

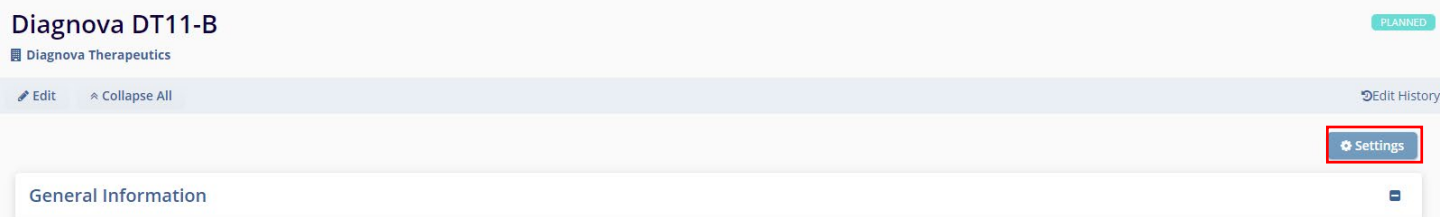
- APPLICABLE TO:
- Company Administrator
 - CTMS
 - Study Manager
 - CRA

Note: In order to manage access permissions, the study must be created first.

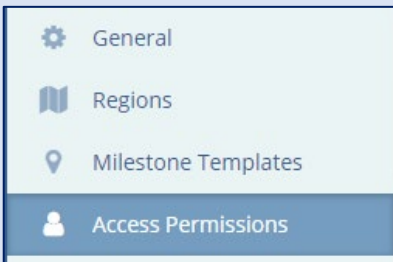
1. Navigate to the study whose team you wish to manage.



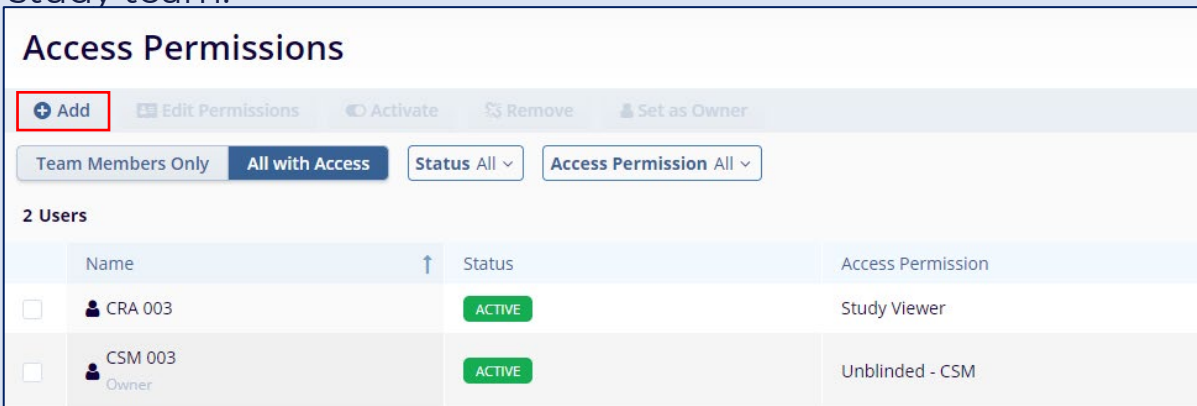
2. Select '**Study Details**' from the navigation links at the left-side of the screen and press the **Settings** button at the top-right of the screen.



3. Select **Access Permissions** from the menu at the left.



4. Press the **Add** button in order to add additional members to the study team.





Note: You may add multiple users at the same time but they will all have to share the same role. Repeat these steps for each individual study role to be invited.

5. Search for the users to be invited by typing in the 'Users' field.

- All users who will play a part in the study should be added with the "Study Viewer" role unless they are serving as a Study Manager.
- If the study is blinded, you will need to reach out to the Trial Interactive Service Desk at help@trialinteractive.com to have an Unblinded CSM created so that that user can manage unblinded aspects of the study including designating unblinded CRAs.

Add Users to Study Team
□ ×

List of Invited Users

Users 1 Users*

CRA 001 ×

Pending

Set permissions

Simple **Advanced**

Role*

None

- Clinical Research Associate (CRA) i
- Clinical Study Manager (CSM) i
- Clinical Study Manager test i
- Clinical Trial Associate (CTA) i
- Contract CRA i
- Country Manager (CM) i

End Date

Cancel
Add

6. Press 'Add' to invite these users to the team for the specified role.

Editing a User's Role on the Study Team.

- Choose the user from the list of Study Team members.
- Press the **'Edit Permissions'** button.

Team

2 Users 1 Selected


	Name	Status	Role
<input checked="" type="checkbox"/>	CRA 003	ACTIVE	Study Viewer
<input type="checkbox"/>	CSM 003 <small>Owner</small>	ACTIVE	Unblinded - CSM

- Choose the Advanced option from the toggle switch.

- By default, the user's role will populate from the top down for each study-related level. Use the dropdown menus to select a different role as required.

- Press **Save**

Edit Study Permissions ✕



Set permissions

Show All
 Show Assigned Permissions

5 Items

Levels	Role	End Date
<input type="checkbox"/> Diagnova DT11-B 2	Study Viewer ⌵	<input type="text" value="day month year"/>
<input type="checkbox"/> United States 1	Study Viewer ⌵	<input type="text"/>
<input type="checkbox"/> 002 Test	Study Viewer ⌵	<input type="text"/>
<input type="checkbox"/> Other 1	<input type="text" value="Search"/> <ul style="list-style-type: none"> <input type="button" value="Clinical Study Manager test"/> ⓘ <input type="button" value="Clinical Trial Associate (CTA)"/> ⓘ <input type="button" value="Contract CRA"/> ⓘ <input type="button" value="Country Manager (CM)"/> ⓘ <input type="button" value="CRA Manager"/> ⓘ <li style="background-color: #2196f3; color: white;"><input type="button" value="Study Viewer"/> ⓘ 	<input type="text"/>