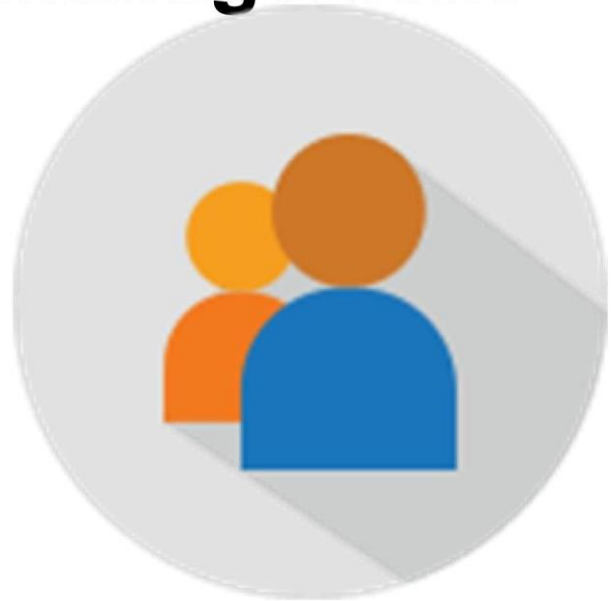# Account Management

CHAPTER 2 – ACCOUNT MANAGEMENT

The 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 BioSample orders.

2.1 OBJECTIVE

This chapter provides information for users on how to:

- ❖ Account Management: o View
  My Profile o Edit My Profile o
  Change Password o Upload
  Documentation o Request
  Additional Privileges
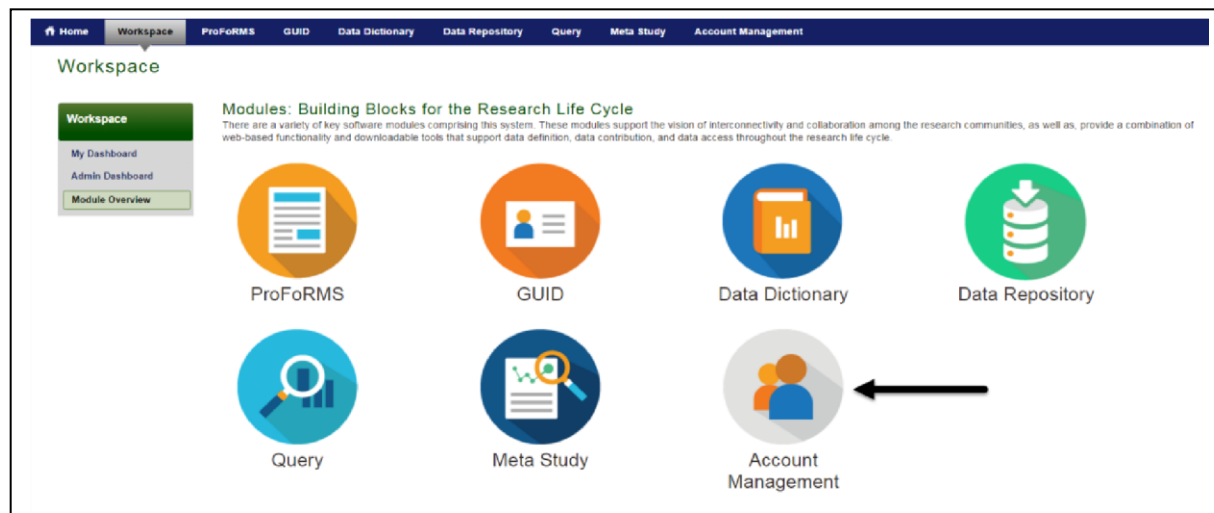
2.2 MODULE NAVIGATION

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

To access the **<u>Account Management</u>** module, perform the following actions:

1. Log in to the system.

2. Navigate to the **Workspace** landing page.

BRICS
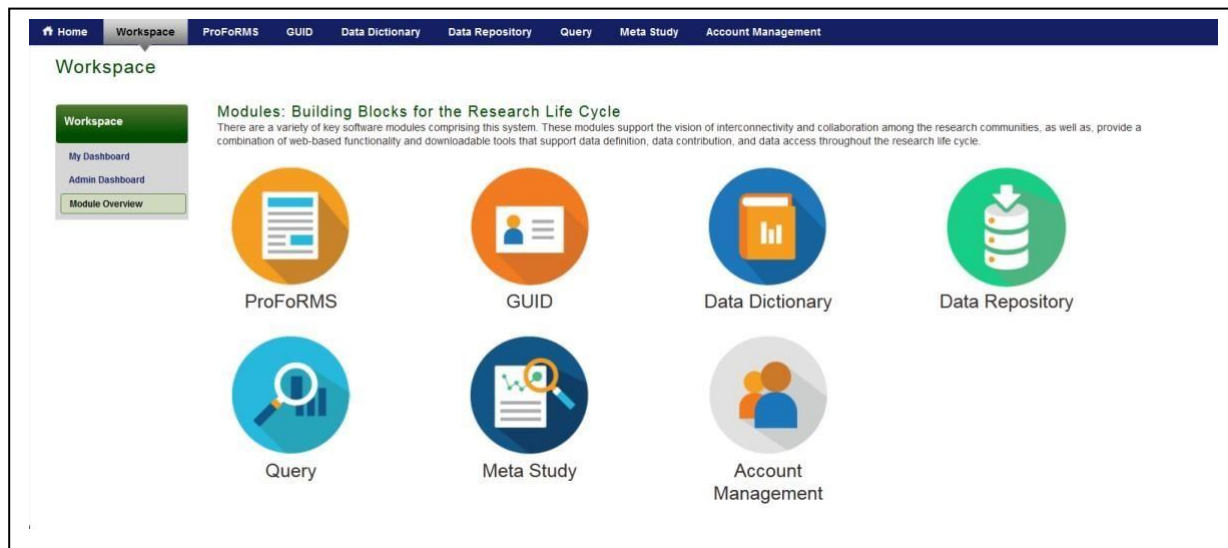
3. Click the **Account Management** module icon.

4. Click the **Account Management** menu using the left side menu to navigate through the sub-menus. With the **Account Privileges** available to all users, the following is displayed::

ICON KEY

📖 Notes

📁 Important
Information

Things to Note:

📁 Use the left side menu to navigate through the module.

2.3 ACCOUNT MANAGEMENT

The **Account Management** module houses the features to:

- ❖ View My Profile
- ❖ Edit My Profile
- ❖ Change Password
- ❖ Upload Documentation
- ❖ Request Additional Privileges

All BRICS users have access to the Account Management module; however, your role determines what you can and cannot do within the module.

2.3.1 View My Profile

When logged into the system, a user may access the My Profile page at any time.

To display **My Profile,** perform the following actions:

1. Log in to the system.

2. Navigate to the **Account Management** module from your **Workspace**.

3. Click on the **My Profile** link to display your Account Profil**e.**

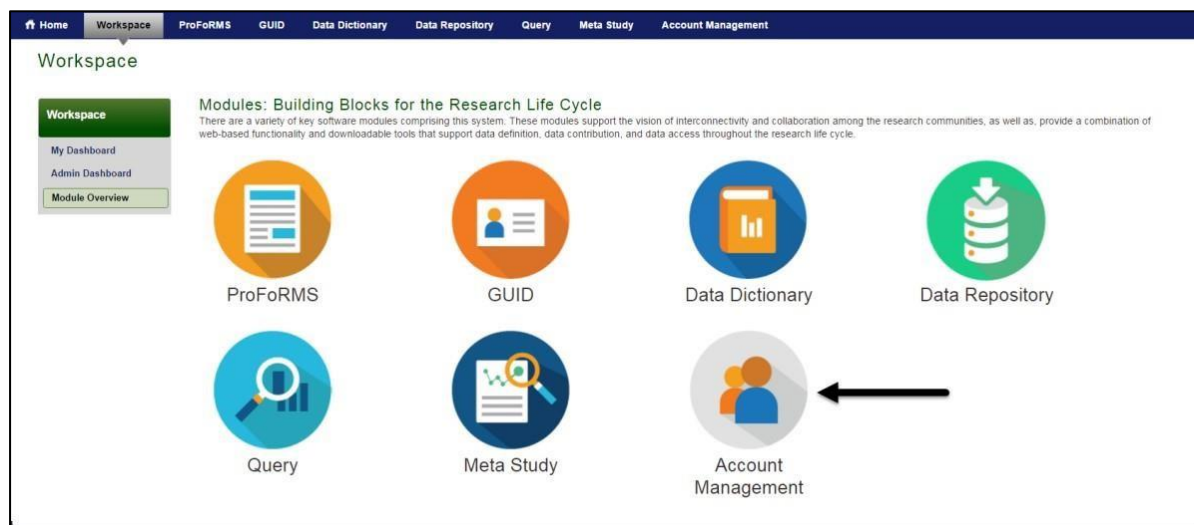**4.** The **My Profile** page displays as seen below.

2.3.2 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.
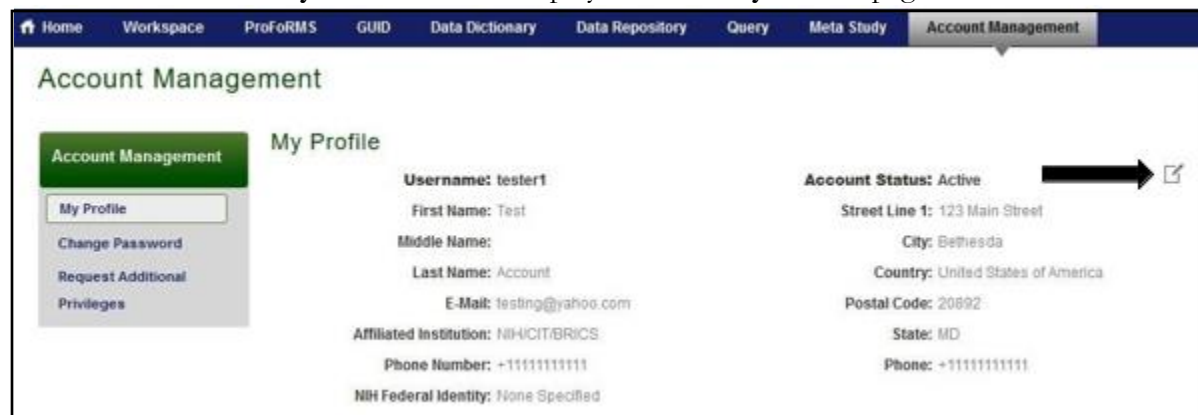2. Navigate to the **Workspace**.
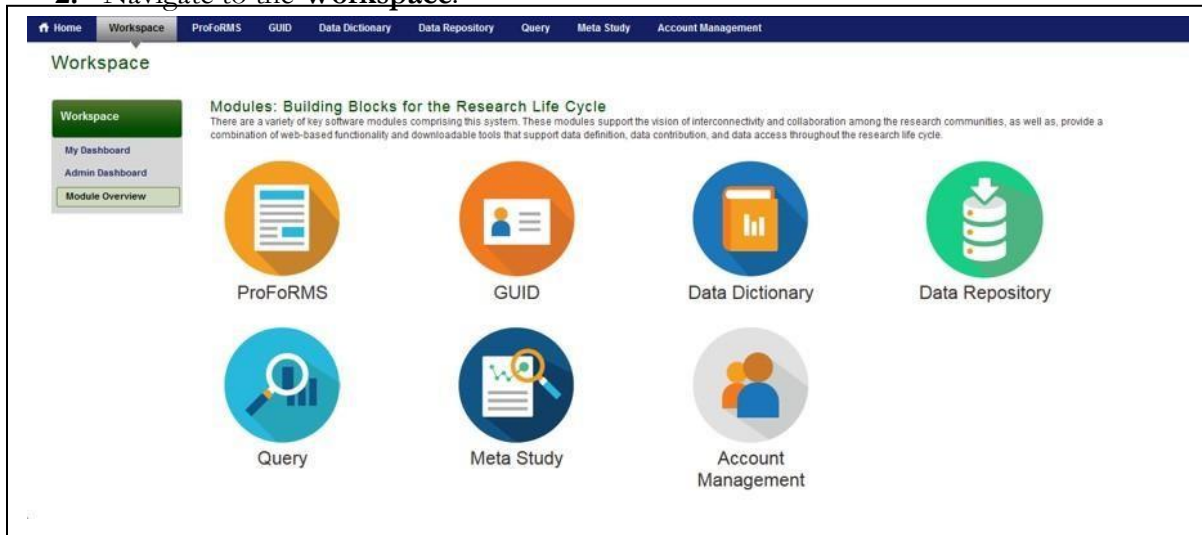
3. Select the **Account Management** module.

4. Click on the My Profile link.

5. Click on the **Edit My Profile** icon to display the **Edit My Profile** page.

6. Enter the profile information you wish to edit including any contact information as needed and click the **Update Profile** button to update your profile.
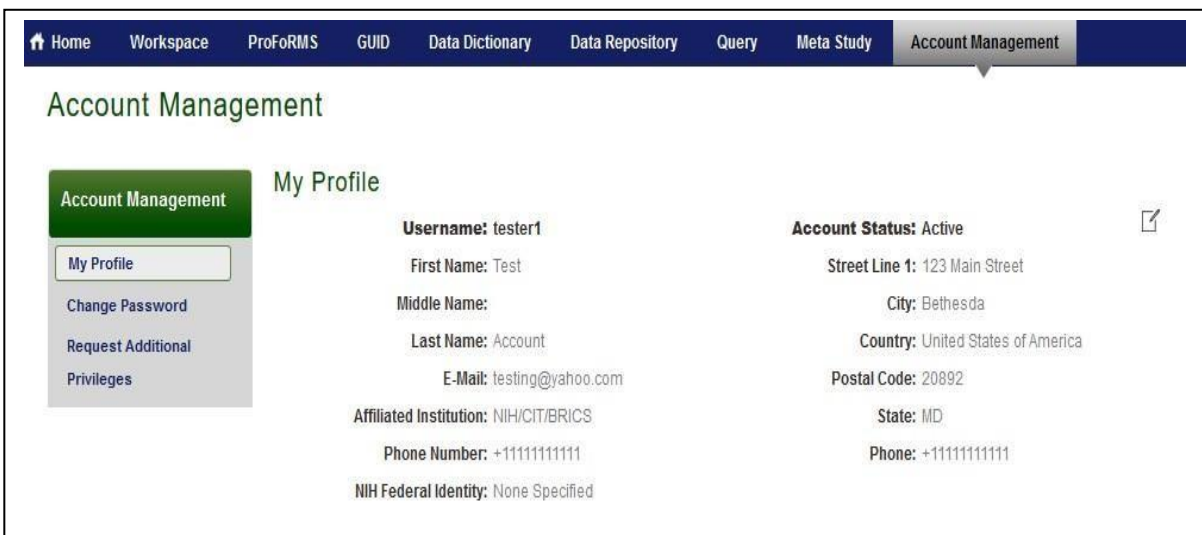
2.3.3 Change Password

When logged into the system, a user's account password can be changed using the *Change Password* link on the left side menu. This may be performed at any time to enhance security as necessary or for any other personal reason you would like to change your password.

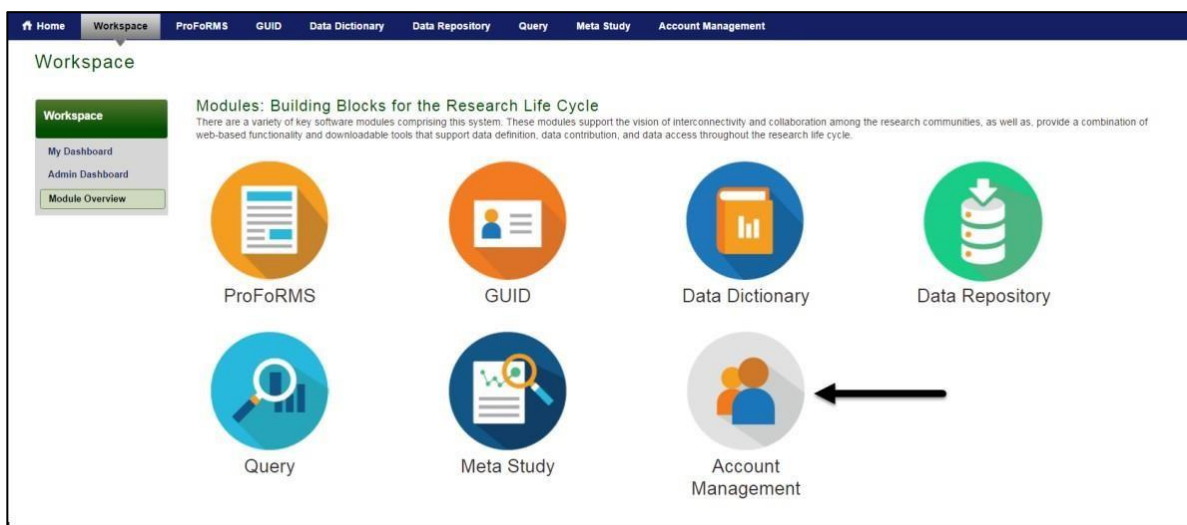To change your password, perform the following actions:

1. Log in to the system.

2. Navigate to the **Workspace**.

3. Select the **Account Management** module.

4. Select the **Change Password** tab.

   a. The **New Password** textbox expands to display the password creation standards that must be followed when choosing a new password.

5. Enter your **Current Password**, **New Password**, and **Confirm Password** in the text boxes to confirm your new password.
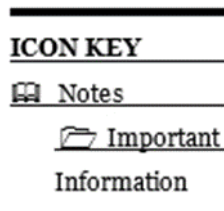
6. Click the **Change Password** button.

   a. The password change takes effect immediately and must be used when logging into BRICS again.

7. If you decide to leave your change password screen without submitting a new password request, click on the **Cancel** button.

ICON KEY

📖 Notes

📂 Important Information

Things to Note:

📂 Passwords are case sensitive and consist of 8-15 alphanumeric characters including at least 3 of the following different kinds of characters: capital letters, lowercase letters, numbers, and/or special characters.

📂 Passwords display as dots for security purposes. Make sure to enter your password carefully.

📂 Your old password may re-appear in the Password field if you have not cleared your browser's cache/history, especially if you had previously opted to save the password in the field. Make sure you are entering the new password before you attempt to log in. If unsure, clear the cache/history and log in again with the new password.

2.3.4 Upload Documentation

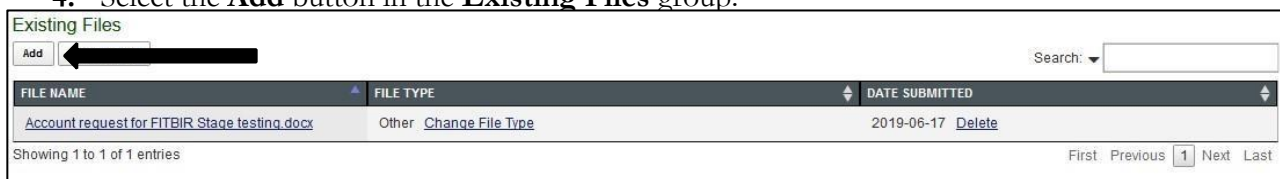To upload documentation, perform the following actions:

1. Log in to the system.

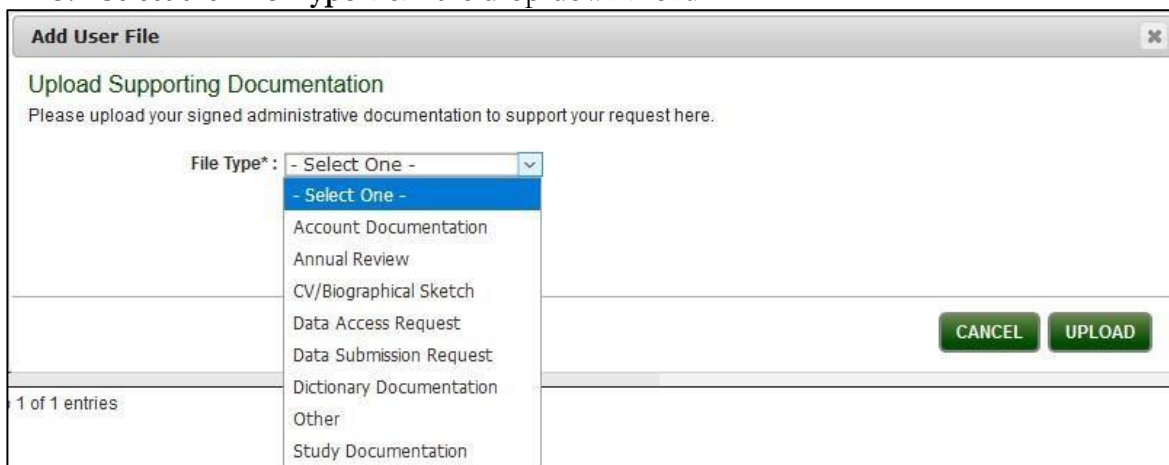2. Navigate to the **Workspace** and select the **Account Management** module.
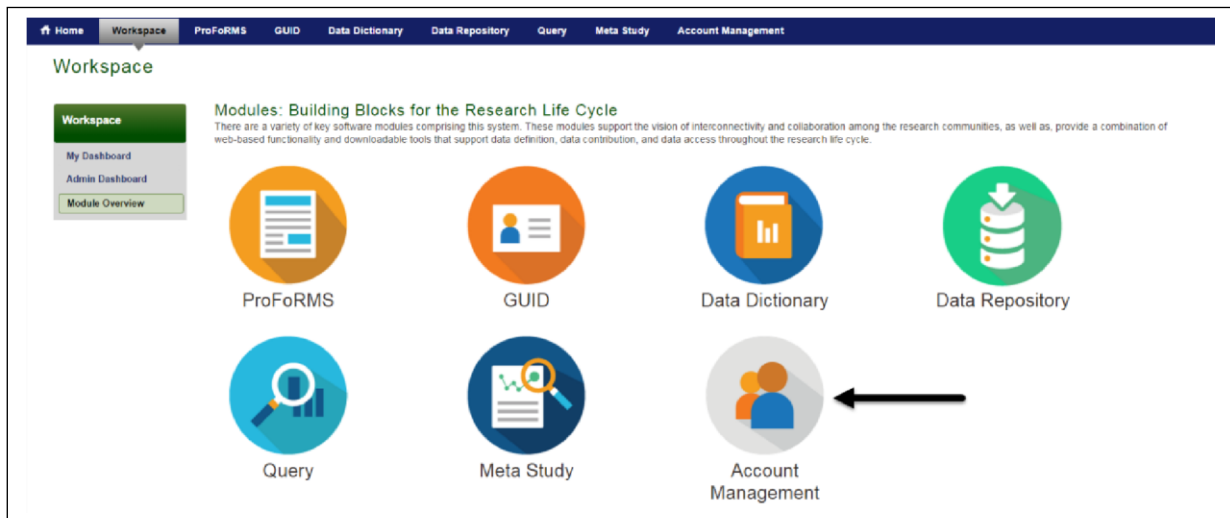
3. Click the **My Profile** link.

4. Select the **Add** button in the **Existing Files** group.

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

6. 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.

2.3.5 Request Additional Privileges

To request additional privileges, perform the following actions:
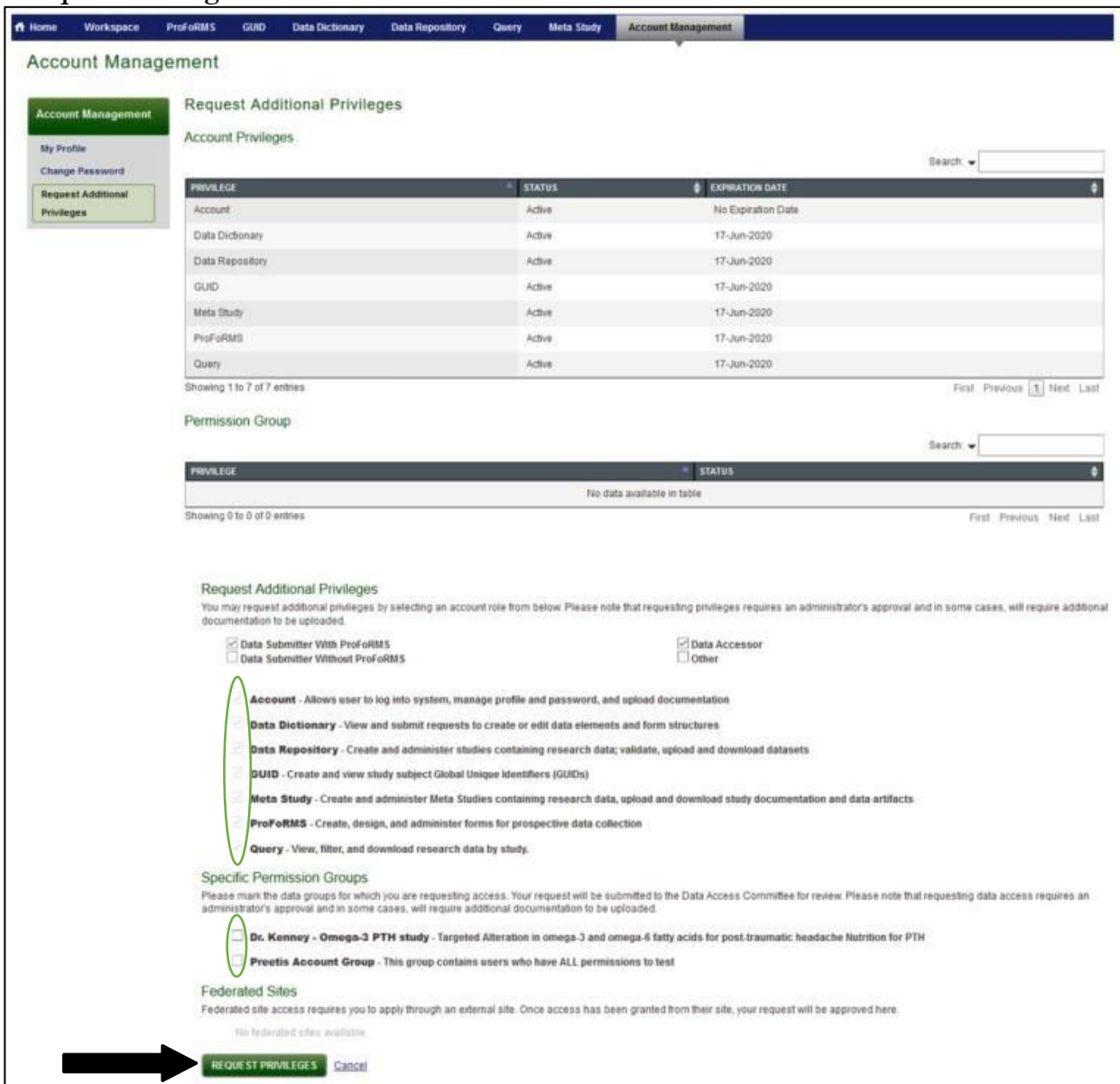
1. Log in to the system.

2. Navigate to the **Workspace** landing page.
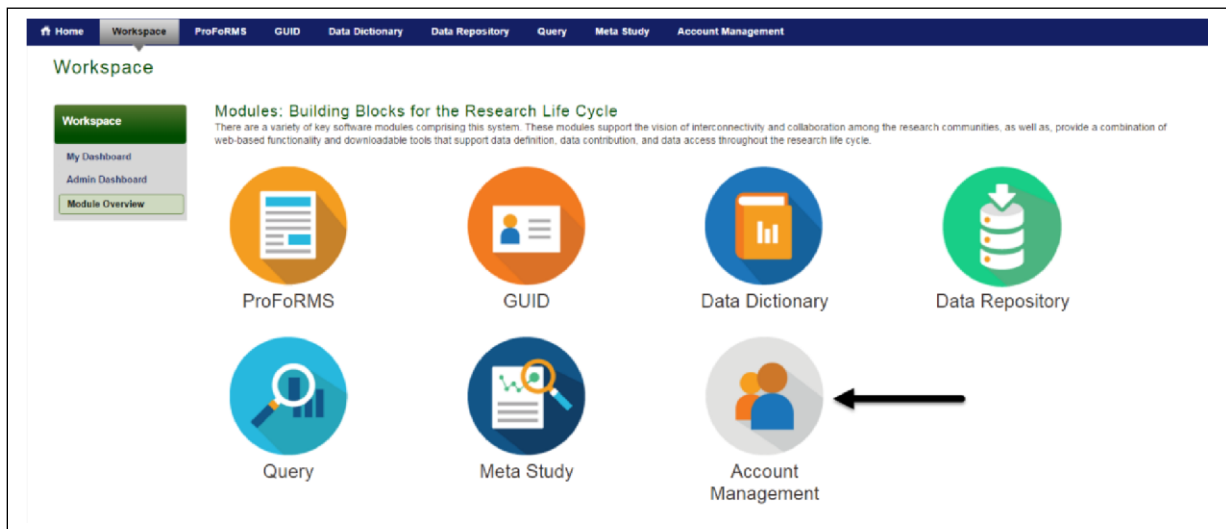
3. Select the **Request Additional Privileges** link on the left side menu.

4. Select the desired permission by clicking on the check box beside the specific privilege and then select **Request Privileges.**

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