

# How to Manage Study Access Permissions

CTMS version 3.0



- APPLICABLE TO:
- ☒

 Company Admin
- ☒

 Study Manager
- ☐

 CRA

- 1

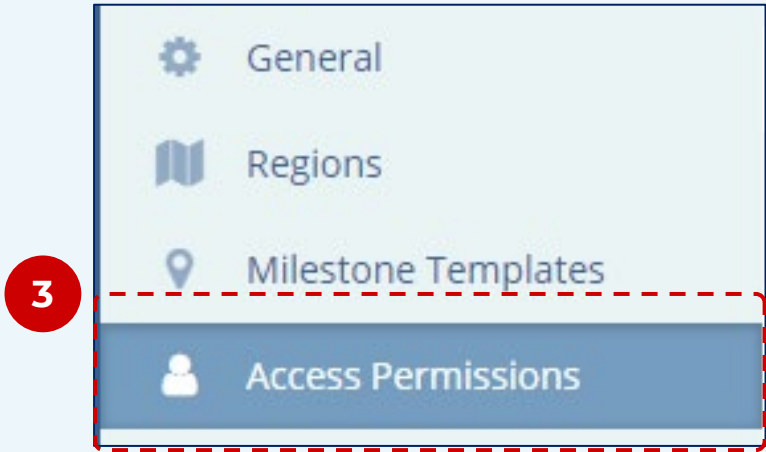
Navigate to the study whose access rights you wish you manage.
- 2

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.



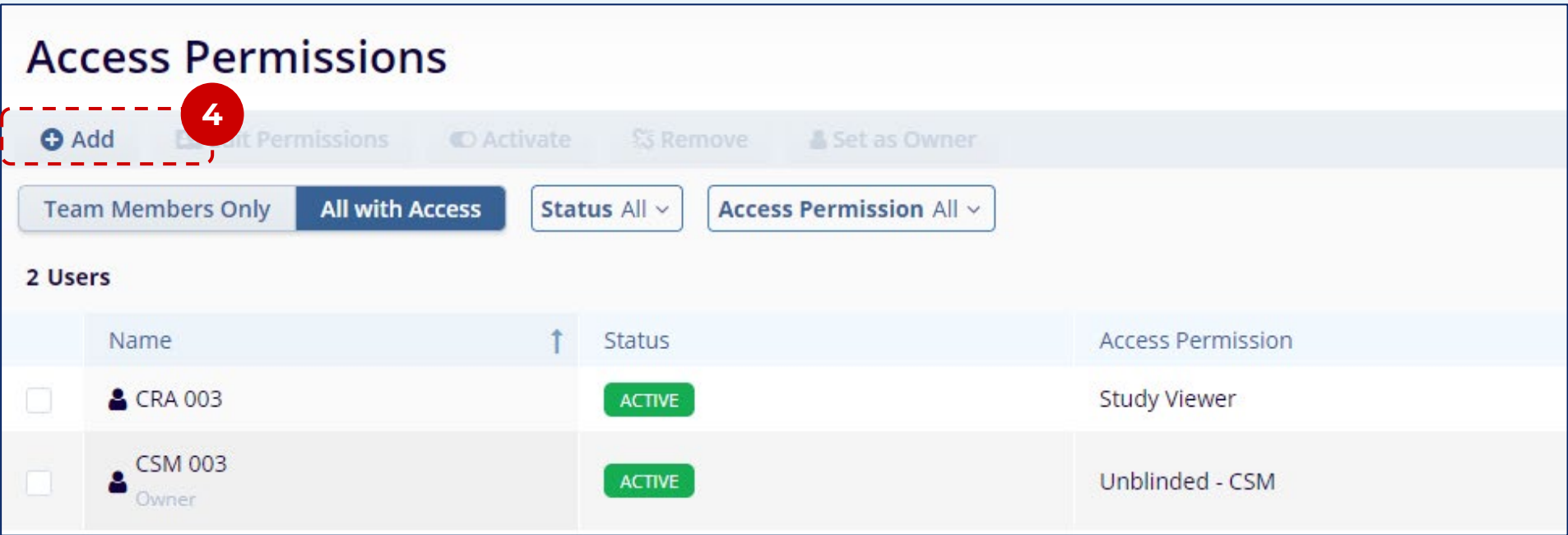
- 3

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



- 4

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



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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. 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, 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](mailto:help@trialinteractive.com) to have an Unblinded CSM created so that that user can manage unblinded aspects of the study including designating

Add User Study Access Permission

5

List of Invited Users

Users 1 User\*

CSM 2 x

Pending ☐

Set permissions

Simple Advanced

5

Access Permission \*

None

End Date

6

Cancel Add

## 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
<input checked="" type="checkbox"/>	<div>CRA 003</div>	ACTIVE	Study Viewer
<input type="checkbox"/>	<div>CSM 003</div> <div>Owner</div>	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

Simple

Advanced

Show All

Show Assigned Permissions

Search

5 Items

Levels	Role	End Date
<div>Diagnova DT11-B 2</div>	<div>Study Viewer</div>	<div>day month year</div>
<div>United States 1</div>	<div>Study Viewer</div>	
<div>002 Test</div>	<div>Study Viewer</div>	
<div>Other 1</div>		

Cancel

Save