

5.5.2 Adding a LDAP User to OpenClinica.

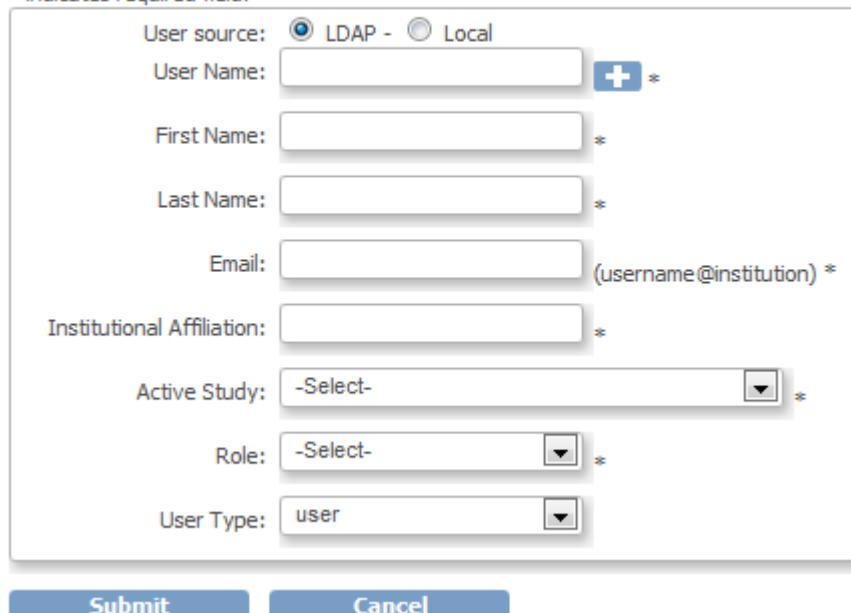
The first time you log in to OpenClinica, you must use a local account with Business or Technical Administrator privileges (i.e. root). Once you have created the first LDAP/Active Directory account in OpenClinica with Business or Technical Administrator privileges, you will not need the local account again (unless you are using web services.)

Follow these quick steps to add an LDAP/Active Directory

1. Select Tasks > Users (under the Administration section)
2. Select the Create New User link and you will be presented with the Create a User Account page.

Create a User Account

* indicates required field.



The form contains the following fields and controls:

- User source:** Two radio buttons, **LDAP -** (selected) and **Local**.
- User Name:** Text input field with a blue **+** button and an asterisk (*) indicating it is required.
- First Name:** Text input field with an asterisk (*) indicating it is required.
- Last Name:** Text input field with an asterisk (*) indicating it is required.
- Email:** Text input field with a placeholder *(username@institution)* and an asterisk (*) indicating it is required.
- Institutional Affiliation:** Text input field with an asterisk (*) indicating it is required.
- Active Study:** Dropdown menu with **-Select-** and an asterisk (*) indicating it is required.
- Role:** Dropdown menu with **-Select-** and an asterisk (*) indicating it is required.
- User Type:** Dropdown menu with **user** selected.

At the bottom of the form are two buttons: **Submit** and **Cancel**.

3. When LDAP/Active Directory authentication is enabled, the LDAP radio button will be pre-selected

4. Select the + next to the User Name field and a popup window will appear

LDAP Users



The form contains the following elements:

- Search:** Text input field.
- Find:** Blue button.
- Close:** Blue button.

5. Enter search criteria in the text box to find an account in the LDAP/Active Directory system based on either user name or email address and select Find

Only users that have been assigned to a particular Group in the LDAP/Active Directory system will be searched against. The Group is defined by your Systems Administrator in the Administration

> Users > Configure Password Requirements screen.

LDAP Users

Search:

Username	First name	Last name	Email	Actions
ldap1	ldap1			<input data-bbox="810 427 853 461" type="button" value="+"/>
ldap3	ldap3			<input data-bbox="810 468 853 501" type="button" value="+"/>
ldap5	User5	Ldap	example@example.com	<input data-bbox="810 508 853 542" type="button" value="+"/>
ldap6		Ldap	example@example.com	<input data-bbox="810 548 853 582" type="button" value="+"/>
ldap7	User7		example@example.com	<input data-bbox="810 589 853 622" type="button" value="+"/>
ldap8	User8	Ldap		<input data-bbox="810 629 853 663" type="button" value="+"/>
ldap9	User9	Ldap	example@example.com	<input data-bbox="810 669 853 703" type="button" value="+"/>
ldap10	ldap10			<input data-bbox="810 710 853 743" type="button" value="+"/>
ldap11	John	Doe		<input data-bbox="810 750 853 784" type="button" value="+"/>

6. Select the to populate the users information to the Create a User Account page
7. The popup window will close and you will be brought back to the Create a User Account page
 - a. Depending on the amount of information contained in the LDAP system, the following fields will be populated:
 - i. User Name
 - ii. First Name
 - iii. Last Name
 - iv. Email
 - v. Institutional Affiliation
 - b. The following fields will still need to be configured:
 - i. Active Study
 - ii. Role
 - iii. User Type

LDAP Users

Search:

Username	First name	Last name	Email	Actions
ldap1	ldap1			<input data-bbox="810 353 853 392" type="button" value="+"/>
ldap3	ldap3			<input data-bbox="810 398 853 436" type="button" value="+"/>
ldap5	User5	Ldap	example@example.com	<input data-bbox="810 443 853 481" type="button" value="+"/>
ldap6		Ldap	example@example.com	<input data-bbox="810 488 853 526" type="button" value="+"/>
ldap7	User7		example@example.com	<input data-bbox="810 533 853 571" type="button" value="+"/>
ldap8	User8	Ldap		<input data-bbox="810 577 853 616" type="button" value="+"/>
ldap9	User9	Ldap	example@example.com	<input data-bbox="810 622 853 660" type="button" value="+"/>
ldap10	ldap10			<input data-bbox="810 667 853 705" type="button" value="+"/>
ldap11	John	Doe		<input data-bbox="810 712 853 750" type="button" value="+"/>

The user account is now created. This user can log in to OpenClinica and the system will authenticate with the LDAP system. All Study or Site privileges will continue to be managed by OpenClinica. This new user can be assigned to any other Study or Site you determine

8. Select or Enter values for the remaining required fields as indicated by the * symbol to the right of the field. Select the 'Submit' button.

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