Pediatric Blood and Marrow Transplant
Adult Blood and Marrow Transplant
Stem Cell Laboratory

DOCUMENT NUMBER: COMM-PAS-021 JA2

DOCUMENT TITLE:

Roles

DOCUMENT NOTES:

Document Information

Revision: 01	**Vault:** COMM-PAS-rel
Status: Release	**Document Type:** COMM-PAS

Date Information

Creation Date: 20 Jun 2025	**Release Date:** 01 Jul 2025
Effective Date: 01 Jul 2025	**Expiration Date:**

Control Information

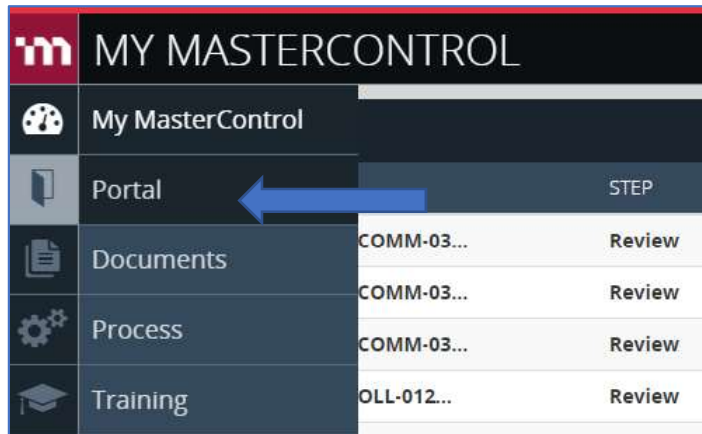|	
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Previous Number: None	**Change Number:** PAS-CCR-043

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Roles

1) Roles give users access to specific areas of the system and allow users to perform specific actions within different vaults.
2) MasterControl has two types of Roles that can be assigned to a user.
   a) **View Only (VO) Role** – Allows a user these Applications and Rights within specific **dft** (draft) and **rel** (release) Vaults.
   b) VO Applications and Rights
      i) Documents
         (1) Explorer
      ii) Portal
         (1) InfoCard
         (2) My Recent
         (3) Portal Search
      iii) Process
         (1) Start Task
      iv) Training
         (1) Approve Training
         (2) My Training
   c) **Power User (PWR) Role** – Allows a user these Applications and Rights within specific **dft** (draft) and **rel** (release) Vaults.
   d) PWR Applications and Rights
      i) Documents
         (1) Approve Packets
         (2) Explorer
         (3) Manage Documents
         (4) Start Task
         (5) Tracking
         (6) View Reports
      ii) Portal
         (1) InfoCard
         (2) My Recent
         (3) Portal Search
         (4) Public Virtual Folder
      iii) Process
         (1) Approve Forms
         (2) Scheduled Tasks
         (3) Start Task
         (4) Tracking
         (5) View Reports
      iv) Training
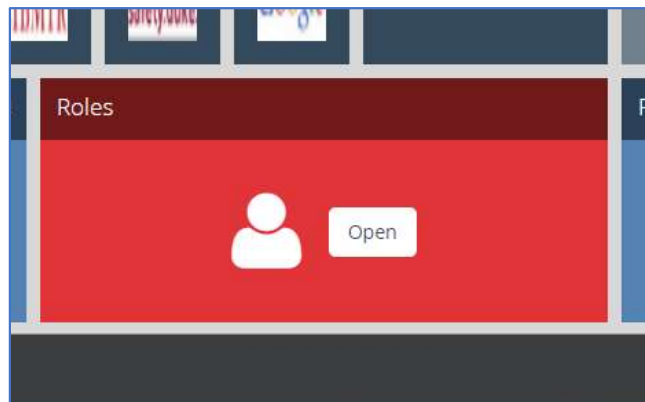   (1) Approve Training
         (2) Group Signoff

     (3) My Training
     (4) Tracking
     (5) Training Folders
     (6) View Reports

3) To view the list of Roles in MasterControl

  a) Click on **Portal** in the navigation menu

  b) Select the **Open** button in the **Roles** tile.

  c) Under **Actions**, select the **Details** icon (ⓘ) beside a **Role Name**. This will display a list of Applications and Rights for a user.

4) Selecting the **Audit** (![icon]) icon under **Actions** will show a log of changes made to the specific Role.

Role Audit Log:

CHANGED FIELD	OLD VALUE	NEW VALUE	CHANGE REASON	USER ID	DATE ▼	ACTIONS
member_id		ED199		BJ42	04 May 2021	ℹ
member_id	Bruce Burnett (BB69)		Removed all Roles and disabled user account.	BJ42	28 Apr 2021	ℹ
member_id		DD225	Added Roles.	SYSADMIN	26 Apr 2021	ℹ
member_id	Sarah Mims (SAM193)		Removed all Roles.	BJ42	31 Mar 2021	ℹ
member_id		CMH163	Added Roles.	SYSADMIN	15 Mar 2021	ℹ
member_id		SFLI	Added department and roles.	SYSADMIN	04 Feb 2021	ℹ
member_id		YZ168	Added Roles and Department.	SYSADMIN	04 Feb 2021	ℹ
member_id	Kristin Page (PAGE0038)		Removed Roles; Kristin Page's last day at Duke 31Jan2021. bj42	SYSADMIN	02 Feb 2021	ℹ
member_id	Nelson Berrocales (NB218)		Removed all Roles. Last day 11/09/2020.	BJ42	09 Nov 2020	ℹ
member_id		Jennifer Suitt (JSS110)	Added Roles.	BJ42	17 Sep 2020	ℹ
member_id		Versailles Gonzalez (VMD9)	Changed to PWRUser status. BJ42 entered wrong Roles when creati…	BJ42	19 Aug 2020	ℹ
Right		*Find InfoCard-CCBB-Lab-dft, Copy Fi…	Added CCBB-Lab dft and rel to this Role.	BJ42	29 Jul 2020	ℹ
Role Vault		CCBB-Lab-rel,CCBB-Lab-dft	Added CCBB-Lab dft and rel to this Role.	BJ42	29 Jul 2020	ℹ
Right		*Find InfoCard-CCBB-TRN-dft, Copy Fi…	Added COMM-TRN and CCBB-LAB to this role.	BJ42	29 Jul 2020	ℹ
Role Vault		COMM-TRN-rel,CCBB-TRN-dft,COMM-…	Added COMM-TRN and CCBB-LAB to this role.	BJ42	29 Jul 2020	ℹ
member_id		Sarah Mims (SAM193)	Added All Company-PWR role.	BJ42	29 Jul 2020	ℹ
member_id		Beth Shaz (BHS16)	Added Roles.	BJ42	10 Jul 2020	ℹ
member_id	Lottie Moore (LYON0015)		Per Alicia Pena, Lottie no longer needs access to MasterControl, per…	BJ42	18 Jun 2020	ℹ

5) In order to edit Role information, add or remove users to a Role, select the Edit (✎) icon. Here, Users and Role Rights can be added or removed. See the **Edit Security Role** page below.

a) Use the arrow buttons ➤ or ◄, to move one, groups of two, or more between the available and assigned rights boxes at the same time. Use the double-arrow buttons ⟫ or ⟪ to move the entire group of available rights to the assigned rights (and vice versa) at once.

b) See example below.

Approve Immediately and **Check-In InfoCard** are Rights in the "ABMT-Equipment-arc" vault that can be granted by selecting and moving them to the **Assigned Vault Rights** box.

    c)   Notice the **Role Owners** field on the top right of the Edit Security Role page. Role owners are the only users who can see the Role.

6)   Creating a Role

    a)   To create a new PWR (power user) Role, click the plus sign () at the top of the Roles page.

PWR User Role

Notice there are many more options in the Application and Available Rights fields of the new PWR role in comparison to those in the new VO role.

VO User Role

Limited options in the Application and Available Rights fields for VO Role.

    b)   A new Role can also be created by coping an existing Role. Select the **copy** icon on the Roles list page beside the desired Role.

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APBMT Clinical Quality Program (CQP), Duke Cancer Institute (DCI)
Durham, NC

c) A copy is created below the original.

All Company-PWR	All Company-PWR Users	SYSADMIN	05 Mar 2013	
All Company-PWR (copy)	All Company-PWR Users	ACM93	25 May 2021	
View Only All Company-VO	All Company-VO Users	SYSADMIN	30 Jan 2013	

d) Select the **edit** (✎) icon and edit the Role as needed, including changing the **Role Name** and **Description** for the new Role.

Role Information

* Role Name

All Company-PWR (copy)

7) If a user needs an additional Right that is not included in the already-assigned Roles, a new individual role can be created and assigned that contains that particular right.

Signature Manifest

Document Number: COMM-PAS-021 JA2

Revision: 01

Title: Roles

Effective Date: 01 Jul 2025

All dates and times are in Eastern Time.

COMM-PAS-019 FRM3 -- COMM-PAS-021 JA3

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Document Release

Name/Signature	Title	Date	Meaning/Reason
Amy McKoy (ACM93)	Document Control Specialist	30 Jun 2025, 05:47:22 PM	Approved