

## Access & Site Administration

### BMS 13.0-14.0 Manual

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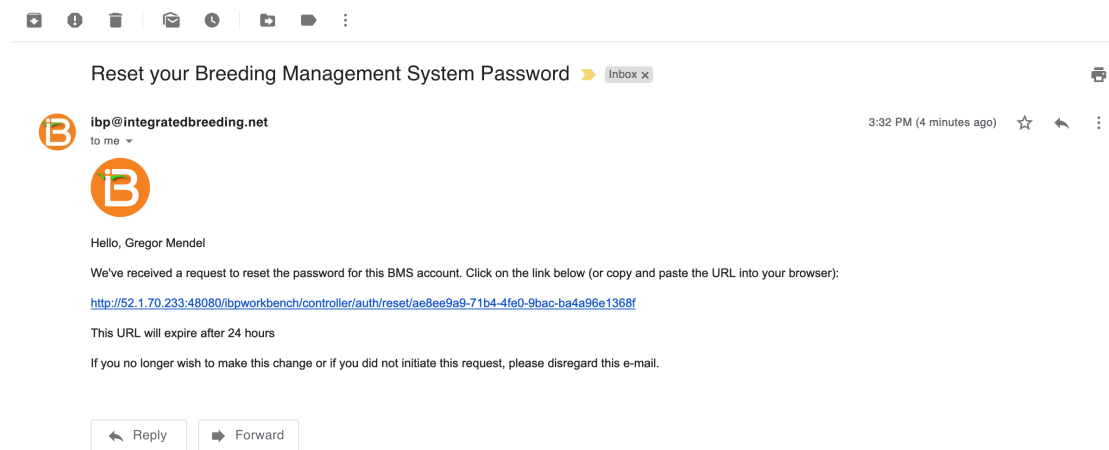
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## Access System

Users will receive an email from the system administrator containing a temporary url link to establish or reset password.

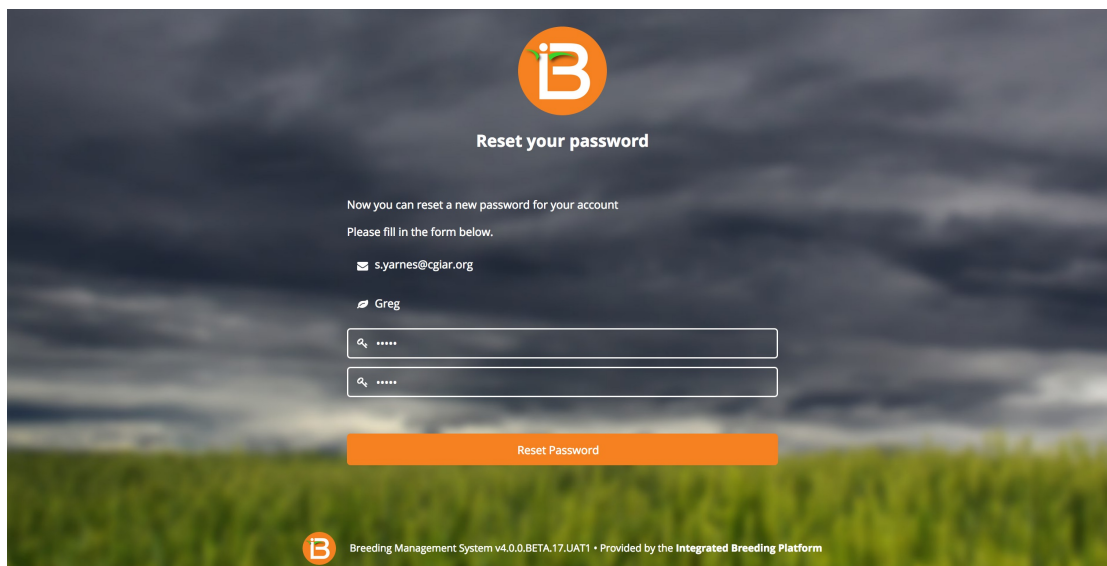
- Follow the link to establish or reset your password.



## Set Password

The temporary url link sent to your email, leads to a page where you can set or reset your password.

- Enter your password twice and select Reset Password.
- Bookmark or save the url corresponding to the server installation of the BMS for future access

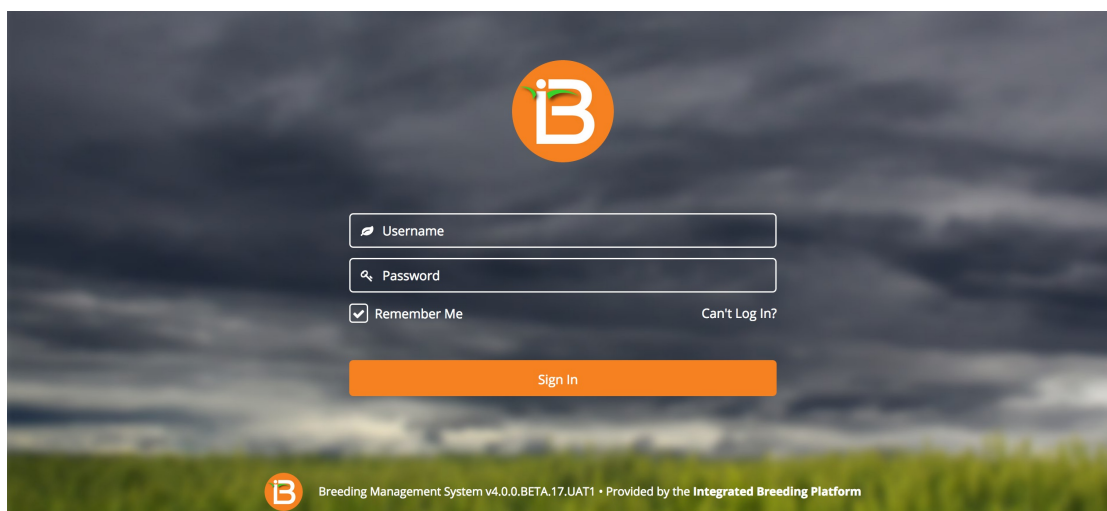


The screenshot shows the 'Reset your password' page. At the top is the iB logo. Below it, the heading 'Reset your password' is centered. The text reads: 'Now you can reset a new password for your account. Please fill in the form below.' There is an email input field containing 's.yarnes@cgjar.org' and a name input field containing 'Greg'. Below these are two password input fields, each with a small eye icon and a masked password '.....'. An orange 'Reset Password' button is at the bottom. The footer contains the iB logo and the text 'Breeding Management System v4.0.0.BETA.17.UAT1 • Provided by the Integrated Breeding Platform'.

## Login

The BMS will automatically log out inactive users.

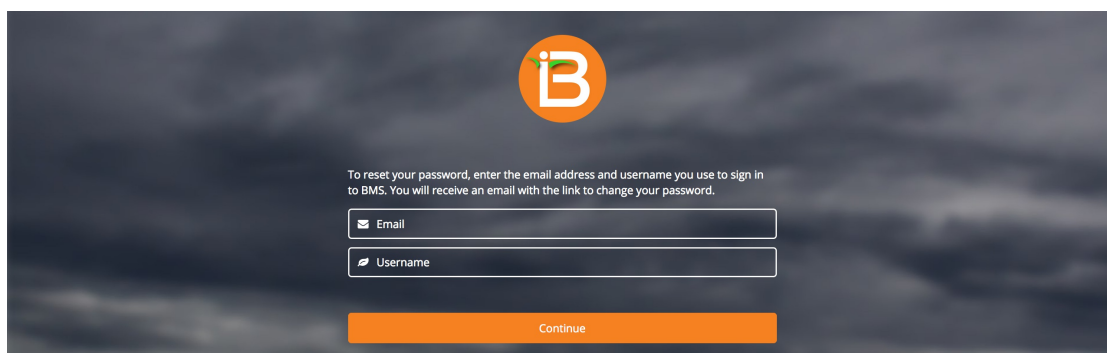
- Login to the BMS by navigating to the url and entering username and password. Select Remember Me if you want to automate login from your computer. Select Sign In.



The screenshot shows the login page. At the top is the iB logo. Below it are two input fields: 'Username' and 'Password'. The 'Password' field has a small eye icon. Below the 'Username' field is a checkbox labeled 'Remember Me'. To the right of the checkbox is a link that says 'Can't Log In?'. An orange 'Sign In' button is at the bottom. The footer contains the iB logo and the text 'Breeding Management System v4.0.0.BETA.17.UAT1 • Provided by the Integrated Breeding Platform'.

## Request Password Reset

Select "Can't login?". Enter your username and email. You will receive an email to reset you password.

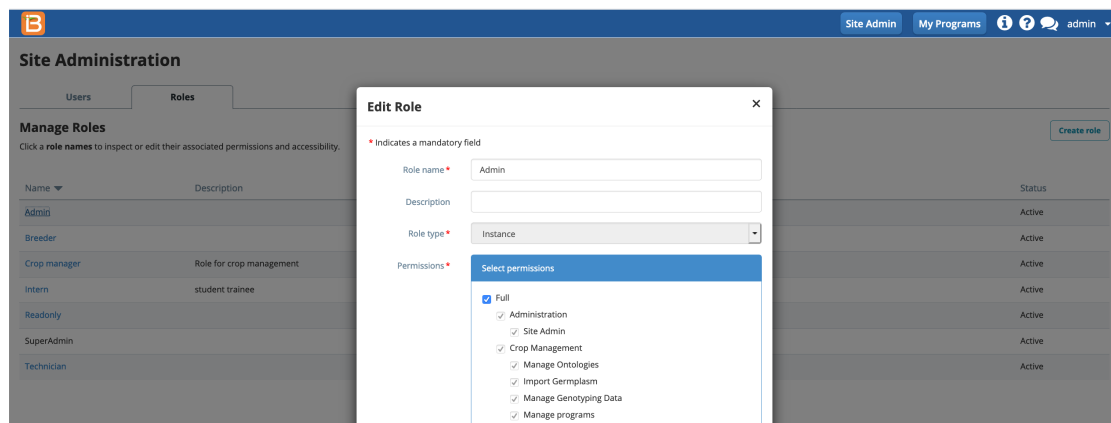


The screenshot shows the 'Request Password Reset' page. At the top is the iB logo. Below it, the text reads: 'To reset your password, enter the email address and username you use to sign in to BMS. You will receive an email with the link to change your password.' There are two input fields: 'Email' and 'Username'. An orange 'Continue' button is at the bottom. The footer contains the iB logo and the text 'Breeding Management System v4.0.0.BETA.17.UAT1 • Provided by the Integrated Breeding Platform'.

## Site Administration

The site administration module allows for users to be added to the system and assigned customized roles and permissions. Users assigned full administrative permissions will see the Site Admin button at the top of the browser window.

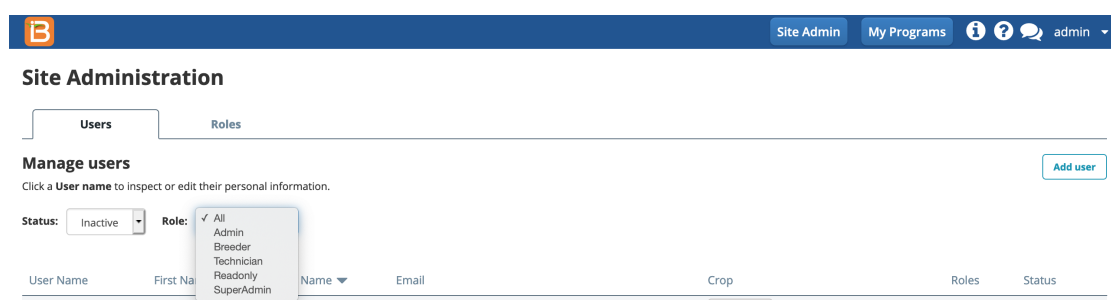
- Select the Site Admin button to review details about users and roles.



Example of an Admin role with full Site Admin permissions.

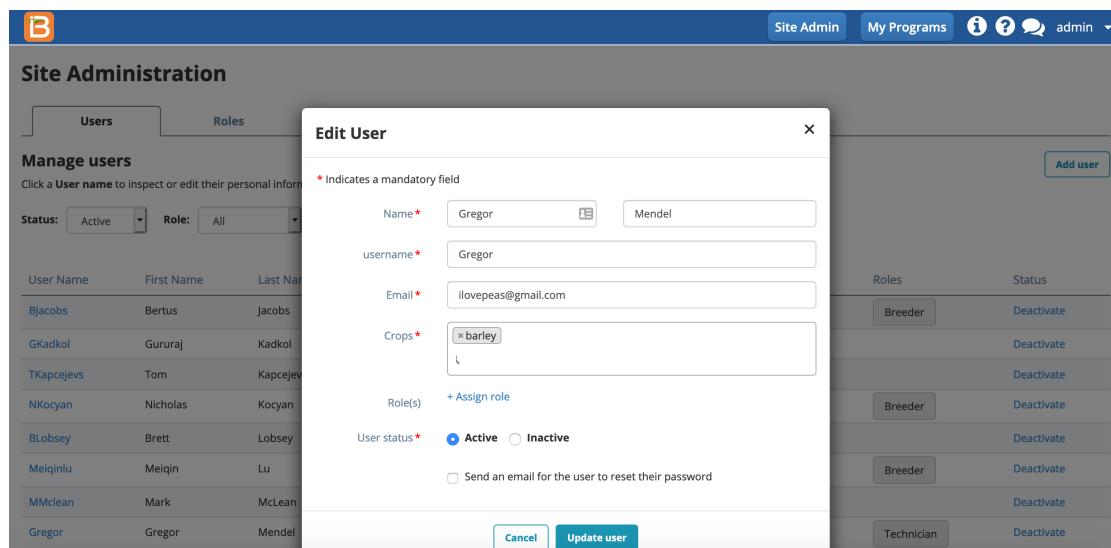
## Users

- Review system users. Filter users by by user status and roles.



## Add, Edit, & Send Password Reset

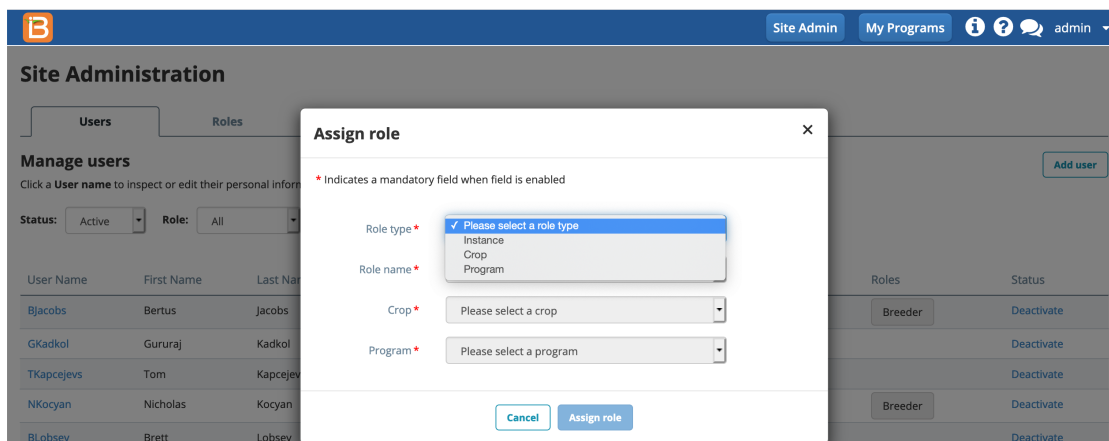
- Select Add User option. Enter the user's name, username, and email. Select the crop(s) that the user will access from the dropdown menu. Only those crops installed on the instance appear in the drop down menu.



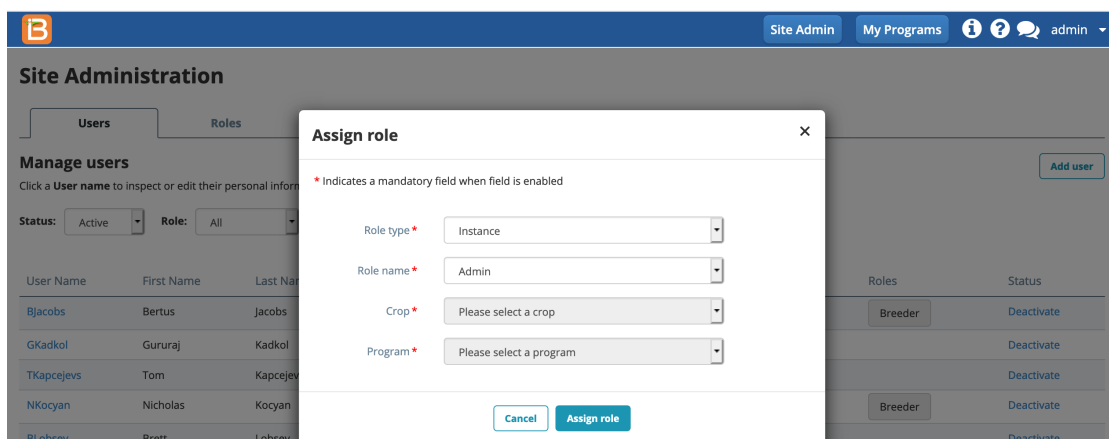
## Assign Roles

A single user can have multiple Roles in the system.

- Choose a role type (see more below).

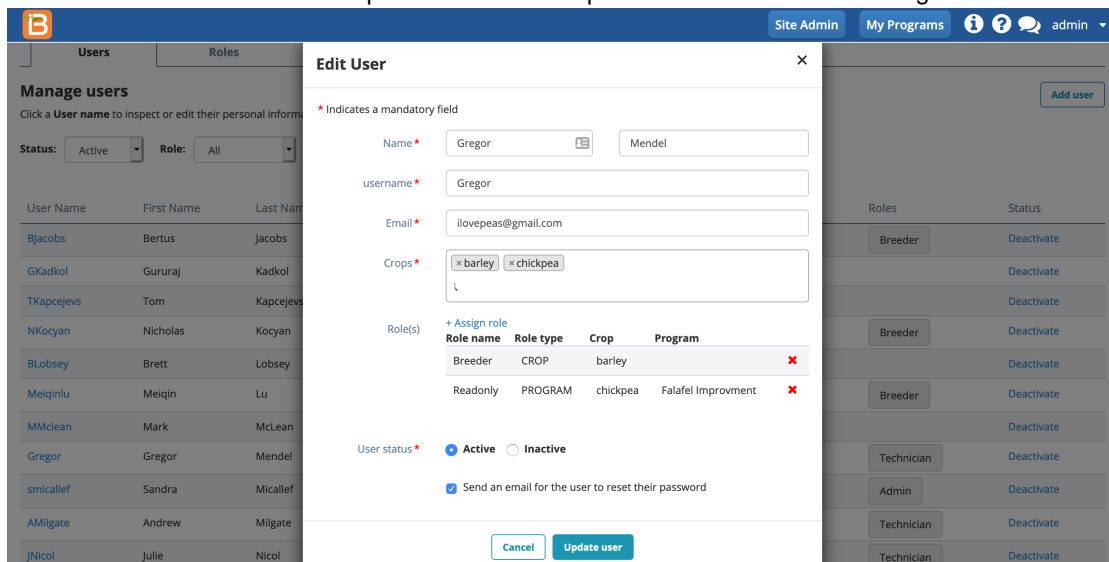


- Choose the Role Name. Role names are defined under Roles (see more below). If you chose a crop or program role type, you will also need to specify crop and/or programs. Select Assign Role.



Select any user name to activate the Edit User popup. Change details as needed, and block access by changing user status to Inactive.

- Assign multiple roles as needed for each user. Specify the user status. Check send an email to allow user to establish/reestablish their password. Select Update User to make the changes.



Gregor has access to 2 crops, barley and chickpea. He has full access to barley and read only access to chickpea.

## Roles

The Roles tab reveals the roles established for users of the system. The SuperAdmin is the only fixed system role, and is reserved for the person(s) with authority over the BMS instance at the time of installation. Roles are based on the permissions associated with role type.

### Role Type

Role Type defines a set of possible permissions based on different levels of institutional management. Roles are based on the permissions available from three role types.

- 1. **Instance** - Permissions across the full instance of the BMS
- 2. **Crop** - Permissions across a crop within the BMS
- 3. **Program** - Permissions across a program, within a crop, within the BMS

Available Permissions		Role Type		
		Instance	Crop	Program
Administration	Site admin	Yes	-	-
Crop Management	Manage ontologies	Yes	Yes	-
	Import germplasm	Yes	Yes	-
	Manage genotyping data	Yes	Yes	-
	Manage & Add programs	Yes	Yes	-
	Manage Program Settings	Yes	Yes	Yes
Breeding Activities	Manage germplasm	Yes	Yes	Yes
	Manage studies	Yes	Yes	Yes
	Manage samples	Yes	Yes	Yes
Information Management	Browse studies	Yes	Yes	Yes
	Head to head query	Yes	Yes	Yes
	Import datasets	Yes	Yes	Yes
	Multi-trait query	Yes	Yes	Yes
Statistical Analysis	Single-site analysis	Yes	Yes	Yes
	Multi-site analysis	Yes	Yes	Yes

## Review, Edit, Create

- Select any of the customized roles to review or edit permissions.

Site AdminMy Programs

admin

Site Administration

Users

Roles

Manage Roles

Create role

Click a role names to inspect or edit their associated permissions and accessibility.

Name	Description	Type	Permissions	Status
Admin		INSTANCE	Full	Active
Breeder		CROP	Breeding Activities and 3 more	Active
Readonly		PROGRAM	Manage Germplasm and 6 more	Active
SuperAdmin		INSTANCE	Full	Active
Technician		CROP	Breeding Activities and 3 more	Active

1

- Check or uncheck role permissions to expand or restrict user access to the system. Select Update Role to implement the changes.

Users

Roles

Manage Roles

Click a **role name** to inspect or edit their associated permissions and accessibility.

Name	Description
Admin	
Breeder	
Crop manager	Role for crop management
Readonly	
Super/Admin	
Technician	

Edit Role

\* Indicates a mandatory field

Role name\*

Breeder

Description

Role type\*

Crop

Permissions\*

Select permissions

Full

☐ Crop Management

☐ Manage Ontologies

☐ Import Germplasm

☒ Manage Genotyping Data

☐ Manage programs

☒ Breeding Activities

☒ Manage Germplasm

☒ Manage Samples

☒ Manage Studies

☒ Information Management

☒ Browse Studies

☒ Head to Head Query

☒ Multi-trait Query

☒ Import Datasets

☒ Statistical Analysis

☒ Single-Site Analysis

☒ Multi-Site Analysis

Cancel

Update Role

Create role

Status

Active

Active

Active

Active

Active

Active

## Edit Role

\* Indicates a mandatory field

Role name \*

Breeder

Description

Role type \*

Crop

Permissions \*

Select permissions

Full

☐ Crop Management

☐ Manage Ontologies

☐ Import Germplasm

☒ Manage Genotyping Data

☐ Manage programs

☒ Breeding Activities

☒ Manage Germplasm

☒ Manage Samples

☒ Manage Studies

☒ Information Management

☒ Browse Studies

☒ Head to Head Query

☒ Multi-trait Query

☒ Import Datasets

☒ Statistical Analysis

☒ Single-Site Analysis

☒ Multi-Site Analysis

Cancel

Update Role

[illegible]

- Select **Create Role**. Name, describe, and assign role type (see more above). Check the appropriate permissions for the new role. Select **Add Role** to implement the changes.

[illegible]

Create Role

✕

\* Indicates a mandatory field

Role name \*

Intern

Description

student trainees

Role type \*

Program

▼

Permissions \*

Select permissions

Full

Crop Management

Manage programs

Manage Program Settings

Breeding Activities

Manage Germplasm

Manage Samples

Manage Studies

Information Management

Browse Studies

Head to Head Query

Multi-trait Query

Import Datasets

Statistical Analysis

Single-Site Analysis

Multi-Site Analysis

Cancel

Add Role

[illegible]