## RIAL NTERACTIVE How to Convert Contacts to Users TI version 10.6 **Admin APPLICABLE TO:** Collaborate Manager eTMF $\mathbf{O}$ **Editor** Reader ()1a Log into the study and navigate to the Sites module. Select a Site **1b** Institutio.. Site Status Country Principal ... Site Activ. Bahamas $\checkmark$ Beachside. PENDING **Brad Pitt**

- 2 In the Site pane located at the bottom of the browser window, switch to the Contacts dashlet.
- $\square$ Hogwarts PENDING United Ki Albus Du I I I Contacts General Info Site Visits I O Add Last Name First Nam 2
- 3 Select the contact(s) you want to convert into users, then click Convert to User.



 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.

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

Convert Selected Site Contact(S) To	o User(S) 🛛 🗙
Role *	
Editor	•
Actions	
Cancel Convert Contact To Bo	omUser

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## How to Convert Contacts to Users



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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.



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