

How to Manage Study Access Permissions

CTMS version 3.1



- APPLICABLE TO:
- ☒

 Company Admin
- ☒

 Study Manager
- ☐

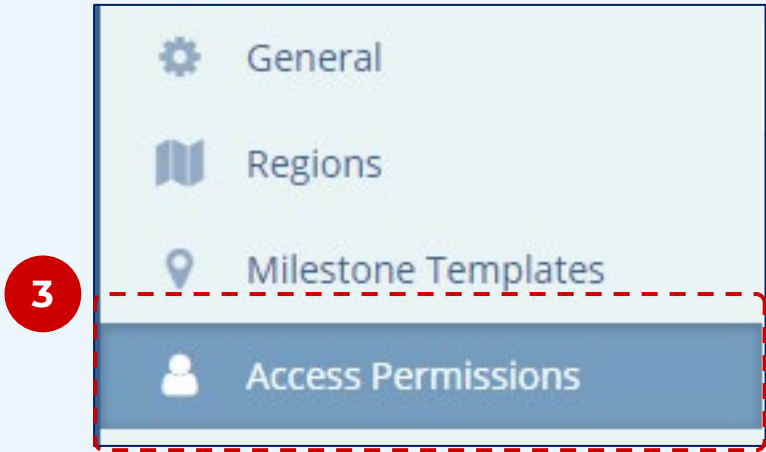
 CRA

1 Navigate to the study whose access rights you wish you manage.

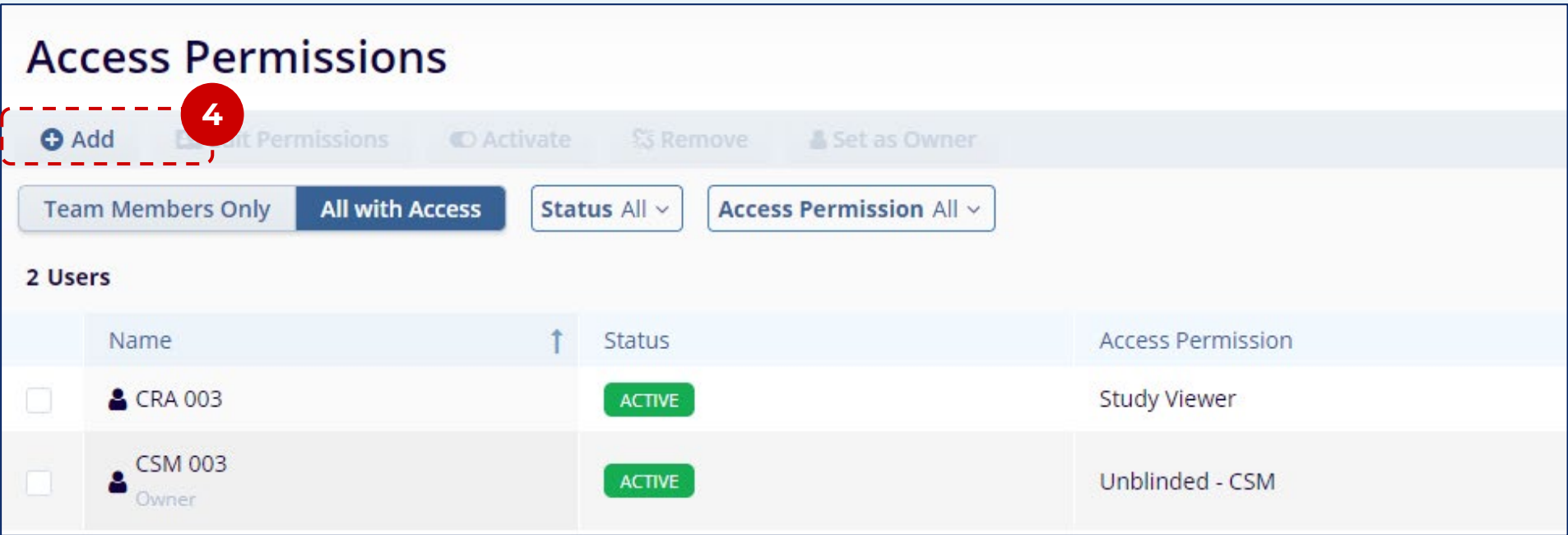
2 Select **Study Details** in the navigation links at the left side of the screen and press the **Settings** button at the top-right of the screen.



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 to have an Unblinded CSM created so that that user can manage unblinded aspects of the study including designating unblinded CRAs.

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

Note: The list of Access Permissions available contains permissions applicable to the Study, Country, and Site levels. These permissions must be applied at the appropriate level (see step 10). For example, a site-level permission such as “Site and Visit Editor” will not allow a CRA user to see the study. For that, they must be granted “Reader” access at the study level and “Site and Visit Editor” access at the appropriate site.

Generally speaking, all users involved in the study below the level of “Study Manager” should be granted “Reader” access at the study level and then awarded additional access rights as necessary to perform their assigned tasks.

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"/>	 CRA 003	ACTIVE	Study Viewer
<input type="checkbox"/>	 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

Simple

Advanced

Show All

Show Assigned Permissions

5 Items

Levels

☐

Diagnova DT11-B 2

☐

United States 1

☐

002 Test

☐

Other 1

Role

Study Viewer

Study Viewer

Study Viewer

Search

Clinical Study Manager test

Clinical Trial Associate (CTA)

Contract CRA

Country Manager (CM)

CRA Manager

Study Viewer

End Date

day month year

Cancel

Save