How to Invite Site Users

TI version 10.7

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APPLICABLE TO:

● Admin
○ Manager
○ Editor
○ Reader

● eISF
○ Collaborate

Site users have access to the eISF only in the areas of their direct competence. The correct assignment of personnel to Sites is crucial to maintain information security and confidentiality. Note: Because Administrators cannot be restricted, they never should be invited as Site users.
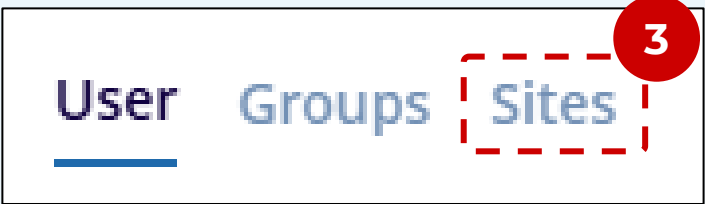
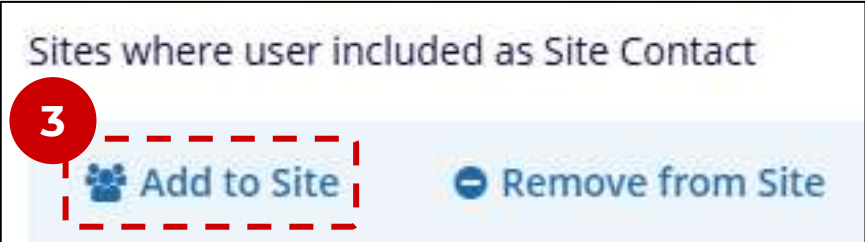**1** Enter the room and navigate to the **Users Management** panel via the Navigation Grid.
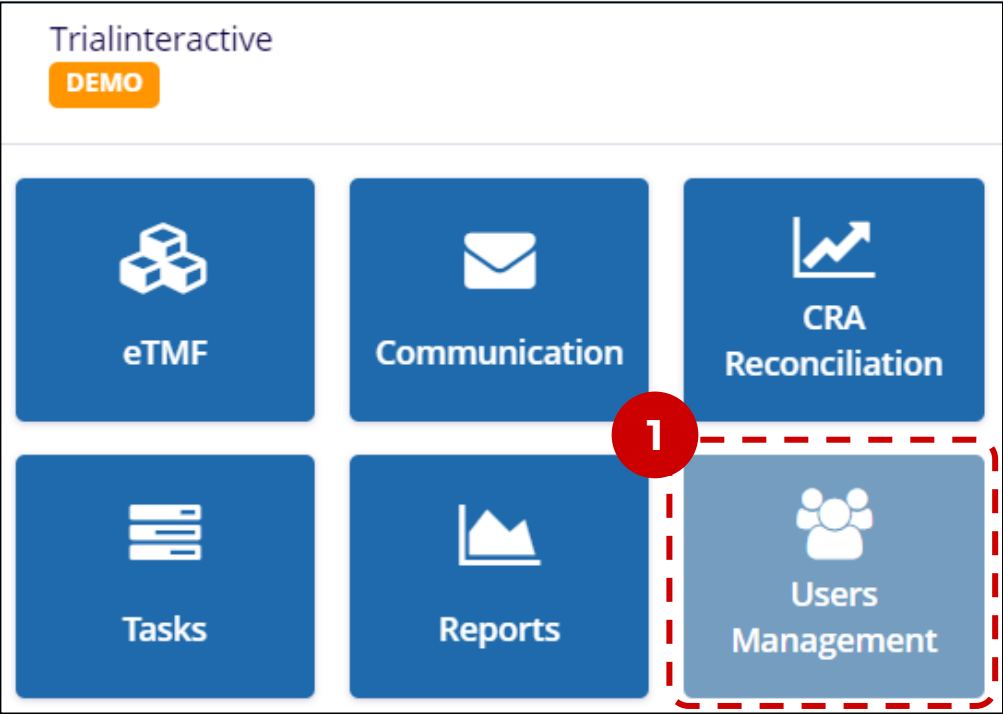
2 Expand the **Invite** tray and select **Regular**.
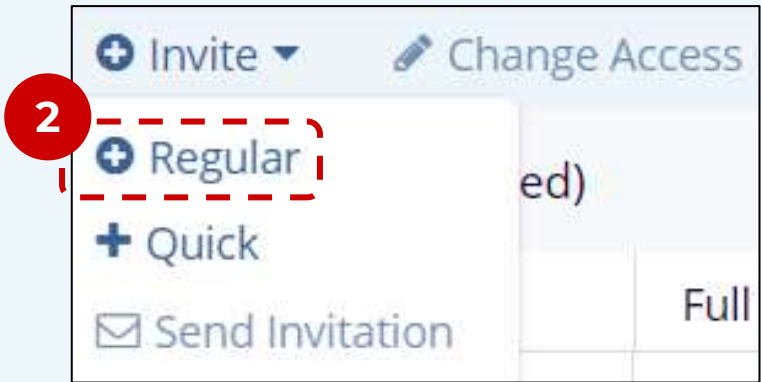
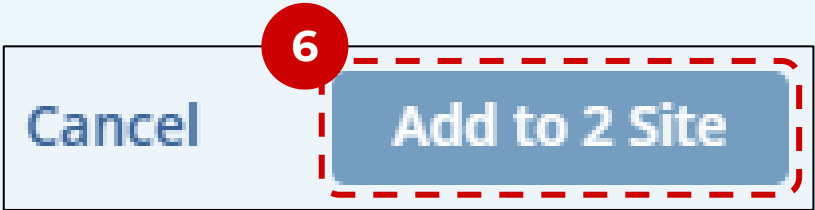**3** Complete the basic User details, then switch to the **Sites** tab.

4 Click on **Add to Site**.

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5 **Select** as many Sites as appropriate for the user.

Site
- ☑ 🏛 000-Test Site
- ☑ 🏛 001-Merkel Institute
- ☐ 🏛 002-Sellers Central H
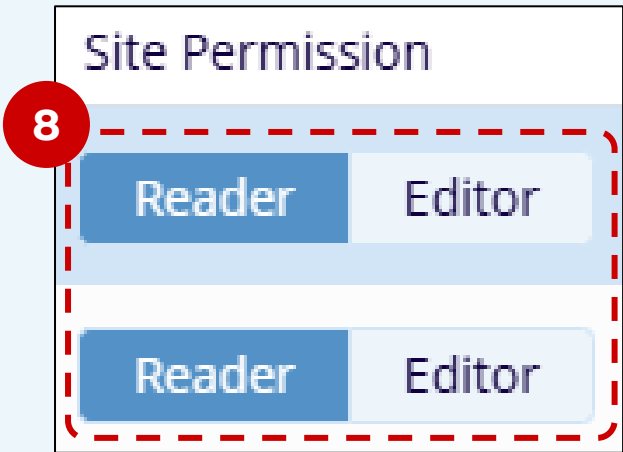
**6** Click on **Add to *n* Site(s)**.

Cancel   **Add to 2 Site**

7 For each Site, select the **role** ('Contact Type') that the user will cover.
Different roles at different sites <u>can</u> be selected.

Contact Type

Sub-Investigator
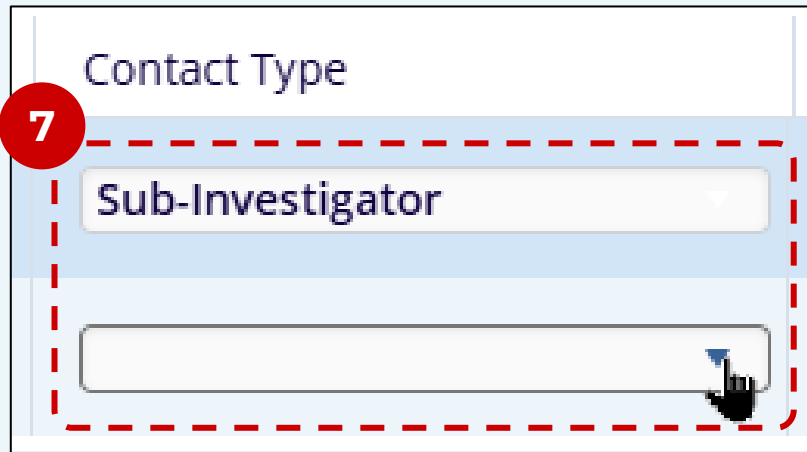
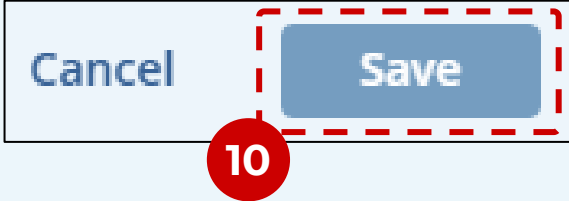**8** For each Site, **select** the level of access the user will have:
read only –'Reader'; or full access –'Editor'.

Site Permission

| Reader | Editor |

| Reader | Editor |

9 eISF can contain Restricted Folders at each site, to host sensitive documents. Use the **checkboxes** to give the user access to such folders at any of the selected Site.

Access To Restricted Documents

- ☐
- ☑
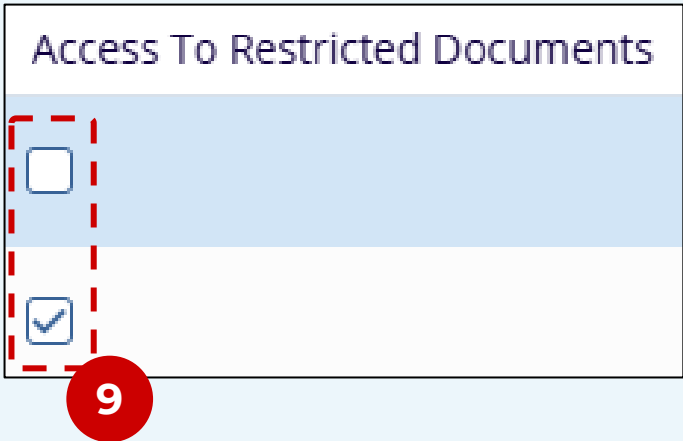
10 Review your preferences, then click **Save**.

Cancel | Save

10

11 Users will receive an **email** inviting them to access the eISF room.

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Welcome ▓▓▓▓ ▓▓▓▓ to Study ABC-123 eISF. You have been granted access to this room as a user.

In order to use the room you will need the following:

- Supporting Browser (Google Chrome, Mozilla Firefox, Microsoft Internet Explorer, Edge, Safari)
- Adobe 8.0 and above
- Software for any additional file types hosted

Follow the link below to visit the room.
Room Link