

User Matrix

		Study					Site					Admin
		Data Manager	Data Entry Person	Data Specialist	Monitor	Viewer	Data Manager	CRC	Investigator	Monitor	Viewer	
<b>Submit Data</b>												
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 (Excluding Forms)							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 Form)***	C3	C3	C3	C3	C3	C3	C3	C3	C3	C3	
	View Casebook	X	X	X	X	X	X	X	X	X	X	
Manage Form												
	Default Form Highest Access Level §	Edit†††	Edit†††	Edit†††	Review††	Read Only†	Edit†††	Edit†††	Edit†††	Review††	Read Only†	Role-Dependent
	Reassign Form Version***	C5					C5					
	Remove/Restore Form***	C5	C5	C5			C5	C5	C5			
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 Event Status	X	X	X			X	X	X			
Queries												
	View Query Within Record***	C5	C5	C5	C5	C5	C5	C5	C5	C5	C5	Role-Dependent
	View Query Only***	C5	C5	C5	C5	C5	C5	C5	C5	C5	C5	
	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/Update a Query***	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	
	Close/Reopen a Query***	C4			C4		C4			C4		
	Add Annotation***	C4	C4	C4	C4	C4	C4	C4	C4	C4	C4	

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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			
<b>Consent Module</b>												
Consent Forms												
	View Consent Form	C5	C5	C5	C5	C5	C5	C5	C5	C5	C5	Role-Dependent
	View Unmasked Consent Attestation							X	X			
	Countersign***		C5	C5				C5	C5			
	Unconsent***		C5	C5				C5	C5			
	Reassign Consent Form Version***	C5					C5					
<b>Data Transformation Module</b>												
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					
<b>Monitor and Manage Data</b>												
SDV												
	Verify/Unverify Form***	C5				C5	C5			C5		Role-Dependent
	View Form***	C5				C5	C5			C5		
	View Item Data***	C5				C5	C5			C5		
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										
	Annotated CRF/Casebook	X										
	Blank Casebook	X	X	X	X	X	X	X	X	X	X	

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	Archival Casebook	X*										X

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<b>Extract Data</b>												
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	C5		C5	C5		C5		C5	C5		
	Schedule Dataset Extracts											X
<b>Code</b>												
MedDRA Coding												
	Code Verbatims	C2, C5	C2, C5	C2, C5	C2, C5	C2, C5						Role-Dependent
	Code Verbatims + Review Codes	C2, C5	C2, C5	C2, C5	C2, C5	C2, C5						
<b>Study Build System</b>												
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*	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											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
	Reset MFA											x
Other												
Miscellaneous												
	Summary of Study/Site Progress (HomePage)	X					X					Role-Dependent
	Update Profile	X	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	X
	Logout	X	X	X	X	X	X	X	X	X	X	X

Legend	
*	User must be an Admin user
**	Requires study to be published
***	Access depends on form, event, site, and study status
§	Option to configure any access level or no access on the User Roles screen.
§§	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	Study build access is defined within the Edit Role window on the User Roles page (Manage Study).

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C2	Code access is defined for study-level roles within the Edit Role window on the User Roles page.											
C3	Access is further refined based on the level of access defined for the form in the Edit Role window on the User Roles page. Available for forms where the user has Edit access.											
C4	Access is further refined based on the level of access defined for the form in the Edit Role window on the User Roles page. Available for forms where the user has Edit or Review access.											
C5	Access is further refined based on the level of access defined for the form in the Edit Role window on the User Roles page. Available for forms where the user has Edit, Review or Read Only access.											
†	Read Only access includes viewing the form without editing data or working with queries.											
††	Review access includes viewing the form and working with queries, but not editing form data.											
†††	Edit access includes viewing and editing form data and working with queries. Edit access also includes functionality like editing the form, clearing the form, completing the form, and adding reason for change when a complet											