A close up of a sign

Description automatically generated

User Permissions Overview

# INTRODUCTION

The Florence eBinders™ User Roles and Permissions module allows you to customize and fine-tune the privileges that members of your study team have for your research documents. Permissions may be assigned broadly at the Team level or more granularly at the Binder, Folder, and Document levels. Permissions from each level of this hierarchy are inherited from the level above it, meaning that if you give a User access to a Binder, they will also receive access to the Folders and Documents contained within that Binder.

# AUTOMATIC PERMISSIONS:

# TEAM OWNER PERMISSIONS

The “Team Owner” Role is automatically assigned to a Team’s creator. This Role includes all Permissions at the Team level, except View Documents with PII and Download Documents with PII. If you would like the Team Owner to have these Permissions, they will need to be added as individual User Permissions or a full-access “Team Administrator” Role can be created and added to this User’s assigned Roles.

In order for the Team Owner default Role to be reassigned to a new team member a request must be sent either to the Team’s Florence Account Manager or to support@florencehc.com.

# BINDER OWNER PERMISSIONS

The “Binder Owner” permission is automatically assigned to a Binder’s creator. This role allows the Binder creator to automatically have all privileges listed in the “Manage Binder” category as well as any permissions on items below it such as Folders and Documents. See Manage Binder permissions below.

# DOCUMENT OWNER PERMISSIONS

The “Document Owner” permission is automatically assigned to a Document’s creator. This role allows the Document creator to automatically have all privileges listed in the “Manage Document” category. See Manage Document permissions below.

# PLACEHOLDER FILLER PERMISSIONS

The “Document Owner” permission is automatically assigned to a Document’s creator in the event a Placeholder is filled. This role allows the Document creator to automatically have all privileges listed in the “Manage Document” category. See Manage Document permissions below.

**WHAT IS PII?**

PII stands for Personally Identifiable Information. PHI, or Protected Health Information, is an important subset of the broader PII category. As Documents are redacted in eBinder Suite™, the assumption is made that PII or PHI has been blocked. Therefore, users who do not have access to view or download Documents with PII will be blocked from viewing previous versions of Documents which have been redacted.

# DESCRIPTIONS OF USER PERMISSIONS

Download Documents with PII: The User may download Documents in their original pre-redacted versions to his/her local computer.

## Manage Team and its Contents:

**Create Binders:** The User may set up new Binders.

**Create Tags:** The User may generate new Tags for the Team.

**Delete Tags:** The User may remove Tags for the Team.

**Download All Audit Trail Events for the Team:** The User may download a report of all Team-level Audit Trail events to his/her local computer in either PDF or CSV format.

**Invite Users to the Team:** The User may add new members to the eBinders™ Team via the “Manage Team Members” page under the Settings menu.

**Manage Labels:**

**Assign Labels:** The User may assign Labels to different Binders on their Team

**Create/Edit Labels:** The user may create or edit Labels for their Team

**Delete Labels:** The User may delete or remove Labels for their Team

**Manage Access and Permissions for the Team:**

**Assign Roles (Off) for the Team:** The User may Assign Roles and turn them on and off.

**Manage Access Dates for the Team:** The User can select start and end dates for assigned Roles.

**Manage Roles and Permissions for the Team:** The User can create, assign, and manage Roles and Permissions for the Team.

**Run Role Manager for the Team:** [Premium feature] The User can run the Role Manager to create and assign Roles for the Team.

**View Users, Roles and Permissions for the Team:** The User can view all Users, Roles, and their Permissions for the Team.

## Manage Binder:

**Import Folder Structure:** The User may upload a Folder template into a Binder (analogous to setting up tabs in a paper binder).

**Delete Binder:** The User may remove a Binder and all of its contents from eBinders™.

**Download All Audit Trail Events for the Binder:** The User may download a report of all Binder-level Audit Trail events to his/her local computer in either PDF or CSV format.

## Manage Folder:

**Import/Upload Document:** The User may upload a Document via email, drag and drop, or browsing from his/her local computer.

**Create Folder:** The User may make a new Folder within the Binder(s) where s/he is granted permissions.

**Delete Folder:** The User may remove a Folder and all of its contents from a Binder on which s/he has this permission.

**Download All Audit Trail Events for the Folder:** The User may download a report of all Folder-level Audit Trail events to his/her local computer in either PDF or CSV format.

**Duplicate Folder:** The User may create a new copy of the Folder and all of its contents in a new location within eBinders™.

**Import Folder Structure:** The User may create folder structures outside of Florence via Excel and import the Folder structure into any Folder as an easy way to duplicate structures throughout Florence.

## Manage Document:

**Annotate Document:**

**Add Text to Document:** The User may add wording to the Document via a text box.

**Finalize Form:** The User may finalize a form after making any annotations necessary or after signing a form. User MUST have this permission if you need them to sign a form.

**Highlight Document:** The User may highlight parts of the Document.

**Redact Document:** The User may censor part or all of the Document by drawing a black box over the information being redacted. Note that when a redaction is made on a document, Florence then recognizes the document as PII. This impacts permissions that cannot view PII.

**Request Signatures:** The User may send notifications to other eBinders™ Team members to ask for their electronic signature on the Document and select the reasoning that applies.

**Sign Document:** The User may electronically sign the Document and select the reasoning that applies.

**Stamp Document:** The User may add text to the top of every page of the Document.

**Assign Tags:** The User may select Documents to include in a pre-determined category, or Tag, to help customize options in the Reports module.

**Create Document Shortcut:** The User may create a shortcut of a Document to other Folders or Binders within Florence. Other Users without permissions to certain Folders or Binders are able to view the shortcut if it’s placed in their permissable Folders and Binders.

**Delete Document:** The User may remove the Document from eBinders ™. Note that this action CANNOT be undone, but the audit trail will show when the document was deleted, and by whom.

**Download All Audit Trail Events for the Document:** The User may download a report of all Document-level Audit Trail events to his/her local computer in either PDF or CSV format.

**Download Documents without PII:** The User may only download Documents to his/her local computer that have not been redacted or in their post-redaction versions.

**Manage Document Approval Workflow (PREMIUM FEATURE):**

**Approve Document:**

**Cancel Document:**

**Initiate Document Approval Workflow:**

**Reject Document:**

**Duplicate Document:** The User may create a new copy of the Document in a new location within eBinders™. Note that the User needs to have permission to the location they are duplicating the Document to.

**Move Document:** The User may transfer the Document into an alternate location within eBinders™. Note that the User needs to have permission to the location they are moving the Document to.

**Rename Document:** The User may change the name of the Document. The original Document name will show in the audit trail.

**Replace a Document or Fill a Placeholder:** The User may upload a new version of a Document or upload a Document into the previously created Placeholder.

## Update Document:

**Manage Tasks on a Document:** The User may create and modify Tasks for the Document on which this permission is granted, as well as assign Tasks to other Team members within eBinders™.

**Manage Document Due and Expiration Dates:** The User may set or clear Due and Expiration Dates on Documents and Placeholders.

**Update Document Type and Status (REQUIRES INTEGRATION):**

**Update Document Type:** The User can update the Document Type from their Team’s listing

**Update Document Status:** The User can select the Document Status based on the Document’s Type

**Update Document Properties:** *Future functionality – This permission is not currently active.*

**View All Audit Trail Events for the Document:** The User may view Audit Trail events for Documents on which this permission is granted.

**View Documents without PII:** The User may view only post-redaction versions of Documents and Documents that have not been edited with the redaction tool.

**Move Folder:** The User may transfer the Folder into an alternate location within eBinders™.

**Rename Folder:** The User may change the name of the Folder.

**Update Folder:**

**Manage Tasks on a Folder:** The User may create and modify Tasks for the Documents contained within the Folder on which this permission is granted, as well as assign these Tasks to other Team members within eBinders™.

**Update Folder Properties:** *Future functionality – This permission is not currently active.*

**View All Audit Trail Events for the Folder:** The User may view Audit Trail events for Folders on which this permission is granted, including the Audit Trails for the Documents contained within those Folders for which the User also has permission to access.

**Rename Binder:** The User may change the name of the Binder.

## Update Binder:

**Manage Tasks on a Binder:** The User may create and modify Tasks for the Documents contained within the Binder on which this permission is granted, as well as assign these Tasks to other Team members within eBinders™.

**Update Binder Properties:** *Future functionality – This permission is not currently active.*

**View Binder:** The User may view the Binder, in addition to any of its contents (Folders and Documents) for which the User also has permission to access.

**View All Audit Trail Events for the Binder:** The User may view Audit Trail events for Binders on which this permission is granted, including the Audit Trails for the Folders and Documents within those Binders for which the User also has permission to access.

## Manage Projects:

**Create Projects:** The User may set up a new Dashboard Project via the “Manage Projects” page under the Settings menu.

**Delete Projects:** The User may remove a Dashboard Project and all of its included Timelines from eBinders™.

**Duplicate Projects:** The User may make a copy of an existing Dashboard Project.

### Manage Timelines:

**Assign to Timelines:** The User may add Documents and Placeholders to Dashboard Project Timelines.

**Build Timelines:**

**Create Timeline:** The User may add a new Timeline to a Dashboard Project.

**Update Timeline:** The User may edit a Dashboard Project Timeline, including changing its name, completion status, and projected start and end dates, as well as duplicating or deleting it.

**Delete Timelines:** The User may remove a Dashboard Project Timeline from eBinders™.

**Duplicate Timelines:** The User may make a copy of an existing Dashboard Project Timeline.

**View Dashboard:** The User may access Dashboard Projects and Timelines via the “Dashboard” icon in the left hand navigation panel.

**Update Projects:** The User may edit a Dashboard Project, including changing its name, completion status, and included Timelines, as well as duplicating or deleting it.

Manage Tasks on a Team: The User may create and modify Tasks for the Documents contained within the Binders that belong to their Team, as well as assign those Tasks to other Team members within eBinders™.

Rename Team: The User may change the name of the eBinders™ Team.

Send Announcement: The User can send Announcements in eBinders™.

Remove Users from the Team: The User may remove other Users from their eBinders™ Team via the “Manage Team Members” page, which also removes access from these Users to that eBinders™ Team.

**Update Tags:** The User may edit or modify the Tags that have been created for the Documents within their eBinders™ Team.

**Update Team Profile:** The User may modify the Team name, the Team time zone, and details about the Team’s Florence ePrinter™ (if applicable) via the “Manage Team Profile” page under the Settings menu.

**View Announcement:** The User can view any Team Announcements sent out.

**View All Audit Trail Events for the Team:** The User may view Audit Trail events at the Team level, which includes activities performed on the “Manage Roles,” “Manage Team Members,” and “Manage Team Profile” pages.

**View Manage Team Settings:** The User may view the “Manage Team Profile” page, which includes the Team name, time zone, password and Form options.

View Documents with PII: The User may view Documents in both their pre- and post-redaction versions.