How to Manage Study Access Permissions
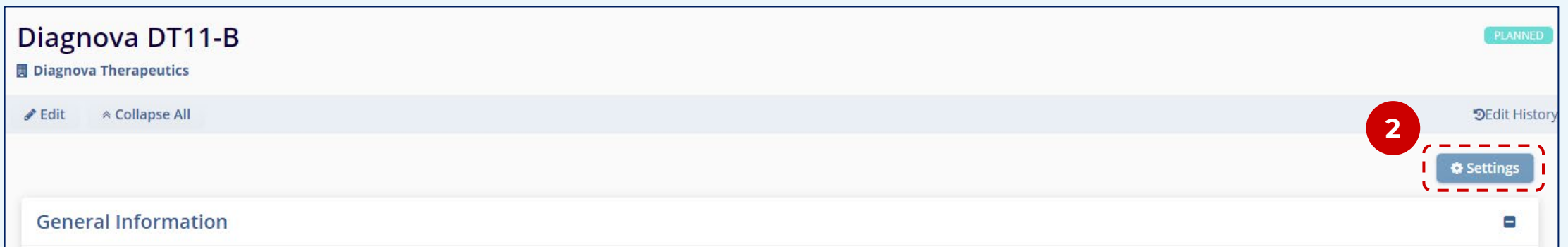
CTMS version 2.1
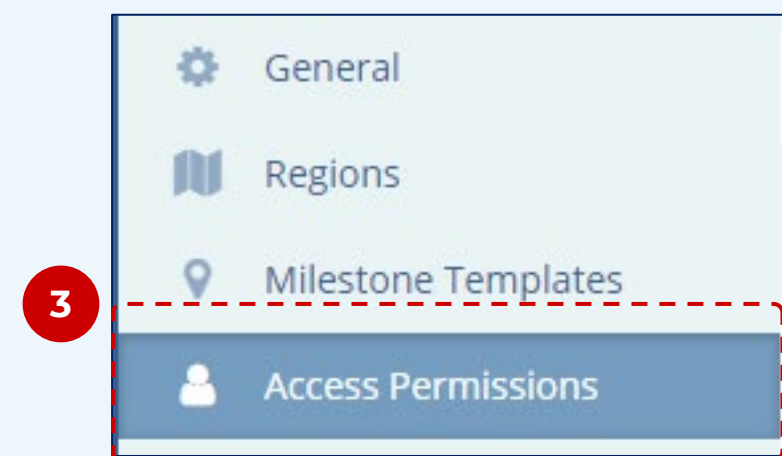
TRIAL INTERACTIVE

APPLICABLE TO:

- ● Company Admin
- ● Study Manager
- ○ CRA

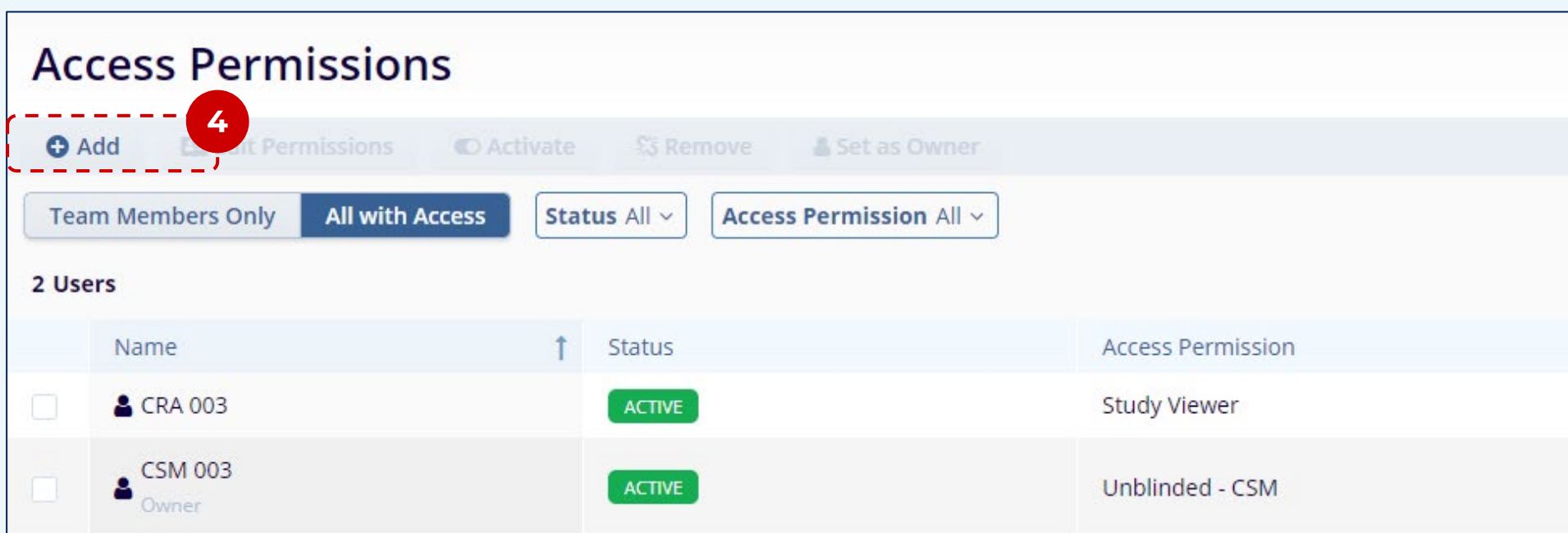**1** Navigate to the study whose team you wish you manage.

2 Select **Study Details** in the navigation links at the left side of the screen and press the **Settings** button at the top-right of the screen.

Diagnova DT11-B
PLANNED

🏢 Diagnova Therapeutics

✏ Edit   ⌃ Collapse All   ↻ Edit History

2   ⚙ Settings

General Information   −

3 Select **Access Permissions** from the menu at the left.

⚙ General

📖 Regions

📍 Milestone Templates

3   👤 Access Permissions

4 Press the **Add** button to add additional members to the permissions list.

Access Permissions

4   ⊕ Add   Default Permissions   ◑ Activate   ⟳ Remove   👤 Set as Owner

| Team Members Only | **All with Access** | Status All ⌄ | Access Permission All ⌄ |

2 Users

Name		Status	Access Permission
☐ 👤 CRA 003	↑	ACTIVE	Study Viewer
☐ 👤 CSM 003 Owner		ACTIVE	Unblinded - CSM

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> ⚠️ **Note**: You may add multiple users at the same time, but they will all have to share the same access rights. Repeat these steps for each individual level of access to be granted.

5 5. Search for the users to be invited by typing in the 'Users' field.

- All users who will play a part in the study should be added with a Study level of access indicating that they can view information but not edit study-level information unless they are to act as a study manager.

- If the study is blinded, you will need to reach out to the Trial Interactive Service Desk at help@trialinteractive.com to have an Unblinded CSM created so that that user can manage unblinded aspects of the study including designating unblinded CRAs.

Add Users to Study Team

5

List of Invited Users

Users **1 Users** *

CRA 001 ✕

Pending ⚪

Set permissions

| Simple | Advanced |

5

Role*

None ⌄

🔍

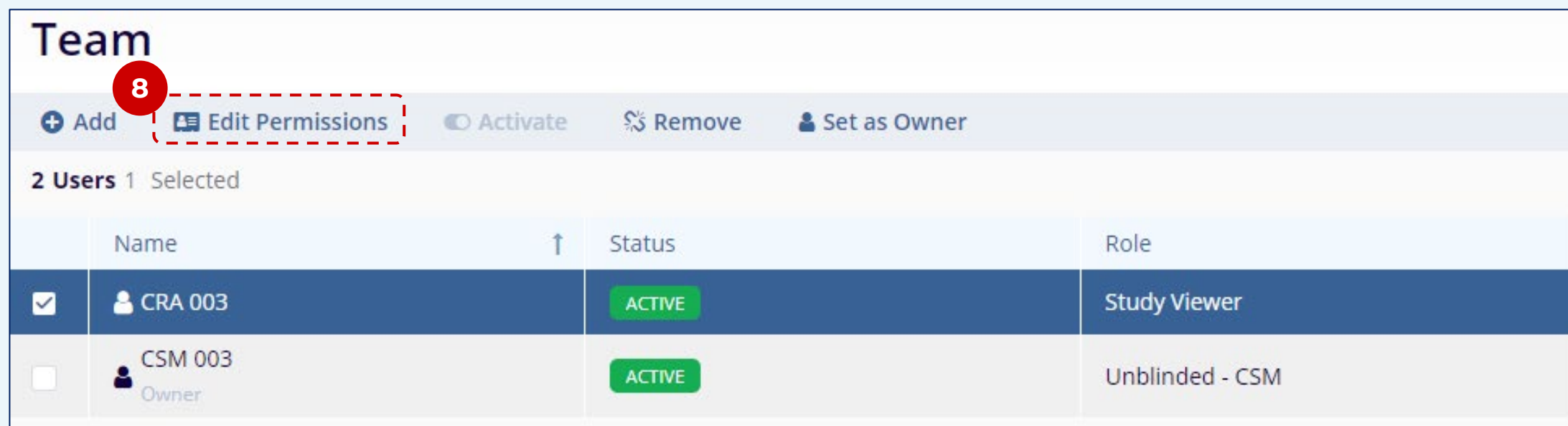| Clinical Research Associate (CRA) | ℹ️ |
Clinical Study Manager (CSM)	ℹ️
Clinical Study Manager test	ℹ️
Clinical Trial Associate (CTA)	ℹ️
Contract CRA	ℹ️
Country Manager (CM)	ℹ️

End Date

6

Cancel   **Add**

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6 Press **Add** to invite these users to the team for the role indicated.

Editing a User's Study Access Role

7 Choose the user from the list of those with access to the study.

8 Press the **Edit Permissions** button.

Team

8 | ⊕ Add | 📖 Edit Permissions | ⓘ Activate | ⚙ Remove | 👤 Set as Owner |

2 Users 1 Selected

	Name	↑	Status	Role
☑	👤 CRA 003		ACTIVE	Study Viewer
☐	👤 CSM 003 Owner		ACTIVE	Unblinded - CSM

9 Choose the **Advanced** option from the toggle switch.

10 By default, the user's role will populate from the top-down for each study-related level. Use the dropdown menu at each level to select a different role as required.

11 Press **Save.**

Edit Study Permissions

👤 CRA 003
✉ CRA003@ti.com

Set permissions **9**

| Simple | **Advanced** | ⦿ Show All ○ Show Assigned Permissions

🔍 Search

5 Items

10

	Levels	Role	End Date
☐	⌄ ⚗ Diagnova DT11-B 2	Study Viewer ⓘ ⌄	day month year 📅
☐	⌄ 🌐 United States 1	Study Viewer ⓘ ⌄ ⇵	
☐	📋 002 Test	Study Viewer ⓘ ⌄ ⇵	
		🔍	
		Clinical Study Manager test ⓘ	
☐	⟩ 🌐 Other 1	Clinical Trial Associate (CTA) ⓘ	
		Contract CRA ⓘ	
		Country Manager (CM) ⓘ	
		CRA Manager ⓘ	
		Study Viewer ⓘ	

11 Cancel Save