

## User Roles - Task Mapping

iManage Extract has **six** pre-configured user roles with the capability to execute defined tasks. **Two** of these roles are at the **global** level implying that the tasks performed by these roles are applicable across all the projects and the remaining **four** are **project-specific** roles whose tasks are limited to the project that they are assigned to.

The following table illustrates the mapping between these roles and the tasks that they can perform in **iManage Extract**:

	Feature	Global roles		Project roles			
		Superuser	Global Trainer	Project Admin	Ingester	Trainer	Reviewer
<b>Projects</b>	Create	✓	✗	✓	✗	✗	✗
	Edit	✓	✗	✓	✗	✗	✗
	View	✓	✗	✓	✗	✗	✗
	Delete	✓	✗	✓	✗	✗	✗
	List assigned projects	✓	✓	✓	✓	✓	✓
	Grant/revoke user access	✓	✗	✓	✗	✗	✗
<b>Users</b>	Create	✓	✗	✗	✗	✗	✗
	Edit	✓	✗	✗	✗	✗	✗
	Edit - Grant/revoke project access	✓	✗	✗	✗	✗	✗
	Edit - Change current roles?	✓	✗	✗	✗	✗	✗
	View	✓	✗	✗	✗	✗	✗
	Delete	✓	✗	✗	✗	✗	✗
<b>Review form library</b>	Create	✓	✓	✗	✗	✗	✗
	Edit	✓	✓	✗	✗	✗	✗
	View	✓	✓	✗	✗	✗	✗
	Delete	✓	✓	✗	✗	✗	✗

	Feature	Global roles		Project roles			
		Superuser	Global Trainer	Project Admin	Ingester	Trainer	Reviewer
<b>Workflows</b>	Create	✓	✗	✓	✗	✗	✗
	Edit	✓	✗	✓	✗	✗	✗
	View	✓	✗	✓	✗	✗	✗
	Delete	✓	✗	✓	✗	✗	✗
	Assign users	✓	✗	✓	✗	✗	✗
<b>Inbox</b>	View	✓	✗	✗	✗	✗	✓
<b>Project review forms</b>	Create	✓	✗	✗	✗	✓	✗
	Edit	✓	✗	✗	✗	✓	✗
	View	✓	✗	✗	✗	✓	✗
	Delete	✓	✗	✗	✗	✓	✗
	Saving to library	✓	✗	✗	✗	✓	✗
<b>Upload manager</b>	Upload Documents	✓	✗	✗	✓	✗	✗
	Remove uploads (this includes deleting docs as well)	✓	✗	✗	✓	✗	✗
<b>Clustering</b>	View clusters	✓	✗	✗	✓	✓	✗
	Rename clusters	✓	✗	✗	✓	✓	✗
	Delete clusters	✓	✗	✗	✓	✓	✗
<b>Task manager</b>	View	✓	✗	✗	✓	✓	✗
	Delete	✓	✗	✗	✓	✗	✗
<b>Dashboard</b>	View	✓	✗	✓	✓	✓	✗
<b>Matrix</b>	View	✓	✗	✗	✗	✓	✓

	Feature	Global roles		Project roles			
		Superuser	Global Trainer	Project Admin	Ingestor	Trainer	Reviewer
<b>Documents</b>	Search	✓	✗	✗	✓	✓	✓
	Tag	✓	✗	✗	✓	✓	✓
	Export	✓	✗	✗	✗	✗	✓
	Run Clustering task	✓	✗	✗	✓	✗	✗
	Run review forms	✓	✗	✗	✓	✓	✗
	Link/Unlink review forms to/from documents	✓	✗	✗	✓	✓	✗
	Run Steps	✓	✗	✗	✓	✗	✗
	Delete	✓	✗	✗	✓	✗	✗
	Move documents in a Workflow	✓	✗	✗	✓	✗	✗
	Move document to another workflow stage	✓	✗	✗	✓	✓	✓
	Apply form changes to assigned docs	✓	✗	✗	✗	✓	✗
	Matrix view	✓	✗	✗	✗	✓	✓
	Edit facets	✓	✗	✗	✓	✓	✗

	Feature	Global roles		Project roles			
		Superuser	Global Trainer	Project Admin	Ingester	Trainer	Reviewer
Review	View review form	✓	✗	✗	✗	✓	✓
	Edit review form	✓	✗	✗	✗	✓	✗
	Train review form	✓	✗	✗	✗	✓	✗
	Finalize review form	✓	✗	✓	✗	✓	✓
	View outline	✓	✗	✗	✗	✓	✓
	View diffing	✓	✗	✗	✗	✓	✗
	View tables	✓	✗	✗	✗	✓	✓
	View custom tabs	✓	✗	✗	✗	✓	✗
	View datapoint extraction	✓	✗	✗	✗	✓	✓
	Add positive sample	✓	✗	✗	✗	✓	✗
	Add negative sample	✓	✗	✗	✗	✓	✗
	Delete sample	✓	✗	✗	✗	✓	✗
	Edit data points	✓	✗	✗	✗	✗	✓
	Delete data points	✓	✗	✗	✗	✓	✓
	Preview document	✓	✗	✗	✗	✓	✓
	SVG view document	✓	✗	✗	✗	✓	✓
	Show debug information SVG View	✓	✗	✗	✗	✓	✗
	Move document to another workflow stage	✓	✗	✗	✗	✓	✓