

APPLICABLE TO:

- Administrators
- Room Managers
- Editors
- Readers

eISF

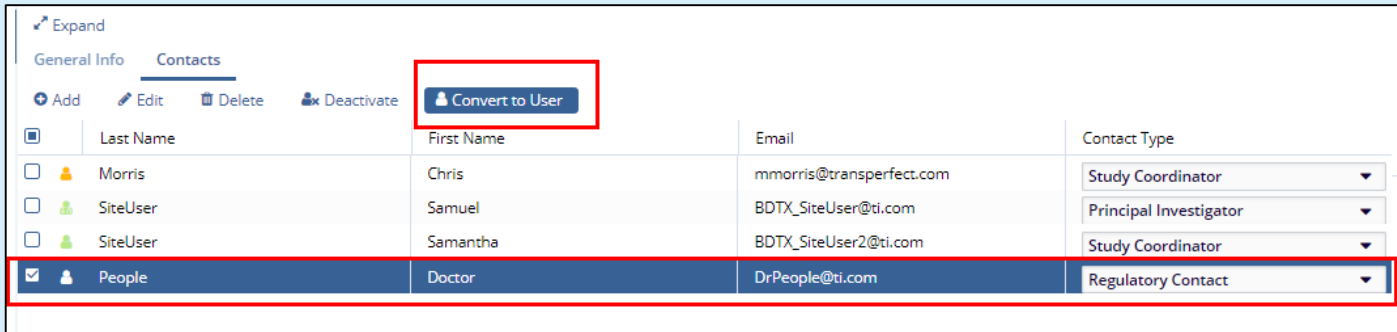
1. In your study room, navigate to the Sites module and select a site.



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



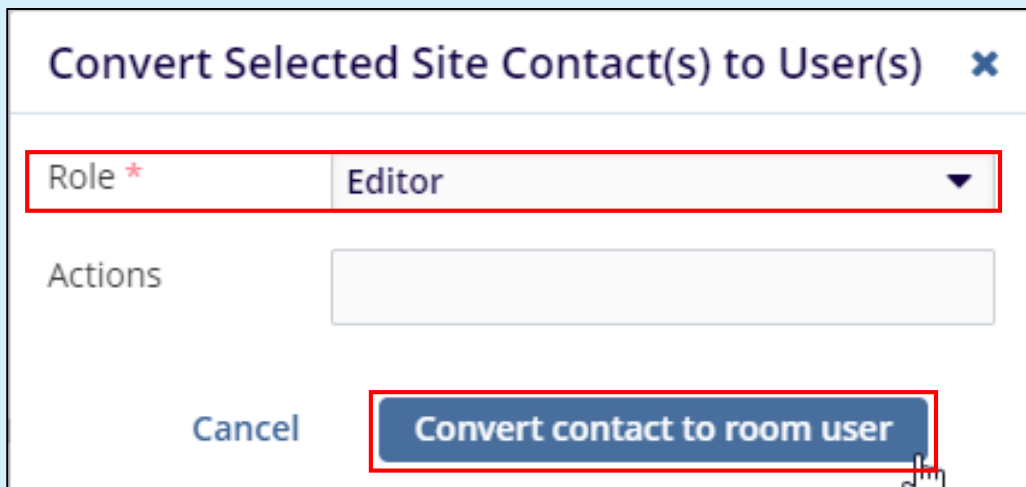
3. Select the contact(s) you want to make into users, then click **Convert to User**.



The screenshot shows a 'Contacts' list with columns for Last Name, First Name, Email, and Contact Type. The 'Convert to User' button is highlighted with a red box. The contact 'People' (Doctor, DrPeople@ti.com, Regulatory Contact) is selected with a checkmark and a blue background.

	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.

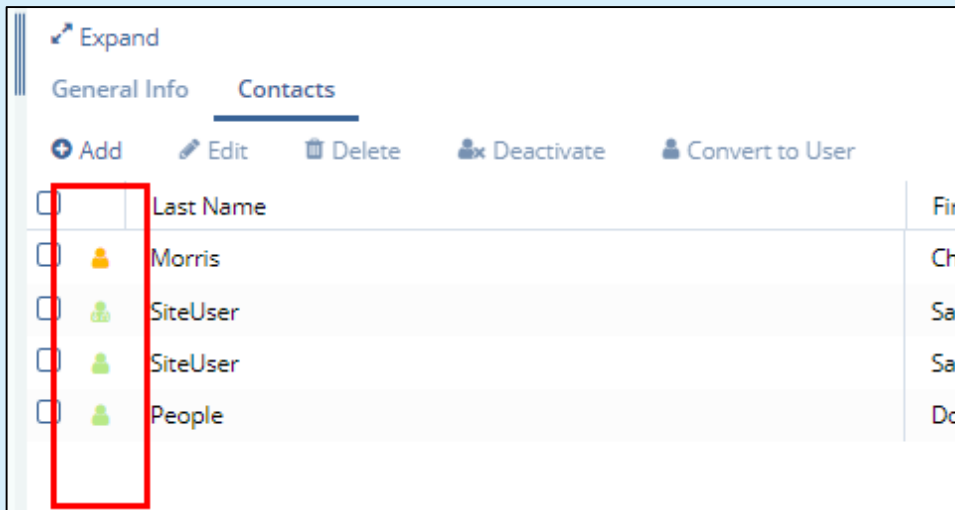


The dialog box is titled 'Convert Selected Site Contact(s) to User(s)'. It contains a 'Role \*' dropdown menu set to 'Editor', an empty 'Actions' text field, and two buttons: 'Cancel' and 'Convert contact to room user'.



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.