eTMF Features and Access Levels_v10.4

eTMF FEATURES AND ACCESS LEVELS

Reader	Basic access rights; review documents, but do not have ability to post files
Editor	Medium access rights; ability to post new documents to the data room and edit metadata, also can be Subject Matter Experts in the Q&A
Manager	Near-Administrator level user with configurable access to settings. This user has no access to security or user management functions.
Administrator	Highest access rights; rights to all documents, all site settings and can add and modify documents and users.
*	Functions which are available to that level of access if the appropriate action is awarded

FEATURES	Reader	Editor	Doc. Manager	Manager	Admin
Audit Manager		X		X	X
Auditor Role: Document audit	X	X		X	X
Auditor Role: Send Queries	X	X		X	X
Compare Documents	X	X		X	X
Confirming or Correcting Auto-Predicted Doc Type		X		X	X
Contact Service Desk Via E-mail	X	X		X	X
Country & Investigative Site Folder View	X	X		X	X
CRA TMF Reconciliation: Check documents as Reviewed (CRAs only)	X	X			
CRA TMF Reconciliation: Run Reports	X	X		X	X
Dashboard Dashlet Arrangement	X	X		X	X
Dashboard Dashlet: Configure title, height, grid columns	X	X		X	X
Dashboard: Add documents or a placeholder in the eTMF Health Dashlet		X		X	X
Dashboard: Edit Project Links dashlet		X		X	X
Dashboard: Manage your tasks and view all tasks in Task Dashlet	X	X		X	X
Default Module Selection on a Per-Room Basis	X	X		X	X
Document: Add a document through Document dropdown		X		X	X
Document: Add documents to Submission Package through Document Cart		X		X	X
Document: Add a document via the Upload dashlet		X		X	X
Document: Add private notes through My Comments	X	X		X	X
Document: Auto-Indexing	X	X		X	X
Document: Bulk Import Documents		X		X	X
Document: Compare Documents through Document Cart	X	X		X	X
Document: Configure Document Grid	X	X		X	X
Document: Copy document link with right-click	X	X		X	X
Document: Download	X	X		X	X
Document: Edit Metadata		X		X	X
Document: Email document to anyone with access to room	X	X		X	X

FEATURES	Reader	Editor	Doc. Manager	Manager	Admin
Document: Enable and Set-up Authoring Review				X	X
Document: Flexible Viewing Options for Documents using Layout Function	X	X		X	X
Document: Initiate Optical Character Recognition		X		X	X
Document: Link Documents through Documents Cart		X		X	X
Document: Mark as Favorite	X	X		X	X
Document: Mark Documents as Popular through Documents Cart		X		X	X
Document: Mass Coding		X		X	X
Document: Merge Documents through Documents Cart		X		X	X
Document: Metadata: Custom date format in My Profile	X	X		X	X
Document: Metadata: Drag and drop documents to eTMF folders to auto-encode metadata		X		X	X
Document: Metadata: Edit metadata on a final document		X*	X	X*	X
Document: Metadata: Type in Date		X		X	X
Document: Move Documents to Start-up		X		X	X
Document: Print	X	X		X	X
Document: Rearrange Data Columns in Document Grid	X	X		X	X
Document: Replace Document with New Version		X		X	X
Document: Right-Click to Add Document		X		X	X
Document: View Document Revisions		X*	X	X*	X
Document: View from Dashboard	X	X		X	X
Document: View Metadata	X	X		X	X
Document: Update 'Auto-Generated Name' at a document type level				X	X
Document: Use Edit Online feature during document upload		X	X	X	X
Email Messages to Room Users		X		X	X
Email Documents to Room Inbox	X	X		X	X
Email: Convert communication sent out of system into a document for eTMF		X		X	X
e-Signature: Apply and initiate an e-signature	X	X		X	X
e-Signature: Enable in study room					X
e-Signature: Retain MS Word and signed PDF		X		X	X
eTMF Completeness View of Documents and Placeholders	X	X		X	X
eTMF Completeness: Ability to Create General Queries on Placeholders		X		X	X
eTMF Completeness: Ability to mark Placeholders as Non-Applicable		X		X	X
eTMF: Sort TMF folders using different filters	X	X		X	X
eTMF: View Sites and Site Contacts if enabled	X	X		X	X
Export: Audit Metadata	X	X		X	X
Export: Document Metadata	X	X		X	X
Export: Document Versions	X	X		X	X
Export: Documents	X	X		X	X

FEATURES	Reader	Editor	Doc Manager	Manager	Admin
General: Flexible pop-up window resizing and repositioning	X	X		X	X
General: Multi-Factor Authentication	X	X		X	X
General: Switch between rooms without accessing Home Screen	X	X		X	X
Homepage: Navigate to documents within the eTMF from the Expired Docs List	X	X		X	X
Homepage: View Cross Study Activity & Expired Docs	X	X		X	X
Import: Documents		X		X	X
Import: Metadata		X		X	X
Manage Audit Settings					X
Manage Dashboard Setup					X
Manage Document Types				X	X
Manage E-mail Settings & Templates				X	X
Manage FAQ Settings				X	X
Manage Forms Settings				X	X
Manage Index Outlines				X	X
Manage Q&A Settings / Subject Matters				X	X
Manage Required Documents				X	X
Manage Room Settings				X	X
Manage Security Settings					X
Mass Coding		X		X	X
Event Manager: Access and View Event Progress	X	X		X	X
Event Manager- Add Events		X		X	X
Event Manager: Add Event Types		X		X	X
Event Manager: Edit Events & Event Types		X		X	X
Q&A: Ability to convert Q&A to the FAQ				X	X
Q&A: Address user questions		X		X	X
Q&A: Assign Subject Matter Experts				X	X
Q&A: Initiate a question	X	X		X	X
Q&A: Read answers to all questions posed				X	X
Q&A: Read answers to personal questions posed	X	X		X	X
Quality Review Module: Duplicate, Disable, Delete Audits					X
Quality Review : Export Pending documents	X	X		X	X
Quality Review : Query resolution feature	X	X		X	X
Search: Advanced search function	X	X		X	X
Search: Enter multiple keywords	X	X		X	X
Search: Simple Search Function	X	X		X	X
Site profile: View edit history	X	X		X	X
Site Status Set to Activated in Rooms Using eTMF		X		X	X
Sites Module: Add, edit, delete sites		X		X	X
Sites Module: Export Site Information	X	X		X	X

FEATURES	Reader	Editor	Doc Manager	Manager	Admin
Tasks: Arrange and view list by category	X	X		X	X
Tasks: Assign to multiple room users		X		X	X
Tasks: Create tasks for yourself	X	X		X	X
Tasks: Export data from Task dashlet		X		X	X
TI Content Management: Deleting a published document deletes the linked eTMF copy		X		X	X
TI Content Management: Encode metadata and publish documents to eTMF		X		X	X
TI Content Management: Linked login from navigation grid for those with access	X	X		X	X
TI Content Management: Option to "Publish to eTMF"		X		X	X
Trial Communication: Inbox Access		X		X	X
Trial Communication: Outbox Access		X		X	X
User Guide Access	X	X		X	X
User Login: Account locks after configurable number of failed login attempts	X	X		X	X
User: Change "View By" pane	X	X		X	X
User: Change login password	X	X		X	X
User: Notification Preferences	X	X		X	X
Users: Change access					X
Users: Invite new users					X
Video Files: view MP4 format	X	X		X	X
View and Group Investigative Sites by Country	X	X		X	X
View: Set a default	X	X		X	X
Workflow Management				X	X
Workflow Query Initiation		X		X	X
Workflow Query Resolution		X		X	X
Workflow: Assign status to documents		X		X	X
Workflow: Bulk edit document status				X	X
Workflow: Change document status and reassign reviewer				X	X
Workflow: Claim documents		X		X	X
Workflow: Queries may be viewed by recipient	X	X		X	X
Workflow: Release claimed documents		X		X	X
Workflow: Users in query workflow can see if queried documents have been deleted in 'Query by Sender' and 'Query by Recipient' views	X	X		X X	X X