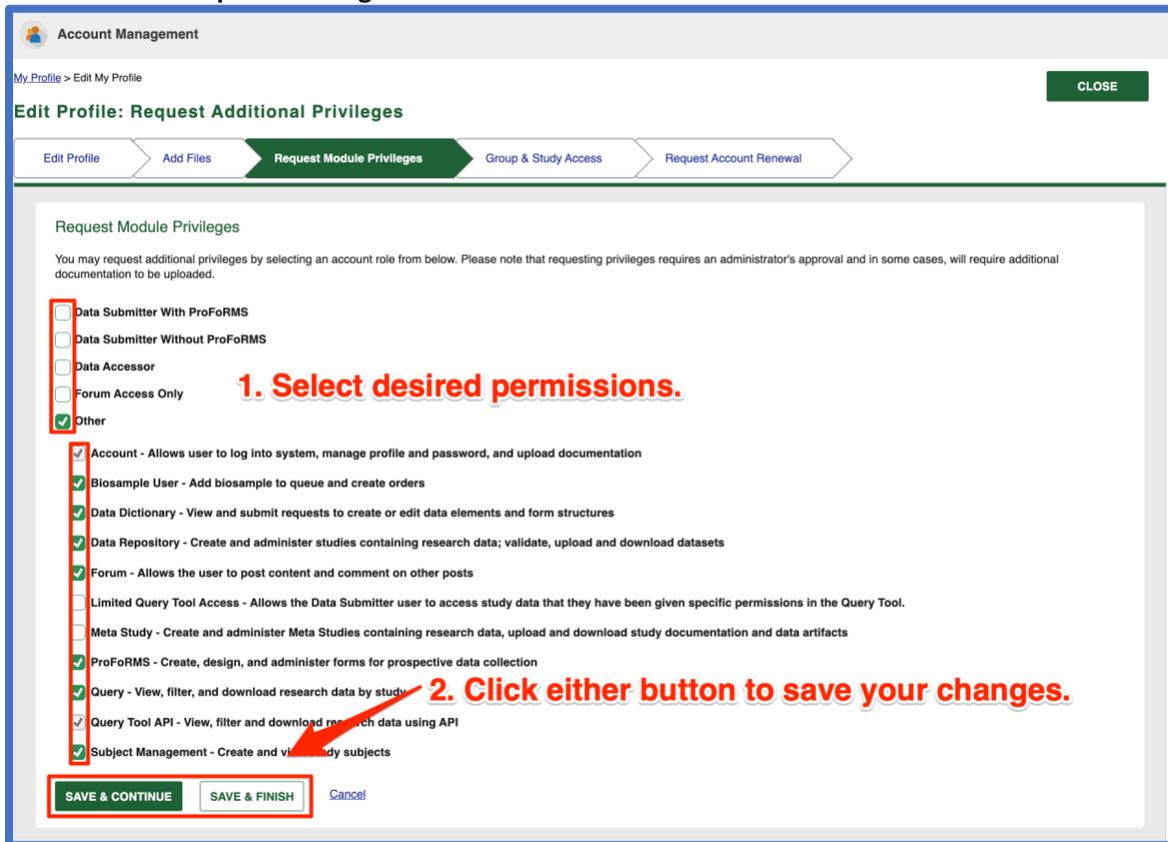
FILE TEMPLATE	PRIVILEGES ASSOCIATED	REQUIRED FOR ANNUAL RENEWAL
<a href="#">Biographical Sketch</a>	Required for Data Access Users (Data Dictionary, Data Repository, Query Tool, Meta Study)	Yes
<a href="#">Data Access Request</a>	Required for Data Access Users (Data Dictionary, Data Repository, Query Tool, Meta Study)	Yes
<a href="#">Data Submission Request</a>	Required for Data Submission Users (Data Dictionary, Data Repository, GUID, ProFoRMS)	Submission privileges are granted for one year intervals until the end of your study's period of performance. Please contact FITBIR Operations to request an extension of your privileges.

Showing 1 to 3 of 3 entries

Cancel

## 2.7 Request Additional Privileges

1. Navigate to the Account Management module.
2. Select the **Edit Profile** button.
3. Select the **Request Module Privileges** chevron.
4. Select the desired permission by clicking on the check box beside the specific privilege and then select **Request Privileges**.



Account Management

My Profile > Edit My Profile CLOSE

**Edit Profile: Request Additional Privileges**

[Edit Profile](#) > [Add Files](#) > **[Request Module Privileges](#)** > [Group & Study Access](#) > [Request Account Renewal](#)

**Request Module Privileges**

You may request additional privileges by selecting an account role from below. Please note that requesting privileges requires an administrator's approval and in some cases, will require additional documentation to be uploaded.

Data Submitter With ProFoRMS  
 Data Submitter Without ProFoRMS  
 Data Accessor  
 Forum Access Only  
 Other

**1. Select desired permissions.**

Account - Allows user to log into system, manage profile and password, and upload documentation  
 Biosample User - Add biosample to queue and create orders  
 Data Dictionary - View and submit requests to create or edit data elements and form structures  
 Data Repository - Create and administer studies containing research data; validate, upload and download datasets  
 Forum - Allows the user to post content and comment on other posts  
 Limited Query Tool Access - Allows the Data Submitter user to access study data that they have been given specific permissions in the Query Tool.  
 Meta Study - Create and administer Meta Studies containing research data, upload and download study documentation and data artifacts  
 ProFoRMS - Create, design, and administer forms for prospective data collection  
 Query - View, filter, and download research data by study  
 Query Tool API - View, filter and download research data using API  
 Subject Management - Create and view study subjects

[Cancel](#)

**2. Click either button to save your changes.**