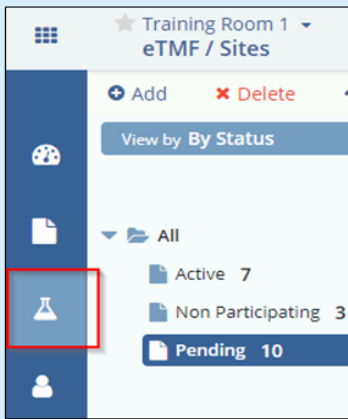


### APPLICABLE TO:

- Administrators
- eTMF
- Room Managers
- Study Start-Up
- Editors
- myTI
- Readers

**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.

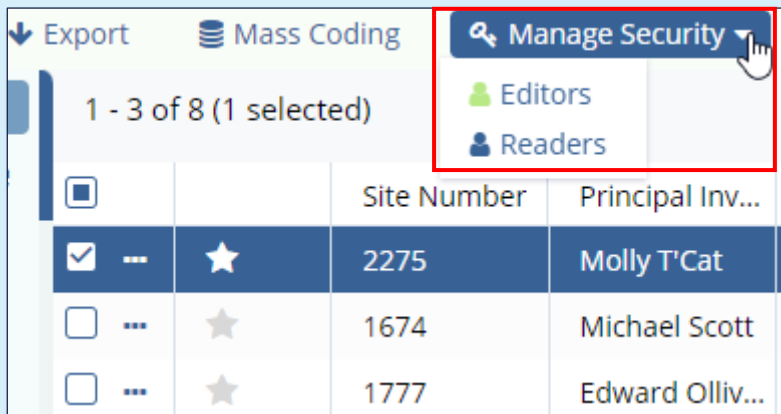
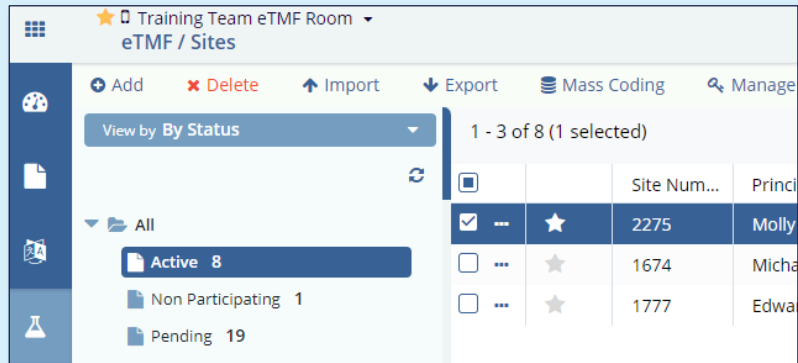


**1. Enter a room and navigate to the Sites module in the eTMF.**

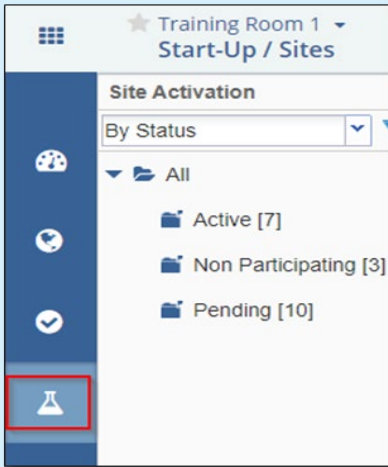
For SSU, go to step #4.

**2. Find and select the Site of interest.**

If selecting multiple sites, proceed to step #6.

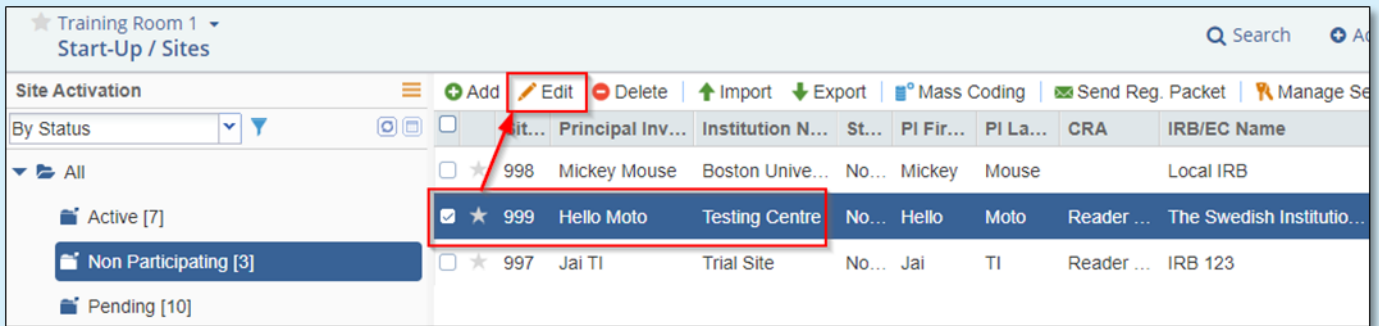


**3. Click Manage Security and select Editors or Readers.**



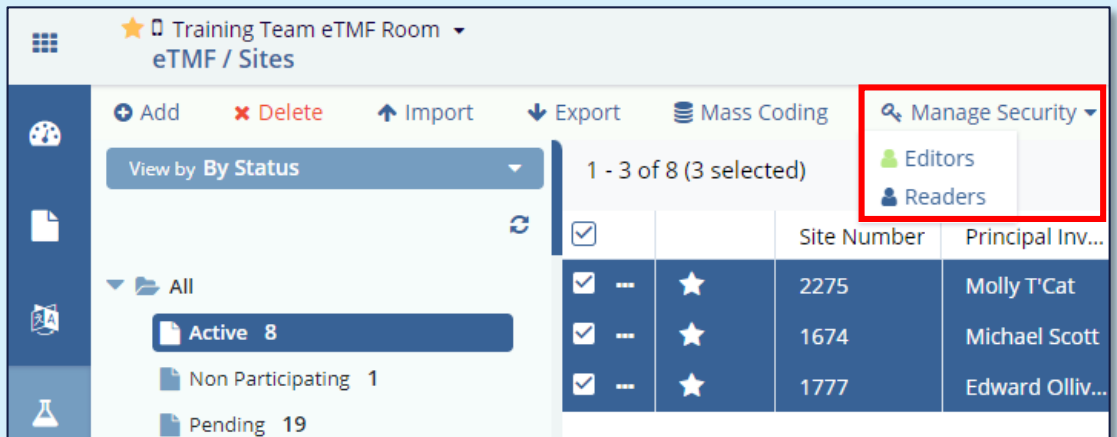
4. To perform this function in SSU, navigate to the **Site Profile** in SSU.

5. Choose the site and click **Edit**.



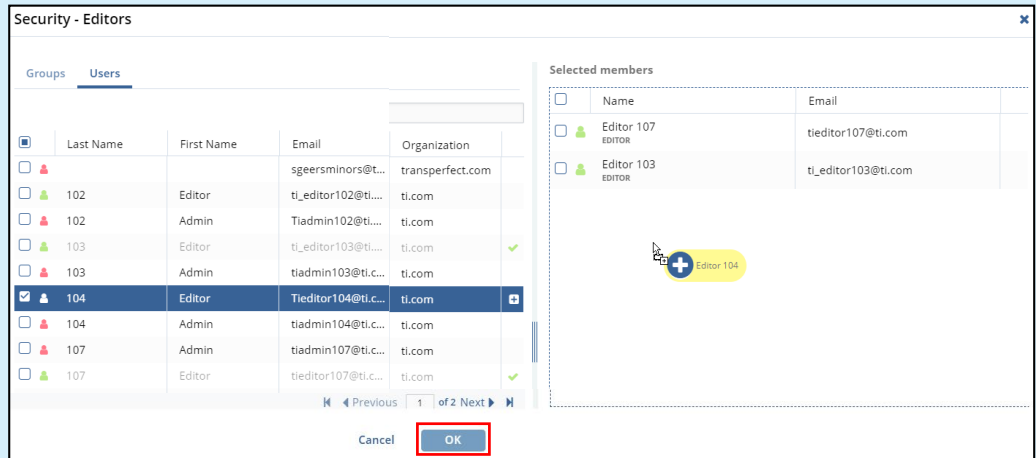
Note: **Site Editors** can modify and update site profile information; this attribute can be given to Editors, Managers, and Admins. **Readers** can only view the site profile.

6. If adding users to multiple sites at once, select your chosen sites in the grid, then click **Manage Security**. Select **Editors** or **Readers**.



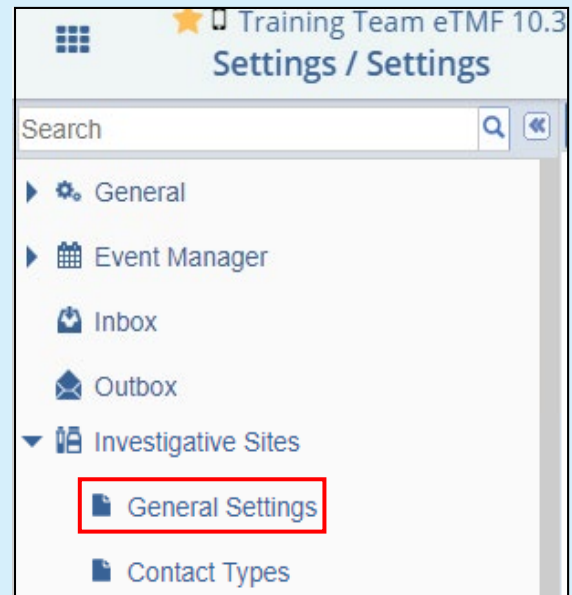
7. Select **Users** and/or **Groups** to be added to the site in the Security panel: double-click, or drag-and-drop from the left to the right pane.

Click **OK**.

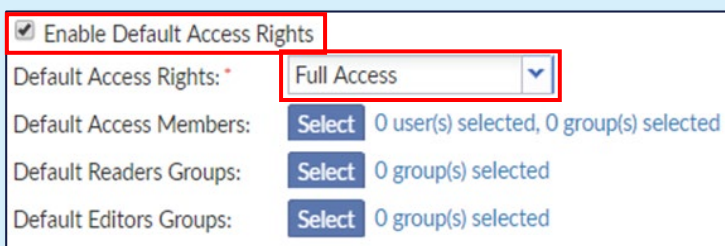


8. Another way to add users is to grant default access for all/select sites. First, navigate to **Settings** via the **Navigation Grid** ('waffle').

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

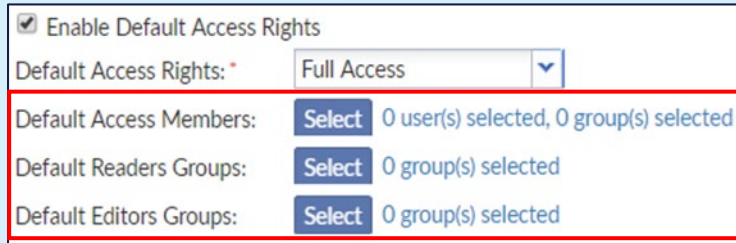


10. Click **Enable Default Access Rights** and choose **Full Access** from the drop-down menu.



**Best Practice:** Before completing the next step, click **Save** and create a **Group** (in Users Management) that will get default site access.

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



Enable Default Access Rights

Default Access Rights: \*

Default Access Members:  0 user(s) selected, 0 group(s) selected

Default Readers Groups:  0 group(s) selected

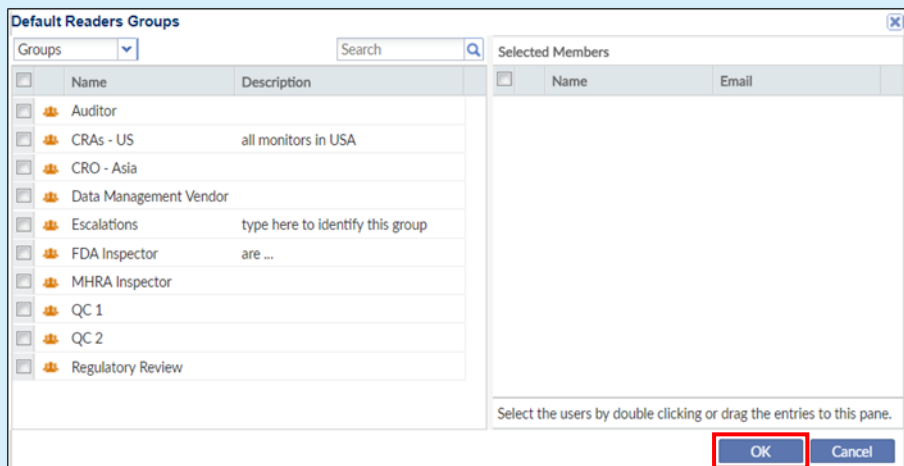
Default Editors Groups:  0 group(s) selected



Note: Do **not** use this method if trying to add one user to view one site.

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

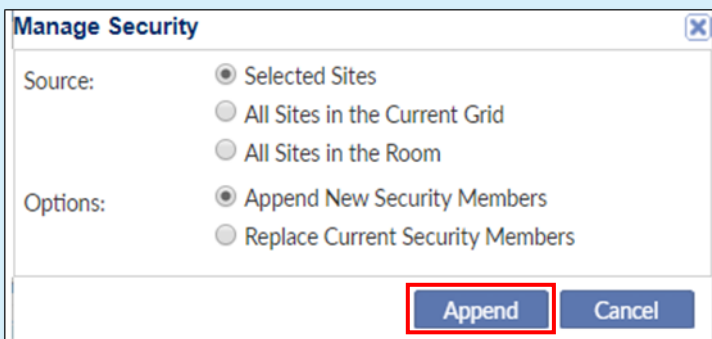
Double-click, or drag-and-drop from left to right to select.



| Groups                   | Name                   | Description                      | Selected Members |
|--------------------------|------------------------|----------------------------------|------------------|
| <input type="checkbox"/> | Auditor                |                                  |                  |
| <input type="checkbox"/> | CRAs - US              | all monitors in USA              |                  |
| <input type="checkbox"/> | CRO - Asia             |                                  |                  |
| <input type="checkbox"/> | Data Management Vendor |                                  |                  |
| <input type="checkbox"/> | Escalations            | type here to identify this group |                  |
| <input type="checkbox"/> | FDA Inspector          | are ...                          |                  |
| <input type="checkbox"/> | MHRA Inspector         |                                  |                  |
| <input type="checkbox"/> | QC 1                   |                                  |                  |
| <input type="checkbox"/> | QC 2                   |                                  |                  |
| <input type="checkbox"/> | Regulatory Review      |                                  |                  |

Select the users by double clicking or drag the entries to this pane.

Click **OK**.



**Manage Security**

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**.