

Setting Up GeneLink: Administrator Menu Quick Reference Guide

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Users

To Add a User:

1. Login to **GENELINK**.
 2. Select the **ADMINISTRATOR MENU** link on the upper right-hand corner of the **GENELINK** main page.
 3. Select **ADD USER** from the **ADMIN OPTIONS** on the **ADMINISTRATION MENU**.
 4. The **ADD USER FORM** displays. Enter the **FULL NAME**, **E-MAIL** address, **USERNAME**, **PASSWORD**, and the **PASSWORD** again for the user.
- *NOTE: USER NAME AND PASSWORD ARE CASE SENSITIVE and limited to 8 characters.*
5. Select **ADD USER**.
 6. The **ADMINISTRATION MENU** displays and confirms that the user has been added.

To Change a Password:

1. Login to **GENELINK**.
2. Select the **CHANGE PASSWORD** link on the upper right-hand corner of the **GENELINK** main page.
3. The **CHANGE YOUR PASSWORD** dialog displays.
4. Enter the **USERNAME**.
5. Enter the **CURRENT PASSWORD**.
6. Enter the **NEW PASSWORD**.
7. Verify the **NEW PASSWORD**.
8. Select **CHANGE PASSWORD**. A confirmation message displays.
9. Select **CONTINUE** to return to the **ADMINISTRATION MENU**.

To Reset Passwords (Root Administrator Only):

1. Login to **GENELINK**.
2. Select the **ADMINISTRATOR MENU** link on the upper right-hand corner of the **GENELINK** main page.
3. Select **RESET PASSWORDS** in the **ROOT ONLY OPTIONS** section of the **ADMINISTRATION MENU**. The **RESET PASSWORD FORM** displays.

4. Select the **USERNAME** from the drop-down list.
5. Enter the **NEW PASSWORD**.
6. Verify the **NEW PASSWORD**.
7. Select **RESET PASSWORD**. The **ADMINISTRATION MENU** displays a confirmation message.

Adding a new project

To Add a Project (Root Administrator Only)

1. Login to **GENELINK**.
2. Select the **ADMINISTRATOR MENU** link on the upper right-hand corner of the **GENELINK** main page.
3. Select **CREATE NEW PROJECT** from the **ROOT ONLY OPTIONS** section of the **ADMINISTRATION MENU**. The **ADD PROJECT FORM** displays:
4. Enter the name of the project in **PROJECT NAME** text box.
5. Select **ADD PROJECT**.
6. The **ADMINISTRATION MENU** displays with a confirmation message advising that the project has been added.

Managing Groups

To Add a Group:

1. Login to GENELINK.
2. Select the **ADMINISTRATOR MENU** link on the upper right-hand corner of the GENELINK main page.
3. From the **ADMINISTRATION MENU**, select **ADD GROUP**. The **ADD GROUP FORM** displays.
4. Enter a **GROUP NAME** and select a **PROJECT NAME** from the drop-down list.

NOTE: THE GROUP NAME MUST BE UNIQUE TO THE GENELINK APPLICATION.

5. Select **ADD GROUP**. A confirmation message displays at the top of the Administration Menu.

To Assign Privileges to a Group:

1. Login to GENELINK.
2. Select the **ADMINISTRATOR MENU** link on the upper right-hand corner of the GENELINK main page.
3. From the **ADMINISTRATION MENU**, select **MANAGE GROUPS**. The **MANAGE GROUP FORM** displays.
4. Select the appropriate group from the **GROUP** drop-down list.
5. Select **CHANGE GROUP ACTIVITIES** from the **ACTION** list.
6. Select **MANAGE GROUP**.
7. Select **EXPORT**, **IMPORT**, **ADMIN**, or **VIEW** from the **AVAILABLE ACTIVITIES** list and move the privilege to the **ACTIVITIES ASSIGNED TO GROUP NAME** list by using your right arrow.

To Associate Groups With Families:

1. Login to GENELINK.
2. Select the **ADMINISTRATOR MENU** link on the upper right-hand corner of the GENELINK main page.
3. From the **ADMINISTRATION MENU**, select **MANAGE GROUPS**. The **MANAGE GROUP FORM** displays.
4. Select the appropriate group from the **GROUP** drop-down list.
5. Select **ASSOCIATE GROUP WITH FAMILIES** from the **ACTION** list.
6. Select **MANAGE GROUP**.
7. Highlight the appropriate families that you wish to associate with the group from the **AVAILABLE FAMILIES** list and move them to the **FAMILIES ASSIGNED TO GROUP NAME** list by using the right arrow.

To Add a User to a Group:

1. Login to GENELINK.
2. Select the **ADMINISTRATOR MENU** link on the upper right-hand corner of the GENELINK main page.
3. From the **ADMINISTRATION MENU**, select **MANAGE GROUPS**. The **MANAGE GROUP FORM** displays.
4. Select the appropriate **GROUP** from the drop-down list
5. Select **CHANGE GROUP MEMBERS** from the **ACTION** drop-down list.
6. Select **MANAGE GROUP**. The **GROUP NAME GROUP** dialog displays.
7. Select the users you wish to add to the group from the **AVAILABLE USERS** list and add them to the **USERS ASSIGNED TO GROUP NAME** list by highlighting the users and selecting the right arrow.

To Remove a User from a Group:

1. Follow directions 1-6 from To Add a User to a Group.
2. Select the users you wish to remove from the group from the **USERS ASSIGNED TO GROUP NAME** list by highlighting the appropriate user(s) and selecting the left arrow.

To Add an Activity (Root Administrators Only):

***NOTE: THIS STEP IS ONLY NEEDED IF YOU WANT AN ADDITIONAL LAYER OF SECURITY. THE SOURCE CODE WILL NEED ALTERATIONS TO ACCOMMODATE ANY ADDED ACTIVITIES.**

1. Login to GENELINK.
2. Select the **ADMINISTRATOR MENU** link on the upper right-hand corner of the GENELINK main page.
3. Select **ADD AN ACTIVITY** from the Root Only Options section of the **ADMINISTRATION MENU**. The **ADD ACTIVITY FORM** displays.
4. Enter the **NEW ACTIVITY NAME**.
5. Select **ADD ACTIVITY**.

Reports

To View the User Report:

1. Login to GENELINK.
2. Select the **ADMINISTRATOR MENU** link on the upper right-hand corner of the GENELINK main page. The **ADMINISTRATION MENU** displays.
3. Select **GENERATE REPORTS**. The **GENERATE REPORT FORM** displays.
4. Select the appropriate user from the **SELECT USER** drop-down list.
5. Select **VIEW USER REPORT**. The **USER REPORT** displays.
6. To print the **USER REPORT**, select the print icon on your web browser.

To View the Project Report:

1. Login to GENELINK.
2. Select the **ADMINISTRATOR MENU** link on the upper right-hand corner of the GENELINK main page. The **ADMINISTRATION MENU** displays.
3. Select **GENERATE REPORTS**. The **GENERATE REPORT FORM** displays.
4. Select the appropriate project from the **SELECT PROJECT** drop-down list.
5. Select **VIEW PROJECT REPORT**. The **PROJECT NAME PROJECT REPORT** displays.
6. To print the **PROJECT NAME PROJECT REPORT**, select the print icon on your web browser.

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