

# 1 Administration

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.


Status: Not yet published to Production Environment | [Return To My Studies](#)
ktamm

New Cancer Drug (KTNewCancerDrug)

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
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	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Resend Invitation</a>
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	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Resend Invitation</a>
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	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Resend Invitation</a>
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	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Resend Invitation</a>
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	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Resend Invitation</a>
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	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Resend Invitation</a>
dewa	cust2	dewaCust2	dwidiana+cust2@openclinica.com	OC	+1	Data Manager	Admin	Available	14-Oct-2019 13:28	08-Oct-2020 03:00	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Resend Invitation</a>
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	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Resend Invitation</a>
Paul U12	Bowen	pbowen+u12@openclinica.com	pbowen+u12@openclinica.com	OpenClinica	1	Investigator (Massachusetts General Hospital )	User	Available	03-Sep-2019 17:19	03-Sep-2019 17:21	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Resend Invitation</a>
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	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Resend Invitation</a>

[First](#)
[Prev](#)
1 of 2
[Next](#)
[Last](#)

# 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.

OpenClinica

Administration

Web Services Information

Download User and Role Audit Logs

Download Qualification Report

People

Enter First, Last, Username, or Email

Find

Reset Search

First	Last	Username	E-mail	Organization	Phone	Roles	Type	Status	Created (UTC)	Updated (UTC)	Last Login (UTC)	Actions
								Invited	20-Jan-2023 16:06	20-Jan-2023 16:08	20-Jan-2023 16:06	<div>Edit</div> <div>Deactivate</div>
								Available	22-Dec-2022 02:31	22-Dec-2022 02:31	22-Dec-2022 02:34	<div>Edit</div> <div>Deactivate</div>
								Available	22-Dec-2022 02:30	22-Dec-2022 02:30	22-Dec-2022 02:37	<div>Edit</div> <div>Deactivate</div>
								Available	22-Dec-2022 02:30	22-Dec-2022 02:30	22-Dec-2022 02:34	<div>Edit</div> <div>Deactivate</div>
								Available	22-Dec-2022 02:25	22-Dec-2022 02:25	22-Dec-2022 02:28	<div>Edit</div> <div>Deactivate</div>
								Created	13-Dec-2022 18:15	13-Dec-2022 18:15	Never	<div>Edit</div> <div>Deactivate</div>
								Invited	16-Nov-2022 14:16	16-Nov-2022 14:16	Never	<div>Edit</div> <div>Deactivate</div>
								Available	14-Nov-2022 20:32	18-Nov-2022 05:05	28-Dec-2022 13:41	<div>Edit</div> <div>Deactivate</div>
								Available	14-Nov-2022 19:12	18-Nov-2022 07:03	28-Dec-2022 13:34	<div>Edit</div> <div>Deactivate</div>
								Available	14-Nov-2022 15:55	14-Nov-2022 15:55	17-Nov-2022 04:13	<div>Edit</div> <div>Deactivate</div>

First

Prev

1

of 36

Next

Last

?

## 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: .openclinica.io/OpenClinica">https://.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:

[table id=50 /]

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

## Web Services Swagger Interface

OpenClinica's Web Services provides [RESTful APIs](#) that allow programmers 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**.

swagger

Select a spec
api

## Api Documentation <sup>1.0</sup>

[ 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
<b>formRequestDTO</b> <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
<b>siteOID</b> <small>required</small> string (path)	siteOID
<b>studyOID</b> <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 (pbowenucr)	Paul U CRC Bowen (pbowenucr)			
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 (pbowenucr)	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.

OpenClinica

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

ktamm (Data Manager)

Enter Participant ID

View

Home | Participant Matrix | Queries | Study Audit Log | Tasks

Alerts & Messages

Instructions

Info

Quick Links

**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	<a href="#">View</a> <a href="#">Download</a> <a href="#">Delete</a>
001	PARTICIPANT_PDF_CASEBOOK	S_KTNEWCAN(TEST)	COMPLETED	09:28am Jan 14 2020	ktamm	09:29am Jan 14 2020	<a href="#">Download</a> <a href="#">Delete</a>
001	PARTICIPANT_PDF_CASEBOOK	S_KTNEWCAN(TEST)	COMPLETED	10:53am Jan 13 2020	ktamm	10:53am Jan 13 2020	<a href="#">Download</a> <a href="#">Delete</a>

Results 1-3 of 3 | Show  per page | [1](#)

## 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 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](#).

Functional approval by Riley Bianchi. Signed on 2023-01-20 2:09PM

Approved for publication by Paul Bowen. Signed on 2023-01-24 3:19PM

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