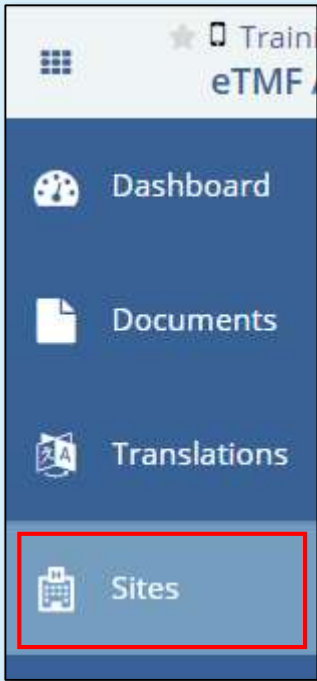


APPLICABLE TO:

- Administrators
- eTMF
- Room Managers
- Study Start-Up
- Editors
- myTI
- Readers

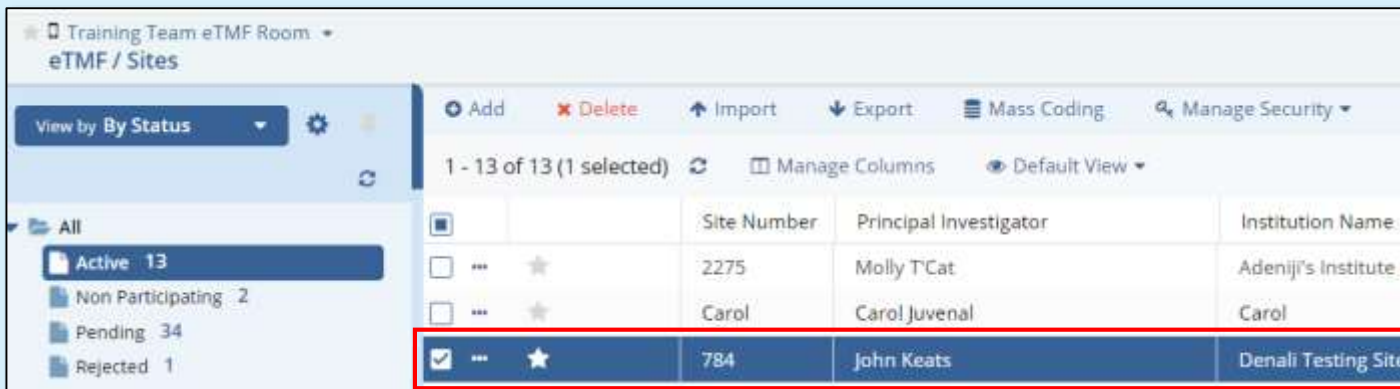


1. Enter a room and navigate to the Sites module in the eTMF.

For SSU, go to step #4.


2. Find and select the Site of interest.

If selecting multiple sites, skip to step #6.

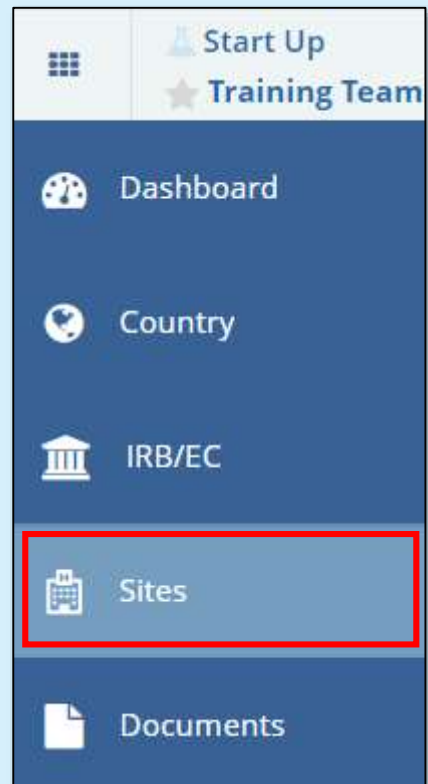


3. Click **Manage Security** in the action bar at the top, and select either **Editors** or **Readers**.

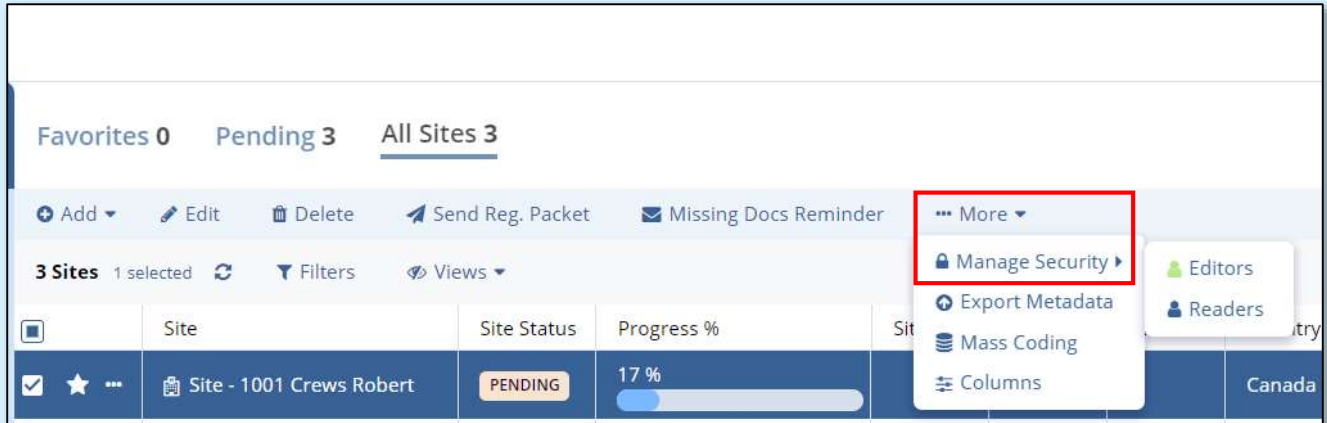


 Note: **Site Editors** can modify and update site profile information; this attribute can be given to Editors, Managers, and Admins. **Readers** can only view the site profile.

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

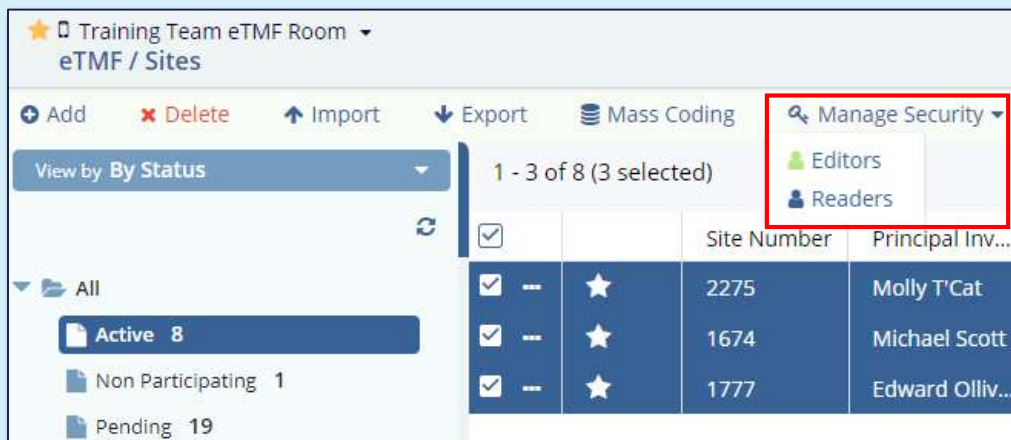


5. Choose a view type, locate and select the site, and expand the **More..** selector to locate the **Manage Security** option. Choose either **Editors** or **Readers**.

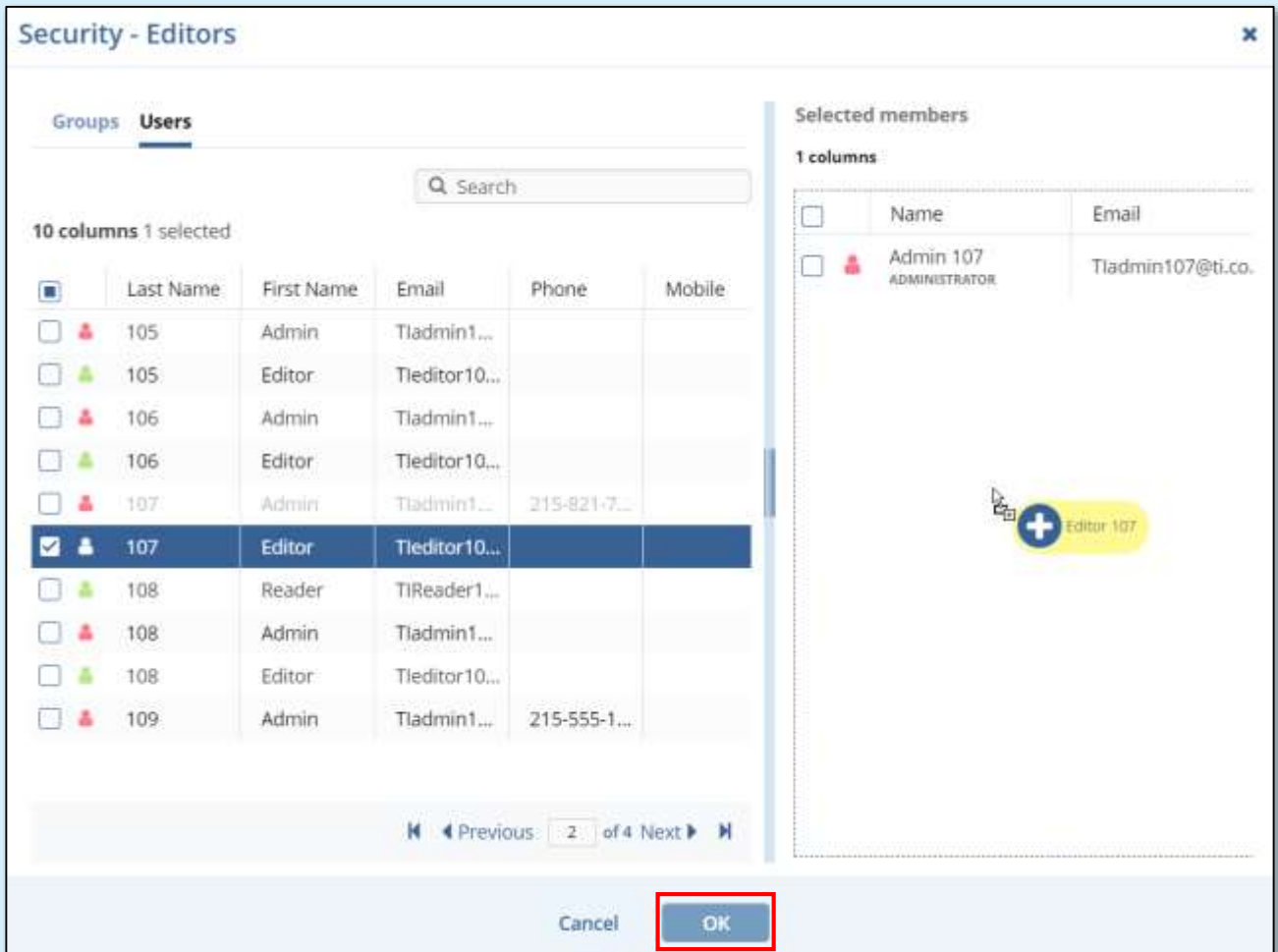


Note: **Site Editors** can modify and update site profile information; this attribute can be given to Editors, Managers, and Admins. **Readers** can only view a site profile.

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**.



**Security - Editors**

Groups **Users**

Search

10 columns 1 selected

	Last Name	First Name	Email	Phone	Mobile
<input type="checkbox"/>	105	Admin	Tladmin1...		
<input type="checkbox"/>	105	Editor	Tleditor10...		
<input type="checkbox"/>	106	Admin	Tladmin1...		
<input type="checkbox"/>	106	Editor	Tleditor10...		
<input type="checkbox"/>	107	Admin	Tladmin1...	215-821-7...	
<input checked="" type="checkbox"/>	107	Editor	Tleditor10...		
<input type="checkbox"/>	108	Reader	TlReader1...		
<input type="checkbox"/>	108	Admin	Tladmin1...		
<input type="checkbox"/>	108	Editor	Tleditor10...		
<input type="checkbox"/>	109	Admin	Tladmin1...	215-555-1...	

Selected members

1 columns

	Name	Email
<input type="checkbox"/>	Admin 107 ADMINISTRATOR	Tladmin107@ti.co.

Previous: 2 of 4 Next

Cancel **OK**

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

### Security Update Options

**Source**

Selected Sites

All Sites In The Current Grid

All Sites In The Room

**Options**

Append New Security Members

Replace Current Security Members

Cancel **Append**



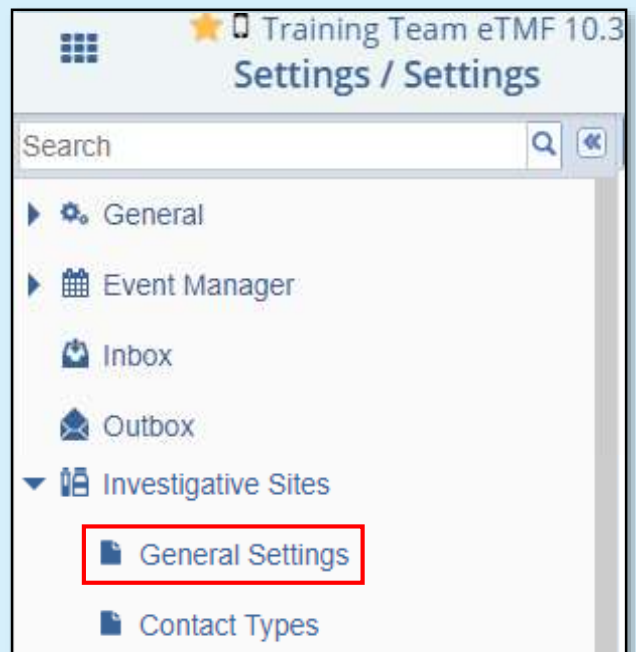
Use **Selected Sites** if you're happy with the selection made.

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.

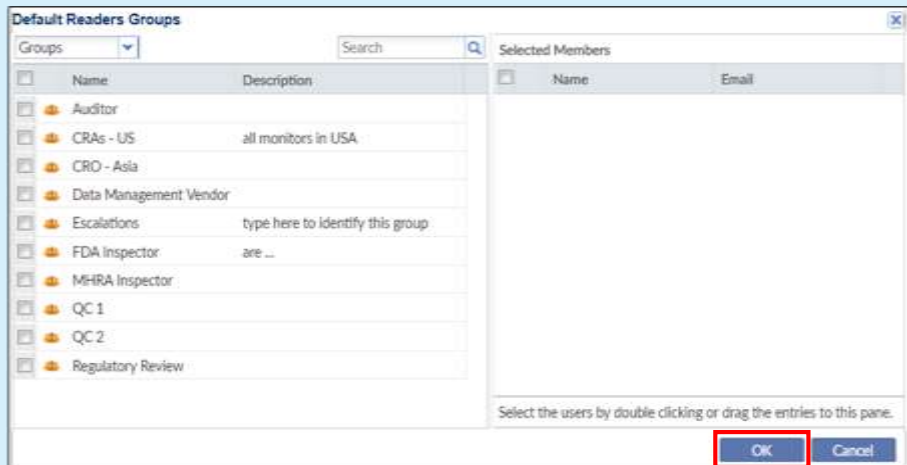
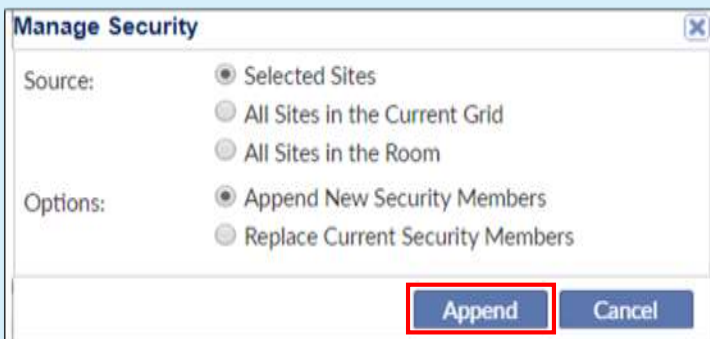
11. Click **Select** to add groups to any one of the three **Default Groups**.




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.