

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

ORGANIZATION								
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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							
revoke any E-signature and delete signature requests	x							
setup SSO	x							
manage integrations	x							
manage company logo	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						
manage task sharing		x						

PROJECTS								
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view projects (project member)					x	x	x	x
view projects (set to project members only, not a member)		x						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
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
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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		
share task (enable/disable link sharing, update shared message)					X	X		
copy shared task link					X	X	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				
manage inventory filters		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 label templates		X	X					
create new label template		X	X					