

**Duke**Medicine

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****Author:** MC363**Owner:** MC363**Previous Number:** None**Change Number:** PAS-CCR-043

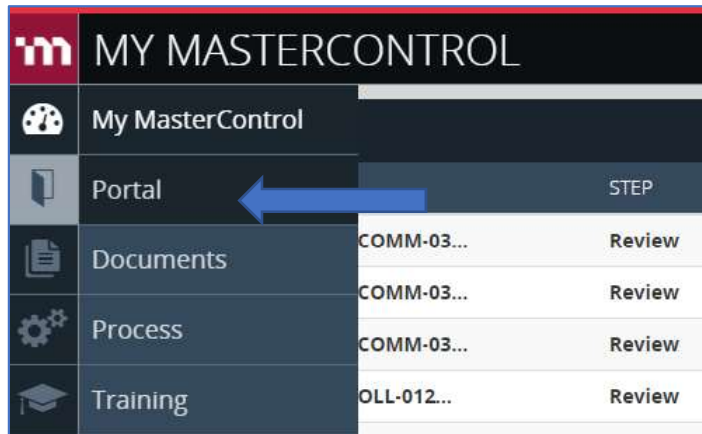
COMM-PAS-021 JA2 Roles

- 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

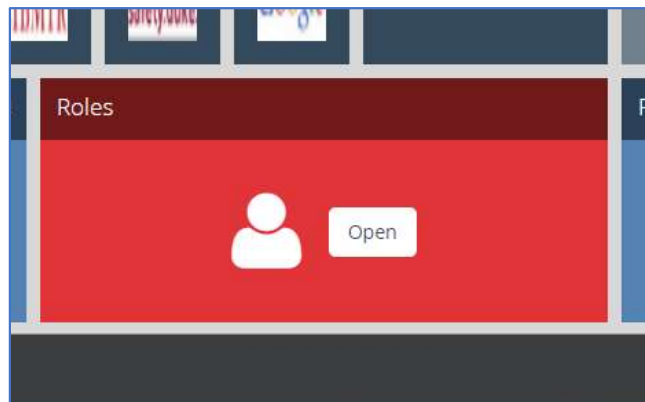
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- (3) My Training
 - (4) Tracking
 - (5) Training Folders
 - (6) View Reports
- 3) To view the list of Roles in MasterControl
- a) Click on **Portal** in the navigation menu



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



MasterControl Portal > Roles

Returned all [221] records.

ROLE NAME	DESCRIPTION	CREATED BY	CREATED	ACTIONS
<input type="checkbox"/> View Only AAA TEST ROLE	CCBB Lab All - View Only	BJ42	19 Jun 2018	
<input type="checkbox"/> AA-VO Role for Upgrade	Role used to transition PWRusers to VO role for upgrade	SYSADMIN	26 Jul 2013	
<input type="checkbox"/> All Company-PWR	All Company-PWR Users	SYSADMIN	05 Mar 2013	
<input type="checkbox"/> View Only All Company-VO	All Company-VO Users	SYSADMIN	30 Jan 2013	

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



PORTAL

MasterControl Portal > Roles > View Role Rights: All Company-PWR

All Company-PWR

USERS	OWNERS	APPLICATION AND COMPONENT RIGHTS	VAULT RIGHTS
Alecia McAllister (ABM52)	Amy McKay (ACM93)	<ul style="list-style-type: none"> Application: Risk <ul style="list-style-type: none"> Component: Risk Reports <ul style="list-style-type: none"> View Reports Application: Portal <ul style="list-style-type: none"> Component: Reports <ul style="list-style-type: none"> Customize Reports Component: InfoCard <ul style="list-style-type: none"> Check-in InfoCard 	<ul style="list-style-type: none"> ABMT-Collections-dft <ul style="list-style-type: none"> Copy File Download PDF From Viewer View Native View PDF ABMT-Equipment-dft <ul style="list-style-type: none"> Copy File Download PDF From Viewer View Native View PDF ABMT-General-dft <ul style="list-style-type: none"> Copy File Download PDF From Viewer View Native View PDF ABMT-General-rel
Alicia Pena (AMP69)	Betsy Jordan (BJ42)		
Amanda Parrish (AKB8)	Sandra Mulligan (MULL026)		
Ana Valverde Vidal (VALVE001)			
Ann Kaestner (KAEST1002)			
April Ozamiz (AMO29)			
Austin Rudisill (ADR35)			
Barbara Waters-Pick (WATER002)			
Beth Shaz (BHS16)			
Betsy Jordan (BJ42)			
Bing Shen (BS76)			
Brian Leatherland (CLIMBER)			
Caleb Hopkins (CMH163)			
Carri Walker (FULLE052)			
David Achila (DA225)			

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

Role Audit Log:

MasterControl Portal > Role Audit Log: All Company-PWR

Returned all [2388] records.

CHANGED FIELD	OLD VALUE	NEW VALUE	CHANGE REASON	USER ID	DATE	ACTIONS
member_id		ED199		BJ42	04 May 2021	🔍
member_id	Bruce Burnett (BB69)		Removed all Roles and disabled user account.	BJ42	28 Apr 2021	🔍
member_id		DD225	Added Roles.	SYSADMIN	26 Apr 2021	🔍
member_id	Sarah Mims (SAM193)		Removed all Roles.	BJ42	31 Mar 2021	🔍
member_id		CMH163	Added Roles.	SYSADMIN	15 Mar 2021	🔍
member_id		SFL1	Added department and roles.	SYSADMIN	04 Feb 2021	🔍
member_id		YZ168	Added Roles and Department.	SYSADMIN	04 Feb 2021	🔍
member_id	Kristin Page (PAGE0038)		Removed Roles; Kristin Page's last day at Duke 31 Jan 2021.	BJ42	02 Feb 2021	🔍
member_id	Nelson Berrocalles (NB218)		Removed all Roles. Last day 11/09/2020.	BJ42	09 Nov 2020	🔍
member_id		Jennifer Sutt (JSS110)	Added Roles.	BJ42	17 Sep 2020	🔍
member_id	Versailles Gonzalez (VMD9)		Changed to PWRUser status. BJ42 entered wrong Roles when creati...	BJ42	19 Aug 2020	🔍
Right		*Find InfoCard-CCBB-Lab-dft, Copy FI...	Added CCB-Lab dft and rel to this Role.	BJ42	29 Jul 2020	🔍
Role Vault		CCBB-Lab-rel,CCBB-Lab-dft	Added CCB-Lab dft and rel to this Role.	BJ42	29 Jul 2020	🔍
Right		*Find InfoCard-CCBB-TRN-dft, Copy FI...	Added COMM-TRN and CCB-LAB to this role.	BJ42	29 Jul 2020	🔍
Role Vault		COMM-TRN-rel,CCBB-TRN-dft,COMM...	Added COMM-TRN and CCB-LAB to this role.	BJ42	29 Jul 2020	🔍
member_id		Sarah Mims (SAM193)	Added All Company-PWR role.	BJ42	29 Jul 2020	🔍
member_id		Dem Shaz (DI1516)	Added Roles.	BJ42	10 Jul 2020	🔍
member_id	Leticia Mance (VCA0015)		For Alicia Pena, Leticia Mance needs access to MasterControl portal.	BJ42	18 Jun 2020	🔍

- 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.

PORTAL Search

MasterControl Portal > Roles > Edit Security Role

Role Information

* Role Name: All Company-PWR

Role Description: All Company-PWR Users

* Role Users

- ☐ Alecia McAllister (ABM52)
- ☐ Alicia Pena (AMP69)
- ☐ Amanda Parrish (AKB8)
- ☐ Ana Valverde Vidal (VALVE001)
- ☐ Ann Kaestner (KAFST002)

* Role Owners

- ☐ Amy McKay (ACM93)
- ☐ Betsy Jordan (BJ42)
- ☐ Sandra Mulligan (MULLI026)

For each Application listed and selected in the Application field, there is a different set of Available Rights to select and move to the Assigned Rights field.

* Role Rights

Application: Documents

Available Rights:

- Edit Reports
- E-mail Import
- E-mail Import Configuration
- Manage Organizers
- Manage Workflows
- Override Template
- Scheduled Tasks
- Start Task

Assigned Rights:

- Approve Packets
- Explorer
- Manage Documents
- Tracking
- View Reports

- 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.

Vault Rights

Vaults:

- ABMT Change Control - Abort
- ABMT Change Control - Compl
- ABMT Change Control - Inproc
- ABMT-Collections-arc
- ABMT-Collections-dft
- ABMT-Collections-rel
- ABMT-Equipment-arc
- ABMT-Equipment-dft

Available Vault Rights:

- Approve Immediately
- Check-In InfoCard
- Check-Out InfoCard
- Copy File
- Custom Number Vault InfoCards
- Delete InfoCard
- Download PDF From Viewer
- Edit InfoCard

Assigned Vault Rights:

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.

PORTAL

MasterControl Portal > Roles

Returned all [210] records.

ROLE NAME	DESCRIPTION	CREATED BY	CREATED	ACTIONS
<input type="checkbox"/> View Only AAA TEST ROLE	CCBB Lab All - View Only	BJ42	19 Jun 2018	
<input type="checkbox"/> All Company-PWR	All Company-PWR Users	SYSADMIN	05 Mar 2013	

PWR User Role

* Role Rights

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.

Application	Available Rights	Assigned Rights
<ul style="list-style-type: none"> Documents PDF Publishing Portal Process Projects Risk Rules Training 	<ul style="list-style-type: none"> Approve Packets Edit Reports E-mail Import E-mail Import Configuration Explorer Manage Documents Manage Organizers Manage Workflows 	

VO User Role

* Role Rights

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

Application	Available Rights	Assigned Rights
<ul style="list-style-type: none"> Documents Portal Process Training 	<ul style="list-style-type: none"> Explorer View Reports 	
















- 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.


ROLE NAME	DESCRIPTION	CREATED BY	CREATED	ACTIONS
<input type="checkbox"/> View Only AAA TEST ROLE	CCBB Lab All - View Only	BJ42	19 Jun 2018	
<input type="checkbox"/> All Company-PWR	All Company-PWR Users	SYSADMIN	05 Mar 2013	

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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-VQ	All Company-VQ 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.

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All dates and times are in Eastern Time.

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