How to Invite Room Users

TI version 10.8

TRIAL INTERACTIVE

APPLICABLE TO:
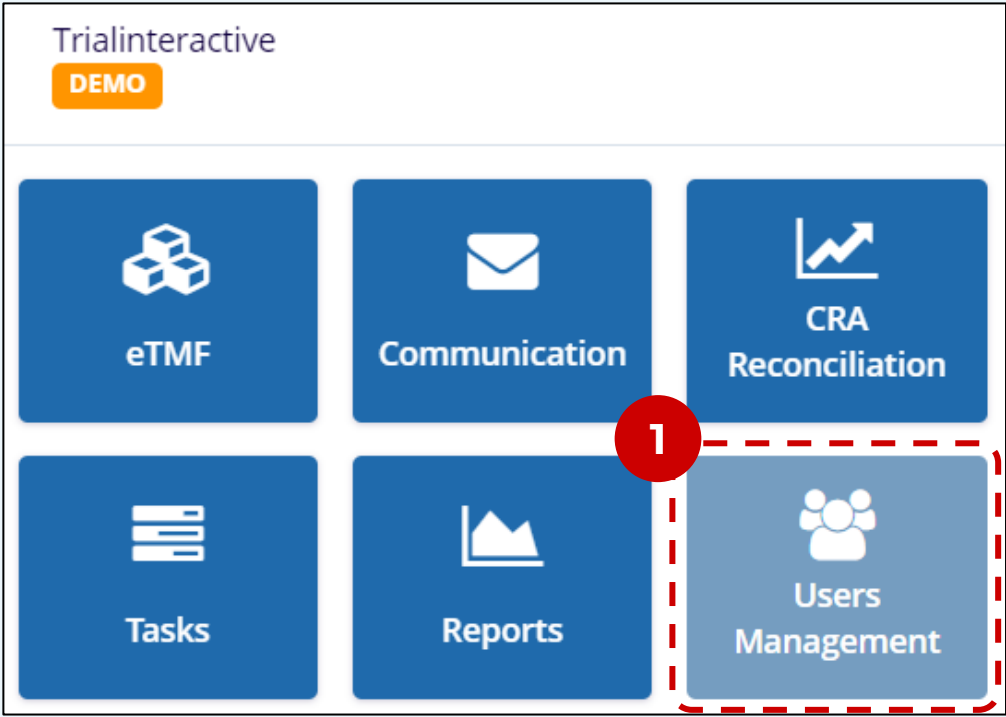
- ● Admin
- ○ Manager
- ○ Editor
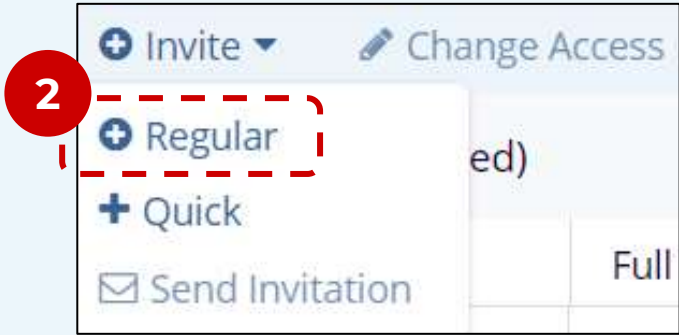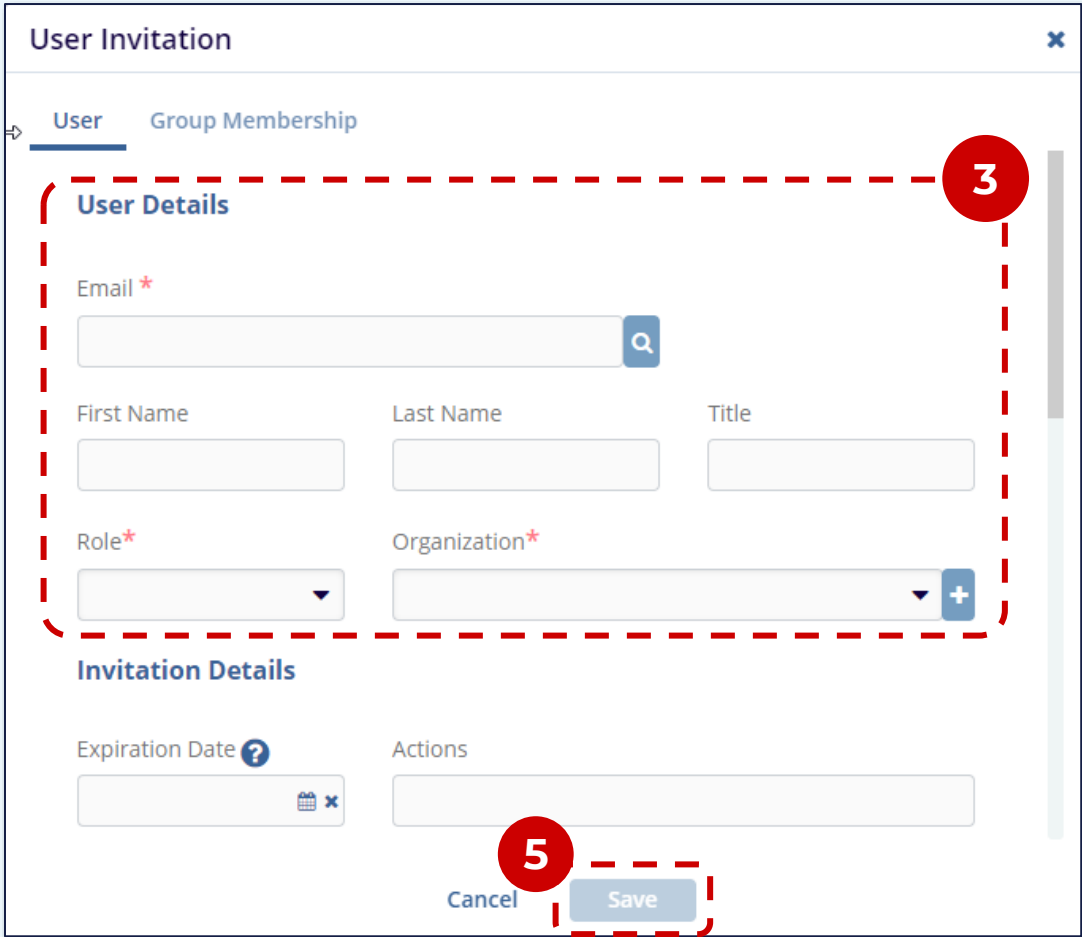- ○ Reader

- ● eTMF
- ● Collaborate

1 Enter the room and navigate to the **Users Management** panel via the Navigation Grid.
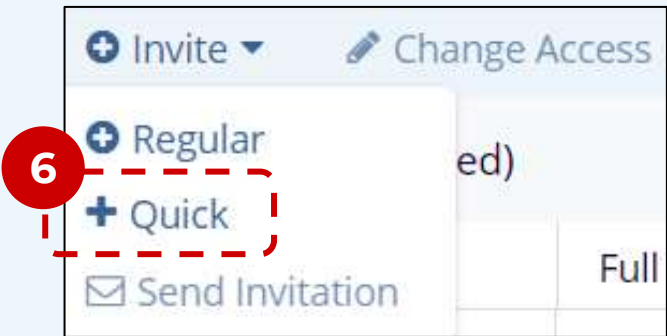
2 Expand the **Invite** tray and select **Regular**.

3 Complete the *user profile fields*.

4 Consider optional changes such as Group Membership, Invite Later, Actions, etc.

5 Click **Save** when ready.

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6 If you wish to add multiple users (of the same role) at once, choose the **Quick** invite option.

6
- **Invite** ▾   ✏ Change Access
- ➕ Regular   ed)
- **＋ Quick**
- ✉ Send Invitation   Full
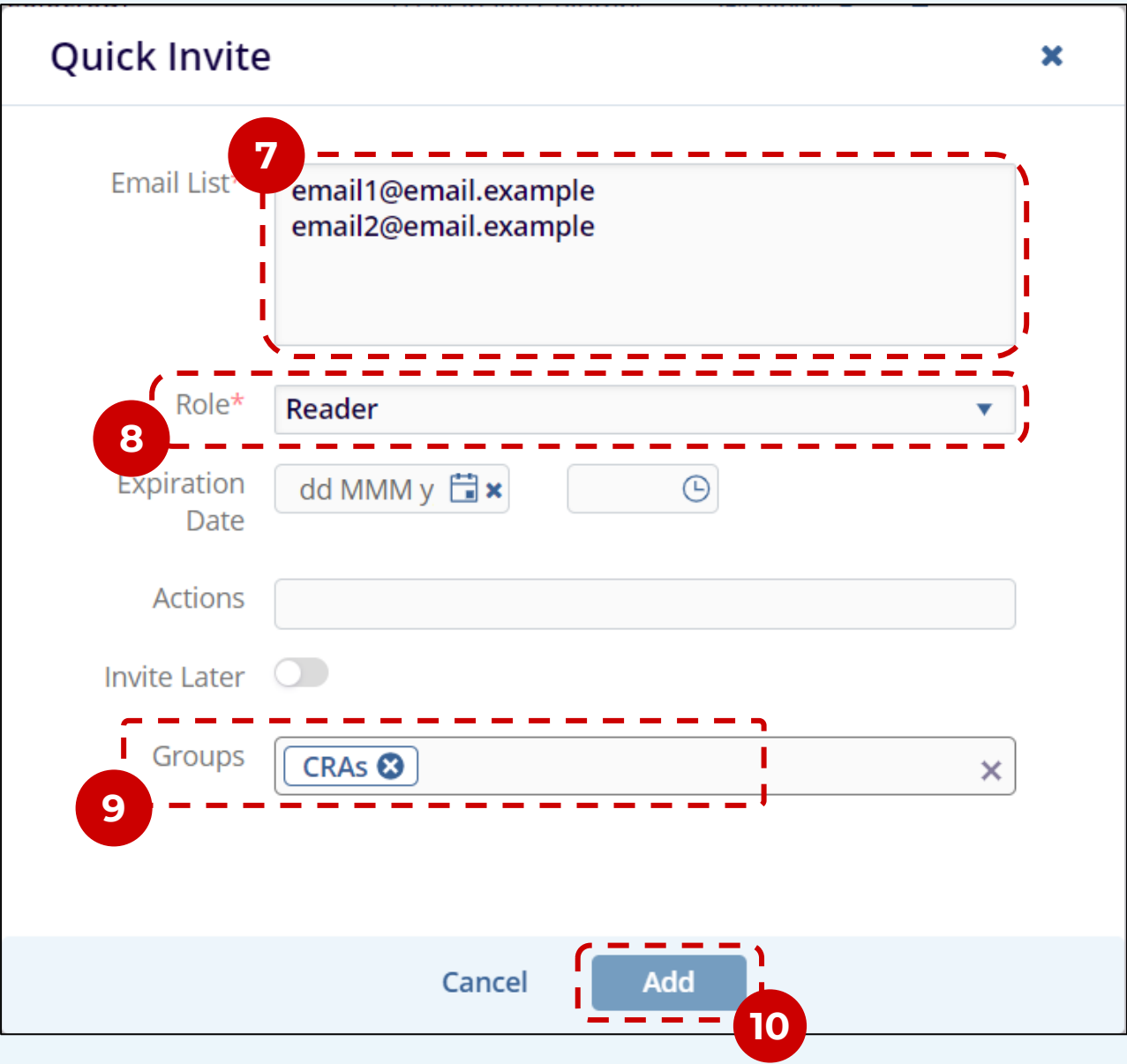
7 List the **email address** for each user.

Quick Invite   ✖

Email List**7**
email1@email.example
email2@email.example

8 Select the assigned **role**.

Role*   Reader   ▼ **8**

Expiration Date   dd MMM y 📅✖   🕐

Actions

Invite Later   ⬤

9 Add any group affiliation, or other optional characteristics.

Groups   CRAs ✖   ✕
9

10 Click **Add** to confirm invites.

Cancel   **Add**   **10**