

# Quick Start Guide

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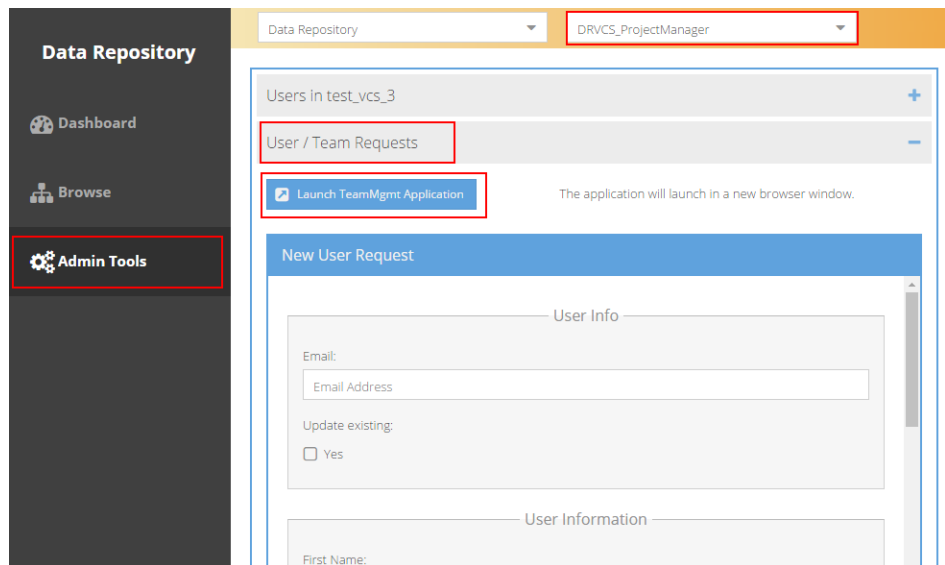
## Navigating to the Application

### From the Data Repository Application:

After logging in to your Data Repository account, ensure that an administrative role is selected in the Role Picker dropdown menu.

Once the Admin menu item appears, select it to navigate to the Administration Panel, and expand the User/Team Requests accordion panel.

The previous Team form has been replaced with a button, simply click on the "Launch TeamMgmt Application" button, which will launch a new browser window and load the Team Management application.



# Application Overview

## Header

The application header contains the application's name as well as overall controls. Use the "Log Out" button to end your portal session.

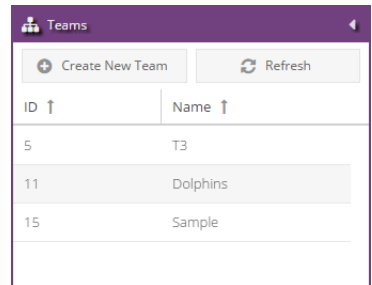


❗ Logging out from the Team Management application will also end any Data Repository sessions that are currently open in other windows.

## Team Panel

The Team Panel contains a list of all existing Teams, and allows creation of new Teams. In order to edit the membership of an existing Team, a Team must be selected first. If no teams exist yet, simply click the Create New Team button to start a new Team item.

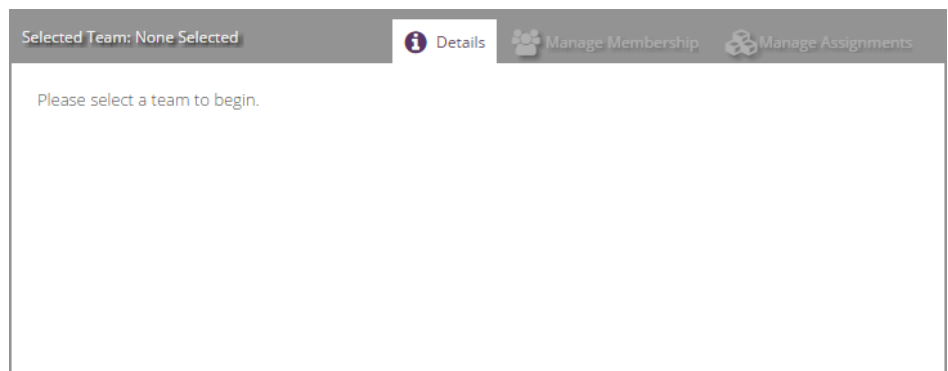
✅ Once a Team has been selected to edit or view, the Teams panel can be collapsed by clicking the arrow icon in the panel's upper right side. The collapsed panel can be reopened at any time by clicking the arrow icon again.



Collapsed Team Panel

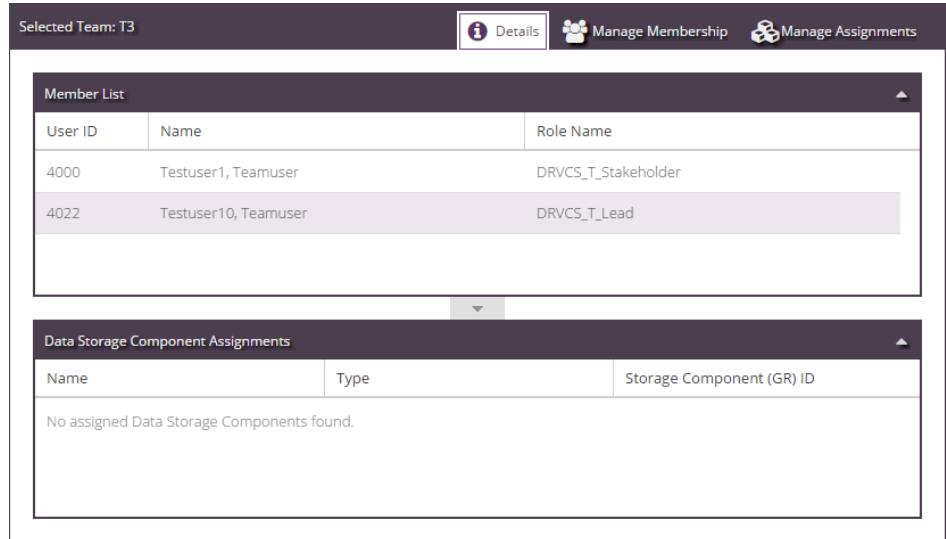
## Tab Content

The Tab Content Panel holds sections that allow viewing or editing of a Teams details and membership. A Team must be selected in the Team Panel to populate information in the Tab Content Panel.



Once a Team has been selected, the Manage Membership and Manage Assignments tabs will become enabled, allowing administration of the users assigned to the Team as well as the Data Repository Storage Objects assigned to the Team.

✔ The height of the Member List and Data Storage Component Assignment panels can be adjusted by clicking and dragging the grey triangle between the two panels.

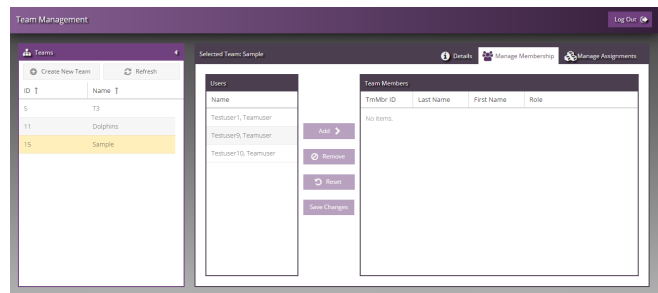



### Manage Membership Tab

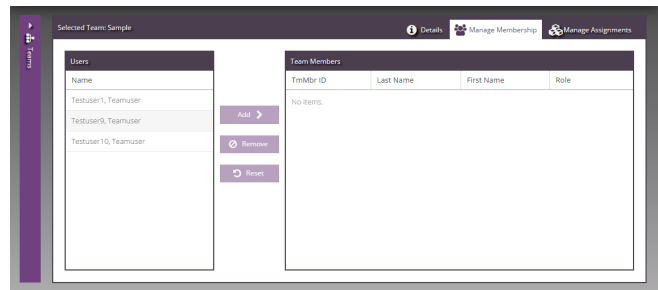
The Manage Membership Tab Panel contains 3 sections, a User List, a set of Action Buttons, and a Team Members list.

The User List contains a list of all the users that may be assigned to the selected Team. Since a user may hold multiple roles on the same Team, a user may be added to a Team more than once.

The Team Members list contains a list of the currently assigned user roles for the selected Team.



✔  The widths of the Users List and the Team Members panel may be adjusted to suit your workspace by clicking and dragging on the gutter areas next to the panel borders, when a resize cursor appears. This works for many other panels in the application as well!



## Adding Users to a Team

First, select the user or users that should be added to the team in the Users List. You may select more than one user by holding down the Shift or Ctrl keys on your keyboard while clicking on the appropriate names.

After the users are selected, the Add button will become enabled. Click the Add button to assign the users to the Team.

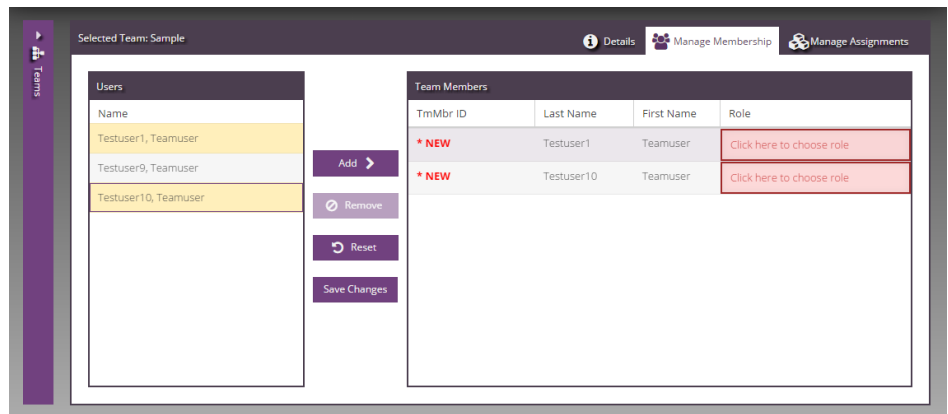
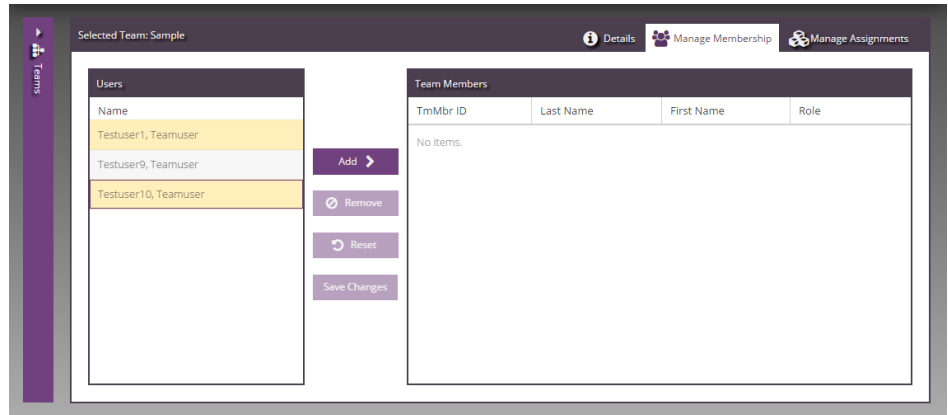
Once users appear on the right side, they will be marked as **\*NEW**. A role must be assigned to each user before continuing. To do so, click the dropdown in the Team Members panel, which appears with a red border, for each newly added team member.

To commit these changes, the Save Changes button must be clicked after all the appropriate dropdowns have been selected.



When a user is added to a team, or if a different role is assigned, that user will receive an email notifying them of the new Team Role.

After the users are selected, the Add button will become enabled. Click the Add button to assign the users to the Team.



Once users appear on the right side, they will be marked as \*NEW. A role must be assigned to each user before continuing.

To do so, click the dropdown in the Team Members panel, which appears with a red border, for each newly added team member.



The application will prevent duplicate assignments of roles to a single user. For example, if John is assigned to the Team Lead role on Team A, if an administrator attempts to add John to Team A with the Team Lead role again, an error message will be displayed.

The screenshot shows the 'Manage Membership' interface for a team named 'Sample'. On the left, the 'Users' list contains three entries: 'Testuser1, Teamuser', 'Testuser9, Teamuser', and 'Testuser10, Teamuser'. The 'Testuser1, Teamuser' entry is highlighted in yellow. In the center, there are buttons for 'Add', 'Remove', 'Reset', and 'Save Changes'. On the right, the 'Team Members' table lists two members, both marked as '\* NEW'. The first member, 'Testuser1', has a dropdown menu open for role selection, showing options: 'DRVCS\_T\_Lead', 'DRVCS\_T\_DataManager', 'DRVCS\_T\_DataReadiness', 'DRVCS\_T\_Analysis', 'DRVCS\_T\_Reviewer', and 'DRVCS\_T\_Stakeholder'. The dropdown menu is highlighted with a red border.

The screenshot shows the 'Manage Membership' interface for a team named 'Sample'. On the left, the 'Users' list contains three entries: 'Testuser1, Teamuser', 'Testuser9, Teamuser', and 'Testuser10, Teamuser'. The 'Testuser10, Teamuser' entry is highlighted in yellow. In the center, there are buttons for 'Add', 'Remove', 'Reset', and 'Save Changes'. On the right, the 'Team Members' table lists two members, both marked as '\* NEW'. The second member, 'Testuser10', has a dropdown menu open for role selection, showing options: 'DRVCS\_T\_Lead', 'DRVCS\_T\_DataManager', 'DRVCS\_T\_DataReadiness', 'DRVCS\_T\_Analysis', 'DRVCS\_T\_Reviewer', and 'DRVCS\_T\_Stakeholder'. The dropdown menu is highlighted with a red border.

To commit these changes, the Save Changes button must be clicked after all the appropriate roles have been selected.

A list of changes to be saved will be provided for the user to review before continuing. Click Save after reviewing the changes, and a message will be displayed after the Save operation has completed.

If a user role could not be saved because it was a duplicate, an error message will be displayed.

At any time before clicking Save Changes, you may use the Reset button to restore the team to its last saved state and discard any changes, additions, or removals.

✔ User Role entries that have been successfully saved will always have a number entry in the TmMbr ID column. Items that are not saved will have \* **NEW** text in red in this column.

Are you sure you want to commit these team membership changes? ✕

Changes: None  
Removals: None  
Additions:

- Testuser1, Teamuser | *DRVCS\_T\_Reviewer*
- Testuser10, Teamuser | *DRVCS\_T\_Analysis*

Save Cancel

Operation Completed - Errors Encountered ✕

✕ The following errors were encountered:

Testuser1, Teamuser | *DRVCS\_T\_Reviewer*  
Error: user is already member of the specified team with the specified role

Items not listed above completed successfully.

OK

Success ✕

i Changes processed successfully.

OK

Selected Team: Sample

Details Manage Membership Manage Assignments

Users		Team Members			
Name		TmMbr ID	Last Name	First Name	Role
Testuser1, Teamuser	Add >	77	Testuser1	Teamuser	DRVCS_T_Reviewer
Testuser9, Teamuser	Remove	78	Testuser10	Teamuser	DRVCS_T_Analysis
Testuser10, Teamuser	Reset				
	Save Changes				

## Removing Users from a Team

To remove a user role assignment from a team, simply click the user role row(s) in the Team Membership panel to select the desired items. The Ctrl and Shift keys may be used to select multiple rows.

Once rows are selected on the right side, the Remove button will be enabled. Click the Remove button, which will cause those rows to disappear from the Team Membership panel.

To help keep track of unsaved changes, any removed team roles are displayed as small tags at the bottom of the Team Membership panel.

To commit the removal, the Save Changes button must be clicked. The process that follows is the same as when additions are saved.

The screenshot shows the 'Team Membership' panel for a team named 'Sample'. On the left, the 'Users' list contains three entries: 'Testuser1, Teamuser', 'Testuser9, Teamuser', and 'Testuser10, Teamuser'. On the right, the 'Team Members' table has two rows. The first row is '77, Testuser1, Teamuser, DRVCS\_T\_Reviewer'. The second row, '78, Testuser10, Teamuser, DRVCS\_T\_Analysis', is highlighted in yellow. In the center, there are four buttons: 'Add', 'Remove', 'Reset', and 'Save Changes'. The 'Remove' button is currently disabled.

Selected Team: Sample			
Details   Manage Membership   Manage Assignments			
Users			
Name			
Testuser1, Teamuser			
Testuser9, Teamuser			
Testuser10, Teamuser			

Team Members			
TmMbr ID	Last Name	First Name	Role
77	Testuser1	Teamuser	DRVCS_T_Reviewer
78	Testuser10	Teamuser	DRVCS_T_Analysis

The screenshot shows the 'Team Membership' panel after the removal of 'Testuser10'. The 'Users' list remains the same. The 'Team Members' table now only contains the first row: '77, Testuser1, Teamuser, DRVCS\_T\_Reviewer'. At the bottom of the panel, a 'Removed:' tag displays 'Testuser10, Team'. The 'Remove' button is now enabled.

Selected Team: Sample			
Details   Manage Membership   Manage Assignments			
Users			
Name			
Testuser1, Teamuser			
Testuser9, Teamuser			
Testuser10, Teamuser			

Team Members			
TmMbr ID	Last Name	First Name	Role
77	Testuser1	Teamuser	DRVCS_T_Reviewer

Removed: Testuser10, Team

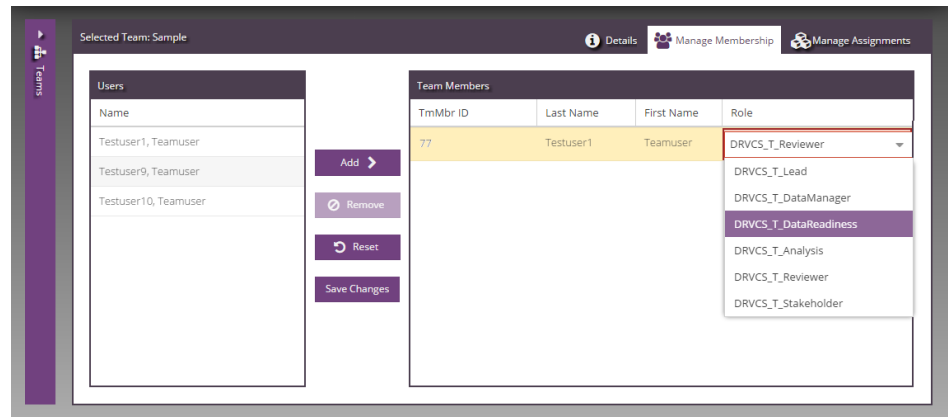


Additions, Removals, and Role Changes can be saved at the same time. A dialog box listing all the pending operations will be shown to the user before proceeding.

## Changing a Role

To swap or change an existing user role for a different role, simply double-click the role name in the Team Membership panel that should be altered.

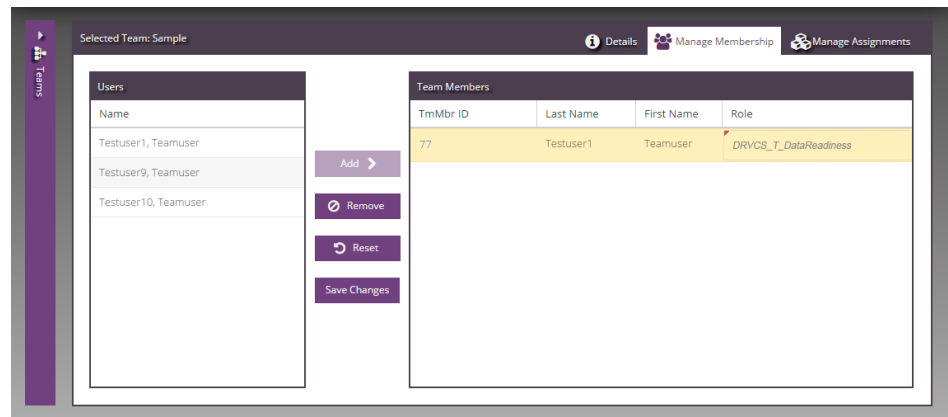
Select the new role from the dropdown menu.



The screenshot shows the 'Manage Membership' interface for a team named 'Sample'. On the left, the 'Users' list contains 'Testuser1, Teamuser', 'Testuser9, Teamuser', and 'Testuser10, Teamuser'. In the center, there are buttons for 'Add', 'Remove', 'Reset', and 'Save Changes'. On the right, the 'Team Members' table has one entry: '77 Testuser1 Teamuser' with the role 'DRVCS\_T\_Reviewer'. A dropdown menu is open over the role, showing options: 'DRVCS\_T\_Reviewer', 'DRVCS\_T\_Lead', 'DRVCS\_T\_DataManager', 'DRVCS\_T\_DataReadiness' (highlighted), 'DRVCS\_T\_Analysis', 'DRVCS\_T\_Reviewer', and 'DRVCS\_T\_Stakeholder'.

The Save Changes button should be clicked when ready to commit. The process that follows is the same as when additions and removals are saved.

✔ Team Membership items that have been altered but not yet saved appear with a small red corner.



The screenshot shows the 'Manage Membership' interface after the role change. The 'Team Members' table now shows the role as 'DRVCS\_T\_DataReadiness'. A small red corner is visible in the top-right corner of the role cell, indicating that the change has been made but not yet saved.



## Manage Assignments Tab

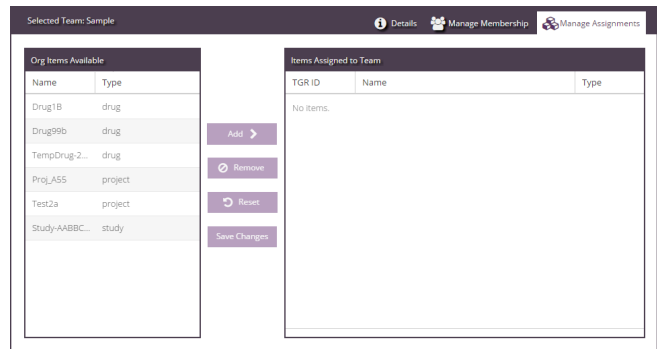
The Manage Assignments Tab Panel contains 3 sections, the Org Items Available list, a set of Action Buttons, and the Items assigned to Team panel.

The Org Items Available list shows any drugs, projects or studies, or other Storage Components, that have **NOT** yet been assigned to the current Team.

The Items Assigned to Team panel shows any items that were previously assigned to the currently selected Team.

Unlike the Manage Membership tab, item assignments have no roles. Therefore, an item can only be assigned to a Team once (an item is either assigned or not assigned).

Therefore, the left-hand Items Available list will shrink as more items are added to the current Team, and the right-hand Items Assigned list will grow. Likewise, if items are removed from the current Team, the Available list will grow larger as the Items Assigned list shrinks.



## Assigning Data Repository Storage Items to a Team


In order to assign one or more Storage Components to a Team, select the component names in the Org Items Available list, using the Ctrl and Shift keys to select multiple items if desired.

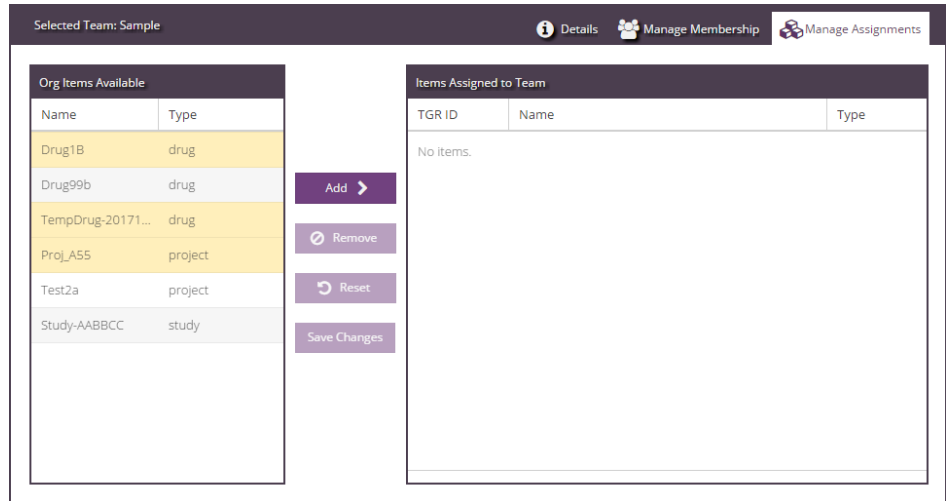
After the items are selected, click the Add button.

The Storage Component names will disappear from the Org Items Available list and appear in the Items Assigned to Team list with a **\* NEW** notation.

Save Changes must be clicked for the assignment to proceed, and the process is the same as above, where a confirmation dialog will be presented.

The Reset button can be used to discard changes.

 Any users that have been assigned Team Lead roles for a given Team will receive an email when a new Storage Component is assigned to their team.



Selected Team: Sample

Details Manage Membership Manage Assignments

Org Items Available	
Name	Type
Drug1B	drug
Drug99b	drug
TempDrug-20171...	drug
Proj_A55	project
Test2a	project
Study-AABBCC	study

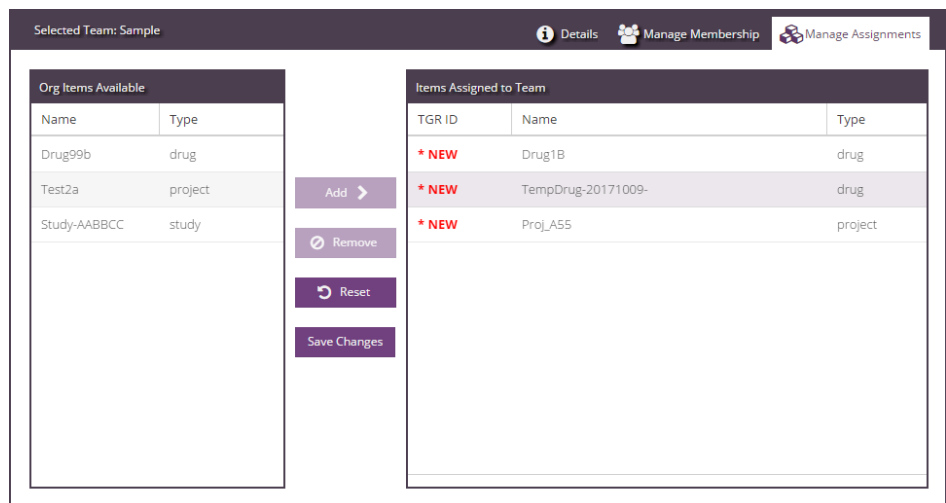
Add >

Remove

Reset

Save Changes

Items Assigned to Team		
TGR ID	Name	Type
No items.		



Selected Team: Sample

Details Manage Membership Manage Assignments

Org Items Available	
Name	Type
Drug99b	drug
Test2a	project
Study-AABBCC	study

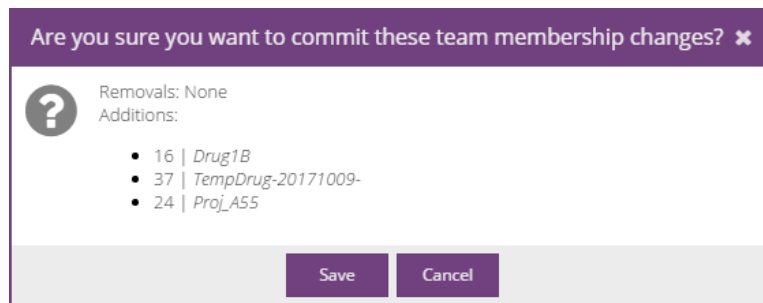
Add >

Remove

Reset

Save Changes

Items Assigned to Team		
TGR ID	Name	Type
* NEW	Drug1B	drug
* NEW	TempDrug-20171009-	drug
* NEW	Proj_A55	project



Are you sure you want to commit these team membership changes? ✕

Removals: None

Additions:

- 16 | Drug1B
- 37 | TempDrug-20171009-
- 24 | Proj\_A55

Save Cancel

## Removing Storage Component Access from a Team

In order to remove one or more Storage Components from a Team, select the component names in the Items Assigned to Team list, using the Ctrl and Shift keys to select multiple items if desired.

After the items are selected, click the Remove button.

The Storage Component names will disappear from the Items assigned to Team list and reappear in the Org Items Available list.

Selected Team: Sample Details Manage Membership Manage Assignments

Org Items Available		Items Assigned to Team		
Name	Type	TGR ID	Name	Type
Drug99b	drug	45	Drug1B	drug
Test2a	project	46	TempDrug-20171009-deleteme	drug
		44	Proj_A55	project
		47	Study-AABBCC	study

Add > Remove Reset Save Changes

Selected Team: Sample Details Manage Membership Manage Assignments

Org Items Available		Items Assigned to Team		
Name	Type	TGR ID	Name	Type
Drug99b	drug	45	Drug1B	drug
Test2a	project	46	TempDrug-20171009-deleteme	drug
		44	Proj_A55	project
		47	Study-AABBCC	study

Add > Remove Reset Save Changes

In addition, the names of the removed items will appear in grey tags at the bottom of the Items Assigned to Teams panel until the removal is saved.

Save Changes must be clicked for the assignment to proceed, and the process is the same as above, where a confirmation dialog will be presented.

The Reset button can be used to discard changes before a Save occurs.

Selected Team: Sample Details Manage Membership Manage Assignments

Org Items Available		Items Assigned to Team		
Name	Type	TGR ID	Name	Type
Drug99b	drug	46	TempDrug-20171009-deleteme	drug
Test2a	project	47	Study-AABBCC	study
Proj_A55	project			
Drug1B	drug			

Add > Remove Reset Save Changes

Removed: project: Proj\_A55 drug: Drug1B