

# User Accounts

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## Overview

This group focused on suggesting changes to ArchivesSpace's user accounts and group permissions. By reviewing relevant JIRA tickets, we determined that there needed to be a more accessible way to browse and edit both user accounts and group permissions. Because of the volume of JIRA tickets related to authentication, our team determined that a survey of the ArchivesSpace community was necessary to understand what was most desired by institutions. We also recommended creating an option within permission groups to allow resource-level permissions for users.

Additional recommendations for field level permissions are also attached to the end of the document for future consideration and refinement thanks to Jason Loeffler.

## Wireframe for viewing User Accounts:

Navigating to the "Manage User Accounts" page (referring to the current cog menu) will bring you to a display similar to viewing agents or subjects.

User	Groups	Active?	Repository	
admin	none	true		<a href="#">Edit</a>
dproud	archivists	false	UA	<a href="#">Edit</a>
test	archivists	false		<a href="#">Edit</a>
dallas	managers	true	UA, MHC	<a href="#">Edit</a>
mike	project-managers	true		<a href="#">Edit</a>
lilly	archivists	true	MHC	<a href="#">Edit</a>
max	viewers	false		<a href="#">Edit</a>
olga	project-managers	true	UA, MHC	<a href="#">Edit</a>

This view will list all user accounts in the ArchivesSpace instance, with columns containing: (1) the permission groups to which the user belongs, (2) whether or not the user is active, (3) the repositories to which the user belongs, and (4) (not pictured above) last modified date for the user account.<sup>1</sup> On the side of the screen are options to facet searches and narrow down the users displayed on the screen. System administrators can narrow searches based on the repositories and permission groups found in the instance. A search bar located at the top of the "Manage Users" page allows anyone to perform searches for only users accounts, in a similar way that ArchivesSpace searches for Agents.

- Issues addressed by wireframe
  - JIRA [ANW-97](#): As an admin, I want to identify inactive users so that they either do not appear or can easily be filtered out of the main user view.
  - JIRA [AR-1041](#): Users index view should provide more information: group(s)/repository/ies, name, etc. and allow sorting/faceting

## Wireframe for User Management:

When you click the cog wheel --> Manage User Access, and then click a user record, this is what you would see.

<sup>1</sup> New York University feedback requested that last modified information should pertain to when the user was added to a new permission group, password changed, etc. Another potential interpretation for "last modified" could be to reflect the last saving-activity within the program. Further input from the ArchivesSpace community is recommended.

Update Account
Delete

## Edit Account

**Username \***

**Full name \***

Email

First Name

Last Name

Phone

Title

Department

Additional Contact Information

Password \*

Confirm password \*

Active user?

Default Repository? 

University Archives ▼
 

- Test Repository
- University Archives
- Michigan Historical Collections

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## Manage User Access

### Groups

<input type="checkbox"/>	repository-managers	Managers of the A&M repository
<input type="checkbox"/>	repository-archivists	Archivists of the A&M repository
<input type="checkbox"/>	repository-project-managers	Project managers of the A&M repository
<input type="checkbox"/>	repository-advanced-data-entry	Advanced Data Entry users of the A&M repository
<input type="checkbox"/>	repository-basic-data-entry	Basic Data Entry users of the A&M repository
<input type="checkbox"/>	repository-viewers	Viewers of the A&M repository
<input type="checkbox"/>	KARM	KARM

Grant system administrator permissions

Update Account
Cancel

We have combined what used to live separately under System menu “Manage Users” and cog menu “Managed User Access” to simplify user management for staff who do that work. We added a checkbox which represents active users. We recommend that it defaults to “active.” Inactivating user accounts (like staff or student workers who’ve left) would strip them of all permissions but still keep them visible in the user listing (making it possible to facet the view of

ASpace users) and enable their inactive accounts to be kept within ArchivesSpace so they do not get removed from linked functions such as Events. We also moved the “grant administrator permissions” checkbox due to comments that it’s too easy to click by accident when setting up a new user. This also seemed the most logical place to address the need for a default repository for when users login. The “Default Repository?” dropdown list will be all of the repositories that the user has permissions in. If no repositories are selected as the “Default,” ArchivesSpace functions as normal, selecting the first numerical Repository ID. We also recommend a separate “Manage User Access” section with permissions for each repository where the user is a member.

- Issues addressed by the wireframe
  - JIRA [AR-1633](#): Manage Users and Manage User Access in same place?
  - JIRA [ANW-97](#): As an admin, I want to identify inactive users so that they either do not appear or can easily be filtered out of the main user view.
  - JIRA AR-1621 [As an staff user, I would like to set a default repository for login](#)

## Wireframe for User Profiles

User profiles (i.e., staff profiles) should link to records, similar to top containers linking to profiles:

- Accessions and Collection Management - to show who will be processing each new accession or project. Ideally the staff interface would have a "My Projects" view to see the queue of processing assignments for the user. Currently, the Collection Management lists are only easily sortable by processing priority, but it would be nice to have this feature for identifying collections to be processed by particular subject specialists/curators.
- Finding Aids - to generate reports by staff or administrators that demonstrate finding aids completed by the staff account for evaluations.
- Sometimes my institution uses student and volunteers to enter finding aid data and it would be wonderful if, by linking the user profile to a collection, it could grant collection-specific write/edit/delete privileges.

### **Current behavior:**

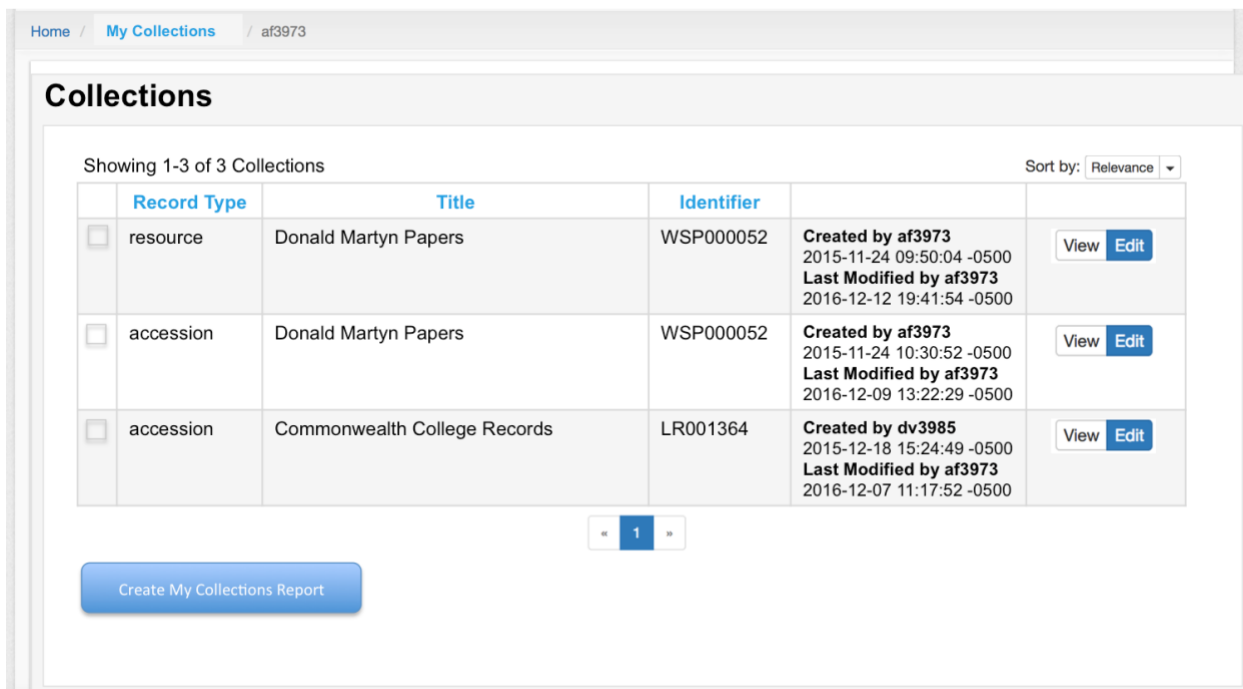
The screenshot shows the 'Collection Management' subrecord form. The left sidebar contains a navigation menu with the following items: Basic Information, Dates, Extents, Agent Links, Related Resources, Related Accessions, Subjects, External Documents, Rights Statements, Instances, Deaccessions (selected), Collection Management, Classifications, and User Defined. A 'Save Accession' button is located at the bottom of the sidebar. The main form area is titled 'Collection Management' and includes a 'Add Collection Management Fields' button. The form fields are: Processing Priority (dropdown), Rights determined? (checkbox), Processing Plan (text area), Processors (text area), Processing hrs/unit Estimate (text input), Processing Total Extent (text input), Extent Type (dropdown set to Linear Feet), Total Processing Hours (text input), and Funding Source (text input).

Shows the current Accession Record's Collection Management subrecord.

**Desired behavior:**

The screenshot shows the 'Collection Management' subrecord form with a red bracket under the 'Processors' field containing the text 'af3973'. A text box below the field explains the desired behavior: 'Change Processors field from free text to dropdown selection(s). Selected user(s) then has/have this accession record saved in their My Collections. Also, for users who don't normally have access for data entry, access/permissions are given to work on the accession and associated resource record (once spawned or linked- linking to the accession should automatically fill in the processor field to match the accession(s), yes you can have multiple processors).'

By providing a list of users in the accession record's CM's processors field, the record can be linked back to the user.



Mockup of what the My Collections page could look like. The page lives within an individual's user management page, and lists all records to which s/he was assigned in the Collection Management subrecords (in accessions and resource records). Ideally there would be a link on this page where to create a report listing these accession and resource records. SIEWG recommends additional thought be put into the specific functionality and behaviors, particularly: collections with multiple processors assigned, what information the report should include, what happens to completed collections (are there separate lists for "new," "in progress," and "completed?"), etc.

- Issues addressed by the wireframe
  - JIRA [AR-1773](#): User Profiles Link to records for Project Management, Reports, and Collection-specific Data Entry

## Wireframe for managing Permission Groups

Currently, clicking on the "Manage Group" option under the cog wheel displays a list of the current permissions groups, with edit buttons, which is displayed below.

Create Group

## Groups

Group name	
Managers of the test repository (repository-managers)	Edit
Archivists of the test repository (repository-archivists)	Edit
Project managers of the test repository (repository-project-managers)	Edit
Advanced Data Entry users of the test repository (repository-advanced-data-entry)	Edit
Basic Data Entry users of the test repository (repository-basic-data-entry)	Edit
Viewers of the test repository (repository-viewers)	Edit

We recommend changing this page to display current permission groups, as well as the user accounts associated with each group. The Groups page allows system administrators, and users with repository management permission can make changes to the group permissions, and add users. For all other users, the “Manage Group” should not be visible in the dropdown menu. The “Create Group” button is kept as well, allowing for the addition of permission group as an extra column.

Along the top of the table would list all of the permissions groups, including any custom permission groups. Along the leftmost column are the individual permissions. Displaying the permissions assigned to each Permission Group. A row at the bottom of the table displays users within each group allowing for user accounts to be added directly from this page. For institutions with multiple repositories, the page will default to the currently selected repository. Within this groups page should a drop-down menu allowing the screen to quickly display multiple permissions groups. It may also be helpful to enable multiple views, such as a dedicated view of the customizable matrix for permissions profiles (currently labeled “Manage Groups” but with our table and checkbox view) and a user view which easily shows their respective permission levels (currently “Manage User Access” but sortable by permission group or alphabetically by username).

Repository: (drop-down menu)

### University Archives Group

Function	Repository Managers	Archivists	Basic Data Entry Users	Viewers	Custom List for Catalogers

transfer all the records of a repository...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
manage this repository...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
create/update accessions in this repository	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
etc.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
etc.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
etc.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
create_job	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
cancel_job	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Users</b>	Adam Barb	Maureen	Gaia Mack	ReferenceStaff1 ReferenceStaff2	Cataloger1 Cataloger2

Some institutions would be interested in the ability to export such a permissions group matrix as possibly a CSV, PDF, or some other common format. This could be added to the main Reports page, and/or there could be a button on the permission matrix to generate the downloadable file.

## Wireframe for allowing user registration

Currently a value in the config file defaults to allowing users to click a link to register for an account (see below)





We recommend a checkbox in the “My Global Repository” settings (or another menu within the staff interface) to publish or remove the link without needing to directly edit the config file.

## My Global Preferences

Edit these values to set your system-wide user preferences. These values can be overridden by repository defaults or by your own preferences for a repository.

### General Settings

- Show Suppressed?
- Publish?
- Pre-populate Records?
- Allow account registration

### Accession Browse Columns

- Column 1 > Accept Default: [no value] ▼
- Column 2 > Accept Default: [no value] ▼
- Column 3 > Accept Default: [no value] ▼
- Column 4 > Accept Default: [no value] ▼
- Column 5 > Accept Default: [no value] ▼

### Resource Browse Columns

- Column 1 > Accept Default: [no value] ▼
- Column 2 > Accept Default: [no value] ▼
- Column 3 > Accept Default: [no value] ▼

- Issues addressed by wireframe
  - JIRA [AR-981](#): As a system administrator, I would like the ability to disallow new user accounts to be made by non-admins.

## Users Editing Their Own Accounts

We recommend at minimum allowing each user to edit his/her own password and default repository, if not the full details available under the existing “Edit Account” page. We have added a permission allowing the editing of a user’s own account information to the recommended Permissions matrix, defaulting to only Repository Managers--this should satisfy those institutions that want only managers to have these edit capabilities, as in the current system. Institutions that want all users to be able to edit their account info can give that permission to all of their groups. The permission would function as stated in the paragraphs below.

When you click the cog wheel --> Manage User Account [new option], users would see the following screen, EXCEPT that everything they are not allowed to edit would be greyed out.

Update Account

### Edit Account

**Username \*** ronaldhot

**Full name \*** RonaldHot

Email vanya.balykov89@gmail.com

First Name RonaldHot

Last Name RonaldHot

Phone 89594995633

Title Приколы за день

Department English

Additional Contact Information vanya.balykov89@gmail.com

Password \*

Confirm password \*

Active user?

Default Repository? University Archives

- Test Repository
- University Archives
- Michigan Historical Collections

- This would solve or partially solve the following JIRA tickets
  - JIRA [AR-1321](#) As a system administrator, I would like users to be able to manage/change their own passwords and use LDAP
  - JIRA [AR-846](#) As a user, I want to directly edit / modify my user account and password, and [AR-984](#) (which claims to be “fixed”) As a staff user I want to be able to edit my account details / password

## Wireframe for Collection Level Permissions

Currently, users with specific permissions have them for all of the records in a repository. A user that can delete archival objects can delete archival objects in any resource. It is recommended to allow specific users to be given permissions to a single resource or classification. The wireframe below displays the results of clicking on one of the available permission groups. At the bottom of the screen will be a box to search for users accounts and resources, giving the user the selected permissions for only the specified record. An “X” to the side will allow an admin to remove the current permissions. This list at the bottom of the screen would exclusively function to give users individual permissions--if this list is left empty, then the system will recognize that this user’s permissions apply to ALL resource records in the repository, instead of none. This means that the default setting would have the resource record permissions function the same as they do in the current version of ASpace, so that institutions that did not want to take on the administrative burden posed by managing users permissions vis-a-vis collections at this level would not have to change the way they do things.

# Managers of the test repository Group

**Description \***

**Members**

Username	Add	Remove
test		
dproud		

**Members can:**

<input type="checkbox"/>	create and run a background job
<input checked="" type="checkbox"/>	cancel a background job
<input type="checkbox"/>	transfer the entire contents of a repository
<input checked="" type="checkbox"/>	manage this repository (change groups and other settings)
<input checked="" type="checkbox"/>	create/update accessions in this repository
<input checked="" type="checkbox"/>	create/update resources in this repository
<input checked="" type="checkbox"/>	create/update digital objects in this repository
<input checked="" type="checkbox"/>	create/update event records in this repository
<input type="checkbox"/>	delete event records in this repository
<input checked="" type="checkbox"/>	suppress the major record types in this repository
<input type="checkbox"/>	transfer major record types between repositories
<input checked="" type="checkbox"/>	delete the major record types in this repository
<input type="checkbox"/>	view suppressed records in this repository
<input checked="" type="checkbox"/>	view the records in this repository
<input type="checkbox"/>	create/update classifications and classification terms
<input type="checkbox"/>	delete classifications and classification terms
<input checked="" type="checkbox"/>	initiate import jobs

## Collection Level Permissions

Devon

- John Murphy papers

- Issues addressed by wireframe
  - JIRA [ANW-134](#): Resource-specific permissions for students/interns/volunteers

## Authentication Issues

Current JIRA tickets document the need to authenticate by various means. Because different institutions have different needs, it is recommended to get more information via a poll, of how users want to authenticate, giving developers more specific information for handling these issues. We suggest careful testing of any additional authentication options so that institutions that have already set up authentication do not have their systems break or lose existing functionality.

- Issues to address
  - JIRA [AR-1000](#): As an administrator, I want to map LDAP groups to ArchivesSpace groups
  - JIRA [AR-1001](#): As an administrator, I would like to be able to add ldap users in the manage user interface
  - JIRA [AR-1137](#): As a sysadmin, I want to create passwordless accounts and assign permissions for future LDAP users
  - JIRA [AR-1079](#): As a User, I want to authenticate using CAS
  - JIRA [AR-1087](#): As a User, I want to authenticate using ActiveDirectory

## Addendum A: Enhancements for creating new user accounts

Additional enhancement to the user registration page include:

- Password strength checking
- User notified of new account with welcome message and login instructions
- Addition of a user account picture
- Locale settings

Note that locale settings would entail a major change to ArchivesSpace entity time-stamping. Time stamps are currently displayed in relationship to GMT. Displaying timestamps based on a user's locale is more immediately useful and user friendly.

**Email address**

jason@minorscience.com

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by email.

**Username \***

jason

Several special characters are allowed, including space, period (.), hyphen (-), apostrophe ('), underscore (\_), and the @ sign.

**Password \***

.....

Password strength: Strong

**Confirm password \***

.....

Passwords match: yes

Provide a password for the new account in both fields.

**Status**

- Blocked
- Active

**Roles**

- Authenticated user
- Administrator
- Archivists
- Managers
- Project Managers
  
- Notify user of new account

**Picture**

Choose File No file chosen

Your virtual face or picture.

One file only.

32 MB limit.

Allowed types: png gif jpeg.

**CONTACT SETTINGS**

- Personal contact form

Allow other users to contact you via a personal contact form which keeps your email address hidden. Note that some privileged users such as site administrators are still able to contact you even if you choose to disable this feature.

**LOCALE SETTINGS**

**Time zone**

New York

Select the desired local time and time zone. Dates and times throughout this site will be displayed using this time zone.

Create new account

## Addendum B: Bulk provisioning user accounts

Methods for bulk generating new user accounts, group permissions, passwords, and grants shall be available through API methods or a complementary administration user interface.

## Addendum C: Searching for user accounts

A search filter shall be available for finding user accounts by keyword, status (i.e. blocked, active), role, and permission type, as depicted here:

The screenshot shows a user management interface. At the top left is a blue button labeled "Add user". Below it are search filters for "Name or email contains", "Status", "Role", and "Permission", each with a dropdown menu set to "- Any -". There are "Filter" and "Reset" buttons. Below the filters is an "Action" dropdown menu set to "Add the Administrator role to the selected user(s)" and an "Apply to selected items" button. The main part of the interface is a table with columns: Username, Status, Roles, Member for, Last access, and Operations. The table lists four users: admin, christine, jason, and lydia. Each user row has an "Edit" button. At the bottom of the table is another "Apply to selected items" button.

<input type="checkbox"/>	Username	Status	Roles	Member for	Last access	Operations
<input type="checkbox"/>	admin	Active	• Administrator	26 minutes 19 seconds	1 minute 12 seconds ago	Edit
<input type="checkbox"/>	christine	Active	• Managers	35 seconds	never	Edit
<input type="checkbox"/>	jason	Active	• Administrator	15 minutes 30 seconds	never	Edit
<input type="checkbox"/>	lydia	Active	• Archivists	56 seconds	never	Edit

## Addendum D: Batch actions for managing user accounts

API methods and a complementary administration user interface shall be available for performing batch actions on existing user accounts. Possible actions include:

- Adding roles to a group of selected user accounts
- Removing roles from a group of selected user accounts
- Blocking or disabling selected user accounts
- Unblocking or reenabling selected user accounts
- Canceling selected account accounts

Such functionality is demonstrated here:

**Add user**

Name or email contains  Status: - Any - Role: - Any - Permission: - Any -

**Action**

- ✓ Add the Administrator role to the selected user(s)
- Add the Archivist role to the selected user(s)
- Add the Managers role to the selected user(s)
- Add the Project Managers role to the selected user(s)
- Block the selected user(s)
- Cancel the selected user account(s)
- Remove the Administrator role from the selected user(s)
- Remove the Archivist role from the selected user(s)
- Remove the Managers role from the selected user(s)
- Remove the Project Managers role from the selected user(s)
- Unblock the selected user(s)

			Remember for	Last access	Operations
<input checked="" type="checkbox"/>	...	...	5 minutes 19 seconds	1 minute 12 seconds ago	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/>	...	...	5 seconds	never	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/>	jason	Active • Administrator	15 minutes 30 seconds	never	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/>	lydia	Active • Archivists	56 seconds	never	<input type="button" value="Edit"/>

## Exhibit 1: Wireframe for Role Permissions

Repository, collection-level, and possible record group permissions shall be administered through a role management user interface.

By selecting “Authenticated user”, rights will cascade down to all roles. This is an efficient way to apply rights across multiple roles. Anonymous user applies to the PUI.

A generic permissions matrix might look like this:



Permission	Anonymous user	Authenticated user	Administrator	Archivists	Managers	Project Managers
<i>Archival Objects: Create new content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Archival Objects: Delete any content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Archival Objects: Delete own content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Archival Objects: Edit any content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Archival Objects: Edit own content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This matrix shall apply to all major ArchivesSpace entities including Resources, Accessions, Archival Objects, Classifications, Digital Objects, Events, et al.

## Exhibit 2: Wireframe for Field Level Permissions

Field level permissions shall be administered through a field management user interface or possibly through the existing ArchivesSpace entity template administration.

A generic permissions matrix might look like this:

Permission	Anonymous user	Authenticated user	Administrator	Archivists	Managers	Project Managers
Create own value for field	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit own value for field	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit anyone's value for field	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View own value for field	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View anyone's value for	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

By selecting “Authenticated user”, rights will cascade down to all roles. This is an efficient way to apply rights across multiple roles. Anonymous user applies to the PUI.

- Grants to view and manage field level permissions can be issued by a Administrator, in Global Preferences and/or Repository Preferences.