

User Matrix

		Study					Site					Admin
		Data Manager	Data Entry Person	Data Specialist	Monitor	Viewer	Data Manager	CRC	Investigator	Monitor	Viewer	
Submit Data												
Participant Matrix												
	Add New Participant	X	X	X			X	X	X			Role-Dependent
	View Participant Record	X	X	X	X	X	X	X	X	X	X	
	Remove/Restore a Participant	X		X			X		X			
	Reassign Participant Site****	X					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	X			
	Edit System-Generated ID	X					X					
	Add New (Visit-Based Event)	X	X	X			X	X	X			
	Add New (Common Event)***	X	X	X			X	X	X			
	View Casebook	X	X	X	X	X	X	X	X	X	X	
Manage Form												
	Edit Form***	X	X	X			X	X	X			Role-Dependent
	View Form in Read-Only Mode***	X	X	X	X	X	X	X	X	X	X	
	View Form in Review-Only Mode***	X	X	X	X		X	X	X	X		
	Reassign Form Version***	X					X					
	Remove/Restore Form***	X	X	X			X	X	X			
	Clear Form***	X	X	X			X	X	X			
	Set Form to Complete***	X	X	X			X	X	X			
Manage Event												
	Add a New Event (Schedule)	X	X	X			X	X	X			Role-Dependent
	View Event	X	X	X	X	X	X	X	X	X	X	
	Edit Event Start Date/End Date	X	X	X			X	X	X			
	Lock/Unlock Event	X					X					
	Sign Event			X					X			
	Remove/Restore Event	X	X	X			X	X	X			
	Change Workflow Status	X	X	X			X	X	X			
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	X		
	Update a Query	X	X	X	X		X	X	X	X		
	Close/Reopen a Query	X			X		X			X		
	Add a Reason for Change	X	X	X			X	X	X			
	Add Annotation	X	X	X	X		X	X	X	X		

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Import Data												
	Import XML Data	X	X	X			X	X	X			Role-Dependent
	Import Tabular Data	X	X	X			X	X	X			
Data Transformation Module												
Transformation Queue												
	Access the Transformation Queue	X	X	X	X	X	X	X	X			Role-Dependent
	Upload Files to the Transformation Queue	X	X	X			X	X	X			
	Transform Files	X	X	X			X					
	Reject/Restore Files	X	X	X			X					
	Import Files	X	X	X			X					
Monitor and Manage Data												
SDV												
	Verify/Unverify Form***	X			X		X			X		Role-Dependent
	View Form***	X			X		X			X		
	View Item Data***	X			X		X			X		
Data Review Tables												
	Create Data Review Tables	C1										Role-Dependent
	View Data Review Tables	X	X	X	X		X	X	X	X		
	Remove/Restore Forms	X	X	X			X	X	X			
	Close Queries	X			X		X			X		
Studies												
	View Study Details	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										

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		Data Manager	Data Entry Person	Data Specialist	Monitor	Viewer	Data Manager	CRC	Investigator	Monitor	Viewer	
Extract Data												
Data Sets												
	Create Datasets	X		X	X		X		X	X		Role-Dependent
	Edit Datasets	X		X	X		X		X	X		
	View Datasets	X		X	X		X		X	X		
	Remove/Restore Datasets	X					X					
	Run Datasets	X		X	X		X		X	X		
	Download/Delete Extract File***	X		X	X		X		X	X		
	Schedule Dataset Extracts											X
Study Build System												
Access												
	Access Study Build System	C1										X
	Access Share	C1										X
	Access Settings / User Roles / Modules	C1										X
	Access Design	C1										Role-Dependent
	Access Go**	C1	X*	X*	X*			X*	X*	X*		
My Studies												
	Create a Study	C1										X
	View All Studies	C1										X
	View My Studies	C1										X
Share												
	Change Status in Study Environment	C1										X
	View Users List	C1										X
	Edit User	C1										X
	Invite User	C1										X
	Resend Invitation	C1										X
	Set/Remove User Role for Environment	C1										X
	Create/Edit Admin Users	C1										X
	View Site List	C1										X
	Add Sites	C1										X
	Edit Sites	C1										X
	Remove/Restore Sites	C1										X
	View Publish History	C1										X
Publish Study												
	Publish to Test	C1										X
	Publish to Production	C1										X

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		Data Manager	Data Entry Person	Data Specialist	Monitor	Viewer	Data Manager	CRC	Investigator	Monitor	Viewer	
Study Designer												
	View Study Design	C1										Role-Dependent
	Add Event	C1										
	Edit Event	C1										
	Archive/Unarchive Event	C1										
	Add Form	C1										
	Edit Form	C1										
	Archive/Unarchive Form	C1										
	Upload Form Version	C1										
	Preview Form Version	C1										
	Design Draft Form Version	C1										
	Add Draft Form Version	C1										
	Archive/Unarchive Form Version	C1										
	Add/Edit Permission Tags for Study	C1										
	Add/Edit/Remove Permission Tags for Forms	C1										
	Download Form Versions	C1										
	Configure Table Design	C1										
	Use Library Content in Draft Form Version	C1										
	View/Manage Library	C1*										
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	
	My Studies Link	X									X	
	Support Link	X	X	X	X	X	X	X	X	X	X	
	Logout	X	X	X	X	X	X	X	X	X	X	

Legend	
*	User must be an Admin user
**	Access depends on whether the study has been published
***	Access depends on permission tags
****	Site-level users can only reassign participants to another site when they have access to both the participant's current site and the reassigned site.
C1	Access to the Study Build System requires Manage Study permissions. This can be granted/removed for Data Managers within the Edit Role window on the User Roles page.