

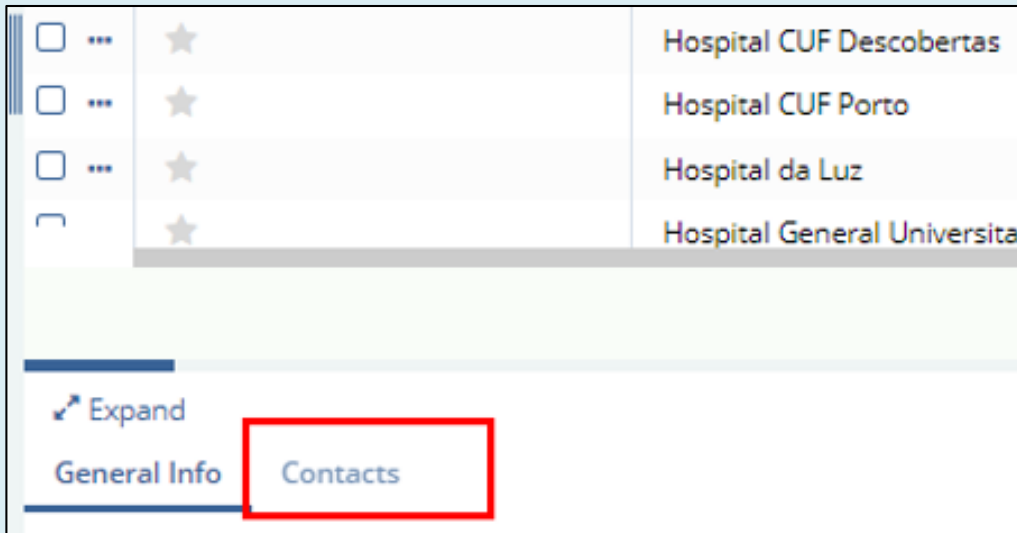
APPLICABLE TO:

- Administrators
- Room Managers
- Editors
- Readers
- eISF

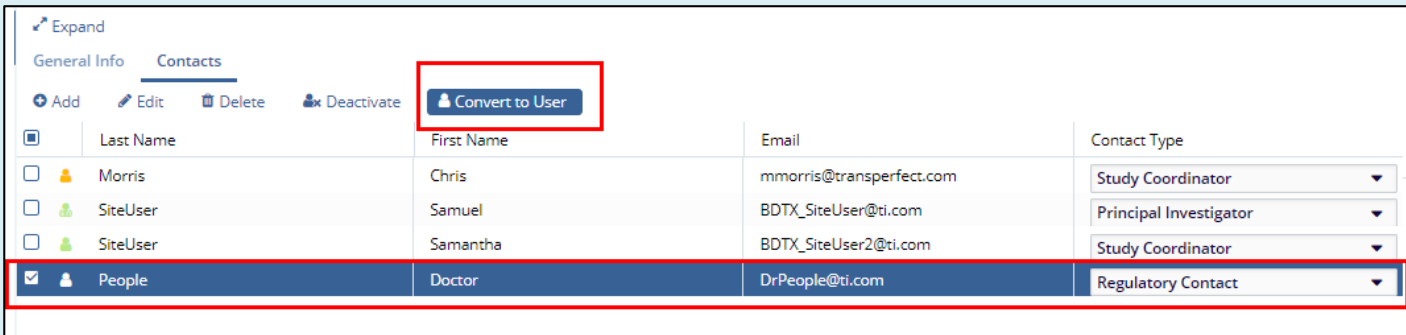
1. In your study room, navigate to the Sites module and select a site



2. In the Site pane located at the bottom of the browser window, switch to the **Contacts** dashlet

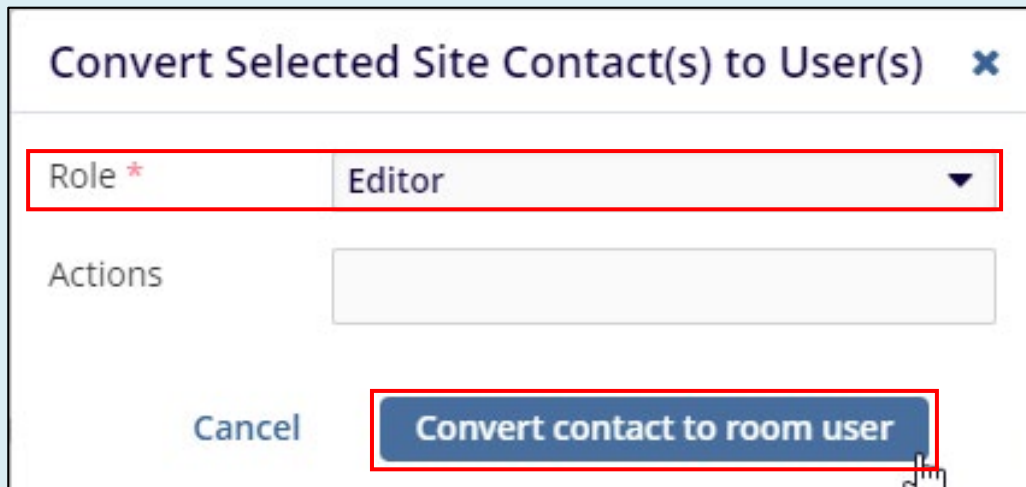


3. Select the contact(s) you want to make into users, then click **Convert to User**



Expand		Contacts		
General Info		Contacts		
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Deactivate"/> <input type="button" value="Convert to User"/>				
<input type="checkbox"/>	Last Name	First Name	Email	Contact Type
<input type="checkbox"/>	Morris	Chris	mmorris@transperfect.com	Study Coordinator
<input type="checkbox"/>	SiteUser	Samuel	BDTX_SiteUser@ti.com	Principal Investigator
<input type="checkbox"/>	SiteUser	Samantha	BDTX_SiteUser2@ti.com	Study Coordinator
<input checked="" type="checkbox"/>	People	Doctor	DrPeople@ti.com	Regulatory Contact


4. A dialog screen pops up. Assign the intended **role** to the user(s). Leave **Actions** blank if you intend to make the contact a site user.



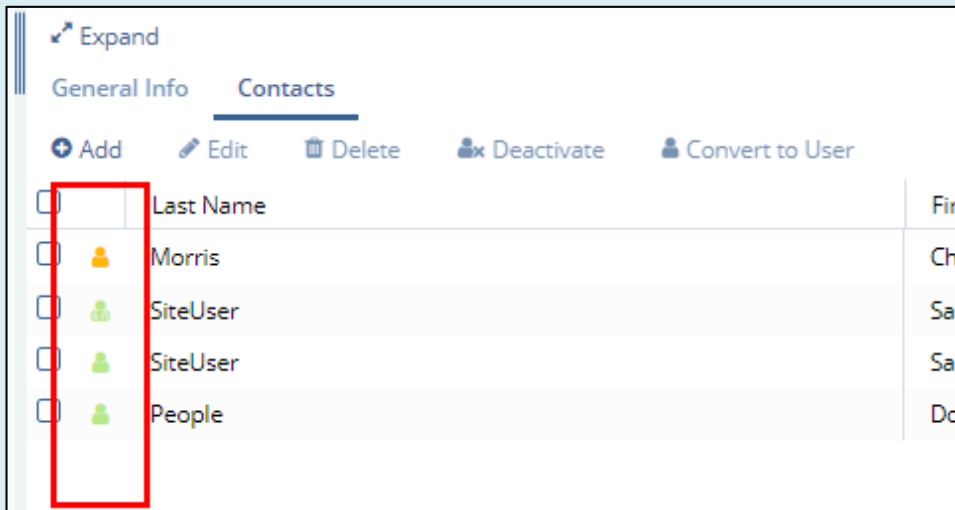
Convert Selected Site Contact(s) to User(s) ✕

Role * Editor

Actions

 Use **Reader** for read-only access, **Editor** for documents upload and collaboration.

5. Clicking on **Convert contact to room user** concludes the process. The contact is now listed as a user.



This process **does not** make the new user a site-specific user, nor does it restrict their access to a specific site. For assigning specific Site roles to users, see the related Job Aid.