COLLABORATE FEATURES AND ACCESS LEVELS v10.5

COLLABORATE FEATURES AND ACCESS LEVELS

Reader	Basic access rights; view-only access to files. These users can only submit documents to a room via email if email is enabled in the room.
Editor	Medium access rights; has the ability to add documents directly to the room, apply metadata to documents, and perform workflow functions.
Manager	Managers have access to most room data, both in the documents view and the settings panel, without providing these users access to change permissions or invite new users to the room. Room configuration permissions can be configured.
Administrator	Highest access rights; rights to all documents, settings, and user access control.
*	Functions which are only available to a Document Owner or proxy .

FEATURES	Reader	Editor	Manager	Admin
Audit Manager		X	X	X
Audit Responder		X	X	X
Auditor Role: Perform Document Audits	X	X	X	X
Auditor Role: Send Audit 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 Reconciliation Module: Check documents as Reconciled (CRAs only)	X	X		
CRA Reconciliation Module: Create General Query	X	X	X	X
CRA Reconciliation Module: Run Reports	X	X	X	X
Dashboard Dashlets: Arrangement	X	X	X	X
Dashboard Dashlets: Configure title, grouping, columns	X	X	X	X
Dashboard Dashlets: Manage Access, Disable and make Mandatory				X
Dashboard: Add documents via eTMF Health dashlet		X	X	X
Dashboard: Manage Expiring/ Expired Documents		X	X	X
Dashboard: Create Manual Placeholders via eTMF Health dashlet	X	X	X	X
Dashboard: Edit contents within "About this Room" dashlet			X	X
Dashboard: Edit contents within "Bulletin Board" dashlet			X	X
Dashboard: Edit "Project Links" dashlet		X	X	X
Dashboard: Manage your tasks and view all tasks in "Tasks" Dashlet	X	X	X	X
Default Module (starting page) Selection on a Per-Room Basis	X	X	X	X

FEATURES	Reader	Editor	Manager	Admin
Document: Add a document through Document dropdown		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: Bulk Import Documents		X	X	X
Document: Compare Documents through Document Cart	X	X	X	X
Document: Copy document link	X	X	X	X
Document: Grid Layout using Layout Function	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
Document: Initiate Optical Character Recognition		X	X	X
Document: Relate Documents through Documents Cart		X	X	X
Document: Mark Documents 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: Change Custom Date Format in My Profile	X	X	X	X
Document: Checkout: Edit Online or Offline		X	X	X
Document: Checkout: Participate in a Collaborative Edit		X	X	X
Document: Checkout: Setup or Close a Collaborative Edit		X	X	X
Document: Metadata: Drag and drop/Add documents to folders to auto-encode metadata		X	X	X
Document: Metadata: Type in Date		X	X	X
Document: Print	X	X	X	X
Document: Pin Views in "View by" Pane	X	X	X	X
Document: Rearrange Data Columns in Document Grid	X	X	X	X
Document: Right-Click to Add Document		X	X	X
Document: Sort document folders using different filters	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
Email Messages to Room Users		X	X	X
Email Documents to Room Inbox	X	X	X	X
e-Signature (non-workflow): Sign a document	X	X	X	X
e-Signature (non-workflow): Initiate an e-signature		X	X	X
e-Signature (non-workflow): Enable in room				X
Export: Audit Metadata	X	X	X	X
Export: Document Metadata	X	X	X	X
Export: Document Versions		X	X	X
Export: Documents	X	X	X	X

FEATURES	Reader	Editor	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: List and navigate to documents within the room via document counters	X	X	X	X
Homepage: View Room Information	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
Manage Workflow Settings				X
Mass Coding		X	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
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
Quality Review Module: Create new Audit				X
Quality Review Module: Duplicate, Disable, Delete Audits				X
Quality Review Module: Create new Audit				X
Quality Reviews: Export Pending documents	X	X	X	X
Quality Reviews: Query resolution feature	X	X	X	X
Queries Module: Export Queries	X	X	X	X
Queries Module: Bulk Reassign Queries		X	X	X
Relation Type: Add				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
Sites Module: Add, edit, delete sites		X	X	X
Sites Module: Export Site Information	X	X	X	X
Sites Module: View Sites and Site Contacts if enabled	X	X	X	X

FEATURES	Reader	Editor	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
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 Investigative Sites by Country	X	X	X	X
View: Set a default	X	X	X	X
Workflow Management				X
Workflow: Query Initiation		X	X	X
Workflow: Query Resolution		X	X	X
Workflow: Assign status to documents***		X	X	X
Workflow: Start a Workflow		X*	X*	X*
Workflow: Setup e-Signature for a Document		X	X	X
Workflow: Sign a Document	X	X	X	X
Workflow: 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