

User Matrix

		Study				Site			Admin	
		Data Manager	Data Entry Person	Data Specialist	Monitor	CRC	Investigator	Monitor	OC Team	Admin
Enter Data										
Participant Matrix										
	Add New Participant	X	X	X		X	X		Role-Dependent	
	View Participant Record	X	X	X	X	X	X	X		
	Remove/Restore a Participant	X		X			X			
	Reassign Participant Site	X								
	Sign Participant			X			X			
Participant Details										
	Invite Participant (Participate)					X	X		Role-Dependent	
	View/Edit Contact Information					X	X			
	Edit Manually Generated ID	X	X	X		X	X			
	Edit System-Generated ID	X								
	Add New (Visit-Based Event)	X	X	X		X	X			
	Add New (Common Event)***	X	X	X		X	X			
	View Casebook	X	X	X	X	X	X	X		
Manage Form										
	Edit Form***	X	X	X		X	X		Role-Dependent	
	View Form in Read-Only Mode***	X	X	X	X	X	X	X		
	View Form in Review-Only Mode***	X	X	X	X	X	X	X		
	Reassign Form Version***	X								
	Remove/Restore Form***	X	X	X		X	X			
	Clear Form***	X	X	X		X	X			
	Set Form to Complete***	X	X	X		X	X			
Manage Event										
	Add a New Event (Schedule)	X	X	X		X	X		Role-Dependent	
	View Event	X	X	X	X	X	X	X		
	Edit Event Start Date/End Date	X	X	X		X	X			
	Lock/Unlock Event	X								
	Sign Event			X			X			
	Remove/Restore Event	X	X	X		X	X			
	Change Workflow Status	X	X	X		X	X			
Queries										
	View Query Within Record***	X	X	X	X	X	X	X		

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	View Query Only***	X	X	X	X	X	X	X	Role-Dependent
	Download Queries	X	X	X	X	X	X	X	
	Print Queries	X	X	X	X	X	X	X	
	Add a New Query	X	X	X	X	X	X	X	
	Update a Query	X	X	X	X	X	X	X	
	Close/Reopen a Query	X			X			X	
	Add a Reason for Change	X	X	X		X	X		
	Add Annotation	X	X	X	X	X	X	X	
Import Data									
	Import XML Data	X	X	X		X	X		Role-Dependent
	Import Tabular Data	X	X	X		X	X		
Monitor and Manage Data									
SDV									
	Verify/Unverify Form***	X			X			X	Role-Dependent
	View Form***	X			X			X	
	View Item Data***	X			X			X	
Studies									
	View Study Details	X							Role-Dependent
Study Audit Log									
	View Study Audit Log	X	X	X	X	X	X	X	Role-Dependent
Rules									
	Add Rules	X							Role-Dependent
	View Rules	X							
	Test Rules	X							
	Remove/Restore Rules	X							
	Download Rules	X							
CRFs									
	View CRFs (All Versions)	X							Role-Dependent
	Migrate CRFs in Batch	X							
Extract Data									
Data Sets									
	Create Datasets	X		X	X		X	X	Role-Dependent
	Edit Datasets	X		X	X		X	X	
	View Datasets	X		X	X		X	X	
	Remove/Restore Datasets	X							

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	Run Datasets	X		X	X		X	X		
	Download/Delete Extract File***	X		X	X		X	X		
	Schedule Dataset Extracts								X	X
Study Build System										
Access										
	Access Study Build System	X							X	X
	Access Share	X							X	X
	Access Settings / User Roles / Modules	X							X	X
	Access Design	X							Role-Dependent	
	Access Go**	X	X*	X*	X*	X*	X*	X*		
My Studies										
	Create a Study								X	X
	View All Studies								X	X
	View My Studies	X							X	X
Share										
	Change Status in Study Environment	X							X	X
	View Users List	X							X	X
	Edit User	X							X	X
	Invite User	X							X	X
	Resend Invitation	X							X	X
	Set/Remove User Role for Environment	X							X	X
	Create/Edit Admin Users								X	X
	Edit OpenClinica Team User								X	
	View Site List	X							X	X
	Add Sites	X							X	X
	Edit Sites	X							X	X
	Remove/Restore Sites	X							X	X
	View Publish History	X							X	X
Study Designer										
	View Study Design	X								
	Add Event	X								
	Edit Event	X								
	Archive/Unarchive Event	X								
	Add Form	X								
	Edit Form	X								

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	Archive/Unarchive Form	X							Role-Dependent		
	Upload Form Version	X									
	Preview Form Version	X									
	Design Draft Form Version	X									
	Add Draft Form Version	X									
	Archive/Unarchive Form Version	X									
	Add/Edit Permission Tags for Study	X									
	Add/Edit/Remove Permission Tags for Forms	X									
	Download Form Versions	X									
	Configure Table Design	X									
	Use Library Content in Draft Form Version	X									
	View/Manage Library	X*									
Publish Study											
	Publish to Test	X							X	X	
	Publish to Production	X							X	X	
Administration											
	View								X	X	
	Web Services Information								X	X	
	Download User Activity Log								X	X	
Other											
Miscellaneous											
	Summary of Study/Site Progress (HomePage)	X							X	X	
	Update Profile	X	X	X	X	X	X	X	X	X	
	My Studies Link	X							X	X	
	Support Link for Client Services	X	X	X	X	X	X	X	X	X	
	Logout	X	X	X	X	X	X	X	X	X	

*User must be an Admin user

**Access depends on whether the study has been published

***Access depends on permission tags