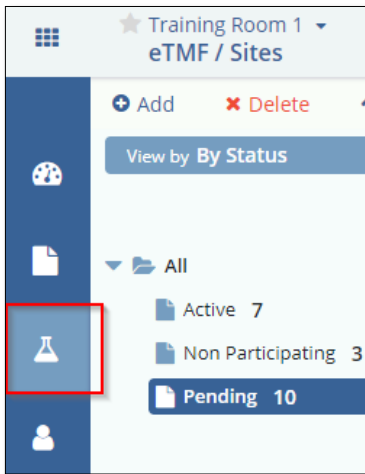


Applicable to: Administrators Editors Readers
 eTMF Study Start-up (SSU)

Note: To perform the steps below, the Admin user must already have access to the site(s). Admin users, by default, do not have full access to all sites.

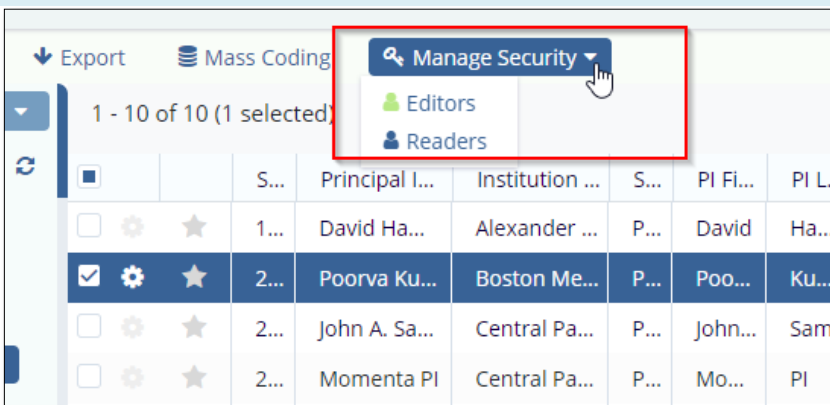
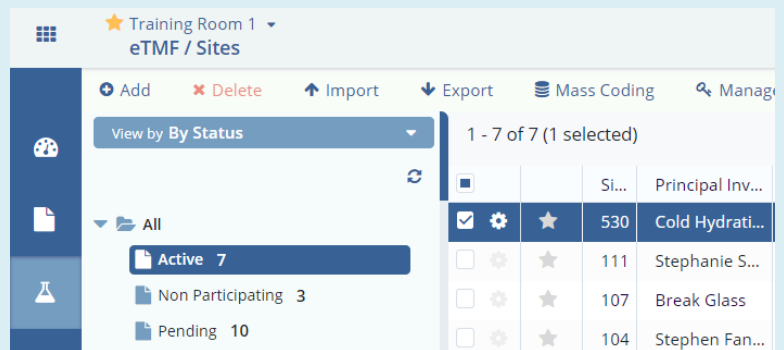


1. Enter a room and navigate to the **Sites** module in the eTMF

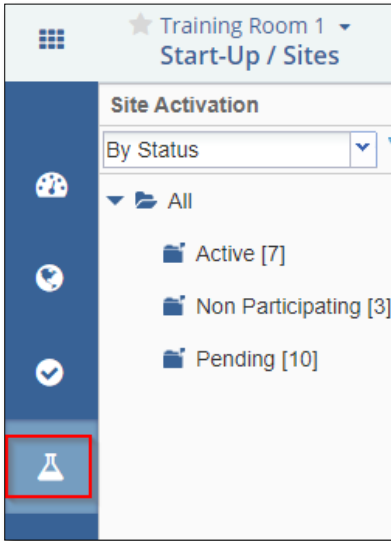
Tip: if adding one or more users to view a site, follow steps # 2- # 6

2. Find and select the site.

If selecting multiple sites, proceed to step #7

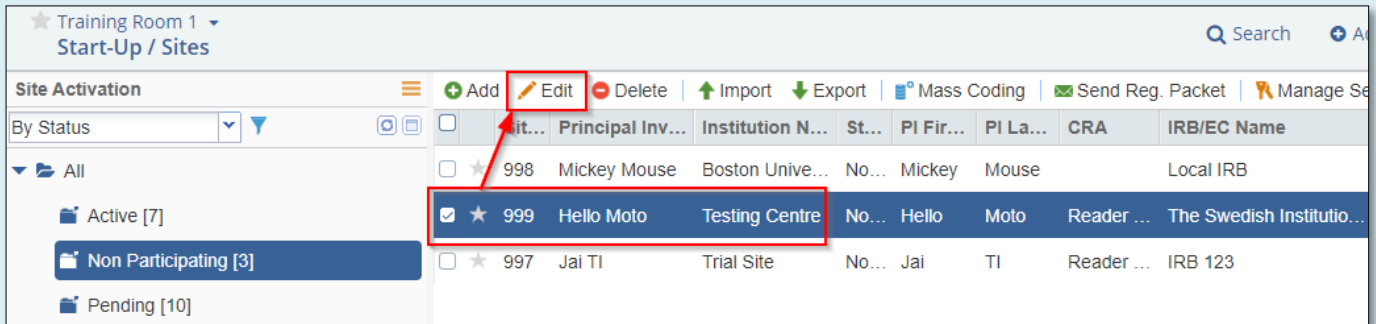


3. Click 'Manage Security' and select **Editors** or **Readers**



4. To Perform this function in SSU, navigate to the site profile in SSU.

5. Choose the site and click **Edit**.

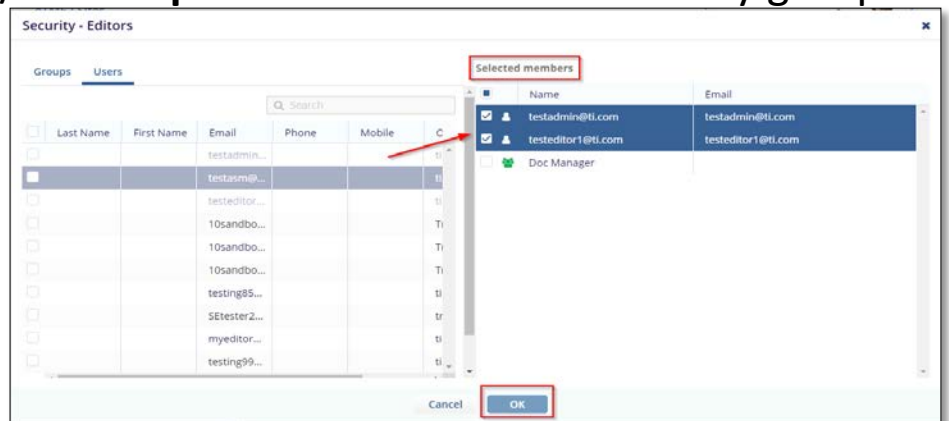


Note: Site **Editors** can modify and update the site profile information; this can include Editors and Admins. **Readers** can only view the site profile.

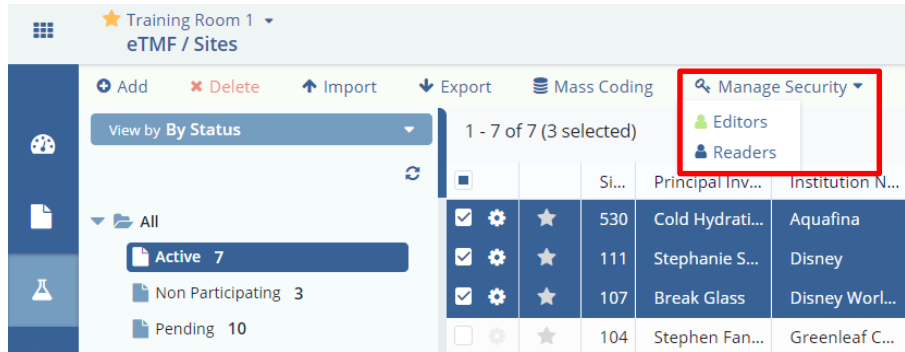
6. Select **Users** and/or **Groups** to be added to the Security group.

Double-click or drag-and-drop to the right pane

Click **Ok**



7. If adding users to multiple sites at once, select the sites in the grid then click **Manage Security**.

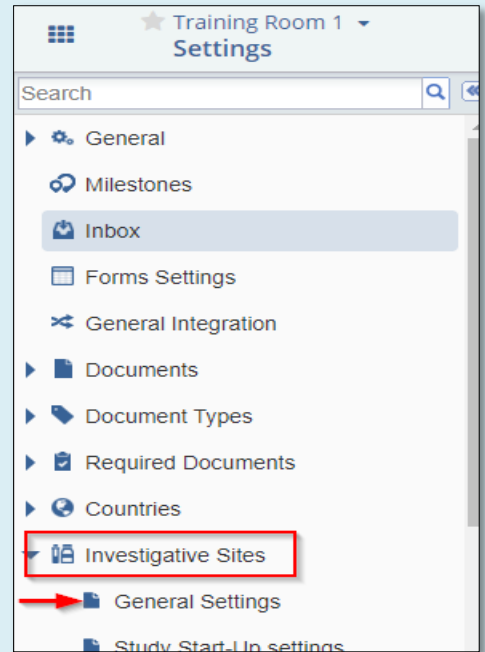


Then select **Editors** or **Readers**.

9. Another way to add users is to grant default access for any sites.

This can be done by navigating to the **Settings** menu.

10. Expand the **Investigative Sites** menu, and click on **General Settings** sub-menu.



11. Click **Enable Default Access Rights**.

Enable Default Access Rights

Default Access Rights: Full Access

Default Access Members: Select 0 user(s) selected, 0 group(s) selected

Default Readers Groups: Select 0 group(s) selected

Default Editors Groups: Select 0 group(s) selected

Set drop down to **Full Access**.

Tip: Before completing the next step, click Save and create a **Group** (in Users Management) for default site access.

12. Click **Select** to add groups to any one of the three **Default groups**.

Enable Default Access Rights

Default Access Rights: * Full Access

Default Access Members: Select 0 user(s) selected, 0 group(s) selected

Default Readers Groups: Select 0 group(s) selected

Default Editors Groups: Select 0 group(s) selected

Note: Do **not** use this step if trying to add one user to view one site.

13. Select **Groups** to be added to the Default Access list.

Double-click or drag-and-drop to select.

Click **Ok**

Default Readers Groups

Groups ▼ Search

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Auditor	
<input type="checkbox"/>	CRAs - US	all monitors in USA
<input type="checkbox"/>	CRO - Asia	
<input type="checkbox"/>	Data Management Vendor	
<input type="checkbox"/>	Escalations	type here to identify this group
<input type="checkbox"/>	FDA Inspector	are ...
<input type="checkbox"/>	MHRA Inspector	
<input type="checkbox"/>	QC 1	
<input type="checkbox"/>	QC 2	
<input type="checkbox"/>	Regulatory Review	

Selected Members

<input type="checkbox"/>	Name	Email

Select the users by double clicking or drag the entries to this pane.

OK Cancel

Manage Security

Source:

- Selected Sites
- All Sites in the Current Grid
- All Sites in the Room

Options:

- Append New Security Members
- Replace Current Security Members

Append Cancel

14. In the **Manage Security** pop-up window, select choices under **Source** and **Options**.

Click **Append**

For any additional assistance, click ...

