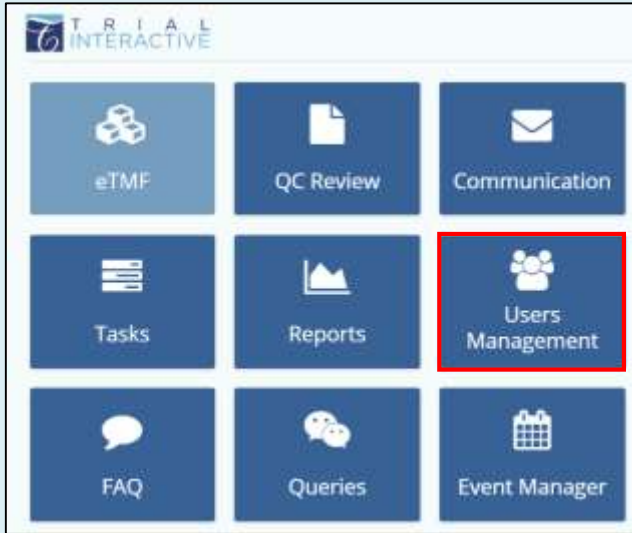


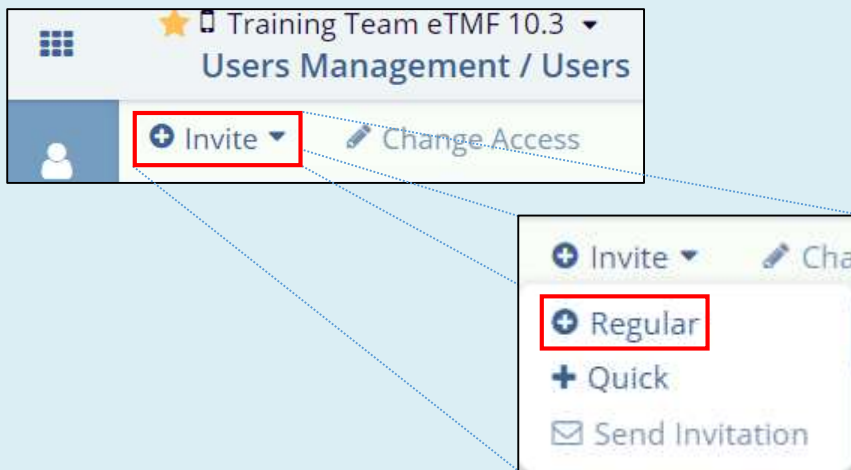
APPLICABLE TO:

- 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**.

The screenshot shows a 'User Invitation' dialog box with two tabs: 'User' and 'Group Membership'. The 'Group Membership' tab is active. Under 'User Details', there is an 'Email' field with a search icon, followed by 'First Name', 'Last Name', and 'Title' fields. Below these are 'Role' and 'Organization' dropdown menus. The 'Invitation Details' section includes an 'Expiration Date' field with a help icon and an 'Actions' field. At the bottom, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

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



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

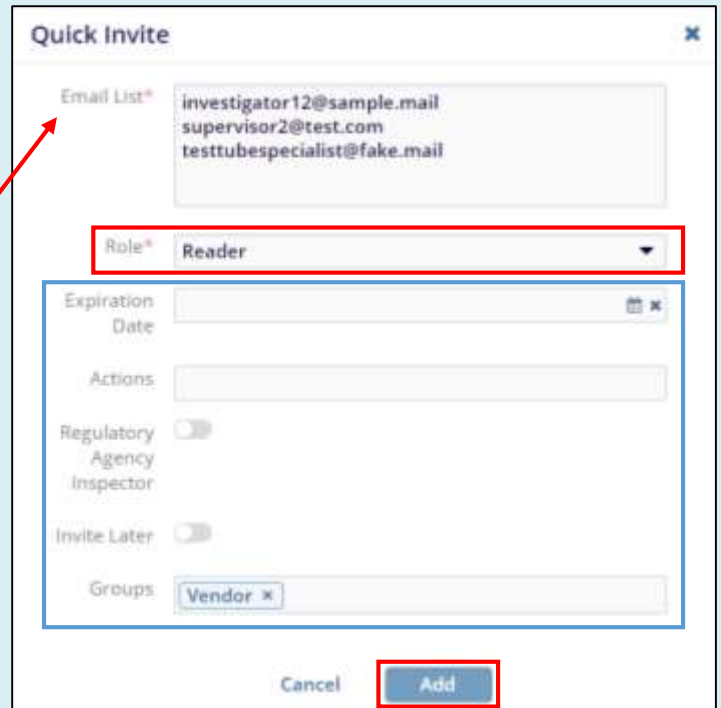
The image shows a toggle switch labeled 'Invite Later' with a green indicator that it is turned on.

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


The screenshot shows a dropdown menu with options: 'Invite', 'Regular', 'Quick', and 'Send Invitation'. The 'Quick' option is highlighted with a red box.

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.

