

User Matrix

		Study					Site				Admin	
		Data Manager	Data Entry Person	Data Specialist	Monitor	Viewer	CRC	Investigator	Monitor	Viewer	OC Team	Admin
Submit Data												
Participant Matrix												
	Add New Participant	X	X	X			X	X			Role-Dependent	
	View Participant Record	X	X	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	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	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	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				

User Matrix

Queries												
	View Query Within Record***	X	X	X	X	X	X	X	X	X	X	Role-Dependent
	View Query Only***	X	X	X	X	X	X	X	X	X	X	
	Download Queries	X	X	X	X	X	X	X	X	X	X	
	Print Queries	X	X	X	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	X	X	X	X	X	X	X	X	X	Role-Dependent
	View Site Details (at Site-level)	X	X	X	X	X	X	X	X	X	X	Role-Dependent
Study Audit Log												
	View Study Audit Log	X	X	X	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										

User Matrix

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										
	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

User Matrix

Study Designer													
	View Study Design	X											
	Add Event	X											
	Edit Event	X											
	Archive/Unarchive Event	X											
	Add Form	X											
	Edit Form	X											
	Archive/Unarchive Form	X											
	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*											
Role-Dependent													
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	X	X	X
	My Studies Link	X										X	X
	Support Link for Client Services	X	X	X	X	X	X	X	X	X	X	X	X
	Logout	X	X	X	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