

<b>ACTIONS</b>	<b>Organization</b>	<b>TEAM ROLES</b>			<b>PROJECT/EXPERIMENT/TASK &amp; PROTOCOLS ROLES DEFINITIONS</b>			
	<b>admin</b>	<b>Owner</b>	<b>User</b>	<b>Viewer</b>	<b>Owner</b>	<b>User</b>	<b>Technician</b>	<b>Viewer</b>

<b>ORGANIZATION</b>								
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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							
allow comments on locked tasks	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						

<b>PROJECTS</b>								
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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



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		
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	
manage steps/add new/insert step content					X	X		
submit form response					X	X	X	
edit form response					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					

**LOCATIONS**

create/duplicate locations		X	X					
manage locations (edit, share own, move, delete)		X	X					
view locations		X	X	X				
create/duplicate box		X	X					
manage box (edit, share own, move, delete, assign item, unassign item, move item, import)		X	X					
view box		X	X	X				

**PROTOCOL TEMPLATES**

create new protocol template		X	X					
import protocols		X	X					
save protocol from task to protocol templates		X	X					
duplicate 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			
<b>LABEL TEMPLATES</b>									
view label templates		x	x	x					
edit/delete/duplicate label templates		x	x						
create new label template		x	x						
<b>FORM TEMPLATES</b>									
view form templates, export data		x	x	x					
create new form template		x	x						
edit form template draft		x	x						
publish draft/archive/restore/manage users		x							

