

ACTIONS	Organization	TEAM ROLES DEFINITIONS			PROJECT/EXPERIMENT/TASK & PROTOCOLS ROLES DEFINITIONS			
	admin	Owner	User	Viewer	Owner	User	Technician	Viewer

ORGANIZATION

view organization members	x							
invite new users to organization	x							
create new team	x							
lock members	x							
promote others to Organization admin	x							
change password policy	x							
access system logs	x							
add themselves to any team as Owner	x							
view/export audit trail		x						
change team member's permissions		x						
remove members from the team		x						
invite organization members to the team		x						
create, edit, delete project folder		x						
change team name		x						

PROJECTS

view projects (project member)					x	x	x	x
view projects (set to project members only, not a member)		x						
view folders					x	x	x	x
view project activities					x	x	x	x
view project members					x	x	x	x
view project comments					x	x	x	x
view archived projects		x			x	x	x	x
manage project members and their roles		x			x			
create project		x	x					
edit project					x			
archive project					x			
move a project to/from a folder		x						
restore archived project					x			

add comment to project						X	X	X	
edit and delete own project comments						X	X	X	
edit and delete any users' project comments						X			
export project						X	X	X	X
create experiment						X	X		

EXPERIMENTS

Project roles are inherited to experiment unless otherwise changed.

view experiment						X	X	X	X
view experiment members						X	X	X	X
view archive experiment						X	X	X	X
duplicate experiment						X	X	X	X
edit experiment						X	X		
archive experiment						X	X		
restore archived experiment						X	X		
move experiment						X	X		
manage experiment members and their roles						X			
create task						X	X		
edit task name						X	X		
duplicate task/workflow						X	X		
move task/workflow between experiments						X	X		
archive task/workflow						X	X		
restore archived task						X	X		
edit canvas - task position/connections						X	X		
view canvas						X	X	X	X
view experiment activities						X	X	X	X

TASKS

Experiment roles are inherited to the task unless otherwise changed.

view task						X	X	X	X
view protocol and protocol steps on task						X	X	X	X
view task info						X	X	X	X
view task activities						X	X	X	X
view task comments						X	X	X	X
view task members						X	X	X	X

view assigned users on tasks					X	X	X	X
view archived task					X	X	X	X
view and download results					X	X	X	X
view and download step attachments					X	X	X	X
view and export assigned items (live & snapshots)					X	X	X	X
view comments on protocol steps on tasks					X	X	X	X
delete/edit comment of any member on tasks					X			
delete/edit own comment on tasks					X	X	X	
export protocol					X	X	X	X
edit task name, notes, dates					X	X		
edit office file on protocol step					X	X		
update task status					X	X	X	
manage task members and their roles					X			
assign users to task					X			
unassign users to task					X			
create, edit and delete tags					X	X		
add/remove task tags					X	X		
create result					X	X		
edit result					X	X		
archive and restore results					X	X		
delete result (from archive)					X			
comment on result					X	X	X	
delete/edit comment of any member on results					X			
delete/edit own comment on results					X	X	X	
load/save/link/un-link protocol to task					X	X		
edit protocol description					X	X		
revert protocol to template version					X	X		
complete/un-complete protocol steps					X	X	X	
check/un-check step checkbox					X	X	X	
comment on protocol step					X	X	X	
delete/edit comment of any member on protocol steps on tasks					X			
delete/edit own comment on protocol steps on tasks					X	X	X	
add/edit/delete protocol steps					X	X		

reorder steps						x	x		
assign/un-assign inventory items to task						x	x	x	
create and manage inventory snapshots						x	x	x	
update task stock consumption						x	x	x	

ELECTRONIC SIGNATURES

view electronic signatures on task						x	x	x	x
sign/reject/revoke own signature						x	x	x	
co-sign						x	x	x	
request signature						x	x	x	
delete signature request						x	x	x	
remind users for e-signature						x	x	x	
revoke all signatures	x	x							

REPORTS

view reports (project member)		x	x	x					
view reports (not a project member)		x							
create new report		x	x						
edit existing report		x	x						
update report		x	x						
delete report		x	x						

INVENTORY

create inventory		x							
share an inventory		x							
archive inventory		x							
delete/restore inventory (from archive)		x							
view archived inventory		x	x	x					
create inventory items		x	x						
create/manage custom columns		x	x						
import inventory items		x	x						
view inventory items		x	x	x					
edit inventory items		x	x						
archive inventory items		x	x						
delete/restore inventory items (from archive)		x	x						
view archived inventory item		x	x	x					

print inventory label		x	x	x				
PROTOCOL TEMPLATES								
create new protocol template		x	x					
import protocols		x	x					
save protocol from task to protocol templates		x	x					
clone protocol		x	x					
view protocol templates (without access set)		x						
view/export/print protocol templates (with access only)					x	x		x
view/export archived protocol templates					x	x		x
create a draft in existing (published) protocol					x	x		
edit and delete protocol draft					x	x		
edit revision notes on protocol draft					x	x		
manage protocol users/roles		x			x			
publish protocol draft					x			
archive/restore protocol					x			
LABEL TEMPLATES								
view label templates		x	x	x				
edit/delete/duplicate protocol templates		x	x					
create new label template		x	x					