

BEXIS 2.8.0

System Administration Module

User Guide

Authors

Sven Thiel, Roman Gerlach, Nafiseh Navabpour

Contact

Website: <http://fusion.cs.uni-jena.de/bexis>
Email: bexis-support@uni-jena.de
Phone: +49-(0)3641-948968

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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.

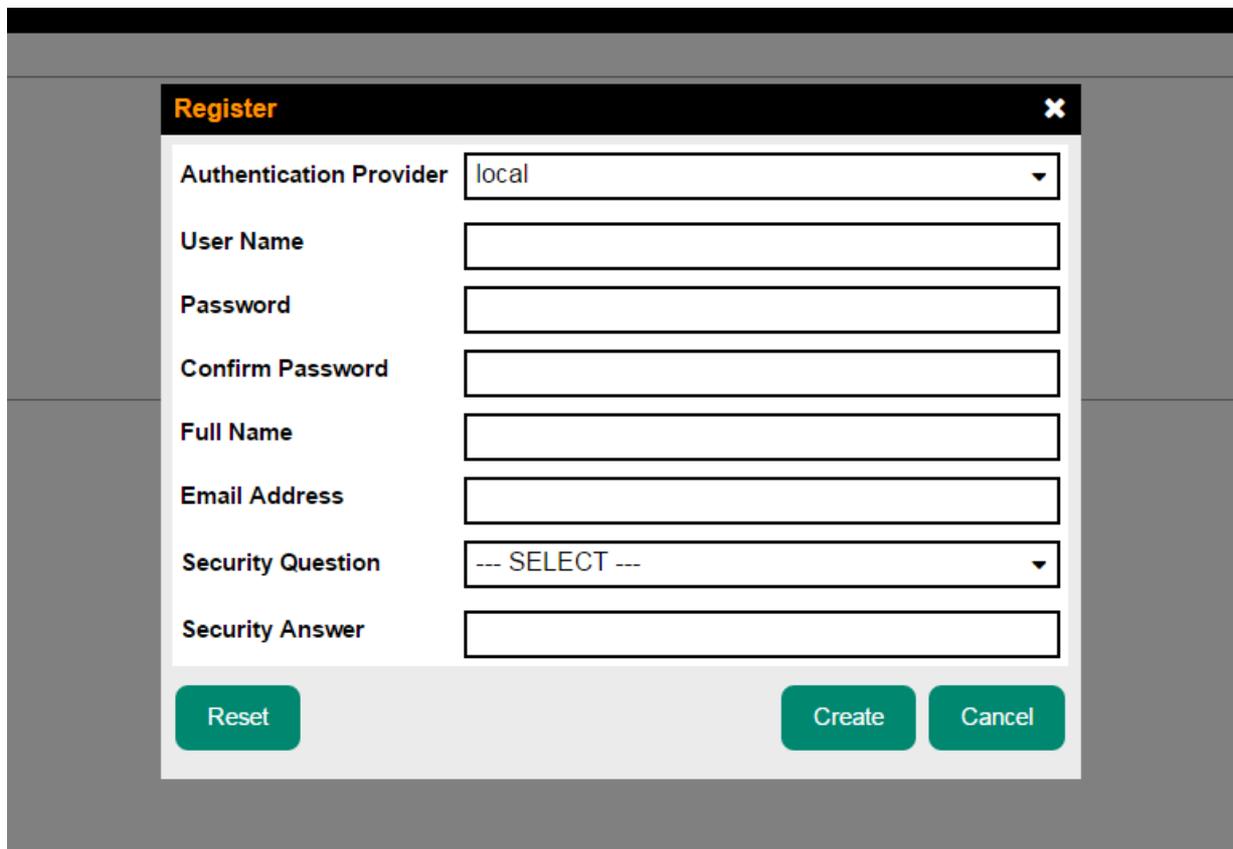
Permissions. Within the system, it is possible to add, remove or modify existing permissions on features and datasets.

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.



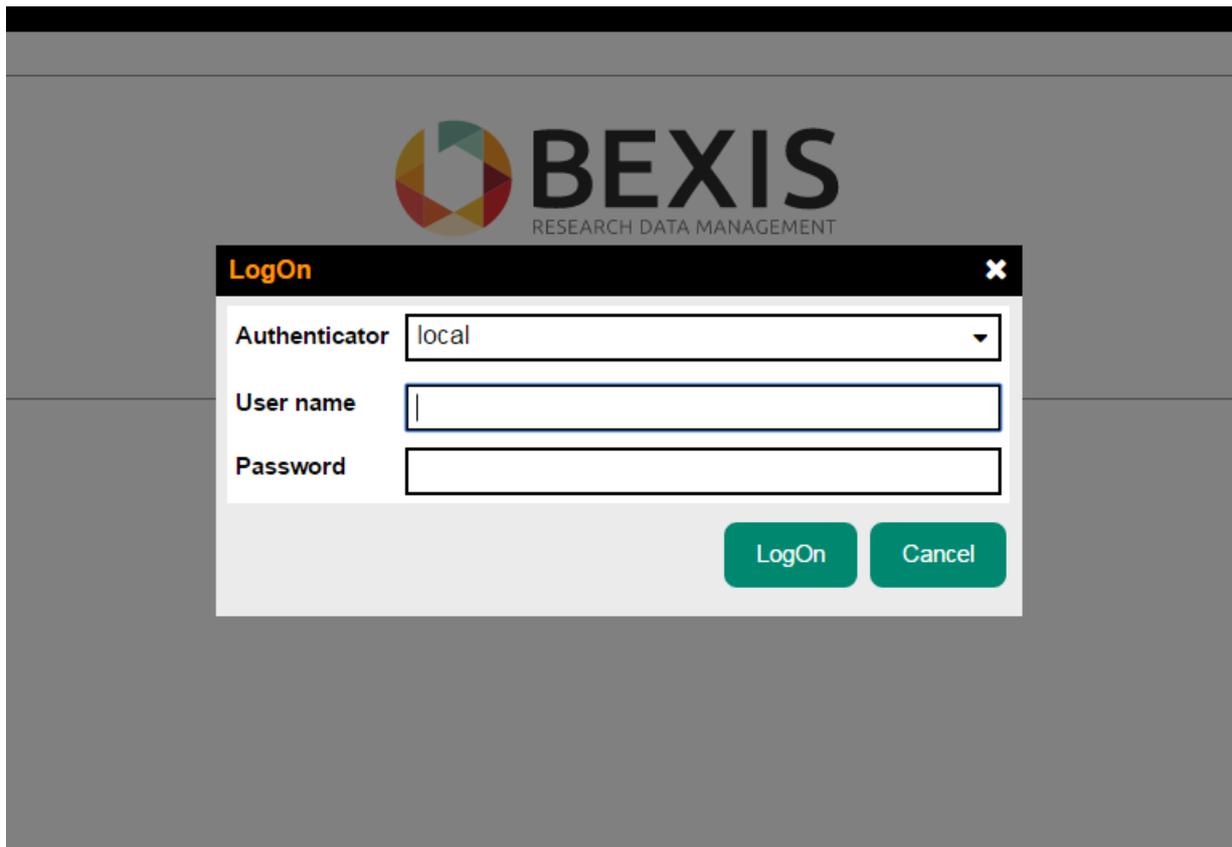
The image shows a screenshot of a web application's registration form. The form is titled "Register" and is contained within a modal window. It features several input fields and buttons. The fields are: "Authentication Provider" (a dropdown menu with "local" selected), "User Name", "Password", "Confirm Password", "Full Name", "Email Address", "Security Question" (a dropdown menu with "--- SELECT ---" selected), and "Security Answer". At the bottom of the form, there are three buttons: "Reset", "Create", and "Cancel".

Field Name	Value / Selection
Authentication Provider	local
User Name	
Password	
Confirm Password	
Full Name	
Email Address	
Security Question	--- SELECT ---
Security Answer	

Buttons: Reset, Create, 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.

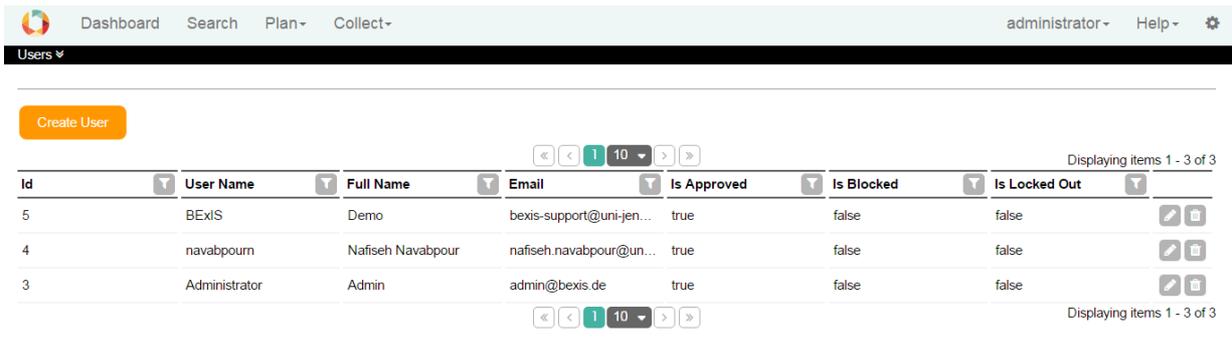


The screenshot shows a web interface for BEXIS Research Data Management. At the top center, there is a logo consisting of a colorful geometric shape (a hexagon-like shape made of triangles) followed by the text "BEXIS" in a large, bold, sans-serif font, and "RESEARCH DATA MANAGEMENT" in a smaller font below it. Below the logo, there is a modal dialog box titled "LogOn" with a close button (X) in the top right corner. The dialog box contains three input fields: "Authenticator" with a dropdown menu showing "local", "User name" with a text input field, and "Password" with a text input field. At the bottom right of the dialog box, there are two buttons: "LogOn" and "Cancel", both in a teal color.

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.

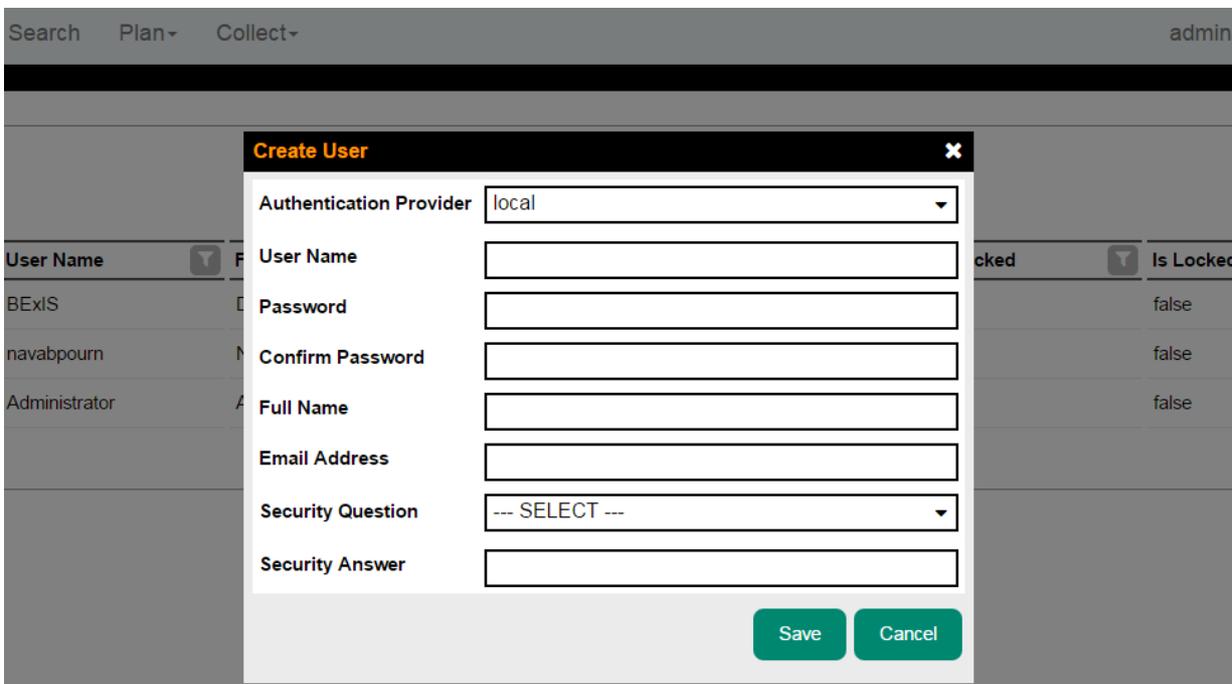


The screenshot shows a web interface for user management. At the top, there is a navigation bar with 'Dashboard', 'Search', 'Plan', and 'Collect' menus, and a user profile 'administrator' with a 'Help' link and a settings icon. Below the navigation bar is a 'Users' section with a 'Create User' button. A table displays a list of users with columns for Id, User Name, Full Name, Email, Is Approved, Is Blocked, and Is Locked Out. The table contains three rows of user data. Below the table are pagination controls and a 'Displaying items 1 - 3 of 3' indicator.

Id	User Name	Full Name	Email	Is Approved	Is Blocked	Is Locked Out
5	BExIS	Demo	bexis-support@uni-jen...	true	false	false
4	navabpour	Nafiseh Navabpour	nafiseh.navabpour@un...	true	false	false
3	Administrator	Admin	admin@bexis.de	true	false	false

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.



The screenshot shows a modal window titled 'Create User' with a close button (X). The form contains the following fields:

- Authentication Provider: local (dropdown menu)
- User Name: text input field
- Password: text input field
- Confirm Password: text input field
- Full Name: text input field
- Email Address: text input field
- Security Question: --- SELECT --- (dropdown menu)
- Security Answer: text input field

At the bottom right of the modal, there are two buttons: 'Save' and 'Cancel'.

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.

The screenshot shows the 'Edit User: BEXIS (Id: 5)' dialog box with the 'Details' tab selected. The form contains the following fields and controls:

- Userid:** 5
- UserName:** BEXIS
- FullName:** Demo
- Email:** bexis-support@uni-jena.de
- Password:** (empty field)
- Confirm Password:** (empty field)
- Approved:**
- Blocked:**
- Locked Out:**

At the bottom right, there are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Edit User: BEXIS (Id: 5)' dialog box with the 'Membership' tab selected. It displays a table of group memberships with pagination controls.

Displaying items 1 - 3 of 3

Memb...	Id	Group Name	Description
<input type="checkbox"/>	2	Admin	Admin
<input type="checkbox"/>	6	BEXIS	Internal group
<input type="checkbox"/>	7	BTO	A group of researcher of BTO

Displaying items 1 - 3 of 3

At the bottom right, there are 'Save' and 'Cancel' buttons.

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.

Group Id	Group Name	Description
2	Admin	Admin
6	BEXIS	Internal group
7	BTO	A group of researcher of BTO

4.1. Create a group

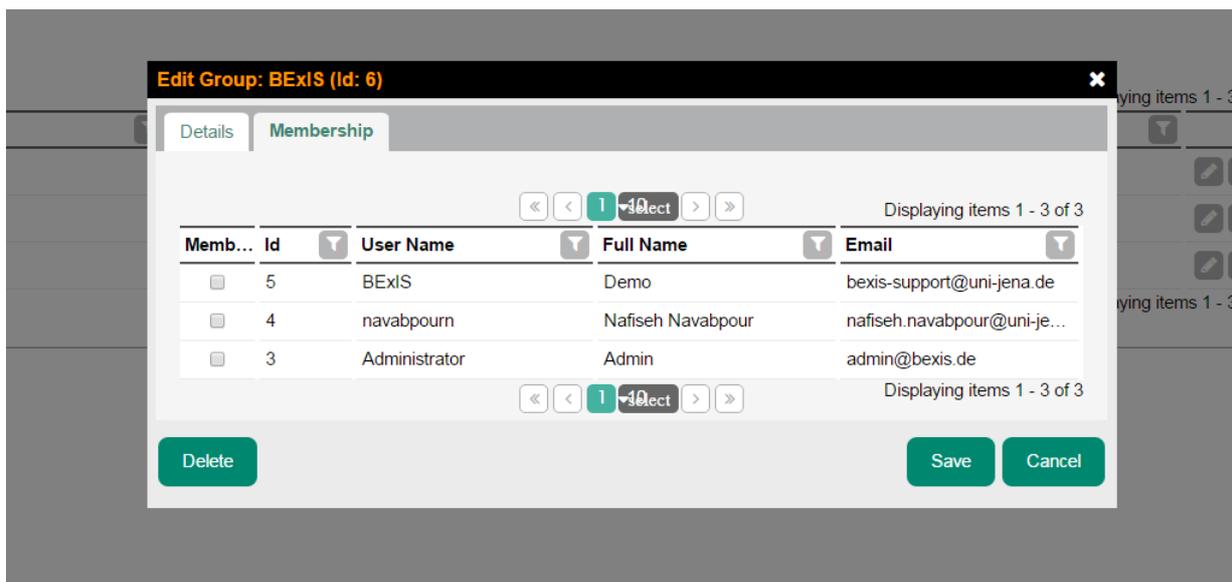
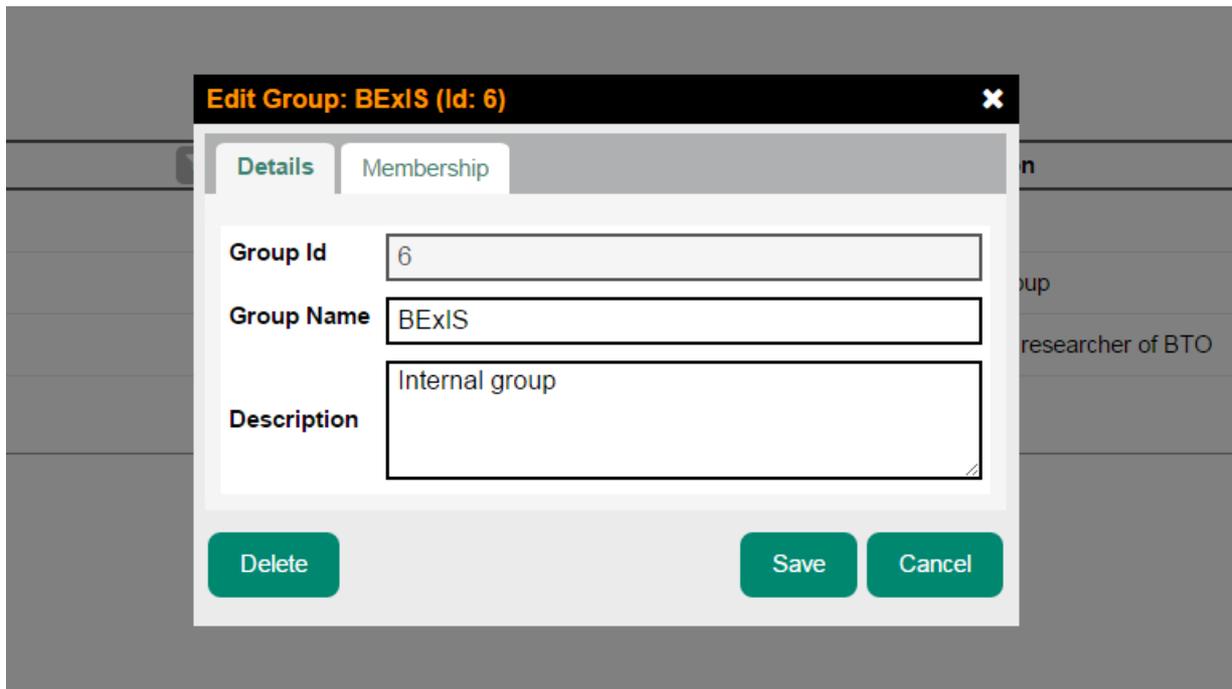
This feature is available from **Administration > Authorization > Groups**. Please press the **Create** button. A modal window will pop up that contains the group creation form. The system supports you with validation on all information entered.

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.



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.

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.

Effect...	Grant	None	Deny	Subject Id	Subject Name	Subject Type
✓	<input checked="" 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"/>	6	BEXIS	Group
✗	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	5	BEXIS	User
✗	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	7	BTO	Group
✗	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	4	navabpourn	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.

The screenshot displays the 'Data Permissions' interface. At the top, there is a navigation bar with 'Dashboard', 'Search', 'Plan', and 'Collect' options, along with user information 'administrator' and a 'Help' link. Below this, the 'Data Permissions' section is active.

The first table lists datasets:

IsPub...	Id	Title	Version
<input type="checkbox"/>	3	Tectonic stress fields in Zagros	4
<input type="checkbox"/>	2	Tectonic Zagros img	4
<input type="checkbox"/>	1	Breeding bird survey	10

Navigation controls for the first table show '1' selected out of 3 items, with '10' items per page. The text 'Displaying items 1 - 3 of 3' is visible.

The second table shows permissions for a selected dataset:

Create	View	Update	Delete	Down...	Grant	Subject Id	Subject Name	Subject Type
<input type="checkbox"/>	2	Admin	Group					
<input checked="" type="checkbox"/>	3	Administrator	User					
<input type="checkbox"/>	6	BEXIS	Group					
<input type="checkbox"/>	5	BEXIS	User					
<input type="checkbox"/>	7	BTO	Group					
<input type="checkbox"/>	4	navabpourm	User					

Navigation controls for the second table show '1' selected out of 6 items, with '10' items per page. The text 'Displaying items 1 - 6 of 6' is visible.

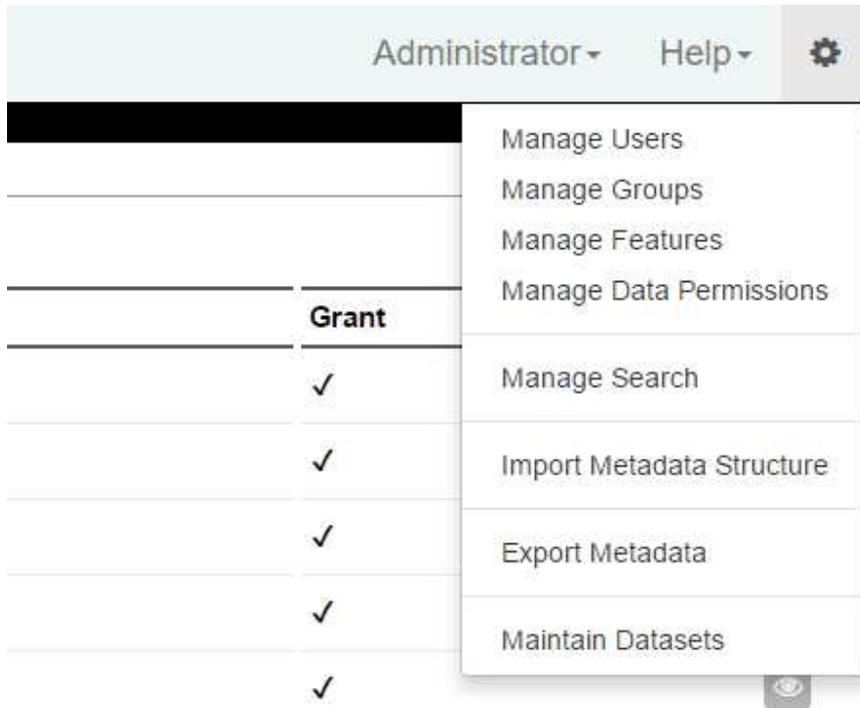
In general, the system works on six different data permission types:

- **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

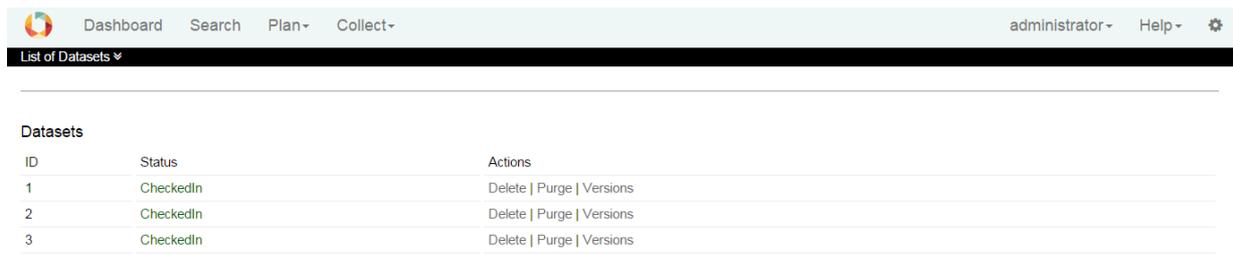
Selecting the checkbox in the first column (i.e. IsPublic) will allow public access to that dataset without any authentication.

6. Maintenance

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



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



The screenshot shows the 'List of Datasets' page. The navigation bar includes 'Dashboard', 'Search', 'Plan', and 'Collect'. The user is logged in as 'administrator'. The page title is 'List of Datasets'. Below the title is a table with the following data:

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

