



eTMF Features and Access Levels V10.2

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
Admin	Highest access rights; rights to all documents, all site settings and can add and modify documents and users
Document Manager	Editor users with permission to delete as well as edit final documents. These users can also update metadata and change file location.

FEATURES	Reader	Editor	Doc 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	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
Document: Enable and Set up Authoring & Review				X

FEATURES	Reader	Editor	Doc Manager	Admin
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 Document Cart		X	X	X
Document: Mark as Favorite	X	X	X	X
Document: Mark documents as Popular through Document Cart		X	X	X
Document: Mass Code		X	X	X
Document: Merge documents through Document 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
Document: Metadata: Type in Date		X	X	X
Document: Move Documents to startup		X	X	X
Document: Print	X	X	X	X
Document: Rearrange data columns in grid	X	X	X	X
Document: Replace Document with a new version		X	X	X
Document: Right-click to add a document		X	X	X
Document: View Document revisions		X	X	X
Document: View from Dashboard	X	X	X	X
Document: View Metadata	X	X	X	X
Documents: Update 'Auto-Generated Name' at a document type level				X
Documents: Use Edit Online feature during document upload		X	X	X
Email Messages to Room Users		X	X	X
Email: Convert communication sent out of system into a document for eTMF		X	X	X
Email: Documents to data room Inbox	X	X	X	X
e-Signature: Apply and initiate an e-signature		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: 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: Documents	X	X	X	X
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
Groups: Add and delete users				X

FEATURES	Reader	Editor	Doc Manager	Admin
Homepage: Navigate to documents within the eTMF from the Expired document list	X	X	X	X
Homepage: View Cross Study Activity & Expired documents	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
Manage E-mail Settings & Templates				X
Manage FAQ Settings				X
Manage Forms Settings				X
Manage Index Outlines				X
Manage Q&A Settings / Subject Matters				X
Manage Required Documents				X
Manage Room Settings				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
Q&A: Address user questions		X	X	X
Q&A: Assign Subject Matter Experts				X
Q&A: Initiate a question	X	X	X	X
Q&A: Read answers to all questions posed				X
Q&A: Read answers to personal questions posed	X	X	X	X
Quality Review Module: Add modified documents back into the audit		X	X	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	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 Index view	X	X	X	X
User: Change login password	X	X	X	X
User: Notification Preferences	X	X	X	X
Users: Change access and delete users				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
Workflow: Change document status and reassign reviewer				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