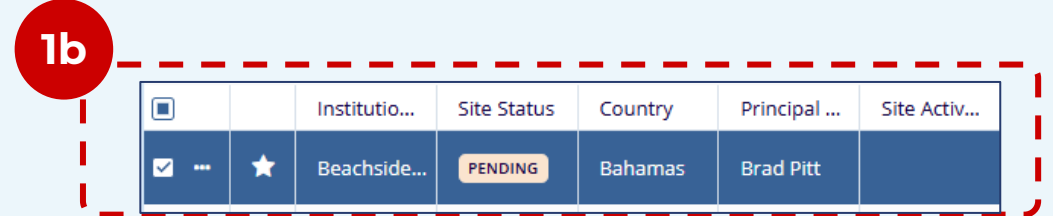
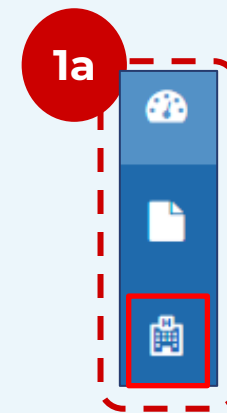


APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- eISF
- eTMF

It may sometimes be necessary, due to role changes or other circumstances, to extend view or edit permission to people listed in a room as Contacts. To achieve this, it is possible to convert any contact into a Reader or Editor user so that they may access the eISF/eTMF directly.

- 1** Log into the study and navigate to the Sites module. Select a Site.



- 2** In the Site pane located at the bottom of the browser window, switch to the Contacts dashlet.

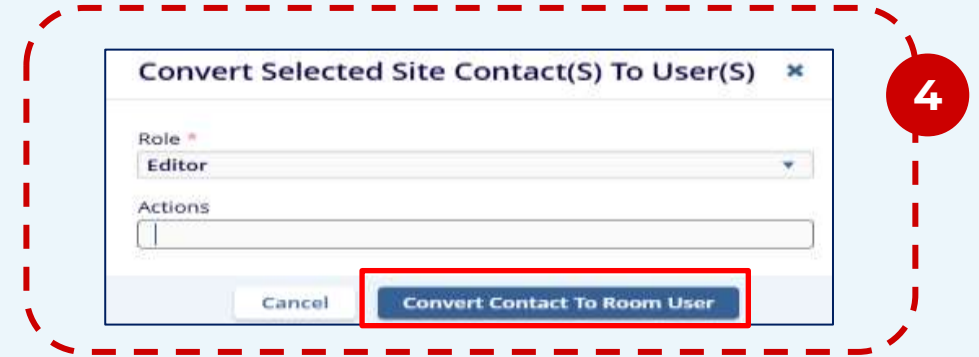


- 3** Select the contact(s) you want to convert into users, then click **Convert to User**.

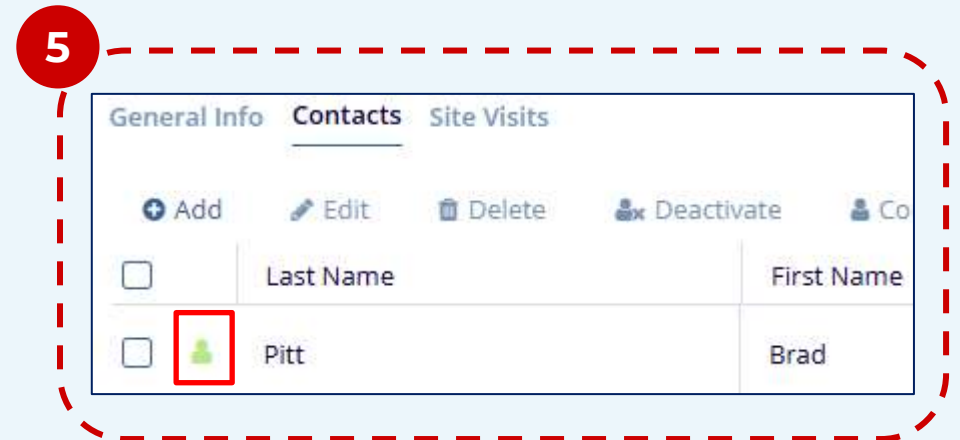



- 4 A dialog screen pops up. Assign the intended role to the user(s). Leave **Actions** blank if you intend to make the contact a Site user.

*Use Reader for read-only access, Editor for documents upload and collaboration.



- 5 Clicking on **Convert Contact to Room User** concludes the process. The contact is now listed as a user.



 This process does not make the new user a site-specific user, nor does it restrict their access to a specific site.
For assigning specific Site Roles to Users, see the related Job Aid.