

8 Using OpenClinica as an Administrator

Administrators have access to manage settings, users, roles, sites, modules, and publishing for all studies in your OpenClinica domain. Additionally, administrators can assign Study Designer and/or Study Runner access to themselves (as well as other users) for any study in the domain. The **User Type** of **Administrator** should be assigned to a limited number of users in your organization. (More information on User Types and Roles can be found here: [User Access and Sharing](#)).

Administrators are the Only User Type with Access to:

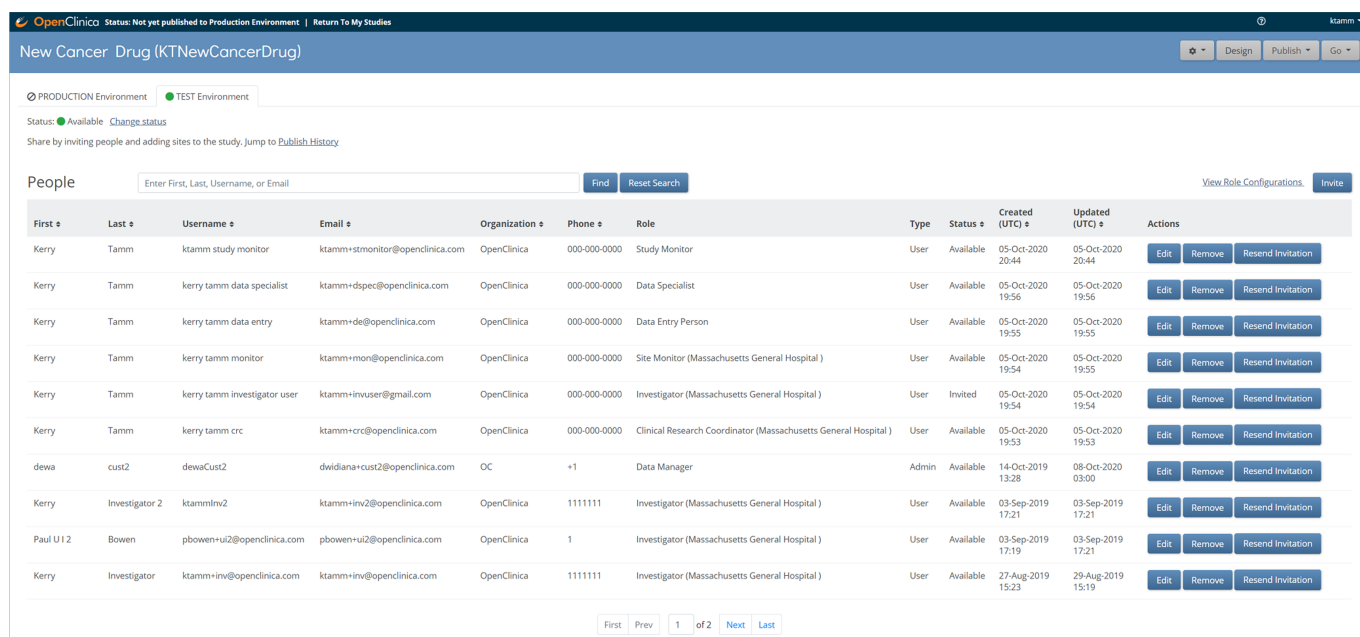
- Create a study
- Perform central user administration
- Access user roles and audit logs
- Access the web services Swagger interface

Study-Specific User Administration

Users with a **User Role** of **Data Manager** in the Test and/or Production environments can manage user accounts for studies in those environments.

To Manage Users for a Study:

1. Go to the **My Studies** screen.
2. Click the **Share** button below the study you want to manage users in. (You can also access the **Share** button from **Study Designer** or the **Settings** screen.)
3. On the study-specific **User Administration/Share** screen, click the **Invite**, **Edit**, or **Remove** buttons to perform those actions as needed. Click the **Resend Invitation** button to resend an invitation if the user accidentally deleted the original invitation or it expired.



The screenshot shows the OpenClinica interface for a study named 'New Cancer Drug (KTNewCancerDrug)'. The 'People' section is active, displaying a table of users. The table has columns for First, Last, Username, Email, Organization, Phone, Role, Type, Status, Created (UTC), Updated (UTC), and Actions. The Actions column contains buttons for Edit, Remove, and Resend Invitation. The table lists several users, including Study Monitors, Data Specialists, Data Entry Persons, Site Monitors, Investigators, and Clinical Research Coordinators, as well as a Data Manager (dewiana+cust2).

First	Last	Username	Email	Organization	Phone	Role	Type	Status	Created (UTC)	Updated (UTC)	Actions
Kerry	Tamm	ktamm study monitor	ktamm+stmonitor@openclinica.com	OpenClinica	000-000-0000	Study Monitor	User	Available	05-Oct-2020 20:44	05-Oct-2020 20:44	Edit Remove Resend Invitation
Kerry	Tamm	kerry tamm data specialist	ktamm+dspec@openclinica.com	OpenClinica	000-000-0000	Data Specialist	User	Available	05-Oct-2020 19:56	05-Oct-2020 19:56	Edit Remove Resend Invitation
Kerry	Tamm	kerry tamm data entry	ktamm+de@openclinica.com	OpenClinica	000-000-0000	Data Entry Person	User	Available	05-Oct-2020 19:55	05-Oct-2020 19:55	Edit Remove Resend Invitation
Kerry	Tamm	kerry tamm monitor	ktamm+mon@openclinica.com	OpenClinica	000-000-0000	Site Monitor (Massachusetts General Hospital)	User	Available	05-Oct-2020 19:54	05-Oct-2020 19:55	Edit Remove Resend Invitation
Kerry	Tamm	kerry tamm investigator user	ktamm+invuser@gmail.com	OpenClinica	000-000-0000	Investigator (Massachusetts General Hospital)	User	Invited	05-Oct-2020 19:54	05-Oct-2020 19:54	Edit Remove Resend Invitation
Kerry	Tamm	kerry tamm crc	ktamm+crc@openclinica.com	OpenClinica	000-000-0000	Clinical Research Coordinator (Massachusetts General Hospital)	User	Available	05-Oct-2020 19:53	05-Oct-2020 19:53	Edit Remove Resend Invitation
dewa	cust2	dewaCust2	dwidiana+cust2@openclinica.com	OC	+1	Data Manager	Admin	Available	14-Oct-2019 13:28	08-Oct-2020 03:00	Edit Remove Resend Invitation
Kerry	Investigator 2	ktamm+inv2	ktamm+inv2@openclinica.com	OpenClinica	1111111	Investigator (Massachusetts General Hospital)	User	Available	03-Sep-2019 17:21	03-Sep-2019 17:21	Edit Remove Resend Invitation
Paul U1 2	Bowen	pbowen+ui2@openclinica.com	pbowen+ui2@openclinica.com	OpenClinica	1	Investigator (Massachusetts General Hospital)	User	Available	03-Sep-2019 17:19	03-Sep-2019 17:21	Edit Remove Resend Invitation
Kerry	Investigator	ktamm+inv@openclinica.com	ktamm+inv@openclinica.com	OpenClinica	1111111	Investigator (Massachusetts General Hospital)	User	Available	27-Aug-2019 15:23	29-Aug-2019 15:19	Edit Remove Resend Invitation

Central User Administration

Only **Administrators** can access the **Administration** where user accounts can be edited, deactivated, or re-activated across all environments. Administration is available in the user menu in the upper right-hand corner.

Note: OpenClinica Team users are hidden by default. If you need to view the members of the OpenClinica Team with access to your study, click the **Show OpenClinica Team users** checkbox.

OpenClinica

Administration

Web Services Information

Download User and Role Audit Logs

Download Qualification Report

People

Enter First, Last, Username, or Email

Find

Reset Search

Show OpenClinica Support Team users

First	Last	Username	E-mail	Organization	Phone	Roles	Type	Status	Created (UTC)	Updated (UTC)	Last Login (UTC)	Actions
							User	Available	28-May-2025 12:53	28-May-2025 12:53	28-May-2025 12:54	<a>Edit <a>Reset Multi-Factor Access <a>Deactivate
							User	Available	28-May-2025 12:47	28-May-2025 12:47	28-May-2025 12:49	<a>Edit <a>Reset Multi-Factor Access <a>Deactivate
							User	Available	22-May-2025 11:14	22-May-2025 11:14	28-May-2025 12:40	<a>Edit <a>Reset Multi-Factor Access <a>Deactivate
							User	Available	19-May-2025 13:40	19-May-2025 13:40	28-May-2025 12:43	<a>Edit <a>Reset Multi-Factor Access <a>Deactivate
							Admin	Available	16-May-2025 13:34	16-May-2025 13:34	30-May-2025 12:53	<a>Edit <a>Reset Multi-Factor Access <a>Deactivate
							Admin	Deactivated	02-Apr-2025 14:16	08-Apr-2025 14:53	08-Apr-2025 11:47	<a>Edit <a>Reset Multi-Factor Access <a>Activate
							User	Available	21-Jan-2025 22:08	21-Jan-2025 22:08	23-Jan-2025 21:15	<a>Edit <a>Reset Multi-Factor Access <a>Deactivate
							Admin	Invited	12-Dec-2024 23:16	12-Dec-2024 23:16	Never	<a>Edit <a>Reset Multi-Factor Access <a>Deactivate
							Admin	Invited	12-Dec-2024 23:15	12-Dec-2024 23:15	Never	<a>Edit <a>Reset Multi-Factor Access <a>Deactivate
							Admin	Invited	12-Dec-2024 23:14	12-Dec-2024 23:14	Never	<a>Edit <a>Reset Multi-Factor Access <a>Deactivate

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Download Qualification Report:

The Download Qualification Report button will download the most recent qualification report. This is updated for each release and includes the information in the sample report below:






















Qualification Report: Stack 17.4

Customer Subdomain: Environment:




Report Date: 05-Jan-2023 16:47:38 UTC

 **19 out of 19**

Running Services

Services			
audit service: 1.9.0		message service: 1.2.0	
authentication service core: 4.8.3.Final		participate gateway: 1.3.0	
authentication service extensions: 1.6.0		randomize service: 1.4.0	
customer service: 1.10.0		study designer: 1.19.0	
dicom service: 1.3.0		study manager: 1.19.8	
form engine - background: 4.0.1.oc-8		study runner: 4.19.36	
form engine - data entry: 4.0.1.oc-8		study runner ui: 2.1.22	
form engine - pdf: 4.0.1.oc-8		study service: 1.19.0	
form engine - preview: 4.0.1.oc-8		user service: 1.18.0	
form service: 1.13.0			

Customer Configuration

System	
Study Runner URL: https:// <input type="text"/> .openclinica.io/OpenClinica	
Database	
Postgres Version: 13.4	
Database Connection	
Mail System	
Test Email Sent	
File System	
Available Disk Space	28 GB out of 99 GB
Disk Space Utilization	72%

To Search for Users:

1. Click the **User** menu in the upper right-hand corner and select **Administration**.
2. Enter a first name, last name, username, or email into the search box.
3. Click the **Find** button to search.

You can click the **Reset Search** button to clear your search criteria and display all users in the

table.

Note: Search results appear on a single page, with a maximum of ten users displayed. You will be asked to refine your search criteria if the system finds more than ten results or zero results. You cannot sort the table when search criteria has been entered.

To Edit User Accounts:

1. From the **User** menu, select **Administration**.
2. On the **Administration** screen, click the **Edit** button to the right of the user whose account you want to edit. You can edit everything except for the username.
3. Click the **Save** button.

To Deactivate/Activate User Accounts:

1. From the **User** menu, select **Administration**.
 1. On the **Administration** screen, click the **deactivate** button to the right of the user whose account you want to deactivate. The user can no longer log into **OpenClinica**.
 2. To reactivate a deactivated account (across all studies/environments), click the **Activate** button to the right of the user whose account you want to activate.

The Possible Statuses for a User are as Follows:

Status	Description
Created	The user account has been created, but no User Roles have been assigned.
Invited	The user account has been created, and at least one User Role has been assigned, but the user has never accessed/activated the account.
Available	The user account is active and available for use.
Deactivated	The user account has been removed. The user can no longer log into OpenClinica.

Note: User accounts cannot be deleted.

Web Services Swagger Interface


OpenClinica's Web Services provides [RESTful APIs](#) that allow programmers you to transfer data between systems and perform bulk actions within the system. Web services documentation is included in the [OpenClinica 4 Technical Documentation](#), and an interactive version of the documentation for developers (using [Swagger](#)) is accessible from the **Administration** screen.

You Can Use Web Services to:

- Retrieve clinical data in JSON or XML or PDF
- Import clinical data in XML
- Get Participant data
- Get a list of Participant IDs
- Add a site or study-level Participant
- Add a set of site or study-level Participants

To Access the Web Services Swagger UI:

1. From the **User Menu**, select **Administration**.
2. Click **Web Services Information**.


Select a spec
api

Api Documentation ^{1.0}

[Base URL: cust2.openclinica-dev.io/OpenClinica/pages/]
<https://cust2.openclinica-dev.io/OpenClinica/pages/v2/api-docs?group=api>

Api Documentation
[Terms of service](#)
[Apache 2.0](#)

Clinical Data REST API for Data Import

- GET** `/auth/api/clinicaldata/{studyOID}/{studySubjectIdentifier}/{studyEventOID}/{formVersionOID}` Retrieve clinical data in JSON or CDISC ODM XML format
- POST** `/auth/api/clinicaldata/import` To import data in an .xml file
- POST** `/auth/api/clinicaldata/pipe` To import study data in Pipe Delimited Text File (Supports Common events with non-repeating item groups only)

Form REST API for Form

- POST** `/auth/api/clinicaldata/studies/{studyOID}/sites/{siteOID}/forms` To create a form for a participant at site level
- PUT** `/auth/api/clinicaldata/studies/{studyOID}/sites/{siteOID}/forms` To update a form for a participant at site level

You can access the documentation for an API by clicking the API you want to use.

Form REST API for Form

- POST** `/auth/api/clinicaldata/studies/{studyOID}/sites/{siteOID}/forms` To create a form for a participant at site level

Both the study OID and the site OID are required url encoded parameters. The DTO has fields for the participant ID, study event OID, study event repeat key (if relevant) and form OID for further identification of the correct form. The form fields which can be updated are the formWorkflowStatus, required, relevant and editable.

Parameters

Try it out

Name	Description
formRequestDTO <small>required</small> (body)	formRequestDTO Example Value Model <pre>{ "editable": "string", "formOID": "string", "formWorkflowStatus": "string", "relevant": "string", "required": "string", "studyEventOID": "string", "studyEventRepeatKey": "string", "subjectKey": "string" }</pre> Parameter content type application/json
siteOID <small>required</small> string (path)	siteOID
studyOID <small>required</small> string (path)	studyOID

To call an API, click **Try it Out**, provide the requested information in the displayed fields, and click **Execute**.

CAUTION: Using the **Try it Out** interface will actually execute your API calls in the target study environment (based on the study OID you provide, and only when you have a role assigned in the study). Many of OpenClinica's APIs can add an update data in a study. BE CAREFUL AND BE AWARE OF THE CONSEQUENCES, especially if you provide the OID of a study in Production.

The **Responses** section shows the results of the operation. If there were any errors in the information you provided, a descriptive error message is listed in the results.

User and Role Audit Log

You can download the User and Role Audit Logs from the **Administration** screen. The downloaded XLS spreadsheet displays specific events, when the event occurred, and which user performed/experienced the event.

AUDIT EVENT	DATE/TIME	TARGET OBJECT	BY	VALUE TYPE	OLD VALUE	NEW VALUE
SUCCESSFUL_LOGIN	2020-12-11T16:29:21.502Z	Kerry Tamm (ktamm)	Kerry Tamm (ktamm)			
SUCCESSFUL_LOGIN	2020-12-11T04:53:23.140Z	Paul U SIM Bowen (pbowenusim)	Paul U SIM Bowen (pbowenusim)			
PASSWORD_CHANGED	2020-12-11T04:53:22.994Z	Paul U SIM Bowen (pbowenusim)	Paul U SIM Bowen (pbowenusim)			
SUCCESSFUL_LOGIN	2020-12-11T04:50:03.538Z	Paul U CRC Bowen (pbowenurc)	Paul U CRC Bowen (pbowenurc)			
SUCCESSFUL_LOGOUT	2020-12-11T04:49:56.558Z	Paul A DM Bowen (pbowenadm)	Paul A DM Bowen (pbowenadm)			
ROLE_CHANGE	2020-12-11T04:49:38.306448Z	Paul U SIM Bowen (pbowenusim)	Paul A DM Bowen (pbowenadm)	PAB 37 (Test)-Site 1		Site Monitor
ROLE_CHANGE	2020-12-11T04:49:19.747630Z	Paul U CRC Bowen (pbowenurc)	Paul A DM Bowen (pbowenadm)	PAB 37 (Test)-Site 1		Clinical Research Coordinator

The User and Role Audit Log Includes the Following Events:

- Successful Logins/Logouts
- Failed Logins
- Password Changes
- User Role Changes
- User Role Definitions (edited User Role fields with old and new values)
- User Profile Changes (edited User Profile fields with old and new values)

To Access the User Role and Audit Log:

1. From the **User Menu**, select **Administration**.
2. Click **Download User and Role Audit Logs** button.

The Bulk Actions Log

When performing a bulk action, you can access the resulting log in Study Runner.

New Cancer Drug (KTNewCancerDrug) | Test Environment | Change | Design | Share | Settings
ktamm (Data Manager)

[Home](#)
[Participant Matrix](#)
[Queries](#)
[Study Audit Log](#)
[Tasks](#)

Alerts & Messages
Instructions
Info
Quick Links

- Queries Assigned to Me

Bulk Actions Log

Bulk actions log displays logfiles that are generated by executing the bulk APIs. [Click here](#) to access API documentation. Reload this page to update job statuses.

Search:

Source	Job Type	Site Name	Job Status	Start Time	Submitted By	Completion Time	Actions
Test_hiro.xml	XML_IMPORT	S_1234567(TEST)	COMPLETED	01:48pm Jul 29 2020	ktamm	01:48pm Jul 29 2020	
001	PARTICIPANT_PDF_CASEBOOK	S_KTNEWCAN(TEST)	COMPLETED	09:28am Jan 14 2020	ktamm	09:29am Jan 14 2020	
001	PARTICIPANT_PDF_CASEBOOK	S_KTNEWCAN(TEST)	COMPLETED	10:53am Jan 13 2020	ktamm	10:53am Jan 13 2020	

Results 1-3 of 3
Show per page

<
>

To Go to the Bulk Actions Log:

Click **Tasks**, and select **Bulk Actions Log**.

You can also view the Bulk Actions Log to check the progress of an action. It also logs information such as Source File Name, Job Type, Site Name, etc. depending on the action it is carrying out. Once an action is complete, you can select **View**, **Download**, or **Delete**.

For more information on Web Services, see the [OpenClinica 4 Technical Documentation](#).

Note: APIs may require you to provide Object Identifiers (OIDs) that are specific to your study. OIDs

are are unique identifiers that are automatically generated for objects you create (for example, there is a unique OID for each: Study, Site, Event, Form, Item Group, Item, and Study Participant). For information on locating any of the OIDs for your study, see [Locating Object Identifiers](#).

Approved for publication by Kate Lambert. Signed on 2025-06-02 3:06PM

Not valid unless obtained from the OpenClinica document management system on the day of use.