

ACTIONS	Organization	Workspace Roles			Project/Experiment/Task & Protocols Roles				
	admin	Owner	User	Viewer	Owner	User	Technician	Reviewer	Viewer

ORGANIZATION

view organization members	x								
invite new users to organization	x								
create new workspace	x								
lock members, revoke API keys	x								
promote others to Organization admin	x								
change password policy	x								
access system logs	x								
add themselves to any workspace 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								
create activity filters, create webhooks	x								
view/export audit trail		x							
change workspace member's permissions		x							
remove members from the workspace		x							
invite organization members to the workspace		x							
create, edit, delete workspace groups		x							
change workspace name		x							
create, edit, delete project folder		x							
manage task sharing		x							
generate, revoke own API key		x	x	x					

PROJECTS

view projects (project member)					x	x	x	x	x
view projects (set to project members only, not a member)		x							
view folders					x	x	x	x	x
view project activities					x	x	x	x	x

view project members					X	X	X	X	X
view project comments					X	X	X	X	X
view archived projects		X			X	X	X	X	X
manage project members and their roles		X			X				
create project		X	X						
edit project					X				
archive project					X				
move a project to/from a folder		X							
restore archived project					X				
add comment to project					X	X	X		
edit and delete own project comments					X	X	X		
edit and delete any users' project comments					X				
export project					X	X	X	X	X
create experiment					X	X			

EXPERIMENTS

Project roles are inherited to experiment unless otherwise changed.

view experiment					X	X	X	X	X
view experiment members					X	X	X	X	X
view archive experiment					X	X	X	X	X
duplicate experiment					X	X	X	X	X
edit experiment					X	X			
archive experiment					X	X			
restore archived experiment					X	X			
move experiment					X	X			
manage experiment members and their roles					X				
create task					X	X			
edit task name					X	X			
duplicate task/workflow					X	X			
move task/workflow between experiments					X	X			
archive task/workflow					X	X			
restore archived task					X	X			
edit canvas - task position/connections					X	X			
view canvas					X	X	X	X	X

view experiment activities					X	X	X	X	X
TASKS									
Experiment roles are inherited to the task unless otherwise changed.									
view task					X	X	X	X	X
view protocol and protocol steps on task					X	X	X	X	X
view task info					X	X	X	X	X
view task activities					X	X	X	X	X
view task comments					X	X	X	X	X
view task members					X	X	X	X	X
view assigned users on tasks					X	X	X	X	X
view archived task					X	X	X	X	X
view and download results					X	X	X	X	X
view and download step attachments					X	X	X	X	X
view and export assigned items (live & snapshots)					X	X	X	X	X
view comments on protocol steps on tasks					X	X	X	X	X
delete/edit comment of any member on tasks					X				
delete/edit own comment on tasks					X	X	X	X	
export protocol					X	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	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	X	

delete/edit comment of any member on results						X				
delete/edit own comment on results						X	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	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	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	X
sign/reject/revoke own signature						X	X	X	X	
co-sign						X	X	X	X	
request signature, delete own requests						X	X	X	X	
delete any signature request						X				
remind users for e-signature						X	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							
manage inventory access and user roles		X							
archive, restore archived, delete inventory		X							
view archived inventory		X	X	X					
create, edit, delete custom columns		X							
view inventory items		X	X	X					
create, duplicate inventory items		X	X						
import inventory items		X	X						
edit inventory items, edit item relationships		X	X						
archive inventory items		X	X						
delete/restore inventory items (from archive)		X	X						
view archived inventory item		X	X	X					
print inventory item 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 items)		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/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							
publish protocol draft		x							
archive/restore protocol		x							
LABEL TEMPLATES									
view label templates		x	x	x					
edit/delete/duplicate label templates		x	x						
create new label template		x	x						
FORM TEMPLATES									
view form templates, view archived, export data		x	x	x					
create new form template		x	x						
edit form template draft		x	x						
publish draft/unpublish unused form/archive/restore/manage users		x							

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