



# **eISF FEATURES AND ACCESS LEVELS v10.8**

<b>Reader</b>	Basic access rights; view-only access to files.
<b>Editor</b>	Medium access rights; has the ability to add documents directly to the room, apply metadata to documents, and perform workflow functions.
<b>Manager</b>	Managers have access to most room data, both in the documents view and the settings panel, without access to change permissions or invite new users to the room. Manager access to room settings can be configured.
<b>Administrator</b>	Highest access rights; rights to all documents, settings, and user access control. *Because of the unrestricted nature of this access, we recommend granting it to essential personnel only.

FEATURES	Reader	Editor	Manager	Admin
Compare Documents	X	X	X	X
Contact Service Desk Via E-mail	X	X	X	X
Country/Region & 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
Document: Add a document through Document dropdown		X	X	X
Document: Add a document via the Upload dashlet		X	X	X
Document: Add a document from stored template		X	X	X
Document: Bulk Import Documents		X	X	X
Document: Download	X*	X*	X	X
Document: Edit Metadata		X	X	X
Document: Add private notes through My Comments	X	X	X	X
Document: Copy document link	X	X	X	X
Document: Change Custom Date Format in My Profile	X	X	X	X

\*Restrictions may apply for Site Users.

FEATURES	Reader	Editor	Manager	Admin
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: Choose Grid Layout using Layout Function	X	X	X	X
Document: Email document to anyone with access to room		X	X	X
Document: Initiate Optical Character Recognition		X	X	X
Document: Mark Documents as Favorite	X	X	X	X
Document: Compare Documents through Document Cart	X	X	X	X
Document: Mark Documents as Popular through Documents Cart		X	X	X
Document: Merge Documents through Documents Cart		X	X	X
Document: Relate Documents through Documents Cart		X	X	X
Document: Mass Coding		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
e-Signature: Sign a document	X	X	X	X
e-Signature: Initiate an e-signature		X	X	X
e-Signature: Enable in room				X
Export: Document Metadata	X	X	X	X
Export: Document Versions		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
Homepage: List and navigate to documents within the room via document counters	X	X	X	X
Homepage: View Room Information	X	X	X	X

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FEATURES	Reader	Editor	Manager	Admin
Import: Documents		X	X	X
Import: Metadata		X	X	X
Manage Dashboard Setup				X
Manage & Store Document Templates				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
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
Queries Module: Export Queries	X	X	X	X
Queries Module: Bulk Reassign Queries		X	X	X
Read & Acknowledge: Send a document for Read & Acknowledge		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
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

\* Restrictions may apply for Site Users.

FEATURES	Reader	Editor	Manager	Admin
<b>Users: Change access</b>				X
<b>Users: Invite new users</b>				X
<b>Video Files: view MP4 format</b>	X	X	X	X
<b>View Investigative Sites by Country/Region</b>	X	X	X	X
<b>Tasks: Assign to multiple room users</b>		X	X	X
<b>Tasks: Create tasks for yourself</b>	X	X	X	X
<b>Tasks: Export data from Task dashlet</b>		X	X	X
<b>User Guide Access</b>	X	X	X	X
<b>User Login: Account locks after configurable number of failed login attempts</b>	X	X	X	X
<b>User: Change “View By” pane</b>	X	X	X	X
<b>User: Change login password</b>	X	X	X	X
<b>User: Notification Preferences</b>	X	X	X	X
<b>Users: Change access</b>				X
<b>Users: Invite new users</b>				X
<b>Video Files: view MP4 format</b>	X	X	X	X
<b>View Investigative Sites by Country/Region</b>	X	X	X	X

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