

Research Organization Level

	Create and Manage User Profiles at Organization Level	Create and Manage Studies at Organization Level
<p>Research Organization Administrator Has full access to all data and functionality in SiteVault. Can create and manage user accounts at the Research Organization level (across multiple Sites if applicable). Commonly used for Regulatory Director/Staff, Project Manager, Business Development</p>	✓	✓
<p>Research Organization Staff Default for all non-administrative research staff. Provides view access to Research Organization level information. Commonly used for Coordinator, Investigators, Data Managers</p>		
<p>Research Organization External For Monitors, CRAs, and Auditors. Commonly used for CRA, Monitor, CTA, Auditors</p>		

Site Level

	Create and Manage User Profiles at Site Level	Create and Manage Studies at Site Level	Access Assigned Studies	Access Assigned Study Documents	Upload Documents	View/Download Source Rendition of Documents	View/Download Viewable Rendition of Documents	Edit Documents*	Delete Document*	Initiate Document Processing Workflows*	Provide Remote Monitoring Document Verdicts*	Participate in Document Workflow Assignment*	View Study Contracts and Budgets	Edit Study Contracts and Budgets	View Site Documents	Create Site Documents	Send Digital Delegations for Approval	Approve/Receive Digital Delegations
<p>Site Administrator</p> <p>Can view and manage all information and documents, adjust settings, and add new users.</p> <p>Commonly used for Regulatory Director, Coordinator, Project Manager</p>	✓	✓	✓**	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
<p>Site Staff</p> <p>Default for all non-administrative research staff. Provides view access to Site level information. Cannot see study information until added to the study.</p> <p>Commonly used for Coordinator, Investigators, Data Managers</p>			✓	✓	✓	✓	✓	✓	✓	✓		✓	✓		✓			✓
<p>Site External</p> <p>Read only access to this Site. Cannot see study documents until added to the study. Cannot view the Studies tab but can filter for assigned studies in eBinder and Library.</p> <p>Commonly used for CRA, Monitor, CTA, Auditors</p>				✓		✓					✓							
<p>Site Viewer (All Studies)</p> <p>Can see all studies for an assigned site, cannot create content but can participate in workflows.</p> <p>Commonly used for Oversight Leadership, Part time staff (nurse, patient care, lab techs etc.), Research Assistants, Psychometric Raters, Pharmacy Staff</p>			✓**	✓**		✓						✓			✓			✓
<p>No Access</p> <p>This user will not see any information for any sites with No Access.</p> <p>Commonly used for individuals who have left the organization or study, designated in SiteVault as "Staff (No SiteVault Access)"</p>																		

* Users ability to Edit Documents, Delete Documents, Initiate Document Workflows, and Participate in Document Workflows are dependent on document object type, document ownership, current document lifecycle state, and the workflows associated with the user's security profile and/or study role assignment.

** Research Organization and Site Administrators can access all Studies at their Sites (not just those they are assigned to)

User Add-On Permissions

(for Research Organization Staff and Site Staff only)

Security Level	Security Role	Add On Description
Research Organization Level	Patients & Recruiting	Adds the ability to create and manage Patient profiles across the research organization and its sites.
Site Level	All Studies Budgets & Contracts	Adds the ability to view all studies and manage all legal and financial documents for the site.
	All Studies Patients & Recruiting	Adds the ability to view all studies and fully manage all Patient profiles and Participant study records for the site.
	Site Profiles	Adds the ability to create and/or manage site-specific profile information for organizations (such as IRB/IECs or sponsors) and products.