

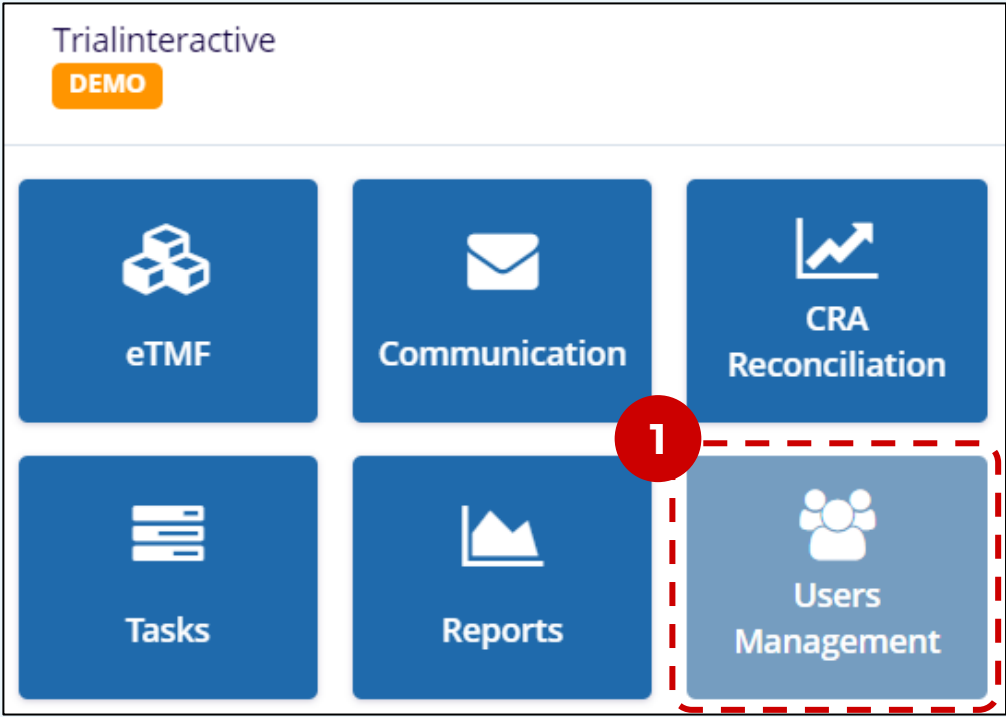
How to Invite Room Users

TI version 10.8

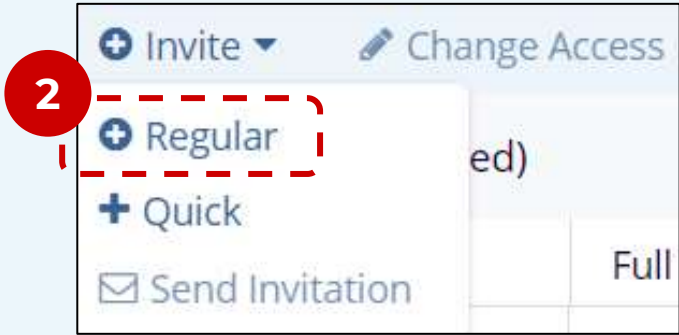
APPLICABLE TO:

- ☒ 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**.



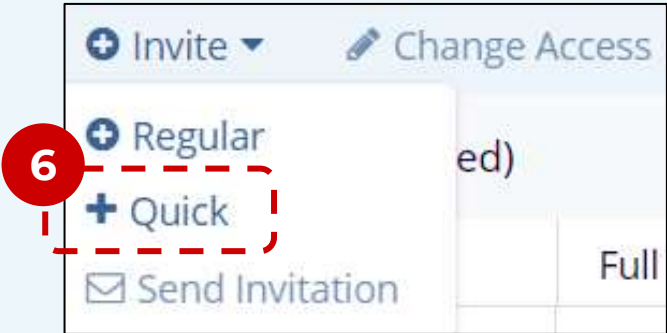
3 Complete the *user profile fields*.

A screenshot of the 'User Invitation' form. The form has two tabs: 'User' (selected) and 'Group Membership'. The 'User Details' section is highlighted with a red dashed rectangular border and a red circle with the number '3' is placed over its top right corner. The 'User Details' section includes fields for 'Email' (with a search icon), 'First Name', 'Last Name', 'Title', 'Role' (with a dropdown arrow), and 'Organization' (with a dropdown arrow and a plus icon). Below this is the 'Invitation Details' section, which includes 'Expiration Date' (with a question mark icon) and 'Actions'. At the bottom right, there are 'Cancel' and 'Save' buttons. A red circle with the number '5' is placed over the 'Save' button.

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

5 Click **Save** when ready.

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

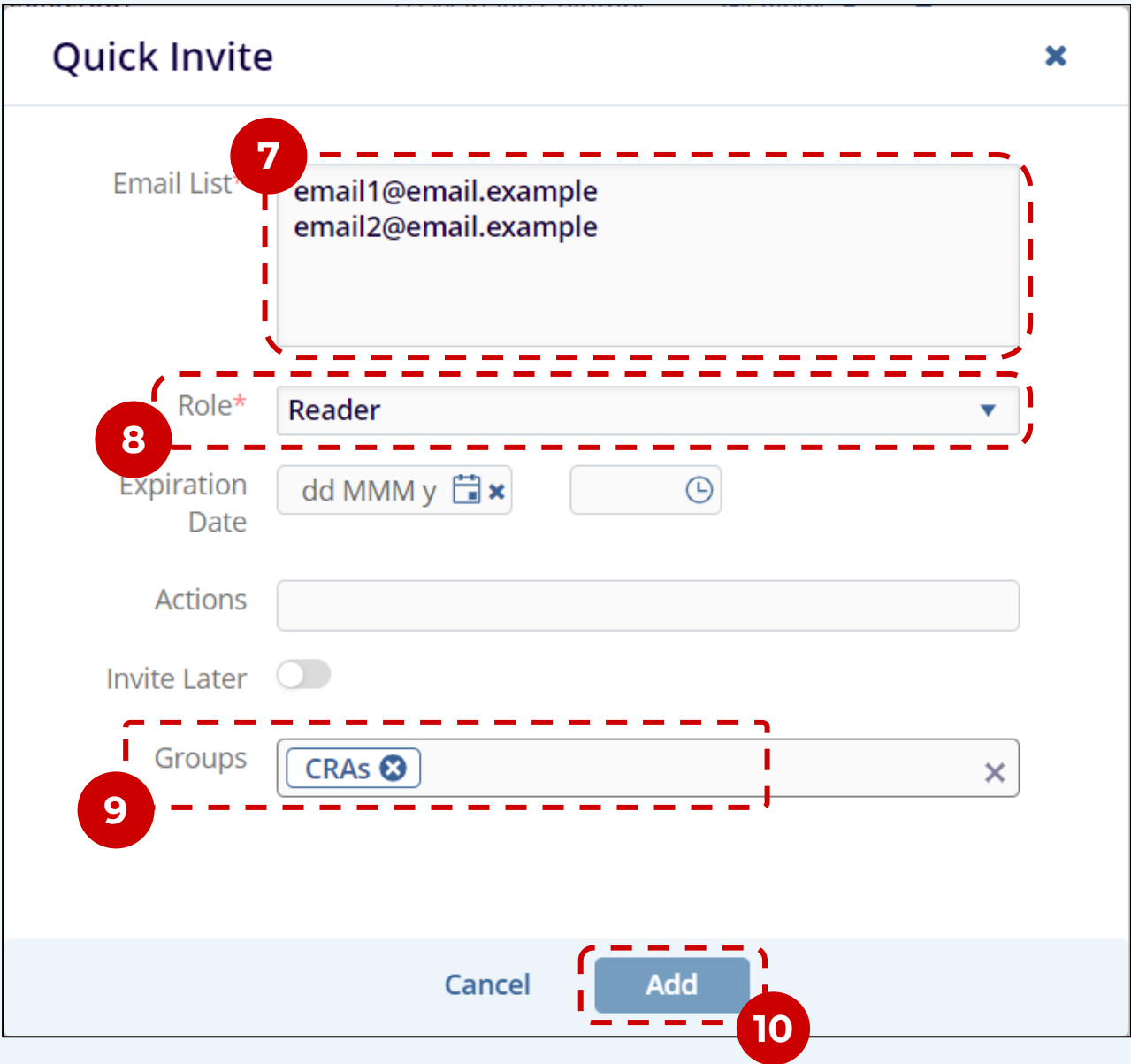


7 List the **email address** for each user.

8 Select the assigned **role**.

9 Add any group affiliation, or other optional characteristics.

10 Click **Add** to confirm invites.



The 'Quick Invite' dialog box contains the following elements:

- Email List:** A text area containing 'email1@email.example' and 'email2@email.example', highlighted with a red dashed box and a red circle with the number 7.
- Role:** A dropdown menu set to 'Reader', highlighted with a red dashed box and a red circle with the number 8.
- Expiration Date:** A date picker set to 'dd MMM y'.
- Actions:** An empty text input field.
- Invite Later:** A toggle switch.
- Groups:** A text input field containing 'CRAs', highlighted with a red dashed box and a red circle with the number 9.
- Buttons:** 'Cancel' and 'Add' buttons at the bottom, with the 'Add' button highlighted by a red dashed box and a red circle with the number 10.