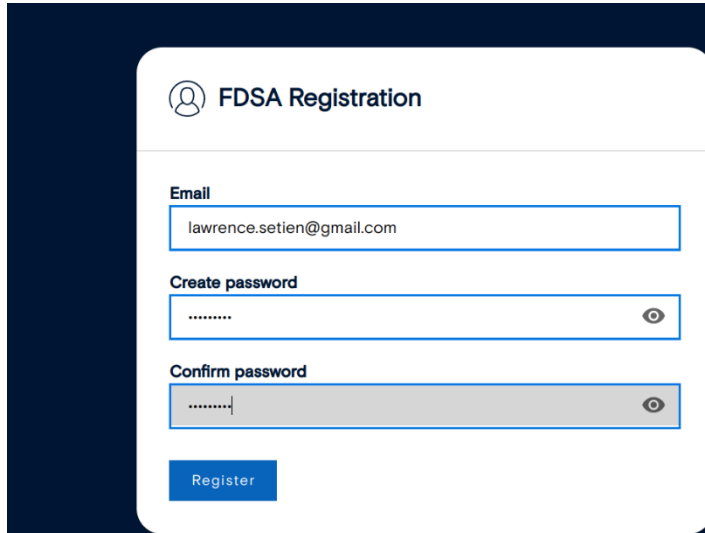


Administrator - First Time Configuration

1. Create the first administrator

- Navigate to https://<your_domain>/admin



The image shows a registration form titled "FDSA Registration" with a user icon. It contains three input fields: "Email" with the value "lawrence.setien@gmail.com", "Create password" with a masked password ".....", and "Confirm password" with a masked password ".....". Each password field has a visibility toggle icon. A blue "Register" button is located at the bottom of the form.

2. Sign in and setup your Multi Factor Authentication app

Note: If after scanning the MFA keeps failing, make sure the time in your phone and in the server are in synch.



Mobile Authenticator Setup

You need to set up Mobile Authenticator to activate your account.

1. Install one of the following applications on your mobile:

- FreeOTP
- Google Authenticator
- Microsoft Authenticator

2. Open the application and scan the barcode:



[Unable to scan?](#)

3. Enter the one-time code provided by the application and click Submit to finish the setup.

One-time code *

Submit

3. Follow the first login set up steps



Add license



Describe your organization



Connect data

Let's get set up

Enter your license code

[Where do I find my license code?](#)

Save & Continue

[Need help?](#)



Let's get set up

Describe your organization

[Learn more](#) [↗](#)

Name of your appliance*

Documentation URL*

Name of your organization*

Contact email address*

Description*

Save & Continue

[Need help?](#)

4. The Overview Section

On this section Admins can get a quick view of the FDSA status, including pending DAR and Tasks reviews.

The screenshot displays the FDSA Test Dashboard. At the top, the FDSA logo and user profile (root@email.com) are visible. The dashboard is divided into several sections:

- Test Dashboard:** Includes navigation icons for Dashboard, Access Requests, Tasks, Users, Admin Settings, Help Center, and Contact Us.
- Finish FDSA setup:** A progress bar shows 4/5 steps complete. The steps are:
 - Add license
 - Describe your organization
 - Connect SMTP [Ⓞ] !
 - Add administrators
 - Connect your data [Ⓞ] !
- Tasks to review:** A table with 1 item to review.

Task	Days In Queue	Project Code	Request Date	Requester	Status
data-profiler-2	0	project_level2	Jun 24, 2024, 7:04:14 PM	lawrence.setien@evaluateserve.com	QUARANTINED
- Pending Data Access Requests:** A table with 3 items to review.

Access Request	Days In Queue	Dataset	Request Date	Requester	Status
project_level2	0	test_dataset	Jun 24, 2024, 7:10:43 PM	lawrence.setien@evaluateserve.com	RECEIVED
project_level2	0	test_dataset	Jun 24, 2024, 7:10:42 PM	lawrence.setien@evaluateserve.com	RECEIVED
project_level2	0	test_dataset	Jun 24, 2024, 7:03:29 PM	lawrence.setien@evaluateserve.com	RECEIVED

5. The Data Access Requests section

- On the Data Access Requests section, you can find more detailed information about the submitted DARs.

The screenshot shows the FDSA (Federated Data Sharing Appliance) interface. The top navigation bar includes the FDSA logo and the user's email address, lawrence.setien@gmail.com. A sidebar on the left contains navigation icons for Dashboard, Access Requests, Tasks, Users, Admin Settings, Help Center, and Contact Us. The main content area is titled "Data Access Requests" and includes a brief explanation: "Whenever a researcher submits a Data Access Request, they will show up on this panel. Data Access Requests require your attention, and must be reviewed and approved before a researcher is permitted to submit tasks to FDSA." Below this, there are tabs for "Needs review", "Approved", "Rejected", and "All". A search bar is located on the right. A table lists three requests, all with a status of "RECEIVED".

Access Request	In Queue	Dataset	Request Date	Requester	Status
project_level2	0	test_dataset	Jun 24, 2024, 6:32:17 PM	lawrence.setien@evaluateserve.com	RECEIVED
project_level2	0	test_dataset	Jun 24, 2024, 6:32:15 PM	lawrence.setien@evaluateserve.com	RECEIVED
project_level2	0	test_dataset	Jun 24, 2024, 6:32:11 PM	lawrence.setien@evaluateserve.com	RECEIVED

At the bottom right of the table, there is a "Items per page" dropdown set to 10 and a "1-3 of 3" indicator.

- Click on the Access Request name to view the details of a specific DAR.
- On this window, you can Approve or Reject the DAR.

The screenshot shows the details page for a specific Data Access Request named "project_level2". The status is "RECEIVED". The page includes a "Back to Data Access Requests" link. The details are organized into several sections:

- Submitted:** Jun 24, 2024, 6:32:17 PM
- End Date for Request:** Nov 27, 2025, 8:59:16 PM
- In Queue:** 0
- Requestor:** lawrence lawrence.setien@evaluateserve.com
- Project Description:** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus lectus augue, semper molestie lacinia fringilla, viverra vel urna. Donec frinaila urna eoct tincidunt.
- Purpose:** Scientific research
- Callback URL:** http://localhost:5000/test
- Access Level:** 2
- Dataset Requested:** test_dataset
- Dataset Requested ID:** 7042acf4-d39e-4e58-8f23-459275ba902d
- Tasks Trusted Level:** Trusted by Dataset

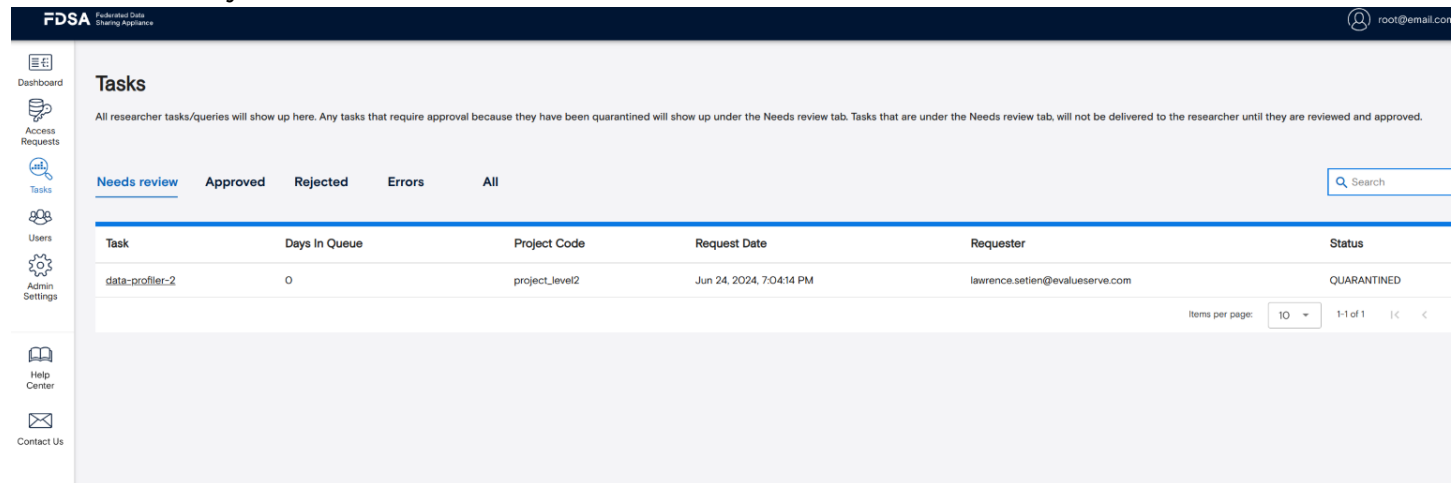
At the bottom right, there are two buttons: "Trusted by project" (with a red thumbs-down icon) and "Trusted by dataset" (with a green thumbs-up icon). On the far right, there are "Approve" and "Reject" buttons.

Note: There are two types of 'trust' mechanisms:

1. By dataset: Every task created under that dataset will go directly to COMPLETE without needing a review.
2. By project: Every task created under that project code will go directly to COMPLETE without needing a review.

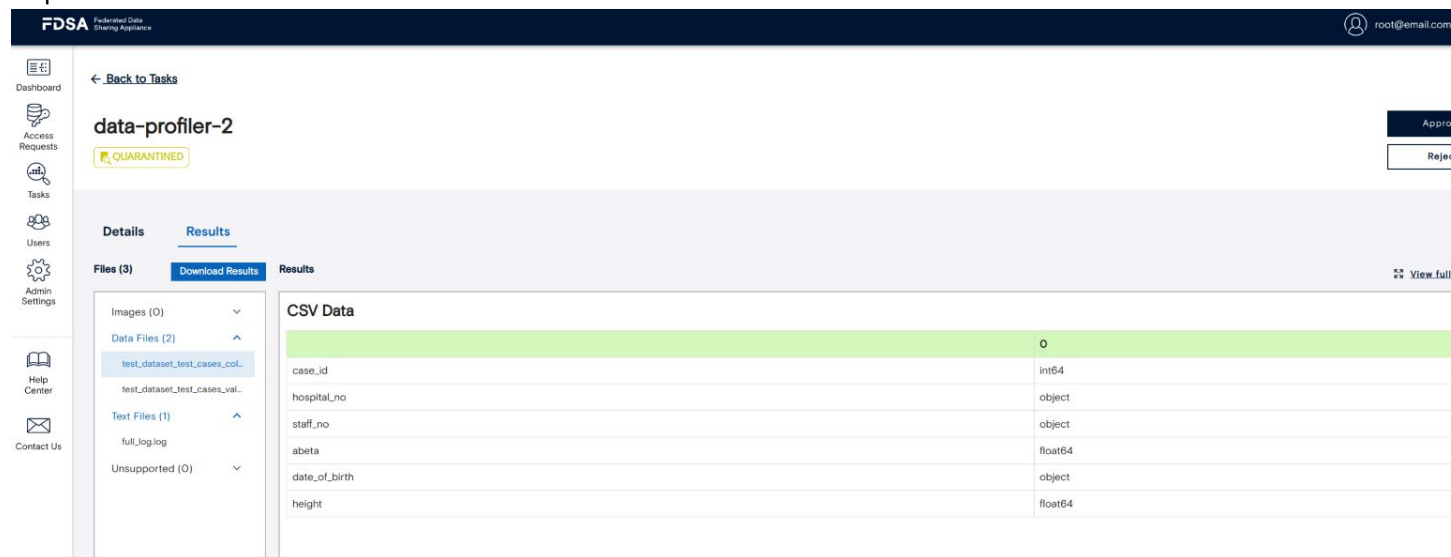
6. The Tasks Section

In this section you can review Researcher submitted tasks.



The screenshot shows the FDSA (Federated Data Sharing Appliance) interface. The top navigation bar includes the FDSA logo and the user 'root@email.com'. A sidebar on the left contains icons for Dashboard, Access Requests, Tasks, Users, Admin Settings, Help Center, and Contact Us. The main content area is titled 'Tasks' and contains the text: 'All researcher tasks/queries will show up here. Any tasks that require approval because they have been quarantined will show up under the Needs review tab. Tasks that are under the Needs review tab, will not be delivered to the researcher until they are reviewed and approved.' Below this text are tabs for 'Needs review', 'Approved', 'Rejected', 'Errors', and 'All'. A search bar is located on the right. A table lists tasks with columns: Task, Days In Queue, Project Code, Request Date, Requester, and Status. One task is visible: 'data-profiler-2' with 0 days in queue, project code 'project_level2', request date 'Jun 24, 2024, 7:04:14 PM', requester 'lawrence.setien@evaluateserve.com', and status 'QUARANTINED'. A pagination control shows 'Items per page: 10' and '1-1 of 1'.

By clicking on the task name, you will see a detailed view. Click on Results to see the expected task result.

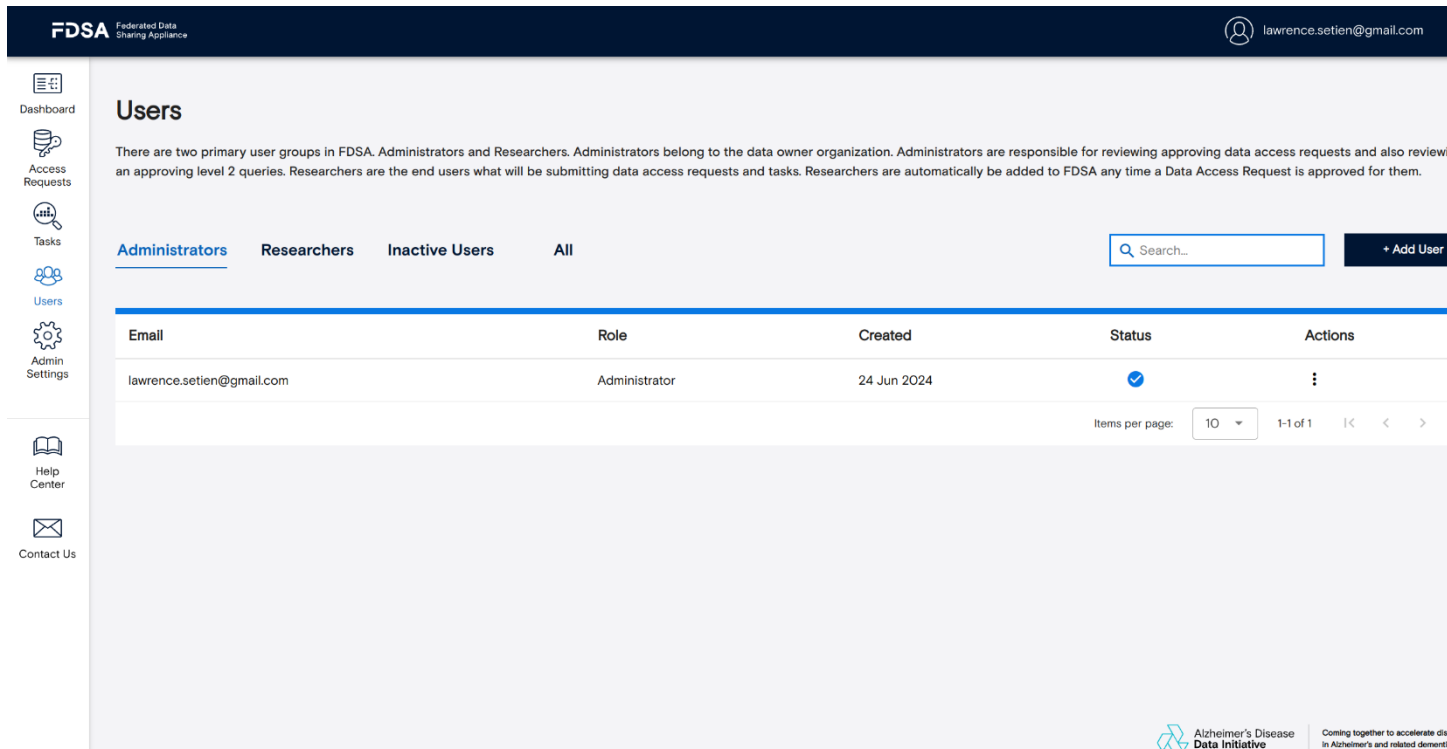


The screenshot shows the detailed view of the 'data-profiler-2' task. The top navigation bar includes the FDSA logo and the user 'root@email.com'. A sidebar on the left contains icons for Dashboard, Access Requests, Tasks, Users, Admin Settings, Help Center, and Contact Us. The main content area is titled 'data-profiler-2' and has a yellow 'QUARANTINED' badge. Below the title are tabs for 'Details' and 'Results'. The 'Results' tab is active, showing a 'Files (3)' section with a 'Download Results' button and a 'Results' section. The 'Results' section displays 'CSV Data' with a table of columns and their data types. The columns are: case_id (int64), hospital_no (object), staff_no (object), abeta (float64), date_of_birth (object), and height (float64). The table has a header row with a value '0' for case_id.

7. The Users Section

How to add a new FDSA user:

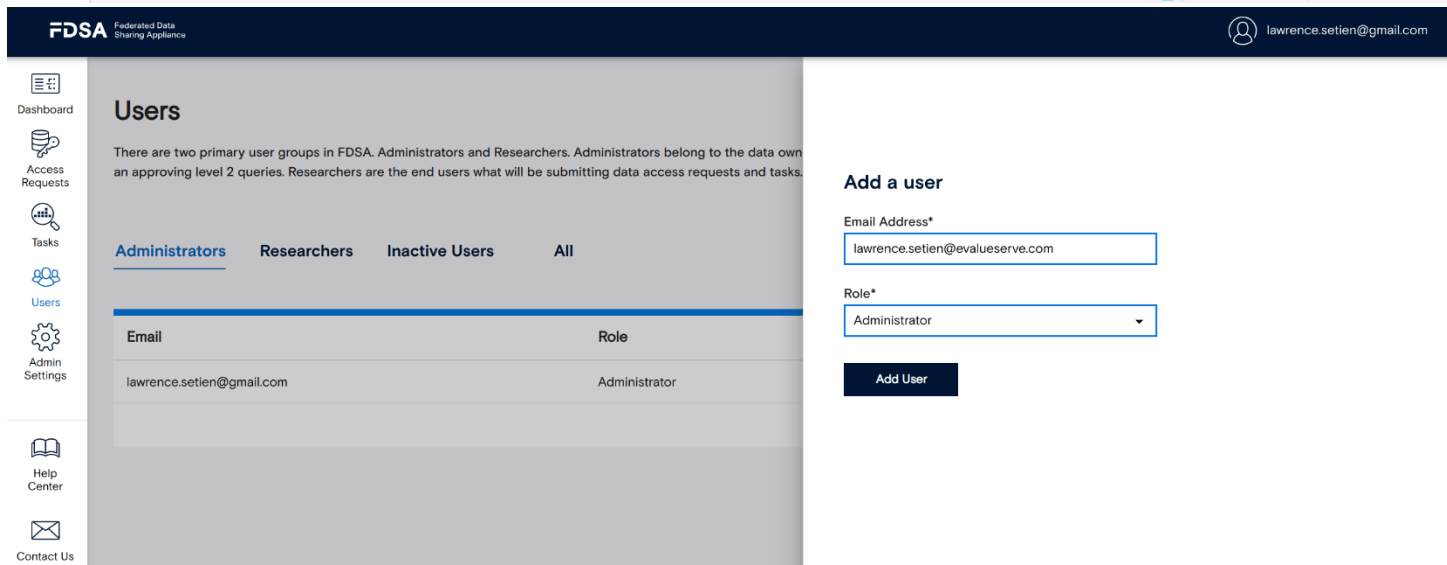
- Go to the Users tab and click on “+ Add User”
- Add the user email, role and click on “Add User”



The screenshot shows the FDSA Users page. The header includes the FDSA logo and the user's email, lawrence.setien@gmail.com. The main content area is titled "Users" and contains a descriptive paragraph about user groups. Below this, there are tabs for "Administrators", "Researchers", "Inactive Users", and "All". A search bar and an "+ Add User" button are located on the right. A table lists the current users:

Email	Role	Created	Status	Actions
lawrence.setien@gmail.com	Administrator	24 Jun 2024	✓	⋮

At the bottom right, there is a footer for the Alzheimer's Disease Data Initiative with the tagline "Coming together to accelerate data in Alzheimer's and related dementia".



This screenshot shows the same FDSA Users page, but with the "Add a user" modal open on the right side. The modal contains the following fields:

- Email Address***: A text input field containing "lawrence.setien@evaluateserve.com".
- Role***: A dropdown menu with "Administrator" selected.
- Add User**: A dark blue button to submit the form.

The background of the Users page is dimmed to show the modal in focus.

Note: The user will receive an email with the temporary credentials; after logging in, they must set up the MFA and update the password.

Under “Actions” you can change the role, reset the MFA, and disable and/or delete the user.

Email	Role	Created	Status	Actions
lawrence.setien@evaluateserve.com	Administrator	24 Jun 2024		<ul style="list-style-type: none">Switch to Researcher RoleDisable userReset MFADelete user
lawrence.setien@gmail.com	Administrator	24 Jun 2024		

8. The Admin Settings tab

FDSA Federated Data Sharing Appliance

lawrence.setien@gmail.com

Settings

Data SMTP Organization Info Registries Advanced Settings

Databases & Datasets

Datasources are connections to PostgreSQL or other supported database servers. Datasets are the unique schemas residing on the database servers.

1. First add a Datasource connection to PostgreSQL.
2. Then select the Datasource and click "+ Add dataset".
3. Fill out the form and click "Save".
4. Datasets will be made available for remote or federated research.

+ Add Datasource

FDSA_TEST_DB

test_dataset

multi_table

Add new datasource

Database type*
[Dropdown menu]

Server name*
[Text input: Server name]

Database name*
[Text input: Database name]

Database user*
[Text input: Database user]

Password*
[Text input: Password]

Connection string*
[Text input: Add connection string]

Port*
[Text input: Port]

Description
[Text area: Description]

Test **Save**

On the **Settings** section you can:

1. Manage Datasource connections and Datasets
2. Manage the SMTP configuration
3. Update the FDSA organization information
4. Add or delete model registries
5. Add a DAR Webhook
6. Update your License
7. Manage token lifetime
8. Whitelist specific IPs to the different part of FDSA

8.1 The Data Tab

- FDSA Comes by default with a test data source already added (FDSA_TEST_DB).
- [Read the instructions on how to create a Datasource DB before adding it in FDSA.](#)
- Add the new Datasource in FDSA.

Datasources & Datasets

Datasources are connections to PostgreSQL or other supported database servers. Datasets are the unique schemas residing on the database servers.

1. First add a Datasource connection to PostgreSQL.
2. Then select the Datasource and click "+ Add dataset".
3. Fill out the form and click "Save".
4. Datasets will be made available for remote or federated research.

[+ Add Datasource](#)

FDSA_TEST_DB

Add new datasource

Database type*	PostgreSQL	DB Host*	fdsa_db
Server name/Friendly Name*	test_database_fdsa	Port*	5432
Database name (Case sensitive)*	test_fdsa	Description	this is a test database
Database user*	test_user		
Password*		

[Test](#) [Save](#)

- Select the added Datasource
- Click on "+ Add dataset"
- [Read these instructions to understand how to generate the Fair Data Steward Token](#)
- Complete the form and click on "Save"

Datasources & Datasets

Datasources are connections to PostgreSQL or other supported database servers. Datasets are the unique schemas re...

1. First add a Datasource connection to PostgreSQL.
2. Then select the Datasource and click "+ Add dataset".
3. Fill out the form and click "Save".
4. Datasets will be made available for remote or federated research.

+ Add Datasource

FDSA_TEST_DB

test_dataset

multi_table

FDSA_TEST_DB + Add dataset

Delete

Database type*

PostgreSQL

Server name/Friendly Name*

FDSA_TEST_DB

Database name (Case sensitive)*

test_datasource

Database user*

test_dataset_user

Test Update

New Dataset

Title (Friendly name)

test_dataset

Schema Name

test_dataset

Dataset Access Level

Federated query- Level 2

Fair Data Steward Token

eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiIsImtpZCI6IjI6IiwiaWF0IjoiMTYyMzQ1MjM0Iiwic2NjaW50IjoiZm9udCJ9

Automatic Data Access Requests approval

This is a synthetic/test/trusted DB. Do not quarantine tasks

Save Cancel

Note: On this window you can also update and delete Datasources and Datasets.

8.2 The SMTP Tab

On this view you can test and update the SMTP configuration.

Settings

Data SMTP Organization Info Registries Advanced Settings

SMTP Configuration

These are the email settings FDSA will use when communicating with FDSA users. These settings are best set to your own organization, so that all FDSA email communications will be sent from your organization's email services.

SMTP Protocol*

TLS

Default sender

fdsa.notify@gmail.com

Mail server*

smtp.gmail.com

Authentication required?

Port number*

587

Username

fdsa.notify@gmail.com

Display name

FDSA

Password

Password

Test

Save

8.3 The Organization Info Tab

On this view you can update the information about your FDSA. This information will be useful to the researcher.

Settings

Data SMTP Organization Info Registries Advanced Settings

Organization info

The information supplied here will be shown to researchers when they connect to your FDSA via the ADDI Query Builder Tool. Provide as much detail here as possible to help provide researchers with a sense of your organization and what it's all about.

Name of your appliance*

test

Documentation URL

test

Organization name*

tes

Description

test

Contact email address*

test@email.com

Save

8.4 The Registries Tab

On this tab you can view the existent model registries to which your researchers will have access to.

The FDSA Public Registry and FDSA Private Registry are added by default during the installation.

The screenshot shows the 'Settings' page with the 'Registries' tab selected. The page title is 'Registries'. Below the title, there is a descriptive paragraph: 'Researchers use dockerized containers with Python or R programs (called models) to perform federated research calculations on data. These dockerized programs can be stored and retrieved from the Azure container registry. By default, FDSA includes two registries, which in most cases are all that are needed. In most cases the registry page will not need to be edited. However, if desired, FDSA administrators can add a private registry for use by researchers.' Below this text, there are two registry options: 'FDSA Private Registry' (unselected) and 'FDSA Public Registry' (selected). The 'FDSA Public Registry' is shown in a light gray box with a lock icon in the top right corner. It contains the following information: 'Date created: Jun 24, 2024, 2:41:14 PM', 'ID: 2c79fd43-f654-48aa-ad13-15f049a867a', 'URL: fdsacomunityregistry.azurecr.io'.

8.5 The Advanced Settings Tab – License

If required, you can update your FDSA License here.

The screenshot shows the 'Settings' page with the 'Advanced Settings' tab selected. The page title is 'License'. Below the title, there is a descriptive paragraph: 'Every FDSA requires a license. FDSA licenses are free. If you do not have a license, click the Contact Us icon on the left, and in the Inquiry Type, select License Request along with a short message confirming you will be using FDSA for non-commercial purposes. If someone will get in touch with you.' Below this text, there is a 'License' section with a text input field labeled 'License key' and a green checkmark icon to its right. Below the input field is a 'Save' button. On the left side of the page, there is a sidebar menu with the following items: 'License', 'Web Hook', 'Tokens', 'Whitelists', 'Keycloak', 'DARs API', 'Common API', and 'Admin'.

8.6 The Advanced Settings Tab – Web Hook

[Find here more information about the Web Hook feature.](#)

License

Web Hook

Tokens

Whitelists ^

Keycloak

DARs API

Common API

Admin

Data Access Request Web Hook

FDSA will automatically forward Data Access Request payload to the webhook configured on this page. This option enables data owners to easily integrate their own Data Access Approve/Reject services. Data owners will use the FDSA DAR Approve/Reject API [YOUR FDSA]/api/admin/v1.0/data-access-requests/[request_id]/review to push their approval/rejection back to FDSA once their internal process is completed. Details for this feature are found in the AD Connect documentation

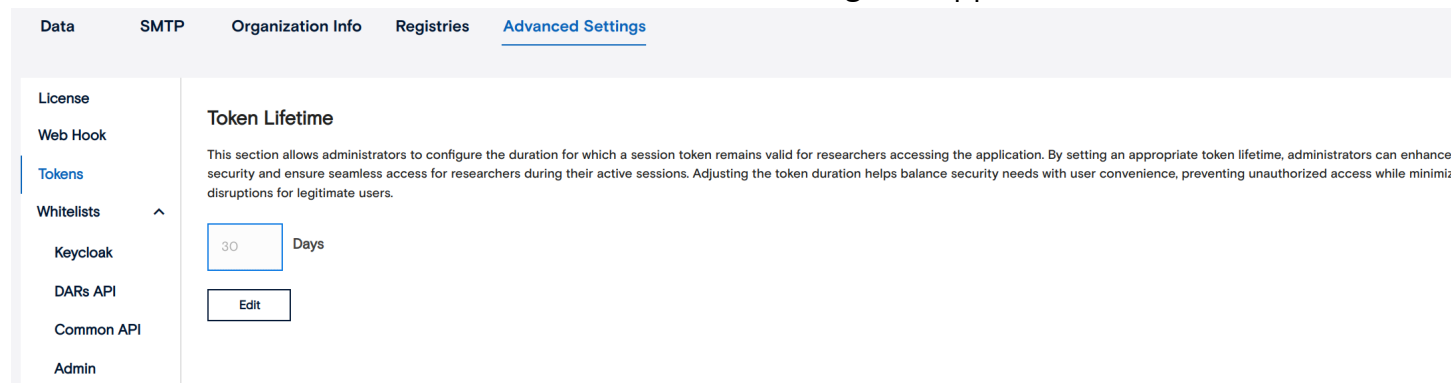
URL	Date Created	Last Updated	Actions
-----	--------------	--------------	---------

No web hook added yet

+ Add Web Hook

8.7 The Advanced Settings Tab – Tokens

This section allows administrators to configure the duration for which a session token remains valid for researchers accessing the application.

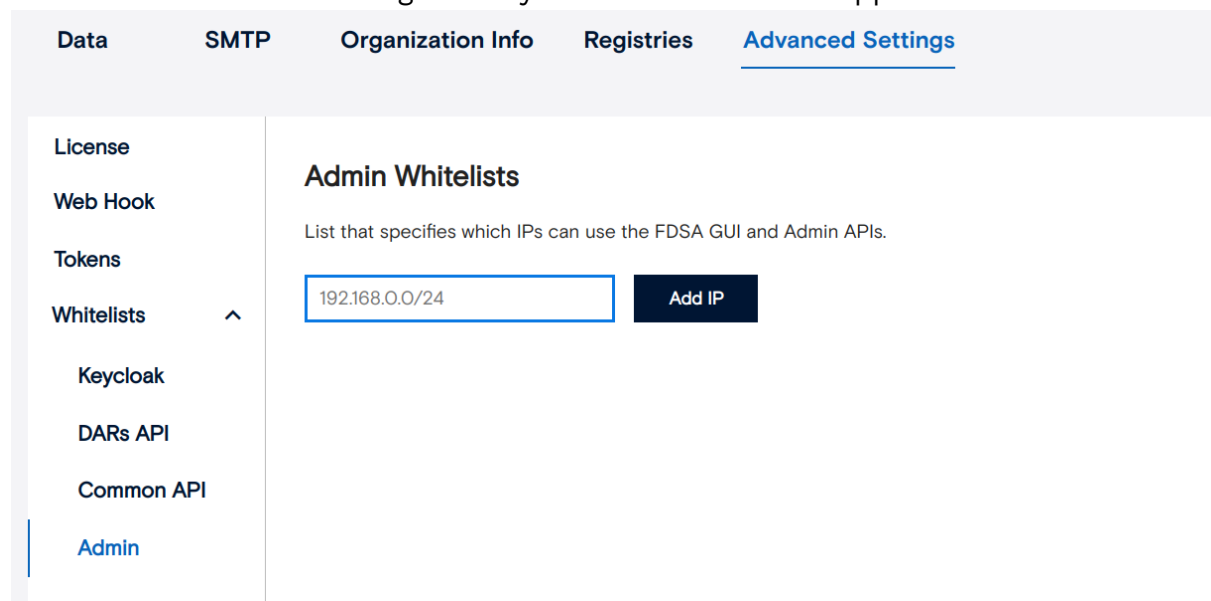


The screenshot shows the 'Advanced Settings' tab in a web application. The left sidebar contains a menu with items: License, Web Hook, Tokens (highlighted), Whitelists (with an expand/collapse arrow), Keycloak, DARs API, Common API, and Admin. The main content area is titled 'Token Lifetime' and includes a descriptive paragraph: 'This section allows administrators to configure the duration for which a session token remains valid for researchers accessing the application. By setting an appropriate token lifetime, administrators can enhance security and ensure seamless access for researchers during their active sessions. Adjusting the token duration helps balance security needs with user convenience, preventing unauthorized access while minimizing disruptions for legitimate users.' Below the text is a text input field containing '30' followed by the label 'Days'. An 'Edit' button is located below the input field.

8.8 The Advanced Settings Tab – Whitelists

This section allows admins to manage access to the different components of FDSA. By default, all IPs are whitelisted, but once an IP is added, only that IP will be able to use that FDSA component.

Please be aware that wrong IPs may block access to the appliance.



The screenshot shows the 'Advanced Settings' tab in a web application. The left sidebar contains a menu with items: License, Web Hook, Tokens, Whitelists (with an expand/collapse arrow), Keycloak, DARs API, Common API, and Admin (highlighted). The main content area is titled 'Admin Whitelists' and includes a descriptive paragraph: 'List that specifies which IPs can use the FDSA GUI and Admin APIs.' Below the text is a text input field containing '192.168.0.0/24' and an 'Add IP' button.

9. Help Center

You can find more information about FDSA in the Help Center section.

The screenshot shows the FDSA Help Center interface. At the top, there is a dark blue header with the FDSA logo (Federated Data Sharing Appliance) on the left and a user profile icon with the email 'lawrence.setien@gmail.com' on the right. A vertical sidebar on the left contains navigation icons for Dashboard, Access Requests, Tasks, Users, Admin Settings, Help Center (highlighted), and Contact Us. The main content area is titled 'Need Help?' and includes a sub-section 'Frequently Asked Questions' with three questions: 'What is the difference between Level 1 and Level 2 tasks?', 'Where does the FDSA research data get stored?', and 'How do researchers interact with FDSA?'. Below this is a dark blue banner for 'AD Connect' with a 'Go to AD Connect' button. The bottom right corner of the banner features a geometric pattern of teal triangles.

10. Contact Us

If you face any problem with your FDSA, please email us using the Contact Us section.

The screenshot shows the 'Contact Us' form in the FDSA Help Center. The sidebar on the left highlights the 'Contact Us' option. The form has a title 'Contact Us' and two input fields: 'Subject' (with placeholder text 'Subject of inquiry') and 'Inquiry Type' (a dropdown menu with 'Choose' selected). Below these is a large text area for the message with the placeholder 'Add your message'. A toggle switch for 'Send logs' is currently turned off. A 'Send Inquiry' button is located at the bottom left of the form. The bottom right corner of the page features the Alzheimer's Disease Data Initiative logo and the tagline 'Coming together to accelerate in Alzheimer's and related de...'.