

BExIS 2.7.0

System Administration Module

User Guide

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1. Overview

Caution! Do not delete the preset user and group!

Users. After installation there is just a single user inside the database. The user name is “Administrator” and the password is “gWg2xG”. By default, this user has full access to the whole application (because of the relationship to group “Admin”, see next paragraph).

Groups. Similar to *Users*, there is just one group inside the database – and the group name is “Admin”. In addition to that, the user “Administrator” belongs to that group. By default, this group grants full access to the application.

Features. The set of features is fixed and corresponds to the different hierarchical items of the menu bar.

Permissions. Within the system, it is possible to add, remove or modify existing permissions on features and datasets.

2. Account

By default, only a few components of BExIS are accessible for anonymous users. Any further access to the application is available for authorized users, only. Therefore you need to register and create an account. After a successful registration you are able to logon to BExIS using your account credentials for authentication.

2.1. Registration

First press [**Register**] in the upper right corner. You have to complete the form before you press Register, otherwise the registration will fail. Furthermore, the system supports you with different validation messages if any information is not valid.

Register

▼ User Information

Authenticaton Provider
local ▼

User Name

Password

Confirm Password

Full Name

Email Address

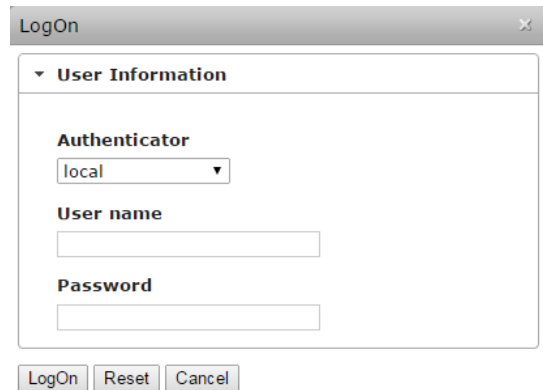
Security Question
What is the first name of the person you first kissed? ▼

Security Answer

Create Reset Cancel

2.2. LogOn

First press [**LogOn**] in the upper right corner. The system redirects you to the logon form and you have to enter your account credentials (user name and password). If the logon is successful, you will see a short welcome message instead of [**LogOn**]. Otherwise, the system will notify you about the status and reason why the logon was not successful.

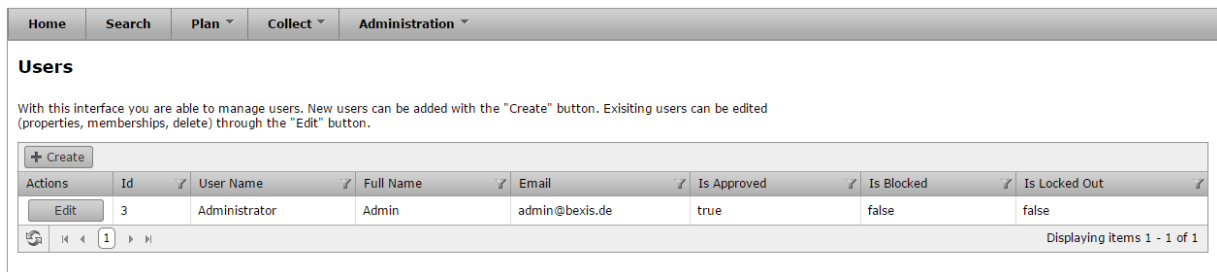


The image shows a 'LogOn' dialog box with a title bar and a close button. It contains a 'User Information' section with a dropdown menu for 'Authenticator' (set to 'local'), a text input for 'User name', and a text input for 'Password'. At the bottom, there are three buttons: 'LogOn', 'Reset', and 'Cancel'.

3. Users

Caution! This part of the system is secured. You may not have access to it.

BExIS provides different features for managing users. These are typically available to system administrators only. Each of them is described in more detail in one of the following subsections.



The image shows a web interface for managing users. It has a navigation bar with 'Home', 'Search', 'Plan', 'Collect', and 'Administration'. Below the navigation bar, there is a 'Users' section with a description: 'With this interface you are able to manage users. New users can be added with the "Create" button. Existing users can be edited (properties, memberships, delete) through the "Edit" button.' There is a '+ Create' button and an 'Edit' button. A table displays user information:

Actions	Id	User Name	Full Name	Email	Is Approved	Is Blocked	Is Locked Out
Edit	3	Administrator	Admin	admin@bexis.de	true	false	false

At the bottom of the table, there are navigation icons and the text 'Displaying items 1 - 1 of 1'.

3.1. Create a user

In addition to the self-registration procedure, user accounts may also be created by an administrator. This feature is available from **Administration > Authorization > Users**. Please press the **Create** button. A modal window will pop up that contains the user creation form. Similar to the self-registration, the system supports you with validation on all information entered.

3.2. Edit a user

Within BExIS you are able to display and modify user information. For security and usability reasons, the system allows modification only for certain parts of the user information. Please go to **Administration > Authorization > Users** and press the Edit button of the respective user. You are now able to alter the user information. Changes are committed to the system when you press the **Save** button.

For any given user memberships to certain groups need to be specified via the tab **Membership**.

You can change the status easily by (un)select the corresponding checkbox.

You can also delete a user directly by clicking on the Delete button. The deletion will be confirmed by clicking the **Delete** button.

The screenshot shows a modal window titled "Edit User: user1 (Id: 10)". It has two tabs: "Details" and "Membership". The "Details" tab is selected and contains the following fields:

UserId	10
UserName	user1
FullName	First User
Email	user1@bexis.de
Password	
Approved	<input checked="" type="checkbox"/>
Blocked	<input type="checkbox"/>
Locked Out	<input type="checkbox"/>

At the bottom of the modal are three buttons: "Delete", "Save", and "Cancel".

4. Groups

Caution! This part of the system is secured. You may not have access to it.

BExIS provides different features for the managing groups. They are typically available to system administrators only. Each of them is described in more detail in the following subsections.

The screenshot shows the "Groups" management interface. It has a navigation bar with "Home", "Search", "Plan", "Collect", and "Administration". Below the navigation bar is the "Groups" section. It contains a "Create" button and a table with the following data:

Actions	Group Id	Group Name	Description
Edit	2	Admin	Admin
Edit	7	Group1	The first group

At the bottom of the table, it says "Displaying items 1 - 2 of 2".

4.1. Create a group

This feature is available from **Administration > Authorization > Groups**. Please press the **Create** button. A modal window will pop up that contains the group creation form. The system supports you with validation on all information entered.

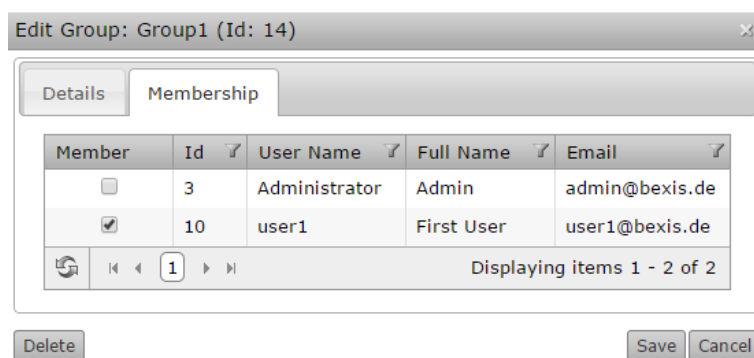
4.2. Edit a group

Within BEXIS you are able to display and modify group information. Please go to **Administration > Authorization > Groups** and press the Edit button of the respective group. You are now able to alter the group information. Changes are committed to the system once you pressed the **Save** button.

For any given user memberships to certain group need to be specified via the tab **Membership**.

You can change the status easily by (un)select the corresponding checkbox.

You can also delete a group directly by clicking on the Delete button. The deletion will be confirmed by clicking the **Delete** button.



5. Permissions

Caution! This part of the system is secured. You may not have access to it.

Permission is a rule that contains certain security regulations. In general, it is possible to set a rule on both, users and groups.

The security system of BEXIS distinguishes between two types of permissions. On the one hand, there are feature permissions, which allow or prohibit the access to well-defined and delimited areas of the application. This type of permissions is working on functional objects (e.g. actions that should be performed) – so called *Features*. On the other hand, data permissions provide the ability to protect real data (e.g. datasets, research plans and so on).

5.1. Features

Currently, features are fixed. It is not possible to add, edit or remove features. Furthermore you are not able to change well-defined and delimited area of a feature, but later on, the administrator will be able to modify features also. Please go to **Administration > Authorization > Features Manager**. This will bring up a page with a tree on the left side.

Home Search Plan Collect Administration

BEXIS

- Administration
 - Users Management
 - Groups Management
 - Data Management
 - Feature Management
 - Search
 - Seed Data Creation
 - Data Collection
 - Search
 - Data Collection
 - Dataset Creation
 - Dataset Submission
 - Research Plan
 - Data Dissemination

Feature Permissions

Here you are able to manage how users (or groups) have access to individual system features or entire modules. Please click on the name in the tree structure on left to view individual permissions. Ticking the checkboxes in the navigation tree will make a feature accessible without authentication (public access). Please use with care!

By default feature permissions are not set, which means access is denied unless access permissions are explicitly granted or inherited from an upper level feature (e.g. module). Individual grants on features rule out higher level settings. Effective permissions are shown in the first column of the table.

Please note that any change will take effect immediately without further confirmation or save/submit action.

Selecting a checkbox in the navigation tree (e.g. Search) will make that feature accessible without authentication (public access). Please use with care!

By clicking a feature name (a node in the tree), the system will show a table on the right side (see below). This table contains all subjects (users and groups) and their feature permission status. You may grant or deny permissions for individual users or groups using the radio buttons. If a permission is not explicitly set (i.e. None) permissions are inherited from up level features. Inherited permissions are shown in the first column as effective permissions.

Home Search Plan Collect Administration

BEXIS

- Administration
 - Users Management**
 - Groups Management
 - Data Management
 - Feature Management
 - Search
 - Seed Data Creation
 - Data Collection
 - Search
 - Data Collection
 - Dataset Creation
 - Dataset Submission
 - Research Plan
 - Data Dissemination

Feature Permissions

Here you are able to manage how users (or groups) have access to individual system features or entire modules. Please click on the name in the tree structure on left to view individual permissions. Ticking the checkboxes in the navigation tree will make a feature accessible without authentication (public access). Please use with care!

By default feature permissions are not set, which means access is denied unless access permissions are explicitly granted or inherited from an upper level feature (e.g. module). Individual grants on features rule out higher level settings. Effective permissions are shown in the first column of the table.

Please note that any change will take effect immediately without further confirmation or save/submit action.

Effective	Grant	None	Deny	Subject Id	Subject Name	Subject Type
✓	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	2	Admin	Group
✓	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	3	Administrator	User
✗	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	7	Group1	Group
✗	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	8	User1	User

5.2. Datasets

The security system of BEXIS is working on both, functional (features) and non-functional (dataset) items. Please go to **Administration > Authorization > Datasets** if you like to manage access to datasets.

By selecting a dataset (i.e. a row in the table), the system will show a second table underneath the first one, which contains all subjects (users and groups) and their different data permission statuses regarding the selected dataset. On this page, you are also able to alter the different kinds of data permissions for a selected dataset.

Home Search Plan Collect Administration

Dataset Permissions

Here you are able to manage how users (or groups) have access to individual datasets. Please select a dataset in the table below and specify who should have permissions to view, update, delete, download data, or who is able to grant access to other users (Note: metadata is always free). Ticking the checkboxes "public access" in the upper table will make a dataset accessible without authentication (public access to primary data). Please use with care!

By default only the creator of a dataset (in the system) has full access, all other permissions are not set, which means access is denied. Grants for individual users rule out higher level settings for groups.

Please note that any change will take effect immediately without further confirmation or save/submit action.

IsPublic	Id	Title	Version
<input type="checkbox"/>	4		4
<input type="checkbox"/>	3	ffff	4
<input checked="" type="checkbox"/>	2	imgages	4
<input checked="" type="checkbox"/>	1	dog town	6

Create	View	Update	Delete	Download	Grant	Subject Id	Subject Name	Subject Type
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	Admin	Group
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	Administrator	User
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	Group1	Group
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8	User1	User

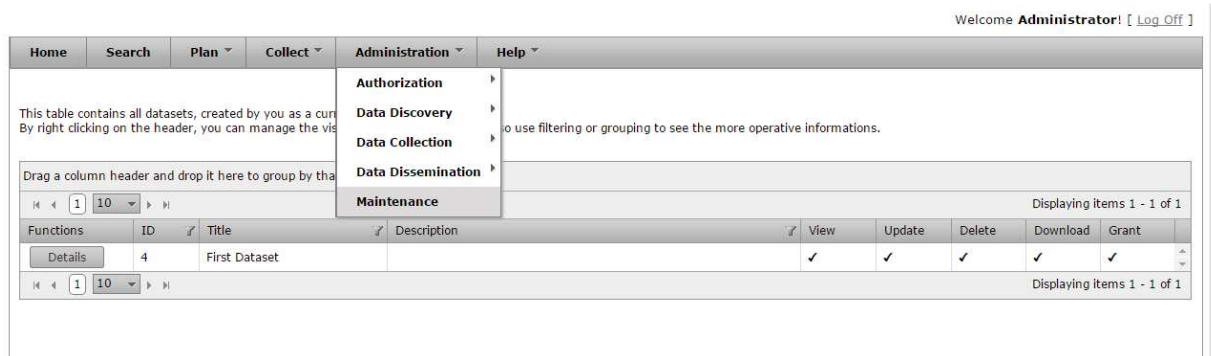
In general, the system works on six different data permission types:

- **Create:** allow/deny creating a dataset
- **View:** allow/deny view access to primary data
- **Update:** allow/deny manipulation (upload and update) of primary data
- **Delete:** allow/deny deletion of the whole dataset
- **Download:** allow/deny downloading primary data
- **Grant:** allow/deny to give permission to other users or groups

Selecting the checkbox in the first column (i.e. IsPublic) will allow public access to that dataset without any authentication.

6. Maintenance

At the dataset maintenance, you are able to see a list of Datasets.



Welcome Administrator! [Log Off]

Home Search Plan Collect Administration Help

Authorization
Data Discovery
Data Collection
Data Dissemination
Maintenance

This table contains all datasets, created by you as a cur...
By right clicking on the header, you can manage the vis...
to use filtering or grouping to see the more operative informations.

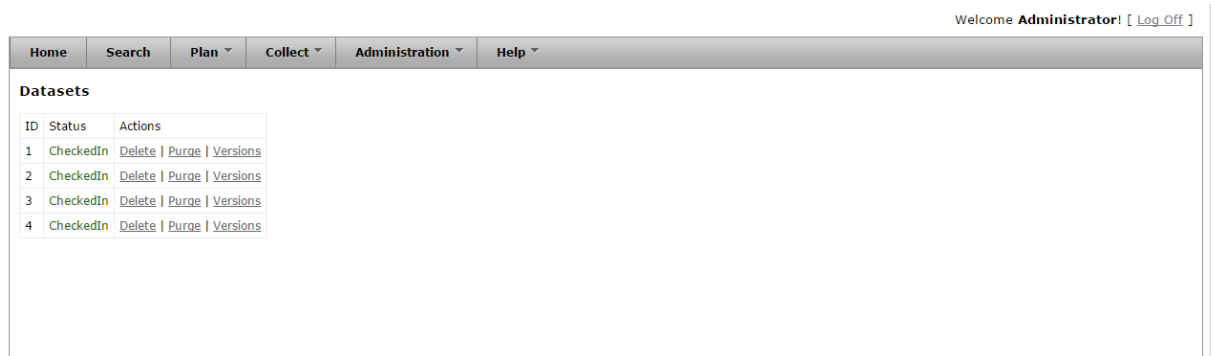
Drag a column header and drop it here to group by tha...

Functions ID Title Description View Update Delete Download Grant

Functions	ID	Title	Description	View	Update	Delete	Download	Grant
Details	4	First Dataset		✓	✓	✓	✓	✓

Displaying items 1 - 1 of 1

You can find this list via menu in **Administration > Maintenance**. In this list you can see the status of each dataset and some useful actions for the maintenance of a dataset.



Welcome Administrator! [Log Off]

Home Search Plan Collect Administration Help

Datasets

ID	Status	Actions
1	CheckedIn	Delete Purge Versions
2	CheckedIn	Delete Purge Versions
3	CheckedIn	Delete Purge Versions
4	CheckedIn	Delete Purge Versions

There are two ways to delete a dataset:

Delete: this function tags a dataset to exclude it from nearly all features of the system (e.g. search). But the dataset itself will stay inside the database. So later on you are able to recover the dataset – if needed.

Purge: the dataset will be removed from the system at all (incl. removal of data permissions, metadata and primary data). There is no way to rollback that action.

Note that if you purge a dataset, you cannot recover it at all.

Home	Search	Plan ▾	Collect ▾	Administration ▾	Help ▾
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Dataset 5 versions

[Return to the list](#)

ID	Timestamp	Status	Actions	Comment
5	7/3/2015 12:35:17 PM	Archived	Details	Metadata was submitted.
6	7/3/2015 12:35:43 PM	Archived	Details	upload data from upload wizard
7	7/3/2015 12:36:40 PM	CheckedIn	Details	upload data from upload wizard

[Return to the list](#)

Via **Versions** you have access to all different versions of a dataset. By clicking **Details**, you will see the primary data (data tuples) of that version.