How to Assign the Document Manager Ability

TI version 10.8

TRIAL INTERACTIVE

APPLICABLE TO:

- ● Admin
- ○ Manager
- ○ Editor
- ○ Reader

- ● eTMF
- ○ Collaborate

⚠️ Note: The role of *Document Manager* can only be assigned to Editors and Managers. This role allows a user to delete or reject documents, as well as edit a final document's metadata and folder location. It should be assigned sparingly and with all due caution.
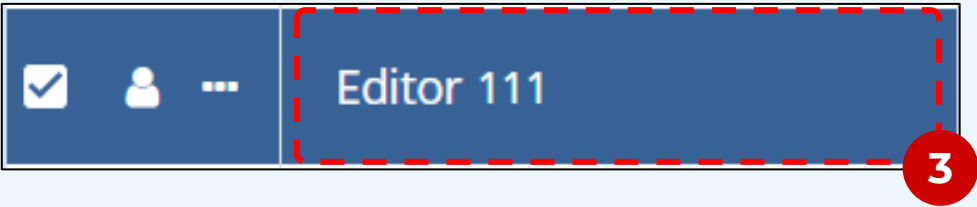
1 Navigate to the **Users Management** area via the Navigation Grid.
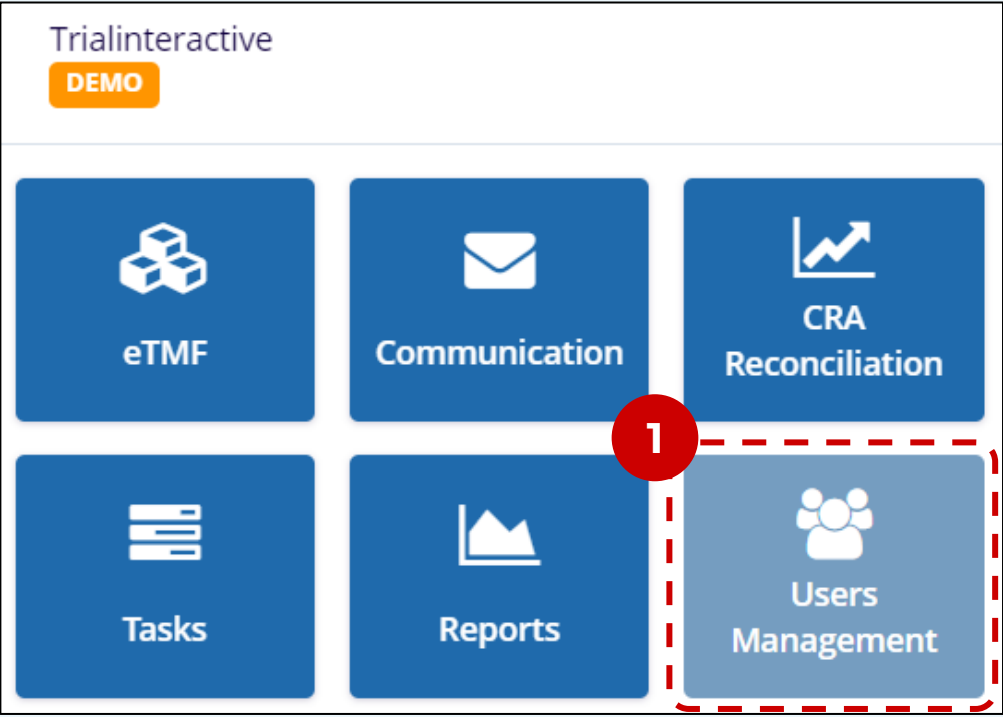
2 Access the **Users** module.

3 **Double-click** on a user to open their profile.

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4 Under <u>Actions</u>, locate and select **Document Manager.**

Actions

Document Manager ⊗

☐ Select All User Actions

4 ☑ Document Manager

☐ CRA Reconciliation

5 **Save** your changes.

5

Cancel   **Save**