

1 Using predefined roles

- The system has prepared a few roles that can be modified to fit your study. Enable the roles you want to use in your study by clicking the switch from "off" to "on" for each role.
- Click the pen to modify what privileges the role should have.

Compare and manage user roles

	Save	Sign	Review	Output	Read-only
Investigator Role ID: R1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Study Coordinator Role ID: R2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monitor Role ID: R3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Project Manager Role ID: R4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Data Manager Role ID: R5	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

+ Add a new role

2 Add new role

- If you want to add a new role simply click "add new role", give it a name, set status to "on", select avatar and check the privileges.
- IMPORTANT!** To avoid a mismatch of roles between versions we recommend to never delete a role, rather set status to "off" if not used.

3 User rights

- For each role (either new or an existing one), you can set the user rights by checking the corresponding checkbox.

The available privileges are listed below.

- Special**
 - User can only view form data (this overrides all edit permissions)
 - Export of data into different formats/view reports
 - Metrics
 - Create private notes
 - Medical coding
 - Perform medical coding
 - Approve medical coding (function not yet implemented)
 - View reference data
 - Edit reference data
 - Publish reference data
- CRF Rights**
 - Add/update subject/event/form data and query answers
 - Reset/Delete events and forms
 - Delete subjects
 - Sign subject/event form data and queries
 - Add/change queries
 - Add pre-queries
 - Promote pre-queries
 - Data review
 - Clinical review
 - SDV
 - Lock data
- eLearning**
 - Site User Training (SUTV4)
 - Monitoring Training (MTPV4)

Edit role "Investigator" [R1]

Edit role

Name: Investigator Status: ☒

Description: Save, sign, reset, delete and export data, resolve queries

Avatar:

Manage rights in this role

Special

☒ User can only view form data (this overrides all edit permissions)

☒ Export of data into different formats/view reports ☒ Metrics ☒ Create private notes

☒ Medical coding ☒ View reference data ☒ Edit reference data

☒ Publish reference data

CRF Rights

☒ Add/update subject/event/form data and query answers ☒ Reset/Delete events and forms

☒ Delete subjects ☒ Sign subject/event form data and queries ☒ Add/change queries

☒ Add pre-queries ☒ Promote pre-queries ☒ Data review ☒ Clinical review

☒ SDV ☒ Lock data

eLearning

☒ Site User Training (SUTV4) ☒ Monitoring Training (MTPV4)

- Promote pre-queries
- Data review
- Clinical review
- SDV
- Lock data

- **eLearning**

- Site User Training (SUTV4)
- Monitoring Training (MTPV4)