APPLICABLE TO:

- ● Administrators
- ○ Room Managers
- ○ Editors
- ○ Readers

- ● eTMF
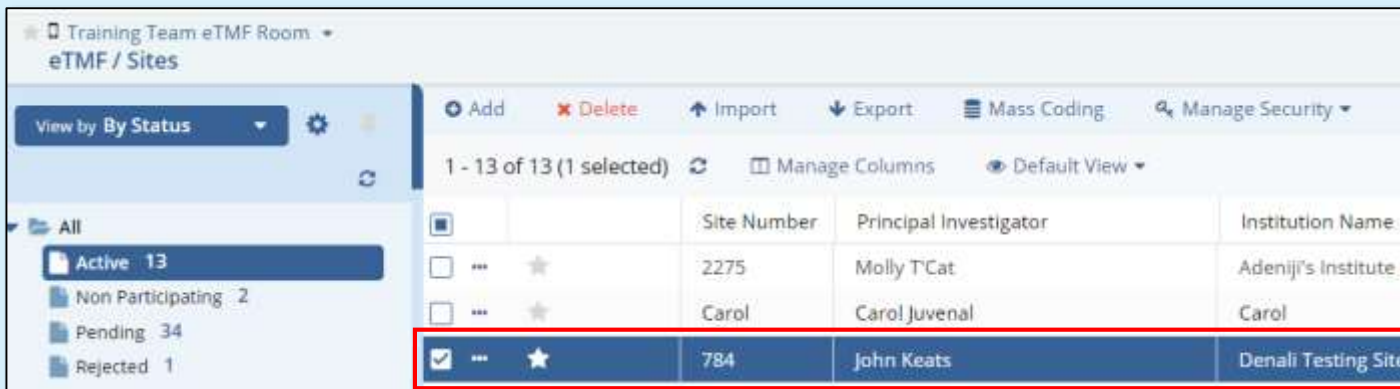- ● Study Start-Up
- ○ myTI
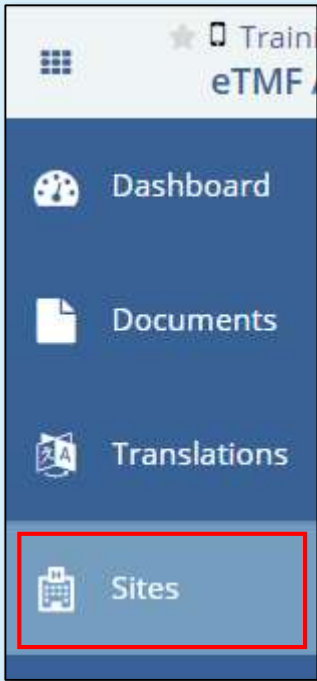
1. Enter a room and navigate to the Sites module in the eTMF.

   For SSU, go to step #4.

2. Find and select the Site of interest.

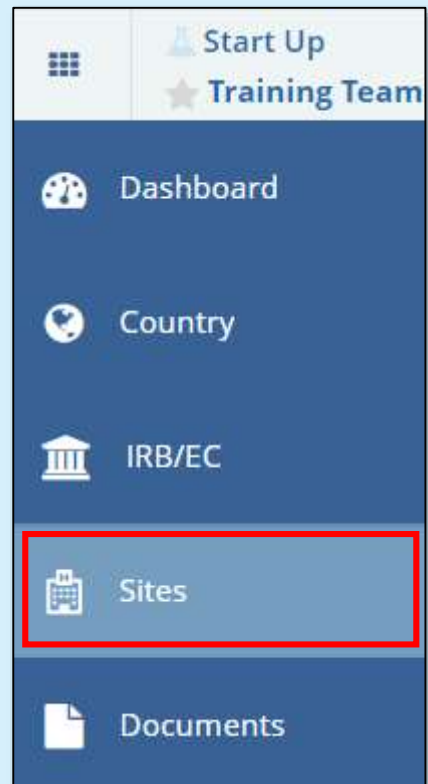   If selecting multiple sites, skip to step #6.

3. Click **Manage Security** in the action bar at the top, and select either **Editors** or **Readers.**
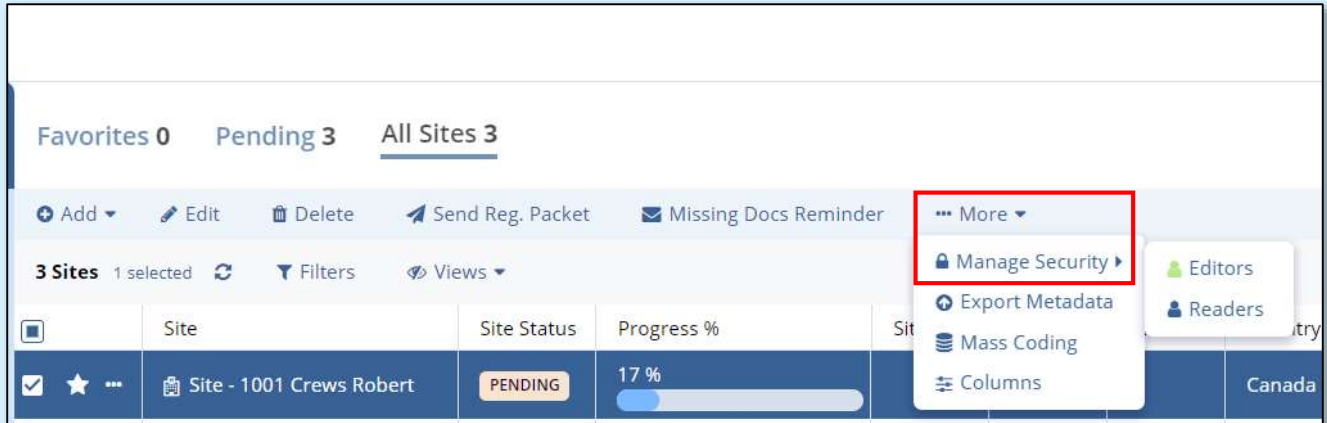

Note: **Site Editors** can modify and update site profile information; this attribute can be given to Editors, Managers, and Admins. **Readers** can only view the site profile.

4. To perform this function in SSU, navigate to the **Site Profile** in SSU.

5. Choose a view type, locate and select the site, and expand the **More..** selector to locate the **Manage Security** option. Choose either **Editors** or **Readers**.
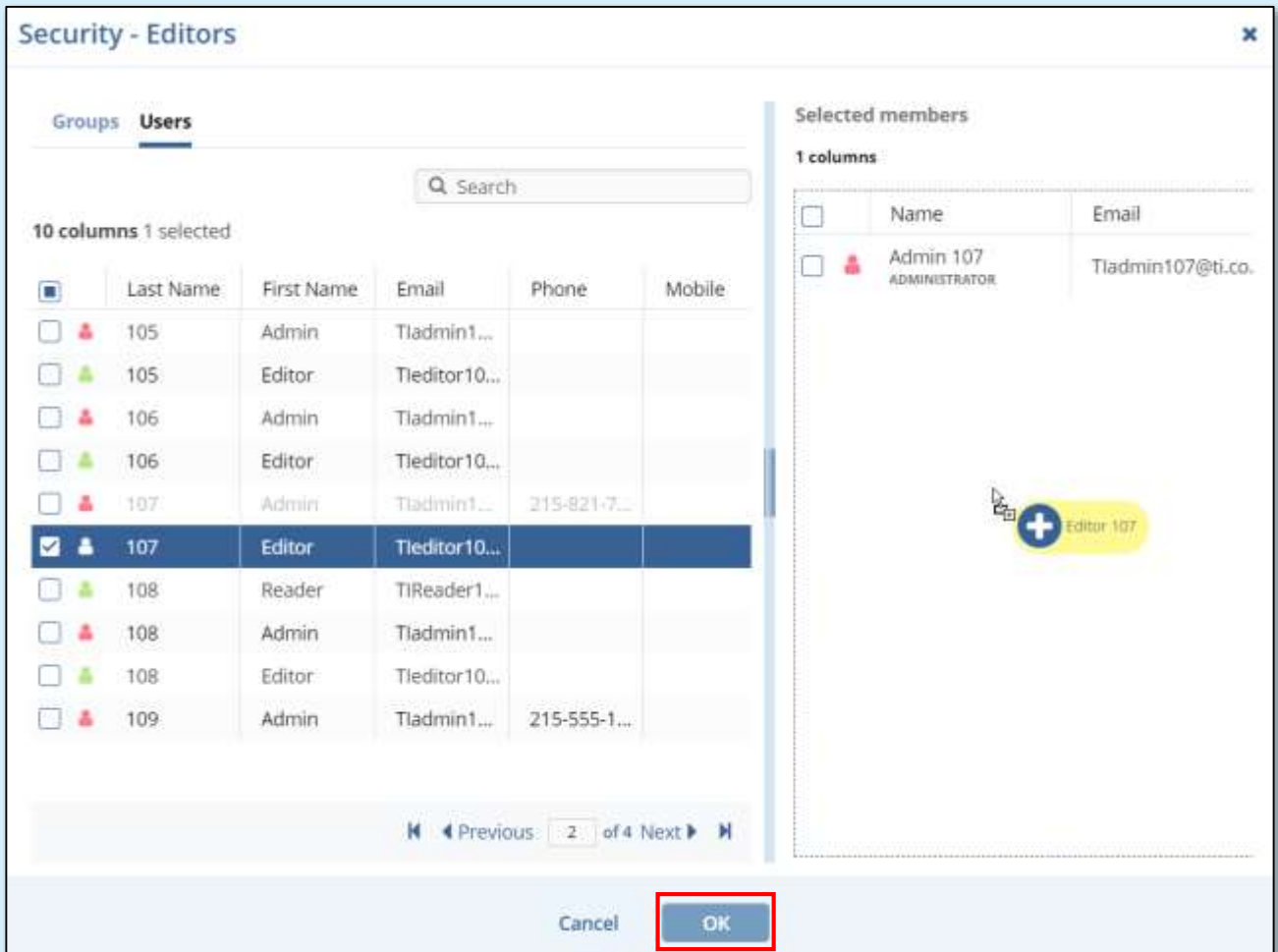

Note: **Site Editors** can modify and update site profile information; this attribute can be given to Editors, Managers, and Admins. **Readers** can only view a site profile.

6. If adding users to specific multiple sites at once, select your chosen sites in the grid, then click **Manage Security.** Select **Editors** or **Readers.**
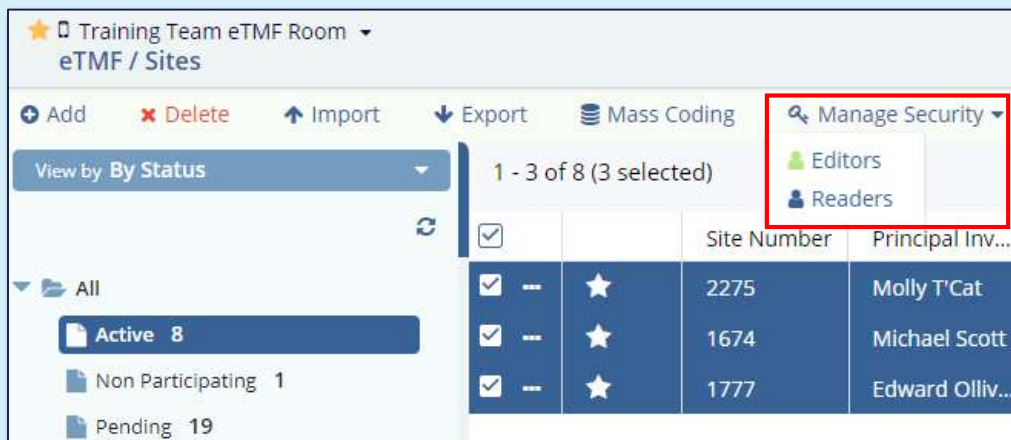
7. A Security panel will open. To add either Editor or Reader access (based on previous selection), select the **Users** and/or **Groups** you wish to access the site(s): double-click a name, or drag-and-drop from the left to the right. Click **OK.**

8. You will be prompted to select the applicable sites and the type of update. Click **Append/Replace** to finalize.


Use **Selected Sites** if you're happy with the selection made.
Do NOT use the **Replace** option for users unless you are sure you want to remove all current access to site(s).

The following section of this guide describes an optional, high-level editing method.

9. Another way to enable users to interact with sites is to grant *default access* for all/select sites. First, navigate to **Settings** via the **Navigation Grid** ('waffle').
Then, expand the **Investigative Sites** menu, and click on the **General Settings** sub-menu.
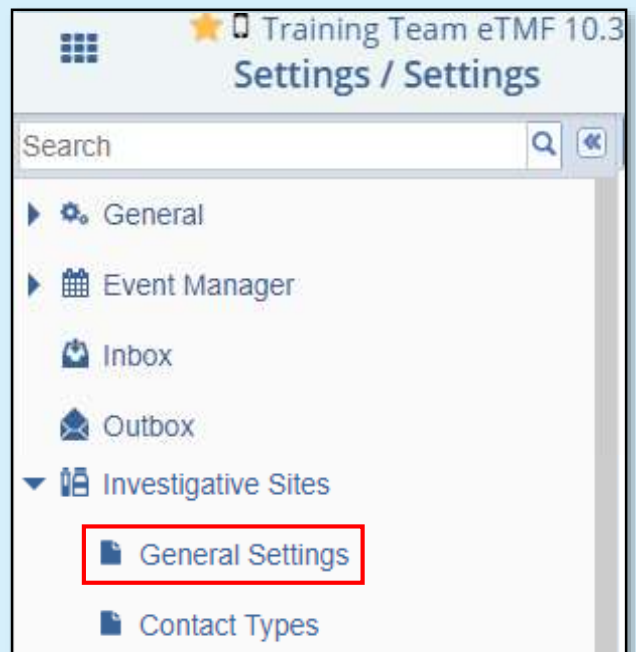
10. Click **Enable Default Access Rights** and choose **Full Access** or **View Only** from the drop-down menu.

Best Practice: Before completing the next step, it is recommended to create a **Group** (in Users Management) that will get default site access.
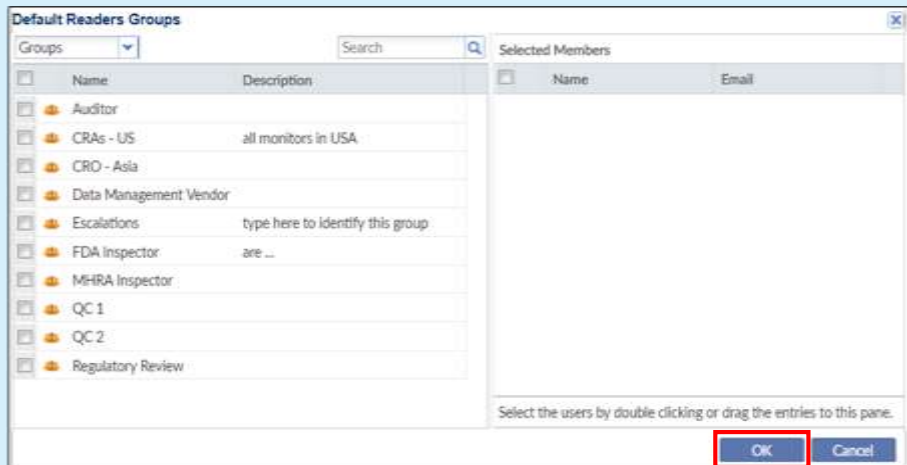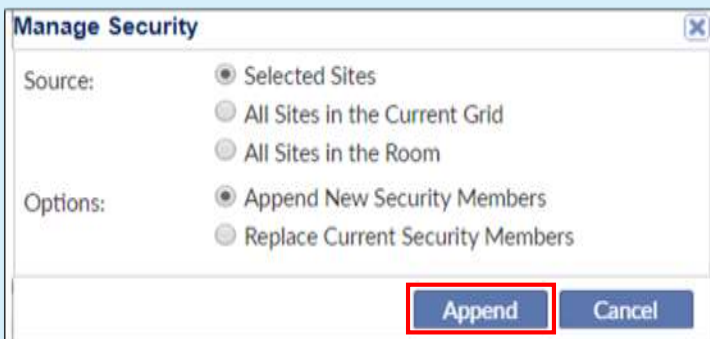
11. Click **Select** to add groups to any one of the three **Default Groups.**

⚠ Important: Do **not** use this method if trying to add one user to view one site.

12. Select what **Groups** will be added to the Default Access List. Double-click, or drag-and-drop from left to right to select.

Click **OK.**

13. In the **Manage Security** pop-up window, make your choices under **Source** and **Options**.

Click **Append/Replace** to finalize.