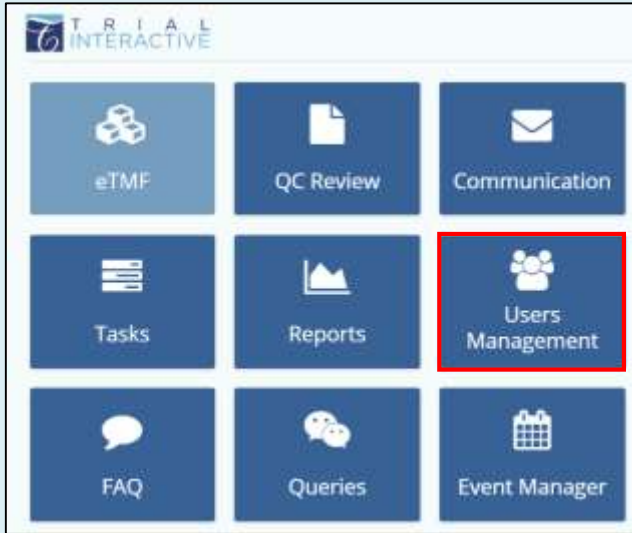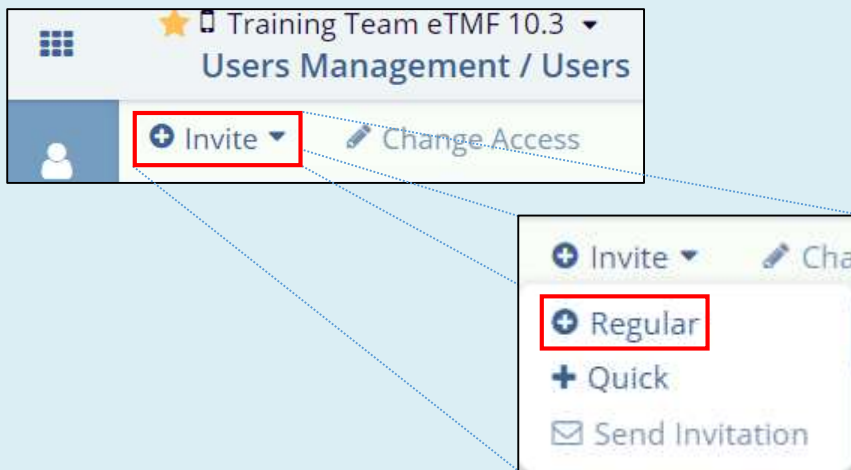**TRIAL INTERACTIVE**

APPLICABLE TO:

● Administrators
○ Room Managers
○ Editors
○ Readers

● eTMF
○ Study Start-Up
● Content Management

1. Enter your TI room and click on **Users Management** from the Navigation Grid.

2. Click **Invite** and select **Regular** from the drop-down menu.

3. Complete the user profile in **User Invitation**.

Select the **Group Membership** tab to assign the user to any groups (optional). Click **Save**.

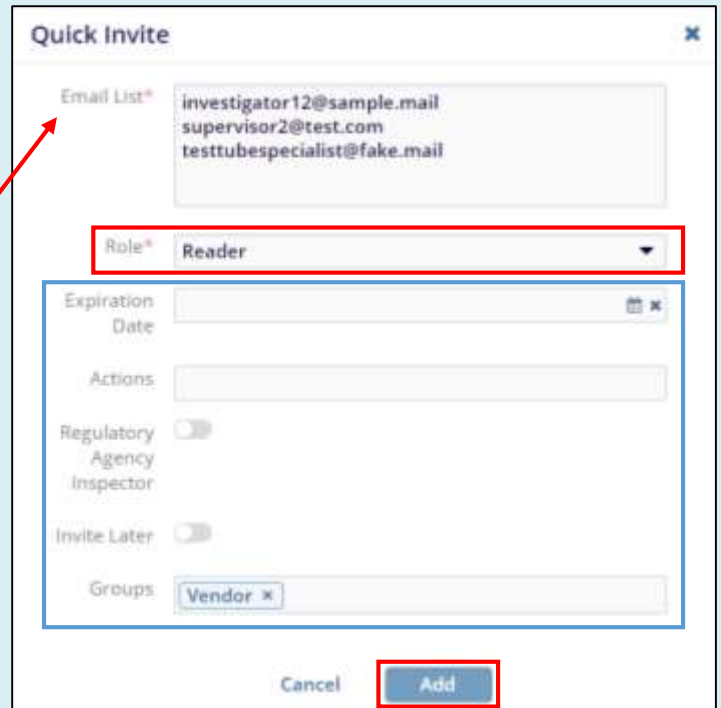Invitations can be delayed by checking **Invite later**.

4. Alternately, invite users via the **Quick** invitation method…

4b. Fewer fields are available via **Quick Invite**, but multiple users can be added this way.

5. Add users' email(s) in the **Email List** area. Separate each address using Enter on your keyboard.

6. Select a **Role**. Every invitee will get this attribute. Grant Actions and/or access to Groups for the users (optional), as well as any additional settings. When you're satisfied with your selection, click **Add**.

To send a previously delayed invitation, set the view to **By Status**, then open the **Pending** folder. Select a user, then choose **Send Invitation** from the **Invite** drop-down menu.