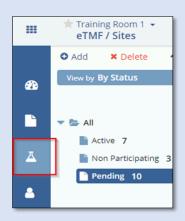
How to Add Users to View Sites T R I A L INTERACTIVE How to Add Users to View Sites TI v 10.3



Note: To perform the steps below, the Admin user must already have access to the site(s). Admin users, by default, do not have full access to all sites.

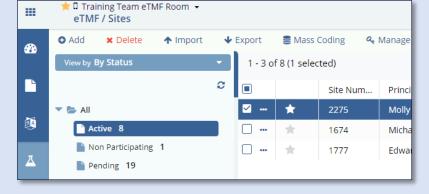


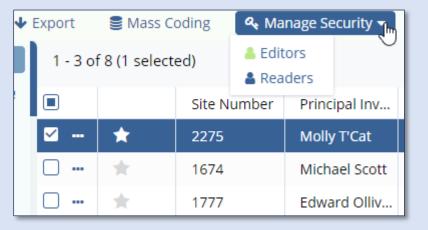
1. Enter a room and navigate to the **Sites** module in the eTMF.

Tip: If adding one or more users to view a site, follow steps #2-#6.

2. Find and select the Site.

If selecting multiple sites, proceed to step #7.





3. Click **Manage** Security and select Editors or Readers.

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	★ Training Room 1 → Start-Up / Sites
	Site Activation
æ	▼ 🖕 All
۲	Active [7]
	Non Participating [3]
⊘	Pending [10]
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4. To perform this function in SSU, navigate to the **Site Profile** in SSU.

5. Choose the site and click Edit.

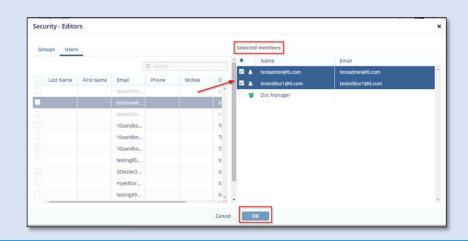
★ Training Room 1 Start-Up / Sites									Q Search	• A0
Site Activation	O Add	🖊 Edit	🗢 Delete	↑ Import ↓ Ex	port	B° Mass (Coding	📼 Send Reg	. Packet ጺ Mana	ige Se
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Non Participating [3]	□ * !	997 Jai	TI	Trial Site	No	Jai	ТΙ	Reader	IRB 123	
Pending [10]										

Note: Site **Editors** can modify and update the site profile information; this can include Editors, Room Managers and Admins. **Readers** can only view the site profile.

6. Select **Users** and/or **Groups** to be added to the Security Group.

Double-click or dragand-drop from the left to the right pane.

Click OK



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7. If adding users to multiple sites at once, select the sites in the grid, then click **Manage Security.**

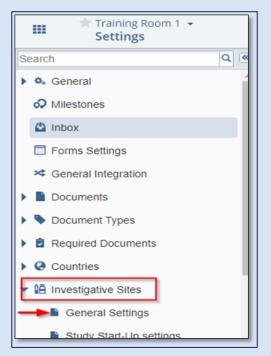
Then select **Editors** or **Readers.**

		ining Team eTf F / Sites	MF Room 👻							
	🛛 Add	🗙 Delete	↑ Import	•	Export	🛢 Mass C	Coding	🝳 Ma	nage Security 🔻	
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8. Another way to add users is to grant default access for any site.

This can be done by navigating to the **Settings** application in the **Navigation Grid**.

9. Expand the **Investigative Sites** menu, and click on the **General Settings** sub-menu.



10. Click **Enable Default Access Rights** and choose **Full Access** from the drop-down menu.

Enable Default Access Ri	ghts	
Default Access Rights: *	Full Access	*
Default Access Members:	Select 0 user	(s) selected, 0 group(s) selecte
Default Readers Groups:	Select 0 grou	p(s) selected
Default Editors Groups:	Select 0 grou	p(s) selected

Tip: Before completing the next step, click **Save** and create a **Group** (in Users Management) for default site access.



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11. Click Select to add groups to any one of the three Default Groups.

Default Access Rights: *	Full Acc	cess	*
Default Access Members:	Select	0 user(s) sele	cted, 0 group(s) selected
Default Readers Groups:	Select	0 group(s) sel	lected
Default Editors Groups:	Select	0 group(s) sel	lected

view one site.

12. Select **Groups** to be added to the Default Access List.

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Double-click or dragand-drop from left to right to select.

Click OK

efault	Readers Groups							X
Groups	~		Search	Q	Select	ted Members		
	Name	Description				Name	Email	
- 4	Auditor							
-	CRAs - US	all monitors in	USA					
-	CRO - Asia							
a	Data Management Vendor							
a	Escalations	type here to id	entify this group					
a	FDA Inspector	are						
a	MHRA Inspector							
a	QC 1							
- 4	QC 2							
- 4	Regulatory Review							
					Select	the users by double of	licking or drag the entries to this	0200
					Select	the users by double c	licking of drag the entries to this	pane.

Manage Secu	ırity 🔀
Source:	Selected Sites
	All Sites in the Current Grid
	All Sites in the Room
Options:	Append New Security Members
	Replace Current Security Members

13. In the **Manage Security** pop-up window, select choices under **Source** and **Options**.

Click Append

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