

Note: All users are given a system access role first. Study-related access permissions are managed on an individual study basis. Please see the related job aid and/or video for additional information on managing study access permissions.

****The information contained on this document is based on standard, out-of-the-box, settings. These settings can be configured to meet the needs of any client. As a result, your System Access Permissions matrix may not match those permissions listed on this document.****

Key:

Read: The user can view the record within the respective location.

Update: The user can update/edit/modify a record within the respective location.

Create: The user can create a record within the respective location.

Delete: The user can perform a soft-delete of a record within the respective location.

Manage: - user can edit settings and manage teams within the respective location.

Blank: Defaults to Above level permission (Domain, Program, Study, etc.)

Domain	Company Administrator	Executive	Internal User (Manager)	Internal User	External User	Internal Auditor
Domain						
Domain Reader						
Update Domain Data						
Create Domain Data						
Delete Domain Data						
Manage Domain Data	X					
All Domain Permissions	X					
Contacts						
Contact Reader	X	X	X	X	X	X
Update Contacts	X		X	X		
Create Contacts	X		X	X		
Delete Contacts	X		X	X		
Manage Contacts	N/A		N/A			
All Contact Permissions	X		X	X		

Domain	Company Administrator	Executive	Internal User (Manager)	Internal User	External User	Internal Auditor
Organizations						
Organization Reader	X	X	X	X	X	X
Update Organizations	X		X	X		
Create Organizations	X		X	X		
Delete Organizations	X		X	X		
Manage Organizations	X		X			
All Organization Permissions	X		X			
Products						
Product Reader	X	X	X	X		X
Update Products	X	X	X			
Create Products	X	X	X			
Delete Products	X	X	X			
Manage Products			X			
All Product Permissions			X			
Programs						
Program Reader	X	X	X			X
Update Programs	X		X			
Create Programs	X		X			
Delete Programs	X		X			
Manage Programs	X		X			
All Program Permissions	X		X			

Domain	Company Administrator	Executive	Internal User (Manager)	Internal User	External User	Internal Auditor
Domain Library						
Activity Templates						
Activity Template Reader	X		X			
Update Activity Templates	X					
Create Activity Templates	X					
Delete Activity Templates	X					
Manage Activity Templates	N/A					
All Activity Template Permissions	X					
Activity Plan Template						
Activity Plan Template Reader	X		X			
Update Activity Plan Templates	X					
Create Activity Plan Templates	X					
Delete Activity Plan Templates	X					
Manage Activity Plan Templates	N/A					
All Activity Plan Template Permissions	X					
Milestone Templates						
Milestone Template Reader	X		X			
Update Milestone Templates	X					
Create Milestone Templates	X					
Delete Milestone Templates	X					
Manage Milestone Templates	N/A					
All Milestone Template Permissions	X					

Domain	Company Administrator	Executive	Internal User (Manager)	Internal User	External User	Internal Auditor
Study Data						
Study Reader	X	X	X			X
Update Studies	X		X			
Create Studies	X		X			
Delete Studies	X					
Manage Studies	X		X			
All Study Permissions	X					
Study Country						
Study Country Reader	X	X	X			X
Update Study Countries	X					
Create Study Countries	X					
Delete Study Countries	X					
Manage Study Countries	X					
All Study Country Permissions	X					
Site						
Site Reader	X	X	X			X
Update Sites	X					
Create Sites	X					
Delete Sites	X					
Manage Sites	X					
All Site Permissions	X					

Domain	Company Administrator	Executive	Internal User (Manager)	Internal User	External User	Internal Auditor
Subject						
Subject Reader	X	X	X			X
Update Subjects	X					
Create Subjects	X					
Delete Subjects	X					
Manage Subjects	N/A					
All Subject Permissions	X					
Site Visit						
Site Visit Reader	X	X	X			X
Update Site Visits						
Create Site Visits						
Delete Site Visits						
Manage Site Visits	N/A					
All Site Visit Permissions						
Milestone						
Milestone Reader	X	X	X			X
Update Milesones						
Create Milesones						
Delete Milestones						
Manage Milestones	N/A					
All Milestone Permissions						
Activity Plan						

Domain	Company Administrator	Executive	Internal User (Manager)	Internal User	External User	Internal Auditor
Activity Plan						
Activity Plan Reader	X	X	X			X
Update Activity Plans						
Create Activity Plans						
Delete Activity Plans						
Manage Activity Plans	N/A					
All Activity Plan Permissions						
Activity						
Activity Reader	X	X	X			X
Update Activities						
Create Activities						
Delete Activities						
Manage Activities	N/A					
All Activity Permissions						
Study Library						
Activity Templates						
Activity Template Reader	X		X			
Update Activity Templates	X					
Create Activity Templates	X					
Delete Activity Templates	X					
Manage Activity Templates	N/A					
All Activity Template Permissions	X					

Domain	Company Administrator	Executive	Internal User (Manager)	Internal User	External User	Internal Auditor
Activity Plan Template						
Activity Plan Template Reader	X		X			
Update Activity Plan Templates	X					
Create Activity Plan Templates	X					
Delete Activity Plan Templates	X					
Manage Activity Plan Templates	N/A					
All Activity Plan Template Permissions	X					
Milestone Template						
Milestone Template Reader	X		X			
Update Milestone Templates	X					
Create Milestone Templates	X					
Delete Milestone Templates	X					
Manage Milestone Templates	N/A					
All Milestone Template Permissions	X					