8.2.3 View and Modify User Information

Access the Administer Users page to view information about all users in your OpenClinica system. To access the page, from the Tasks menu, in the Administration module, select Users.

The Administer Users page includes a table that reports the Studies each user is assigned to and their Role in each Study. the table shows users for all Studies in your OpenClinica system, regardless of the current Study or Site. For more about the terms and values, see [About User Information in the Administration Module](#).

For each user, there are at least two rows:

- The first row is for the user in the OpenClinica system.
- There are one or more rows for the user and their role at each Study or Site they are assigned to.

This page is not approved for publication.

8.2.3.1 View User Information

If you want to view complete information about a user in your OpenClinica system:

1. From the Tasks menu, in the Administration module, select Users.
   The Administer Users page opens.
2. For the user whose information you want to view, click the View icon in the Actions column.
   The View User Account page opens; for more about the terms and values, see About User
   Information in the Administration Module.

8.2.3.2 Edit User Information

You can edit the following information about a user from the Administration module:

- First and Last Name
- Email address
- Institutional Affiliation
- User Type
- SOAP web services authorization
- User password (reset it to a new, temporary password)

For more about the terms and values, see About User Information in the Administration Module.

To edit the information:

1. From the Tasks menu, in the Administration module, select Users.
   The Administer Users page opens.
2. For the user whose information you want to edit, click the Edit icon in the main (first) row of
   the Actions column (not the Edit icon in any of the following rows for that user).
   The Edit a User Account page opens.

3. Change the available values and options (User Name cannot be edited). For details, see About User Information.
4. Click Next.
   The Edit a User Account - Confirmation Screen opens.
5. Verify that the information is correct, then click Confirm.
   The Administer Users page opens, and the Alerts and Messages sidebar panel reports the status of the user information update as successful or not.

8.2.3.3 Change User Role

To change the user Role for a Study or Site that the user is already assigned to, follow these steps.

1. From the Tasks menu, in the Administration module, select Users.
   The Administer Users page opens.
2. For the user whose Role you want to change, click the Edit icon in the Actions column of the row for that Study or Site (not the first row in the table for that user).
   The Modify Role page for the user and Study or Site opens.

3. From the Role drop-down list, select the Role you want to assign to the user. If the user is currently assigned at the Site level, only Roles appropriate to the Site level display. Similarly, if the user is currently assigned to the Study level, only Roles appropriate to the Study level display.
4. Click Submit.
   The Administer Users page opens, and the Alerts and Messages sidebar panel reports the status of the user role change as successful or not.

Note: You cannot use the above steps to change the user Role from a Site-level Role to a Study-level Role, or from a Study-level Role to a Site-level Role. Instead, add the new Role by following the steps in [Assign User to Study or Site and to Role](#). The user can then have a Role at both the Study and Site levels, or you can remove the original Role by following the steps in [Remove or Restore User](#).

8.2.3.4 Assign User to Study or Site and to Role

From the Administration module, you can assign a user to a Role at any Study or Site that they are not already assigned to. This includes:

- Assigning a user to a Study where they are not currently assigned to the Study or any Sites within it.
- Assigning a user to a Site when they are not currently assigned to the parent Study and are not assigned to any other Sites within the Study.
- Assigning a user to a Site within a Study if they are already assigned at the Study level or to another Site in the Study.
- Assigning a user to the Study level if they are already assigned to one or more Sites within the Study.

To assign a user to a Study or Site:

1. From the Tasks menu, in the Administration module, select Users.
   The Administer Users page opens.
2. For the user you want to assign, click the Set Role icon in the Actions column.
   The Set User Role page opens for that user.

3. From the Study Name drop-down list, select the Study or Site to which you want to assign the user. The list does not include entries for Studies and Sites where the user is already assigned.
4. From the Study User Role drop-down list, select the user Role at the selected Study or Site. The list only includes Roles appropriate for the level (Study or Site) that you selected.
5. Click Submit.
   The Administer User page opens. The table includes an entry for the assignment you just completed.

8.2.3.5 Remove or Restore User

Remove User from Study or Site

You can remove a user from a Study or Site so they can no longer access it:

1. From the Tasks menu, in the Administration module, select Users.
   The Administer Users page opens.
2. For the user you want to remove, click the Remove icon in the Actions column in that row for the user (not in the main row for the user).
3. Click OK in the confirmation window.
   The user is removed, but is still listed in the Administer Users table for that Study or Site with only a Restore icon in the Actions column.

You can also [remove a user from the current Study or Site using the Study Setup module](#).

Remove User from System

Using the Administration module, you can remove a user from your OpenClinica system so that they cannot log in and cannot be assigned to any Studies or Sites.

1. From the Tasks menu, in the Administration module, select Users.
   The Administer Users page opens.
2. For the user you want to remove, click the Remove icon in the main (first) row of the Actions column (not in any of the following rows) for that user.
3. Click OK in the confirmation window.
   The user is removed, but is still listed in the Administer Users table with only a Restore icon in the Actions column.

Restore User

After removing a user, you can restore the account so the user can regain access to the Site, Study, or the OpenClinica system. To restore a user:

1. From the Tasks menu, in the Administration module, select Users.
   The Administer Users page opens.
2. If the user you want to restore had been removed from all Studies and Sites:
   1. Click the Restore icon in the main (first) row of the Actions column (not in any of the following rows) for that user.
   2. Click OK in the confirmation window.
      The user is restored to the OpenClinica system.
   3. If the User Type is Business Administrator or Technical Administrator, reset the user's password or they will not be able to log in: for instructions, see [Edit User Information](#). For User Type of User, the user can log in using the same password they used before being removed and restored.
3. Restore the user to the specific Study or Site to which you want them to regain access by clicking the Restore icon in the Actions column in that row for the user.
4. Click OK in the confirmation window.
   The user is restored to that Study or Site.