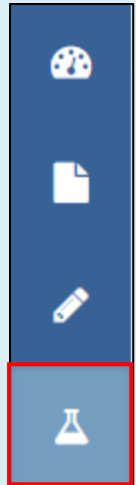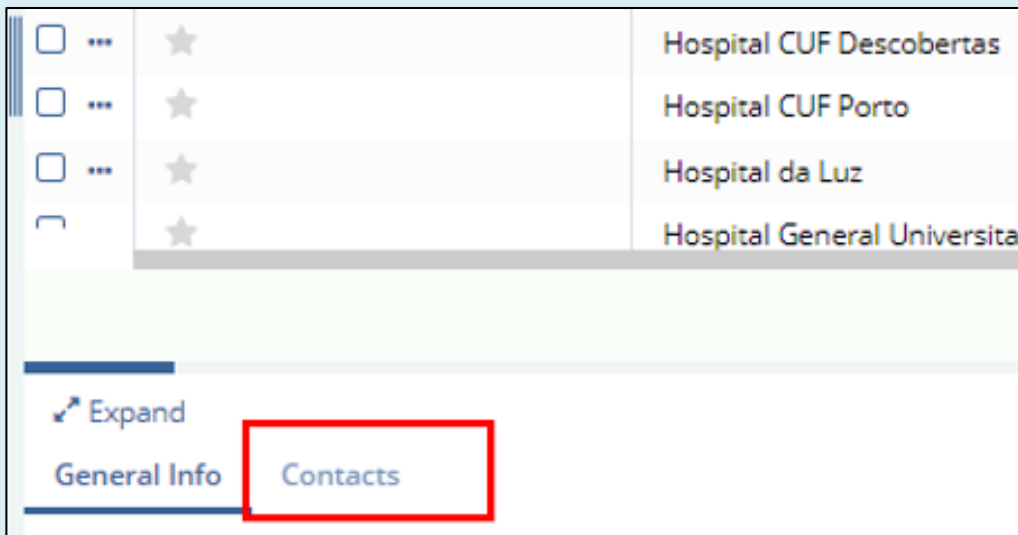**TRIAL INTERACTIVE**

APPLICABLE TO:

- ● Administrators
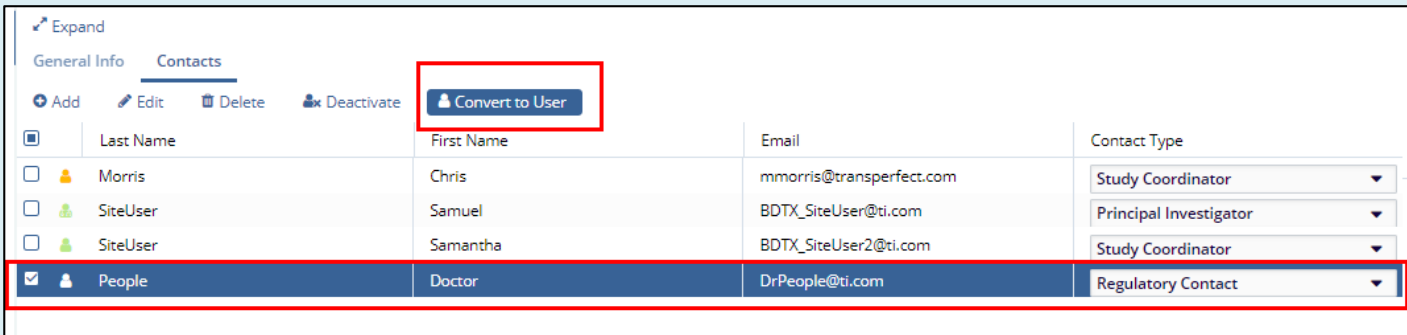- ● Room Managers
- ○ Editors
- ○ Readers

- ● eISF

1. In your study room, navigate to the Sites module and select a site

2. In the Site pane located at the bottom of the browser window, switch to the **Contacts** dashlet
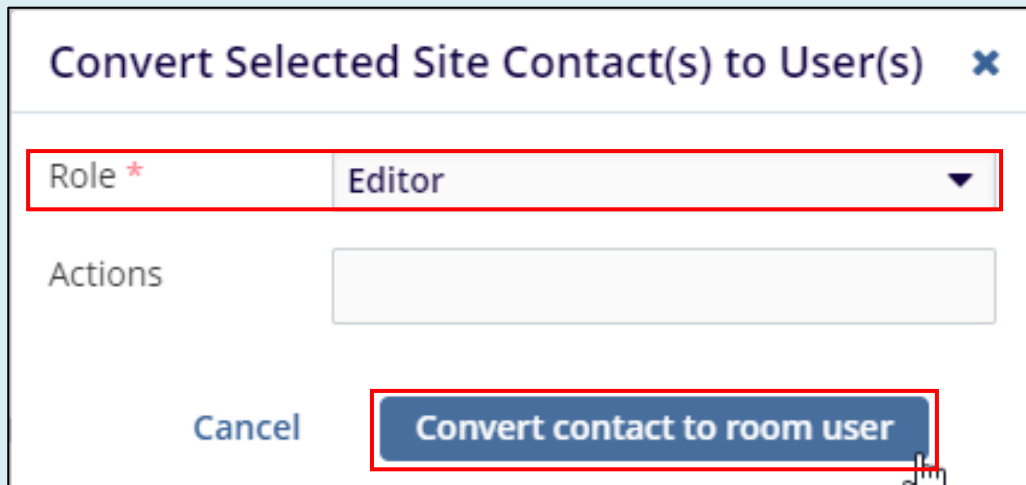
3. Select the contact(s) you want to make into users, then click **Convert to User**

4. 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.
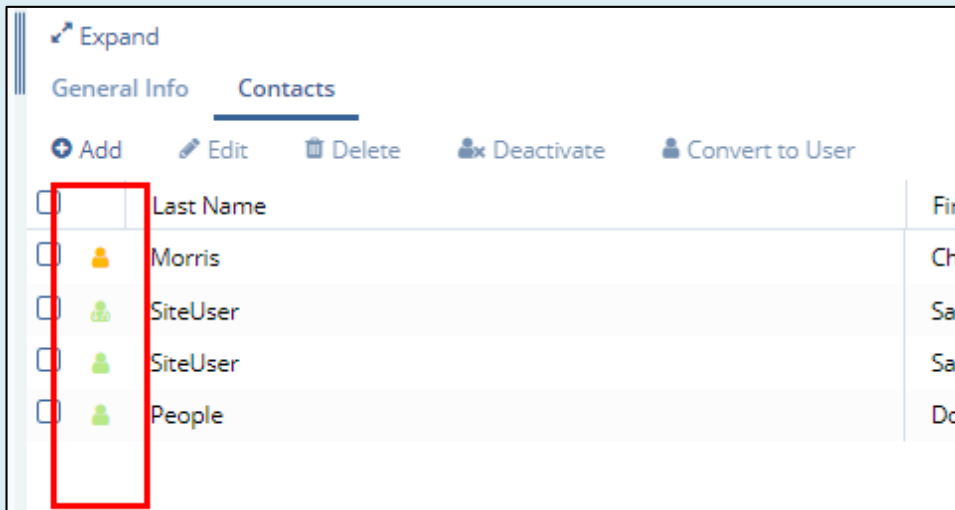

Use **Reader** for read-only access, **Editor** for documents upload and collaboration.

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.