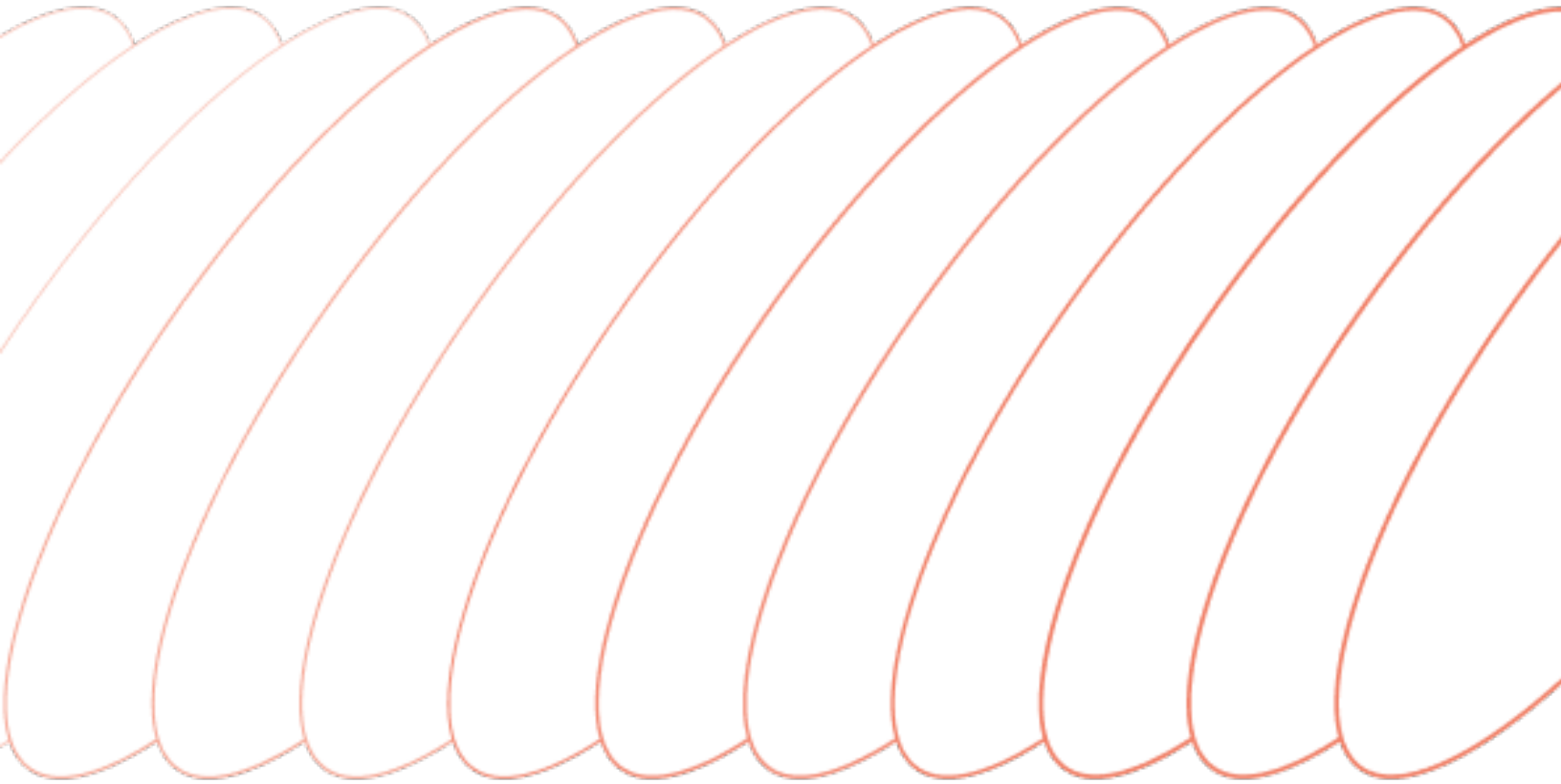
florence.

Developing your Roles in Florence

Tip Sheet



Step 1: Download the Roles Worksheet

- This will be an Excel spreadsheet format where you can easily make edits
- We can provide a pre-populated version to help you visualize the Roles and assigned permissions that are typically seen – *please ask your Application Consultant for more details*
- Meet with your teammates who will be making Access decisions to think about what should:
    - Coordinators
    - Investigators
    - Other Staff
    - Monitors
    - Etc.

  be able to see and do within your Study?

Step 2: Complete the Roles Worksheet

The Roles Worksheet is meant for you to create a high-level summary of the Roles and their access level with these columns:

- Role: List out the Roles in your Team. Group users with similar access levels into one role (Example: PI's and Sub-I's can be grouped into a "Study Investigator" Role)
- Access Level: Specify the level of access each of these Roles should have (Example: Study Coordinators may have restricted access to specific studies)
- Specific Permissions: Think about specific permissions each role will need (Example: A monitor should be able to only view documents and audit trails, but not download) and mark those permissions on each tab as necessary

Step 3: Alert your Application Consultant and Upload to UAT

Once you complete your first draft of your roles worksheet, upload it into your UAT and alert your Application Consultant for review.

Additional Support

Please see available resources (located in our Florence Help Desk) to further assist in crafting your Roles Worksheet:

- How to Create and Edit Roles
- User Permissions Overview
    - Includes an extensive list and description of ALL existing permissions to choose from