

- APPLICABLE TO:
- Admin

Manager

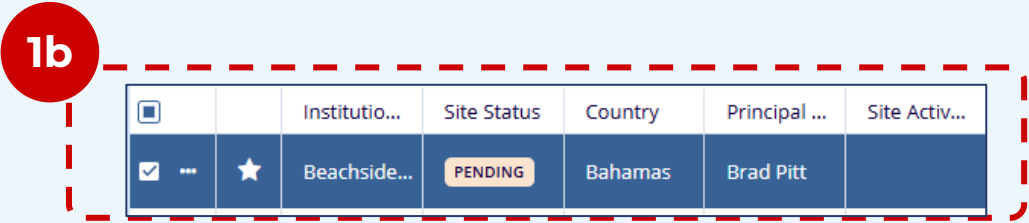
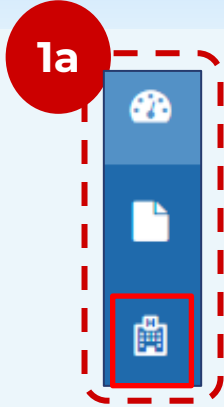
Editor

Reader

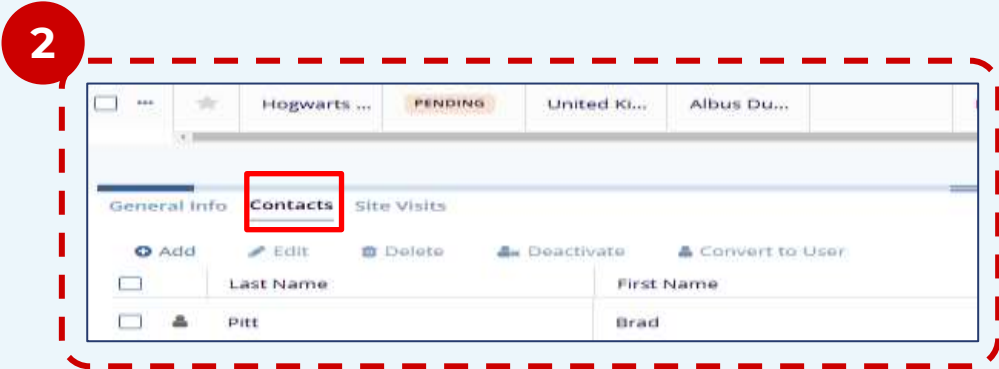
Collaborate

eTMF

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



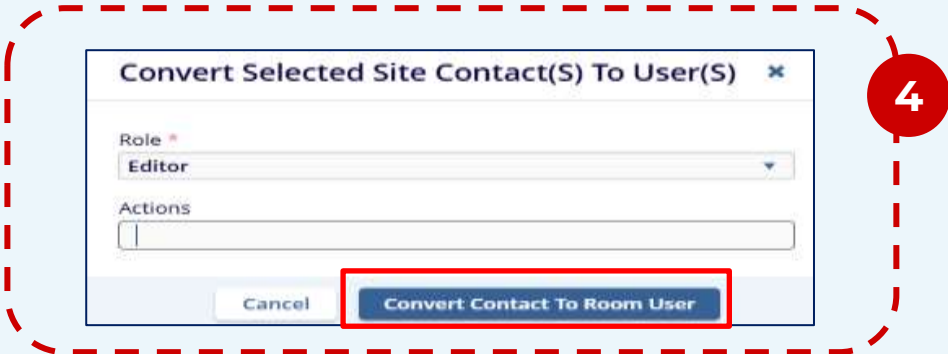
2 In the Site pane located at the bottom of the browser window, switch to the Contacts dashlet.



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



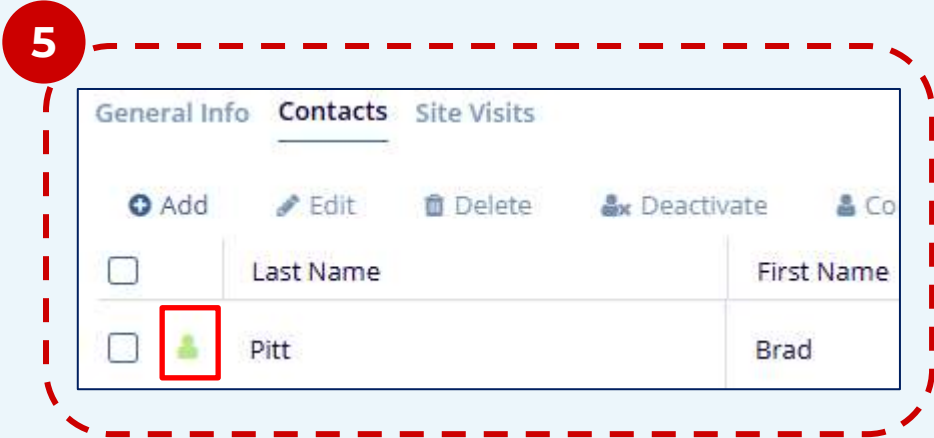
4 A dialog screen pops up. Assign the intended role to the user(s). Leave **Actions** blank if you intend to make the contact a Site user.



*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.