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 (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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	Study					Site					Admin
	Data Manager	Data Entry Person	Data Specialist	Monitor	Viewer	Data Manager	CRC	Investigator	Monitor	Viewer	
Import Data											
Import XML Data	X	X	X			X	X	X			Role-Dependent
Import Tabular Data	X	X	X			X	X	X			
Consent Module											
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					
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***	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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	Study					Site					Admin
	Data Manager	Data Entry Person	Data Specialist	Monitor	Viewer	Data Manager	CRC	Investigator	Monitor	Viewer	
Archival Casebook	X*										X

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	Study					Site					Admin
	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	C5		C5	C5		C5		C5	C5		
Schedule Dataset Extracts											X
Code											
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						
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*	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 - Study-Specific Information	C1										X
Edit Sites - Global Information											X
Remove/Restore Sites	C1										X
View Publish History	C1										X
Publish Study											
Publish to Test	C1										X
Publish to Production	C1										X

User Matrix

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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 Multifactor Authentication (MFA) for a User											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											