

## 7 Using OpenClinica as an Administrator

Administrators manage **settings, users, roles, sites, modules**, and **publishing** for all studies within the OpenClinica domain. They can also assign **Study Designer** and **Study Runner** roles to themselves or other users for any study. **⚠Warning:** Administrator access should be granted to a limited number of users within your organization. For more information on manage settings, users, roles, sites, modules, refer to [Study Settings, User Roles, Modules](#).

### Administrator Capabilities

Administrators are the only user type with access to the following actions:

- [Create a study](#)
- Perform Central User Administration
- Access User and Role Audit Logs
- Access the Web Services (Swagger) Interface

### Study-Specific User Administration

Users with the **Data Manager** role in the **Test** 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.
  - You can also access the **Share** button from **Study Designer** or **Settings**.
3. On the **User Administration / Share** screen, click:
  - Invite
  - Edit
  - Remove
  - Resend Invitation

**⚠ Tip:** Use the **Resend Invitation** option if a user accidentally deletes or misses their original invitation email.

Status: Not yet published to Production Environment

Return To My Studies

Severe Headache Study (HEADACHESTUDY)

PRODUCTION Environment

TEST Environment

Status: Available

Change status

Share by inviting people and adding sites to the study. Jump to Publish History

People

Enter First, Last, Username, or Email

Find

Reset Search

View Role Configurations

Invite

First #	Last #	Username #	Email #	Organization #	Phone #	Role	Type	Status #	Created (UTC) #	Updated (UTC) #	Actions
Paul	Walt	pmwalt	pmwalt@openclinica.com	OpenClinica	1234	Data Manager	Admin	Available	10-May-2018 17:57	13-Nov-2024 21:29	<div>Edit</div> <div>Remove</div> <div>Resend Invitation</div>
John	Lambert	johnlambert	johnlambert@openclinica.com	UC	1234567890	Data Manager	Admin	Available	08-Feb-2024 18:58	18-Sep-2025 19:46	<div>Edit</div> <div>Remove</div> <div>Resend Invitation</div>
John	Walt	johnw@openclinica.com	johnw@openclinica.com	UC	9876543210	Investigator	User	Available	22-May-2025 11:14	22-May-2025 11:14	<div>Edit</div> <div>Remove</div> <div>Resend Invitation</div>
John	Walt	johnw@openclinica.com	johnw@openclinica.com	UC	9876543210	Clinical Research Coordinator	User	Available	19-May-2025 13:40	11-Sep-2025 12:15	<div>Edit</div> <div>Remove</div> <div>Resend Invitation</div>
Andrew	Walt	awalt	awalt@openclinica.com	OpenClinica	9876543210	Data Manager	Admin	Available	13-Aug-2020 20:55	15-Sep-2025 17:59	<div>Edit</div> <div>Remove</div> <div>Resend Invitation</div>
John	Walt	johnw@openclinica.com	johnw@openclinica.com	UC	9876543210	Data Manager	Admin	Available	16-May-2025 13:34	23-Jul-2025 13:05	<div>Edit</div> <div>Remove</div> <div>Resend Invitation</div>
Andrew	Walt	awalt	awalt@openclinica.com	OpenClinica	1	Data Manager	Admin	Available	16-Aug-2021 16:06	16-Aug-2021 16:06	<div>Edit</div> <div>Remove</div> <div>Resend Invitation</div>
John	Walt	johnw@openclinica.com	johnw@openclinica.com	UC	9876543210	Study Monitor	User	Available	28-May-2025 12:53	28-May-2025 12:53	<div>Edit</div> <div>Remove</div> <div>Resend Invitation</div>
John	Walt	johnw@openclinica.com	johnw@openclinica.com	UC	9876543210	Data Specialist	User	Available	28-May-2025 12:47	28-May-2025 12:47	<div>Edit</div> <div>Remove</div> <div>Resend Invitation</div>

## Central User Administration

Only Administrators can access the **Administration** screen, available from the **User Menu** (upper-right corner). From this screen, Administrators can edit, deactivate, or reactivate accounts across **all studies and environments**. **Note:** OpenClinica Team users are hidden by default. To view them, select the **Show OpenClinica Team Users** checkbox.

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 #	Email #	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	<div>Edit</div> <div>Reset Multi-Factor Access</div> <div>Deactivate</div>
							User	Available	28-May-2025 12:47	28-May-2025 12:47	28-May-2025 12:49	<div>Edit</div> <div>Reset Multi-Factor Access</div> <div>Deactivate</div>
							User	Available	22-May-2025 11:14	22-May-2025 11:14	28-May-2025 12:40	<div>Edit</div> <div>Reset Multi-Factor Access</div> <div>Deactivate</div>
							User	Available	19-May-2025 13:40	19-May-2025 13:40	28-May-2025 12:43	<div>Edit</div> <div>Reset Multi-Factor Access</div> <div>Deactivate</div>
							Admin	Available	16-May-2025 13:34	16-May-2025 12:53	30-May-2025 12:53	<div>Edit</div> <div>Reset Multi-Factor Access</div> <div>Deactivate</div>
							Admin	Deactivated	03-Apr-2025 14:16	08-Apr-2025 14:53	08-Apr-2025 11:47	<div>Edit</div> <div>Reset Multi-Factor Access</div> <div>Activate</div>
							User	Available	21-Jan-2025 22:08	21-Jan-2025 22:08	23-Jan-2025 21:15	<div>Edit</div> <div>Reset Multi-Factor Access</div> <div>Deactivate</div>
							Admin	Invited	12-Dec-2024 23:16	12-Dec-2024 23:16	Never	<div>Edit</div> <div>Reset Multi-Factor Access</div> <div>Deactivate</div>
							Admin	Invited	12-Dec-2024 23:15	12-Dec-2024 23:15	Never	<div>Edit</div> <div>Reset Multi-Factor Access</div> <div>Deactivate</div>
							Admin	Invited	12-Dec-2024 23:14	12-Dec-2024 23:14	Never	<div>Edit</div> <div>Reset Multi-Factor Access</div> <div>Deactivate</div>

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## Searching for Users

- From the **User Menu**, select **Administration**.
- Enter a **First Name**, **Last Name**, **Username**, or **Email** in the search box.
- Click **Find**.
- To clear your search and display all users, click **Reset Search**.

**Warning:** Search results show a maximum of **10 users per page**. If your search returns too many or too few results, refine your criteria. Sorting is not available when search filters are applied.

## Editing User Accounts

1. From the **User Menu**, select **Administration**.
2. On the **Administration** screen, click **Edit** next to the user account you want to update.
3. Update the required fields (you cannot change the username).
4. Click **Save**.

## Activating or Deactivating User Accounts

1. From the **User Menu**, select **Administration**.
2. On the **Administration** screen:
  - Click **Deactivate** to disable a user account. The user will no longer be able to log in.
  - Click **Activate** to reactivate a deactivated account across all studies and environments.

## Possible User Statuses

Status	Description
<b>Created</b>	The User account has been created but no roles have been assigned.
<b>Invited</b>	The user account has been created, and at least one role assigned, but the user has not yet activated the account.
<b>Available</b>	The user account is active and available for use.
<b>Deactivated</b>	The user account has been removed. The user can no longer log into OpenClinica.

□ **Note:** User accounts **cannot be deleted**.

## Downloading the Qualification Report

The **Qualification Report** includes details on the system configuration and is updated for each OpenClinica release. **To Download the Qualification Report**

1. From the **User Menu**, select **Administration**.
2. Click **Download Qualification Report**.

The latest qualification report is downloaded automatically in your browser.


























## Qualification Report: Stack 19.4.1

Customer Subdomain:   Environment:  





Report Date: 29-Sep-2025 23:10:29 UTC

 **23 out of 23**

### Running Services

Services			
audit service: 1.12.0		participate gateway: 1.5.0	
authentication service core: 18.0.2		randomize service: 1.7.0	
authentication service extensions: 1.7.21		rules engine: 1.4.2	
customer service: 1.13.0		rule service: 1.3.0	
dicom service: 1.6.2		schedule service: 1.2.1	
form engine - background: 7.3.0.oc-1		study designer: 1.22.7	
form engine - data entry: 7.3.0.oc-1		study manager: 1.23.2	
form engine - pdf: 7.3.0.oc-1		study runner: 4.22.13	
form engine - preview: 7.3.0.oc-1		study runner ui: 2.4.11	
form service: 1.17.6		study service: 1.23.3	
message service: 1.6.0		user service: 1.21.1	
odm service: 1.3.2			

### Customer Configuration

System	
Study Runner URL: https:// <span style="background-color: #ccc; padding: 0 20px;"> </span> openclinica.io/OpenClinica	
Database	
Postgres Version: 13.15	
Database Connection	
Mail System	
Test Email Sent	
File System	
Available Disk Space	17 GB out of 148 GB
Disk Space Utilization	89% 

## User and Role Audit Log

Study Administrators can download the **User and Role Audit Log** from the **Administration** screen. This log records all user- and role-related actions in the study, including account activity, authentication via Single Sign-On (SSO), event type, timestamp, and the user associated with each change. **To Download the User and Role Audit Log**

1. From the **User Menu**, select **Administration**.
2. Click **Download User and Role Audit Log**.
  - The **User and Role Audit Log** modal opens.
3. In the **modal window**, the **Start Date** and **End Date** fields are required. Both fields display in **DD-MMM-YYYY** format and can be entered manually or selected from the calendar.
  - By default, the Start Date is set to today's date minus 30 days (UTC).
  - The End Date defaults to today's date (UTC).
  - You can adjust these fields to select a custom range of up to **368 days (approximately one year)**.
4. Click **Download** to download the audit log file.

#### □ Notes:

- Dates are based on the UTC time zone, which may differ from your local time. Confirm that your selected dates align with UTC to ensure all expected records are included.
- If an error occurs—for example, if the selected date range exceeds one year—an error message appears directly below the title and subtitle. Adjust the date range as needed and click **Download** again.

The system downloads an **.XLS** file containing detailed records of user and role activity, The downloaded file (.XLS) contains:

- **Event type**
- **Date and time (UTC)**
- **Associated user**
- **User who made the change**
- **Details of the change**

The log file includes all entries from the selected Start Date through the End Date (inclusive) and excludes any entries outside that range.

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 (pbowenucrc)	Paul U CRC Bowen (pbowenucrc)			
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 (pbowenucrc)	Paul A DM Bowen (pbowenadm)	PAB 37 (Test)-Site 1		Clinical Research Coordinator

## Events Included in the Log

- Successful Logins/Logouts
- Failed Logins
- Password Changes
- User Role Changes
- Role definition edits (old vs. new values)
- User profile edits (old vs. new values)

For information on audit logs related to participant data, refer to [Participant Audit Log](#).

## Web Services (Swagger Interface)

OpenClinica Web Services provide **RESTful APIs** that enable data exchange and bulk operations between systems.

For background information on RESTful APIs, see [RESTful APIs](#).

The **Swagger UI**, available from the *Administration* menu, allows developers to view API documentation and interact with endpoints directly.

## Access the Web Services Swagger UI

1. From the **User Menu**, select **Administration**.
2. Click **Web Services Information**.
3. Click an API name to open its documentation.

## Web Services Capabilities

You can use Web Services to:

- Retrieve clinical data in JSON, XML, or PDF formats
- Import clinical data in XML format
- Retrieve participant data and IDs
- Add one or more participants at the study or site level
- Add new sites

## Use the Swagger UI

1. Click **Try it out**.
2. Complete the required fields.
3. Click **Execute**.

□ **Note:** Some APIs require **Object Identifiers (OIDs)** specific to your study. OIDs are unique identifiers automatically generated for each object you create, such as studies, sites, events, forms, item groups, items, and participants. For details on finding OIDs for your study, see [Locating Object Identifiers](#).

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

For more information on the Swagger UI, refer to [Swagger](#).

For more information on APIs, refer to [How and When to Use APIs](#).

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## □ Important

When you use **Try it out**, API calls are executed in the **target environment** based on the study OID you provide and your assigned study role.

APIs can **add or update study data**, so use extreme caution when working in a **Production environment**.

The **Responses** section shows the outcome of the operation.  
If any errors occur, a descriptive message appears in the results.

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# Bulk Actions Log

The **Bulk Actions Log** tracks the progress and outcomes of bulk operations performed in **Study Runner**.

OpenClinica

New Cancer Drug (KTNewCancerDrug)Test Environment

Change | Design | Share | Settings

ktamm (Data Manager)

Enter Participant ID

View

HomeParticipant MatrixQueriesStudy Audit LogTasks

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	<div>SearchDownloadDelete</div>
001	PARTICIPANT_PDF_CASEBOOK	S_KTNEWCAN(TEST)	COMPLETED	09:28am Jan 14 2020	ktamm	09:29am Jan 14 2020	<div>DownloadDelete</div>
001	PARTICIPANT_PDF_CASEBOOK	S_KTNEWCAN(TEST)	COMPLETED	10:53am Jan 13 2020	ktamm	10:53am Jan 13 2020	<div>DownloadDelete</div>

Results 1-3 of 3Show50per page

<1>

## To View the Bulk Actions Log

1. Click **Tasks** in the navigation menu.
2. Select **Bulk Actions Log**.

The log displays:

- Source file name
- Job type
- Site name
- Status and completion time

Once an action is complete, you can **View**, **Download**, or **Delete** the log entry.

Approved for publication by Kate Lambert. Signed on 2025-11-10 10:31AM

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