How to Convert Contacts to Users

TI version 10.8

TRIAL INTERACTIVE

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.

1a

1b

			Institutio...	Site Status	Country	Principal ...	Site Activ...
☑	···	★	Beachside...	PENDING	Bahamas	Brad Pitt	

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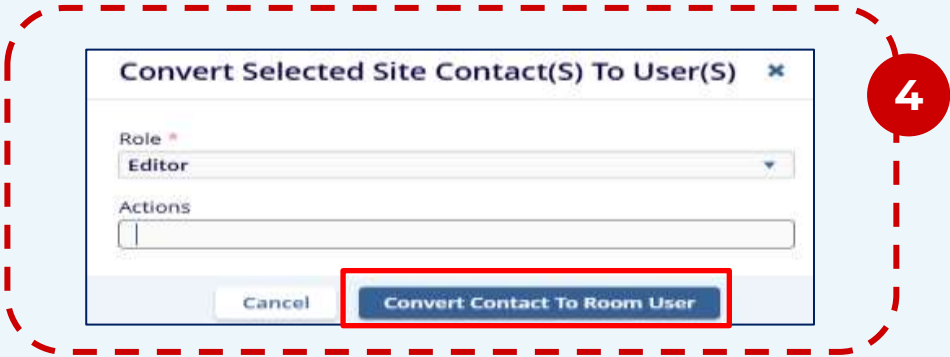
2

	···	★	Hogwarts ...	PENDING	United Ki...	Albus Du...

General Info **Contacts** Site Visits

⊕ Add   ✏ Edit   🗑 Delete   👤× Deactivate   👤 Convert to User

		Last Name	First Name
☐	👤	Pitt	Brad

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

3

⊕ Add   ✏ Edit   🗑 Delete   👤× Deactivate   👤 Convert to User

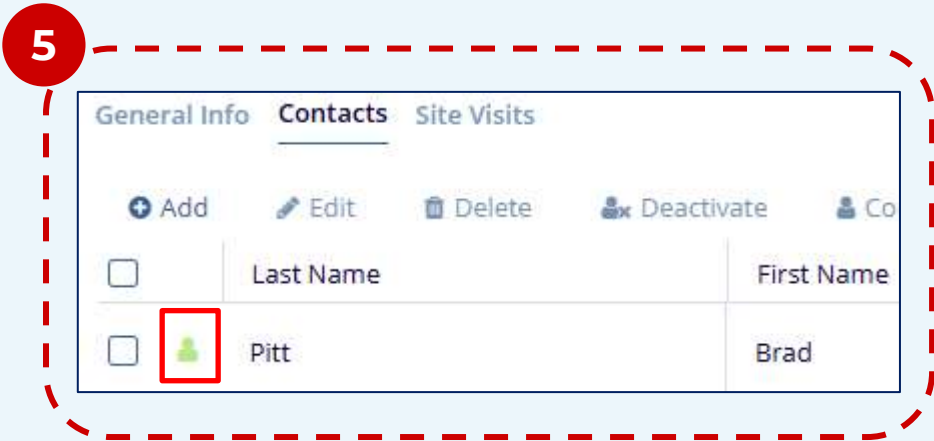|		Last Name	First Name	Email
☑	👤	Pitt	Brad	BradPitt@fakeemail

TRANSPERFECT
LIFE SCIENCES

TRIAL INTERACTIVE

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.

Convert Selected Site Contact(S) To User(S)

Role *
Editor

Actions

Cancel   **Convert Contact To Room User**

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

General Info   Contacts   Site Visits

⊕ Add   ✏ Edit   🗑 Delete   👤× Deactivate   👤 Co

	Last Name	First Name
	Pitt	Brad

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.