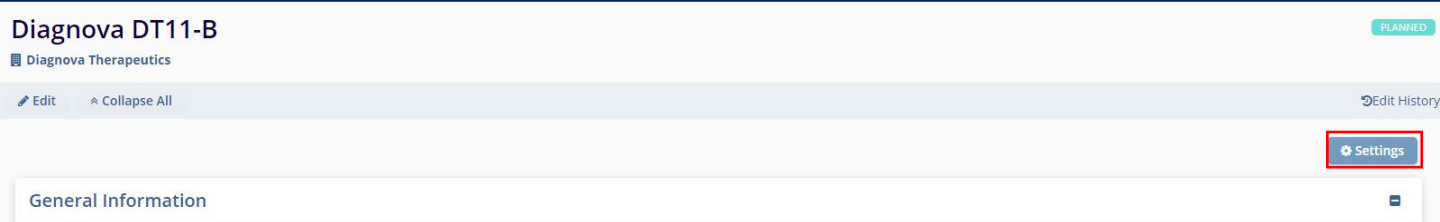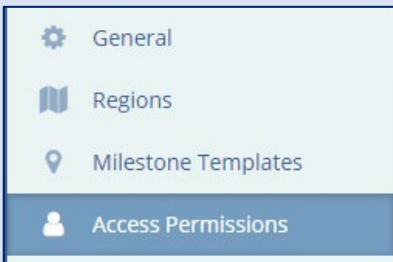**APPLICABLE TO:**

● Company Administrator ● CTMS
● Study Manager
○ CRA

Note: In order to manage access permissions, the study must be created first.
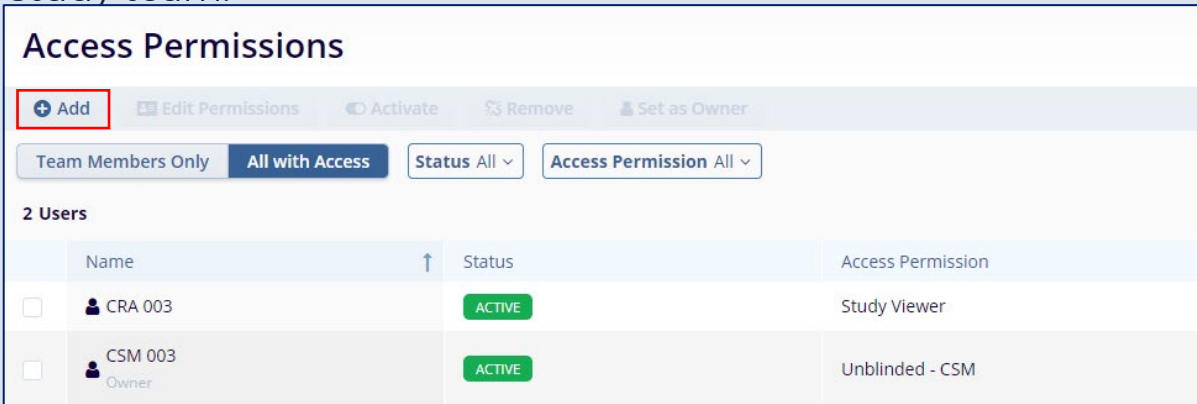
1. Navigate to the study whose team you wish to manage.

⚗ Studies

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.

Diagnova DT11-B   PLANNED
📘 Diagnova Therapeutics

✏ Edit   ⌃ Collapse All   ↻Edit History

⚙ Settings

General Information   ▬

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

⚙ General
🗺 Regions
📍 Milestone Templates
👤 Access Permissions

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

Access Permissions

⊕ Add   ▣ Edit Permissions   ◐ Activate   ⅀ Remove   👤 Set as Owner

| Team Members Only | All with Access | Status All ⌄ | Access Permission All ⌄ |

2 Users

	Name	Status	Access Permission
☐	👤 CRA 003	ACTIVE	Study Viewer
☐	👤 CSM 003 Owner	ACTIVE	Unblinded - CSM

TRANSPERFECT

> ⚠️ **Note**: You may add multiple users at the same time but they will all have to share the same access rights. Repeat these steps for each individual level of access to be granted.

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 a Study level of access indicating that they can view information but not edit study-level information unless they are to act 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

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

End Date

[Cancel] [Add]

---

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

TRIAL INTERACTIVE

Editing a User's Role on the Study Team.

7. Choose the user from the list of Study Team members.

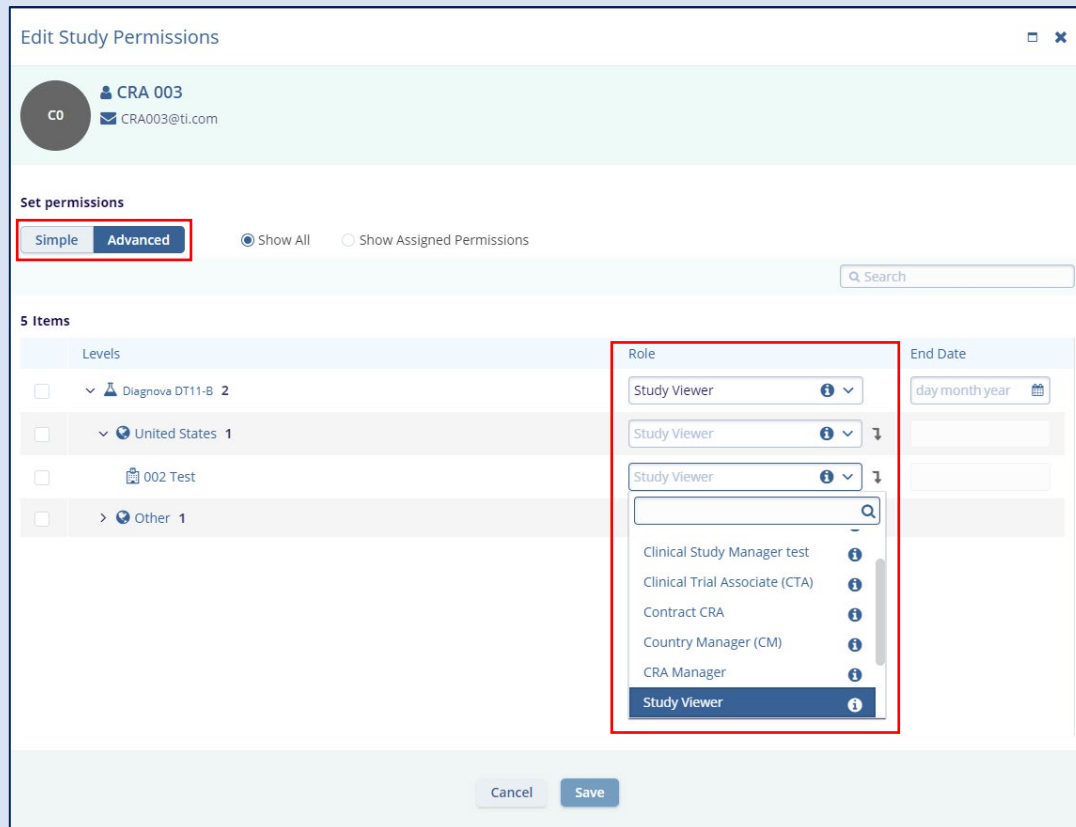8. Press the '**Edit Permissions**' button.

Team

| | Add | 📧 Edit Permissions | ◎ Activate | 🗲 Remove | 👤 Set as Owner |

2 Users 1 Selected

	Name ↑	Status	Role
☑	👤 CRA 003	ACTIVE	Study Viewer
☐	👥 CSM 003 Owner	ACTIVE	Unblinded - CSM

9. Choose the Advanced option from the toggle switch.

10. 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.

11. Press **Save**

Edit Study Permissions

👤 CRA 003
✉ CRA003@ti.com

Set permissions

| Simple | **Advanced** | ◉ Show All ○ Show Assigned Permissions

🔍 Search

5 Items

	Levels	Role	End Date
☐	⌄ 🧪 Diagnova DT11-B 2	Study Viewer ⓘ ⌄	day month year 📅
☐	⌄ 🌐 United States 1	Study Viewer ⓘ ⌄ ↧	
☐	📖 002 Test 1	Study Viewer ⓘ ⌄ ↧	
☐	› 🌐 Other 1		

🔍

Clinical Study Manager test ⓘ
Clinical Trial Associate (CTA) ⓘ
Contract CRA ⓘ
Country Manager (CM) ⓘ
CRA Manager ⓘ
Study Viewer ⓘ

Cancel   Save

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