

ACTIONS	Organization 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/export/print protocol templates					x	x		x
view/export archived protocol templates					x	x		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					