

How to Manage Study Access Permissions

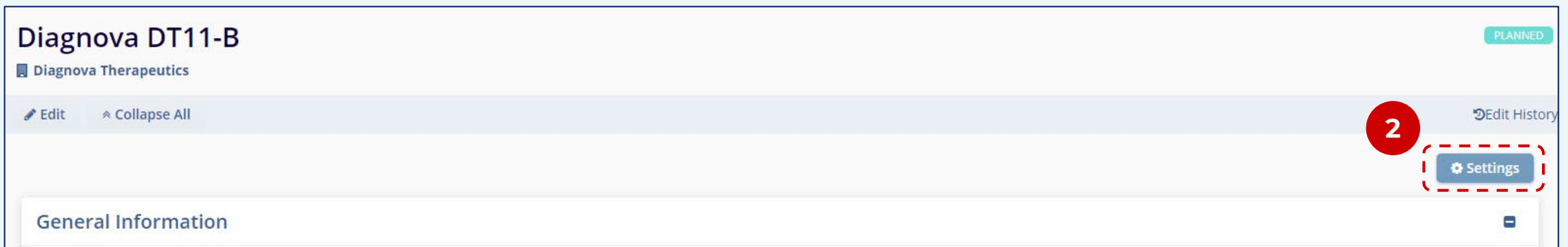
CTMS version 2.0

APPLICABLE TO:

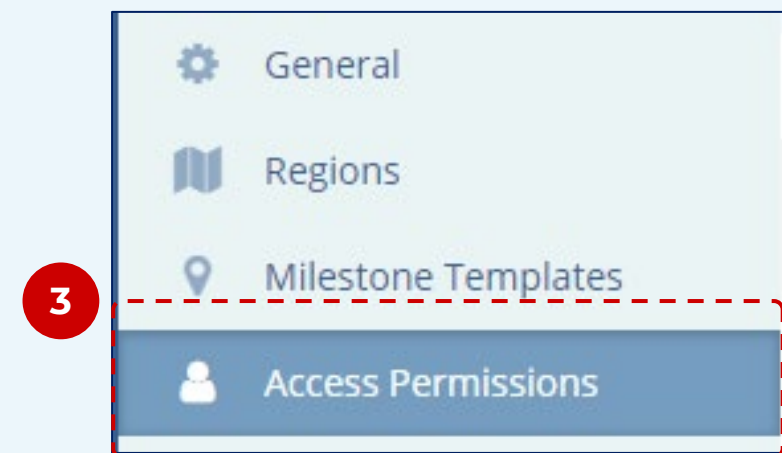
- Company Admin
- Study Manager
- CRA

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

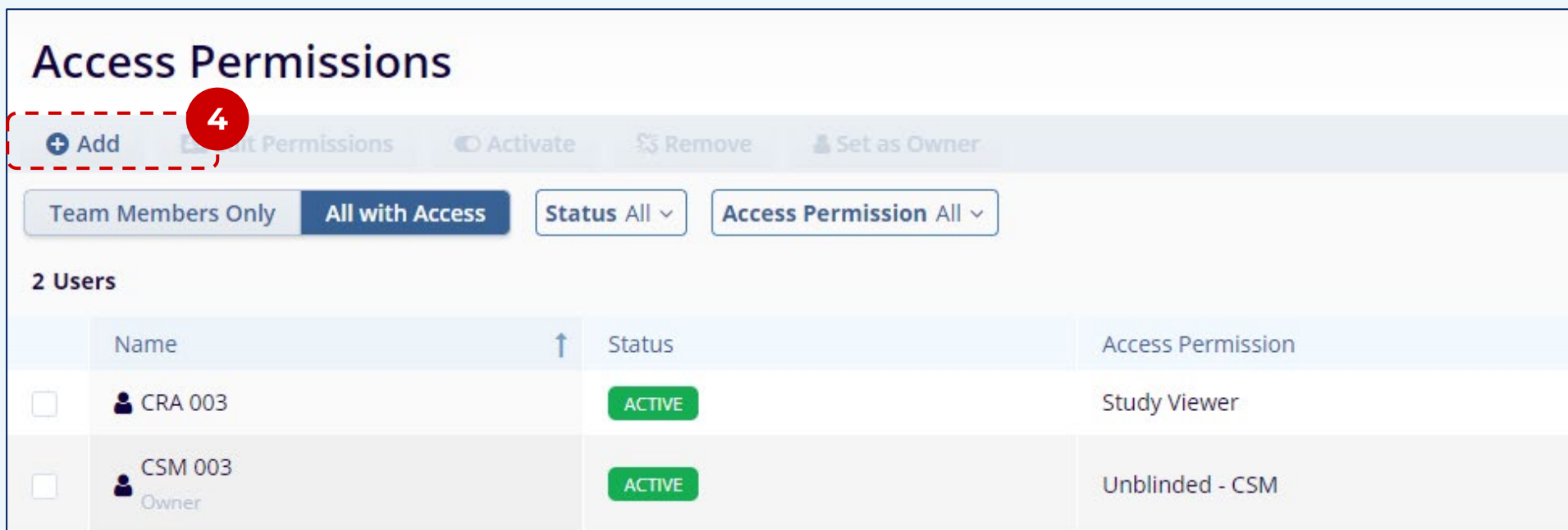
2 Select **Study Details** in the navigation links at the left side of the screen and press the **Settings** button at the top-right of the screen.



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



4 Press the **Add** button to add additional members to the permissions list.



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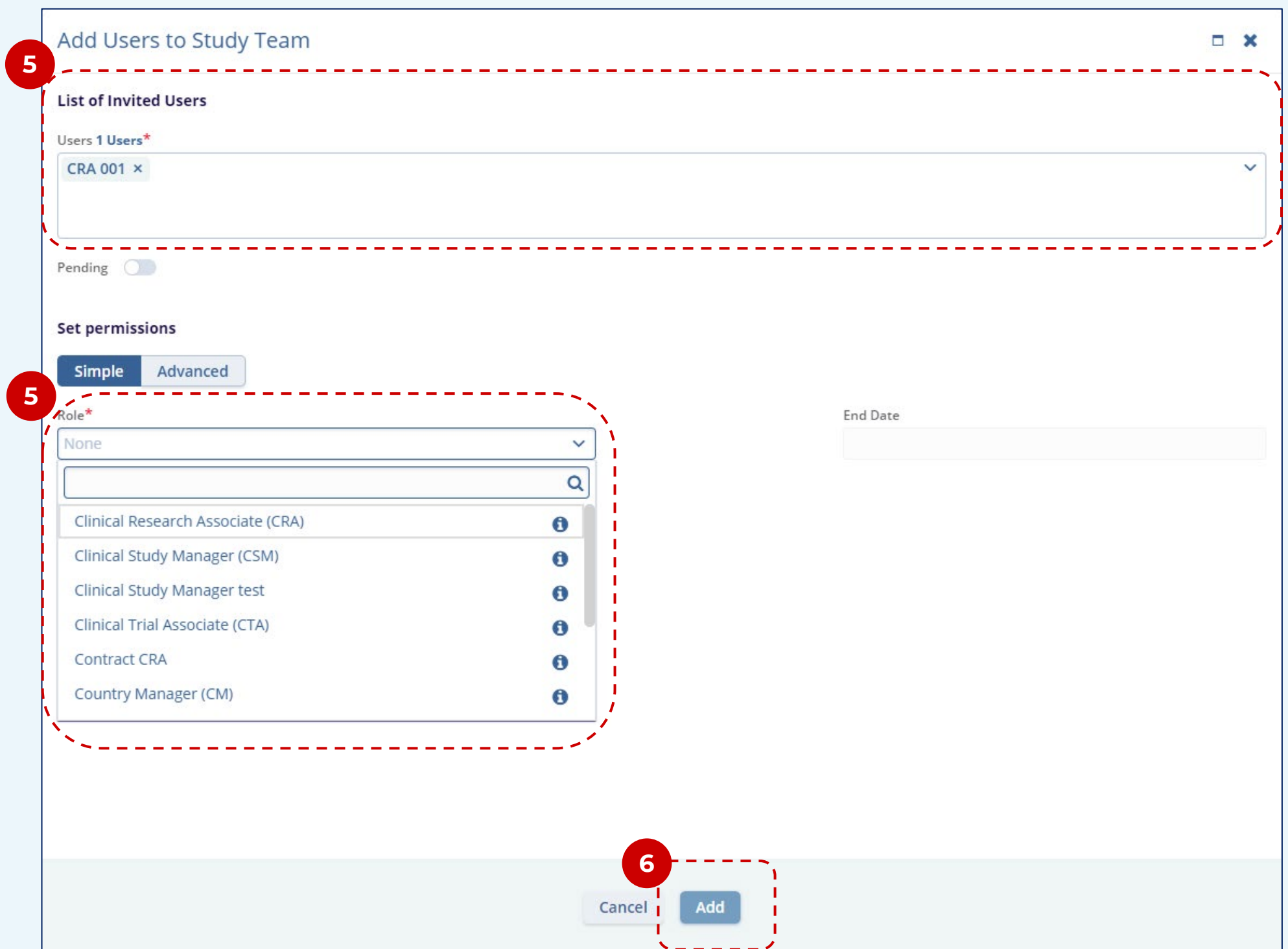
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Note: You may add multiple users at the same time, but they will all have to share the same access rights. Repeat these steps for each individual level of access to be granted.

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

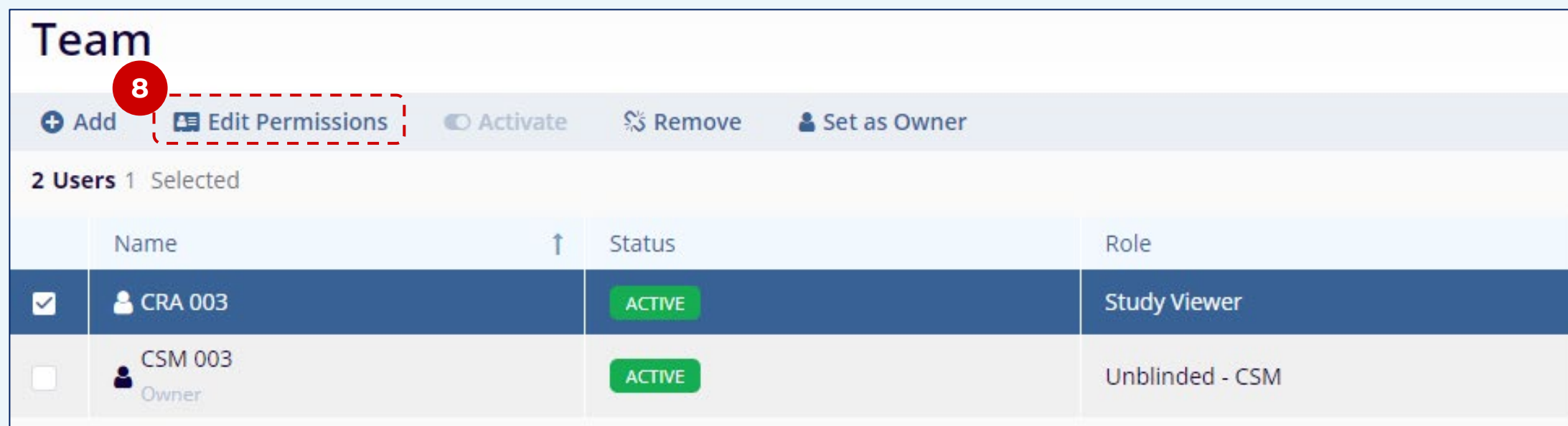
- All users who will play a part in the study should be added with a Study level of access indicating that they can view information but not edit study-level information unless they are to act as a study manager.
- If the study is blinded, you will need to reach out to the Trial Interactive Service Desk at help@trialinteractive.com to have an Unblinded CSM created so that that user can manage unblinded aspects of the study including designating unblinded CRAs.



6. Press **Add** to invite these users to the team for the role indicated.

Editing a User's Study Access Role

- 7 Choose the user from the list of those with access to the study.
- 8 Press the **Edit Permissions** button.



- 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 menu at each level to select a different role as required.

- 11 Press **Save**.

