

User Matrix

		Study					Site				Admin
		Data Manager	Data Entry Person	Data Specialist	Monitor	Viewer	CRC	Investigator	Monitor	Viewer	
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		
	Download Queries	X	X	X	X	X	X	X	X	X		
	Print Queries	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	Role-Dependent	
	View Site Details (at Site-level)	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	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
Study Build System											
Access											
	Access Study Build System	X									X
	Access Share	X									X
	Access Settings / User Roles / Modules	X									X
	Access Design	X									Role-Dependent
	Access Go**	X	X*	X*	X*		X*	X*	X*		
My Studies											
	Create a Study										X
	View All Studies										X
	View My Studies	X									X
Share											
	Change Status in Study Environment	X									X
	View Users List	X									X
	Edit User	X									X
	Invite User	X									X
	Resend Invitation	X									X
	Set/Remove User Role for Environment	X									X
	Create/Edit Admin Users										X
	View Site List	X									X
	Add Sites	X									X
	Edit Sites	X									X
	Remove/Restore Sites	X									X
	View Publish History	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
	Publish to Production	X										X
Administration												
	View											X
	Web Services Information											X
	Download User Activity Log											X
Other												
Miscellaneous												
	Summary of Study/Site Progress (HomePage)	X										X
	Update Profile	X	X	X	X	X	X	X	X	X	X	X
	My Studies Link	X										X
	Support Link for Client Services	X	X	X	X	X	X	X	X	X	X	X
	Logout	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