

Permissions



What are Roles and Permissions?

How do I create, edit, and delete Roles?

Let's assign Roles to Users

Permissions Overview

User vs Role

User

- Each individual on a Team must register in Florence as a **unique User**
- Team Administrators may assign Users **one or more Roles** based on their participation needs on the Team
- Users may be participants on many Teams

Role

- Roles are used in Teams to assign the same Permission levels to **multiple Users** at once, rather than individually
- Roles improve Permission Management by allowing Teams to **"group" similar Users** together and select the appropriate Permissions for all Users in the group instead of having to manage Permissions directly for each User on a Team
- Updating the Permissions for the Role **updates** the Permissions for all Users assigned to that Role

Object Level Permissions

4 Florence Object Types



Team



Binder



Folder



Document

Permissions may be assigned at each of these Object levels in hierarchical fashion:



Team Level Permissions – currently assigned directly to Roles



Binder Level Permissions



Folder Level Permissions



Document Level Permissions

Permissions assigned directly at higher levels **WILL** impact all levels below them (Permissions will be inherited - just as children inherit the genes from their parents)

Permissions assigned at lower levels will **NOT** impact the levels above them (parents cannot inherit genes from their children)

Direct vs Inherited Permission

Direct Permissions

- ▶ Permissions placed **directly** on Object and not **inherited** from a higher-level Object
- ▶ **Direct Permissions** will display as **dark blue** in the pop-up window

Kristin Harbaugh's Permissions for *Placebo eBinder Regulatory*

- Download Documents with PII
- Manage Binder
 - Import Folder Structure
 - Delete Binder
 - Download All Audit Trail Events for the Binder
 - Duplicate Binder
 - Manage Folder
 - Rename Binder
 - Update Binder
 - View Binder
 - View All Audit Trail Events for the Binder
- View Documents With PII

Inherited Permissions

- ▶ Permissions **inherited** from higher level Objects
- ▶ **Example:** Placing **Direct Permission** at Binder level will show as an **Inherited Permission** at Folder and Document levels below it
- ▶ **Inherited Permissions** will display **grey** in the pop-up
- ▶ When Users hover over the item, the tooltip describes where the Permission is being **inherited** from such as a Binder or higher-level Folder

Kristin Harbaugh's Permissions for *01 Protocol and Amendments*

Inherited from role (Super Admin) for binder (Placebo eBinder Regulatory).

- Create Document
- Create Folder
- Delete Folder
- Download All Audit Trail Events for the Folder
- Duplicate Folder
- Manage Document
- Move Folder

Permission Overview

What is the  Permission Overview useful for?

It allows you to see what Permissions a Role or User has on each Object (Team, Binder, Folder, and Document) and to edit them. You can also what items a Role or User has restricted.

Who can access it?

Users assigned a Role with the Manage Permissions for Entire Team can view it Permission Overview and edit permissions from it.

How do I access the Permission Overview?

Option One: Settings dropdown menu and select "Permission Overview"

Option Two: Roles main page

Option Three: Manage Permissions for a specific Role from the Manage Role Page via the "Click here to see folder and document permissions" link

Option Four: Team Members page

Permission Overview: Filter Boxes

ALL
ITEMS

PERMITTED
ITEMS

DIRECTLY PERMITTED
ITEMS

RESTRICTED
ITEMS

All Items:

- Displays **ALL Objects** in the Team regardless of Permissions assigned
- Useful for managing Permissions on Objects the User or Role does not currently have Permissions assigned

Permitted Items:

- Includes **only Objects** the Role or User selected has **access** to
- Replicates the Role or User's **Global View**

Restricted Items:

- Includes all Binders but only Objects under the Binder the Role or User selected does NOT have access to
- Click the + to expand to confirm Objects restricted in each Binder

Directly Permitted Items:

- Highlights Objects the Role or User selected has **direct** Permissions on and will not include any that are **inherited** from a parent Folder, Binder, or Team
- Useful for pinpointing the location where the Permission was assigned to assist in managing the Permission

Manage Role Permissions

CREATE ROLE ACTIONS

- Audit Trail
- Delete
- Duplicate
- Manage Access
- Manage Role Permissions**
- Permission Overview
- Rename

		Last Updated	Actions
<input checked="" type="checkbox"/>	ac	11-Jun-2019 @ 1:04 PM EDT	⋮
<input type="checkbox"/>	ac	27-May-2019 @ 7:48 AM EDT	⋮
<input type="checkbox"/>	Te	19-Jun-2020 @ 10:29 AM EDT	⋮
<input type="checkbox"/>	St	18-Feb-2020 @ 8:49 AM EDT	⋮
<input type="checkbox"/>	M	22-Jun-2020 @ 2:20 PM EDT	⋮



Manage Roles admin test

CREATE NEW ACTIONS

Type	Location	Permissions	Actions
<input type="checkbox"/>	Placebo Pharmaceuticals Clinical Studies	<ul style="list-style-type: none">View Documents With PIIUpdate TagsRemove Users from the Team...and 14 others	⋮

Manage Role Permissions

Manage Roles > admin test

CREATE NEW ▾ ACTIONS ▾

Type Location

- Remove Permissions
- Update Permissions
- View Effective Permissions

Placebo Pharmaceuticals Clinical Studies

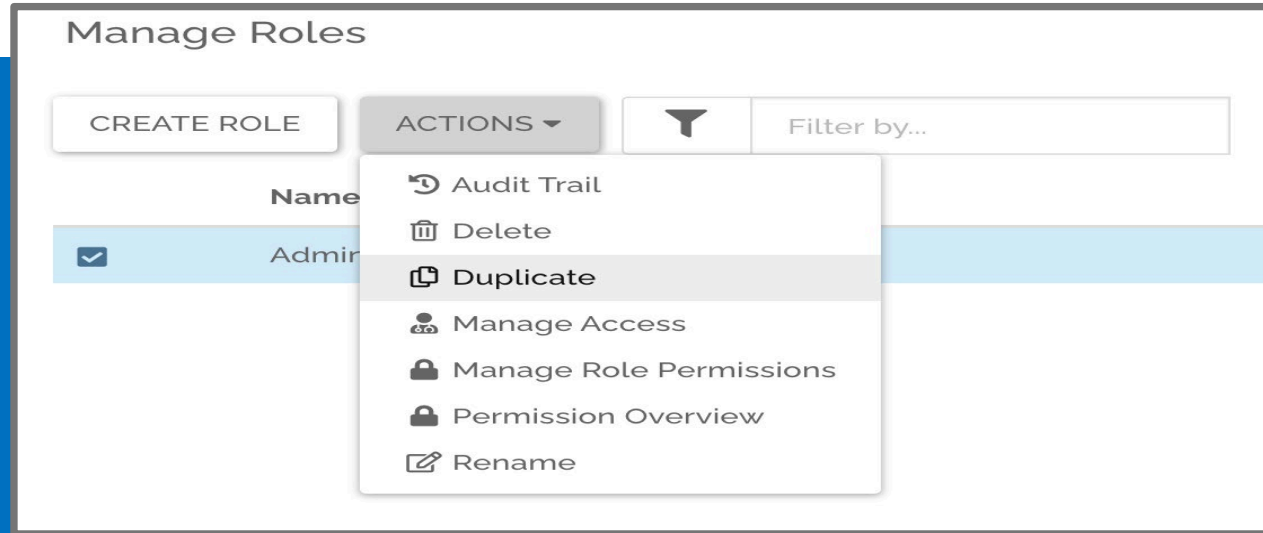
Permissions	Actions
<ul style="list-style-type: none">View Documents With PIIUpdate TagsRemove Users from the Team...and 14 others	

- “Remove Permissions” will delete the item from the role’s access
- “Update Permissions” will allow you to add or remove permissions
- “View Effective Permissions” will show you all permissions granted to that role in the binder you’ve selected
- “Create New” will allow you to add permissions on a team-level, binder-level or folder-level.

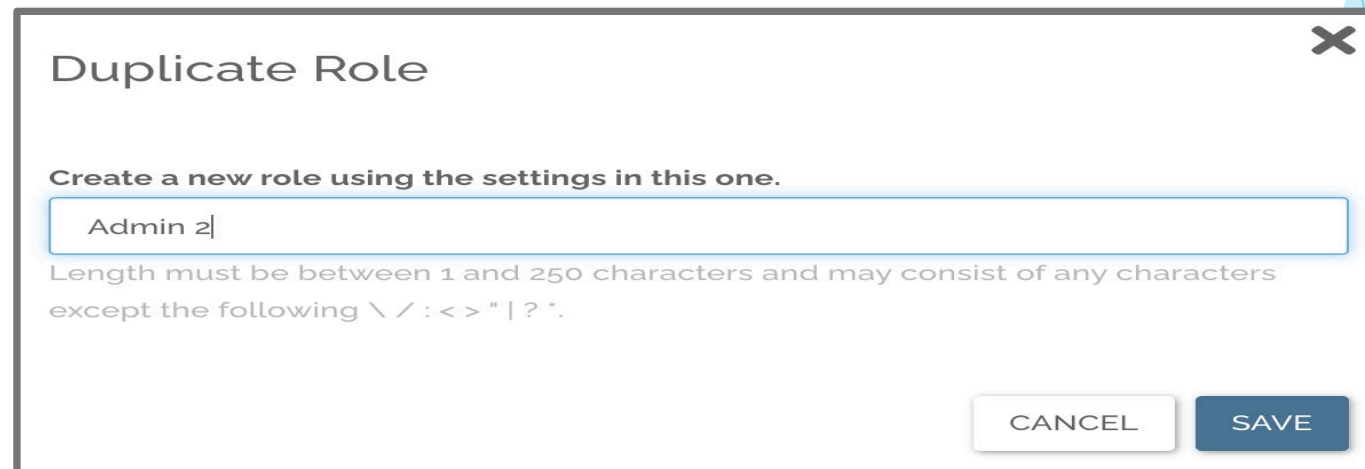
Duplicating Roles

- Select role
- Select Actions
- Select Duplicate

- Rename new role according to your naming convention



The screenshot shows the 'Manage Roles' interface. At the top, there is a 'CREATE ROLE' button, an 'ACTIONS' dropdown menu, a filter icon, and a 'Filter by...' input field. Below this is a table with a 'Name' column. One row is selected, showing a checkbox, a checkmark, and the name 'Admin'. The 'ACTIONS' dropdown menu is open, showing options: Audit Trail, Delete, Duplicate (highlighted), Manage Access, Manage Role Permissions, Permission Overview, and Rename.



The screenshot shows the 'Duplicate Role' dialog box. It has a title bar with a close button (X). The main text says 'Create a new role using the settings in this one.' Below this is a text input field containing 'Admin 2'. A note below the input field states: 'Length must be between 1 and 250 characters and may consist of any characters except the following \ / : < > " | ? *.' At the bottom right, there are two buttons: 'CANCEL' and 'SAVE'.

Duplicating Roles

- Select newly created role
- Select Manage Role Permissions

The screenshot shows the 'Manage Roles' interface. At the top, there is a 'CREATE ROLE' button, an 'ACTIONS' dropdown menu, a filter icon, and a search box containing 'admin'. Below this is a table of roles. The first row, 'Admin', is selected with a checkmark. The 'ACTIONS' dropdown menu is open, showing options: Audit Trail, Delete, Duplicate, Manage Access, Manage Role Permissions (highlighted), Permission Overview, and Rename. Other roles in the list include 'admin', 'admin', 'Team', 'Super', and 'Meagley Admin'.

- Select Binder or Folder > Actions > Update Permissions to change Binder or Folder-Level permissions.

The same permissions will be granted to this new Binder or Folder that were assigned to the original role. You can remove permissions to any Binder or Folder the new role should not have access to from this screen as well.

The screenshot shows the 'Manage Roles > Admin 2' interface. At the top, there is a 'CREATE NEW' dropdown menu and an 'ACTIONS' dropdown menu. Below this is a table with columns 'Type', 'Location', and 'Permissions'. The first row is selected with a checkmark and shows 'Placebo Pharmaceuticals Clinical Studies'. The 'ACTIONS' dropdown menu is open, showing options: Remove Permissions, Update Permissions (highlighted), and View Effective Permissions. The 'Permissions' column lists: View Documents With PII, Manage Team and its Contents, Manage Monitor Reviews, and ...and 1 others.

Adding Users

1 From Settings menu, select "Team Members"

2 Click "Add Members"

3 Enter one or more email addresses, separated by **commas**

4 Check box if you want invites emailed to new users **Pro Tip: don't select for SSO users*

5 Select 'SEND'

Placebo Pharmaceuticals Clinical Studies

Settings Anne Poliner

Manage Team Members: Placebo Pharmaceuticals C

ADD MEMBERS REPORT ACTIONS SAML

Associated Log in(s)	Notification Address	Roles	Actions
<input type="checkbox"/> Anna SAML	anna.mcdermott@researchbinders.org	test role with	

Add Member(s) via Email

Email Addresses

user1@hospital.com, user2@hospital.com

Note: New members will have limited access until they are added to binder(s) and assigned roles by you or another administrator.

Add email invitation to new members

CANCEL SEND

Assigning Roles

1 On Manage Team Members page, select a user

2 From Actions Menu, select Manage Access to display current access

3 Start typing the Role you want to assign them and repeat for all Roles needed.

The screenshot shows the 'Manage Team Members: CS Institute' interface. At the top, there are buttons for 'ADD MEMBERS', 'REPORT', 'ACTIONS', and a search filter. Below this is a table of team members. The first row is highlighted, and the 'ACTIONS' menu is open, showing options like 'Remove Member', 'Manage Access', 'Permission Overview', and 'Remove ALL Permissions'. The 'Manage Access' option is selected, leading to a 'Manage Access for Emma Koutrelakos' dialog. This dialog has a 'Bulk Manage Access' section with a table of roles. The table has columns for 'Role', 'Off/On', 'Start', 'End', and 'Remove'. The first row shows 'Admin' with a toggle switch, a start date of '29-Aug-2019 @ 08:51 AM EST', and an end date of 'Never'. Below the table is a search input field with 'Coord' typed in, and a dropdown menu showing 'Groundbreaking Site Coordinator (ROLE)' and 'Site Coordinator (ROLE)'. There are 'CANCEL' and 'SAVE' buttons at the bottom right.

Manage Team Members: CS Institute

ADD MEMBERS REPORT ACTIONS Filter by...

Name	Actions
<input checked="" type="checkbox"/> Florence Support support@florencchc.com	Remove Member Manage Access Permission Overview Remove ALL Permissions
<input type="checkbox"/> Emma Koutrelakos	

Manage Access for Emma Koutrelakos

Bulk Manage Access

<input type="checkbox"/> Role	Off/On	Start	End	Remove
<input type="checkbox"/> Admin	<input checked="" type="checkbox"/>	29-Aug-2019 @ 08:51 AM EST	Never	REMOVE

Coord

Groundbreaking Site Coordinator (ROLE)
Site Coordinator (ROLE)

CANCEL SAVE

Assigning Roles

4 All Roles are OFF by default, toggle ON

5 When turned ON, default dates are NOW to NEVER. Edit if needed

6 Click SAVE when you have added all Roles and desired dates.

Manage Access for Emma Koutrelakos

Bulk Manage Access

<input type="checkbox"/>	Role	Off/On	Start	End	Remove
<input type="checkbox"/>	Admin	<input checked="" type="checkbox"/>	29-Aug-2019 @ 08:51 AM EST	Never	REMOVE
<input type="checkbox"/>	Groundbreaking Site Coordinator	<input checked="" type="checkbox"/>	02-Dec-2019 @ 08:00 AM EST	06-Dec-2019 @ 06:00 PM EST	REMOVE
<input type="checkbox"/>	Site Coordinator	<input checked="" type="checkbox"/>	08-Dec-2019 @ 09:15 AM EST	13-Dec-2019 @ 04:05 AM EST	REMOVE

Type to add a Role

04 : 05 AM

CLEAR DATE CLOSE SAVE

Removing Users


1 From Settings menu, select "Team Members"

2 Select checkbox of Team Member you want to remove

3 Open Actions menu - Choose **Remove Member**

4 Click **REMOVE** to confirm





1 Manage Team Members: Placebo Pharmaceuticals Clinical Studies

ADD MEMBERS REPORT ACTIONS  fer

2 Name ▾

<input checked="" type="checkbox"/>	Fernando Carvajal fernando.carvajal@florence
<input type="checkbox"/>	Fernando Test carvajalfer111@gmail.com

3

-  Remove Member
-  Manage Access
-  Permission Overview
-  Remove ALL Permissions

team member currently has no ro

Are you **ABSOLUTELY** sure?

This action **CANNOT** be undone. This will permanently remove or cancel the invitation for **Ana Munoz**.

4

CANCEL REMOVE

Removing Users: Not Registered Users

1 From Settings menu, select "Team Members"

2 Select checkbox of unregistered Team Member you want to remove

3 Open Actions menu - Choose **Cancel Invitation**

4 Click **REMOVE** to confirm

Manage Team Members: CS Institute 1

ADD MEMBERS REPORT ACTIONS mon

Name

Not Yet Registered
monitor@sponsor.com 2

- Cancel Invitation 3
- Manage Access
- Permission Overview
- Remove ALL Permissions
- Resend Invitation

Are you **ABSOLUTELY** sure?

This action **CANNOT** be undone. This will permanently remove or cancel the invitation for Ana Munoz.

CANCEL REMOVE 4

Reports

The Manage Team Members page offers two Report Options:

- ▶ **Access Dates:** shows all the users in the Team, their assigned Roles and their start and end date
- ▶ **Audit Trail:** all the users who have been added and changes in permissions and Roles

Both Reports can be downloaded

Audit Trail

NAME ▾ Filter by...

[Download as CSV](#) [Download as PDF](#)

Name	Action	Who	When ▾
CS Institute	Teammate Removed	Florence Support - support@florencehc.com	29-Oct-2019 @ 10:05 PM EDT
Ana Munoz -catyvt@hotmail.com			
Site Coordinator	Role Access Updated	Florence Support - support@florencehc.com	29-Oct-2019 @ 9:20 PM EDT
Teammate: Emma Koutrelakos emma.koutrelakos@florencehc.com			
Before: User was not assigned to role			
After: Start: 29-Oct-2019 @ 9:20 PM EDT End: Never			