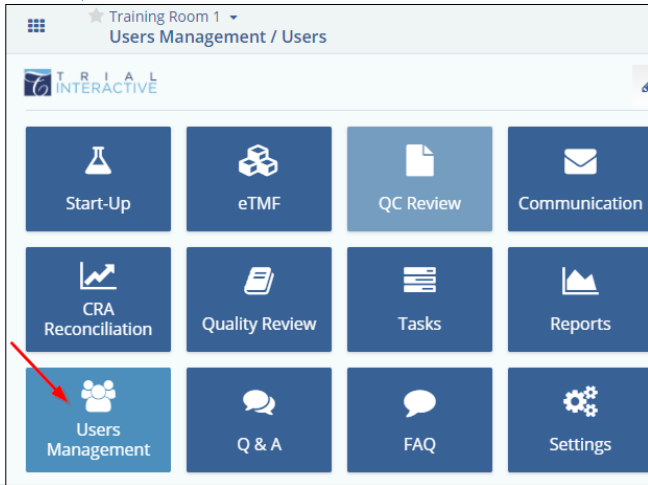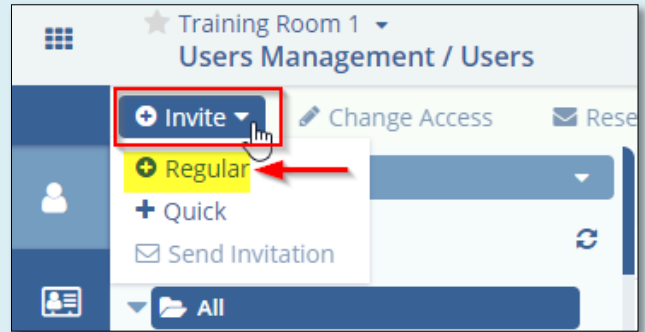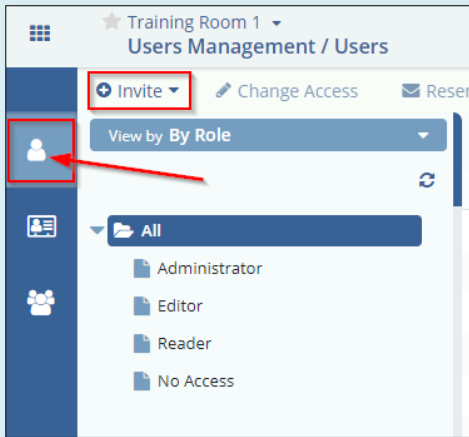# TRIAL INTERACTIVE

How to Invite eTMF Users

Applicable to: ☑Administrators ☐Editors ☐Readers
☑eTMF ☐Study Start-up

1. Enter the room and click on **Users Management** from the Navigation Grid.
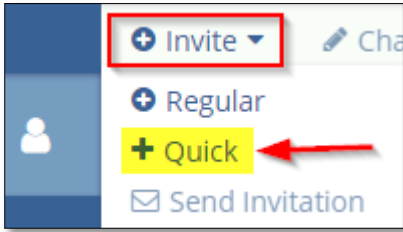

2. Click **Invite** and select **Regular** from the drop down menu.

3. Complete the User Profile.

Select the **Groups** tab to assign the user to any groups.

Click **Save.**

TRIAL INTERACTIVE

Alternately, **Invite** users via the **Quick** invitation method.

Fewer fields are available via the **Quick Invite** but multiple users can be invited by adding their email to the **Email List** area.
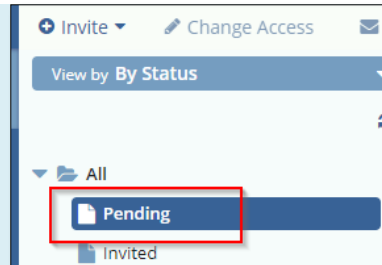
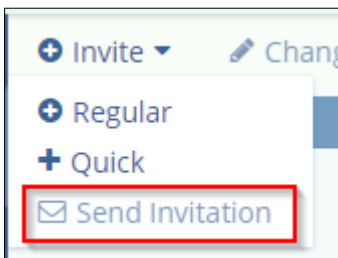Grant access to any **Groups** for the users.

Click **Add.**

Quick Invite

Field	
Email List*	
Role*	
Expiration Date	
Actions	
Regulatory Agency Inspector	
Invite Later	
Groups	

Cancel   Add

Invitations can be delayed by checking **Invite later.**

When ready to send, find the **Pending** invites under **By status.**

Select the users and click **Send Invitation**

For any additional assistance, click …   Help   Guide

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