

## 5.2.3 Inviting Users

### To Invite a User:

1. Click the **Share** button under the Study Card of your study on the **My Studies** screen or in the header of the **Settings** screen or **Study Designer**.
2. Select your study environment (**Test** or **Production**).
3. Under the **People** header, on the right, click the **Invite** button.
4. Begin typing, and click **Invite a new user**, or select an existing user from the drop-down list.
  1. If you select **Invite a new user**, the **Add User** screen appears, and you can enter values for each field. Then click the **Create User** button.

## Add User

Username \*

First Name \*

Last Name \*

Phone \*

E-mail \*

Organization \*

User Type \*

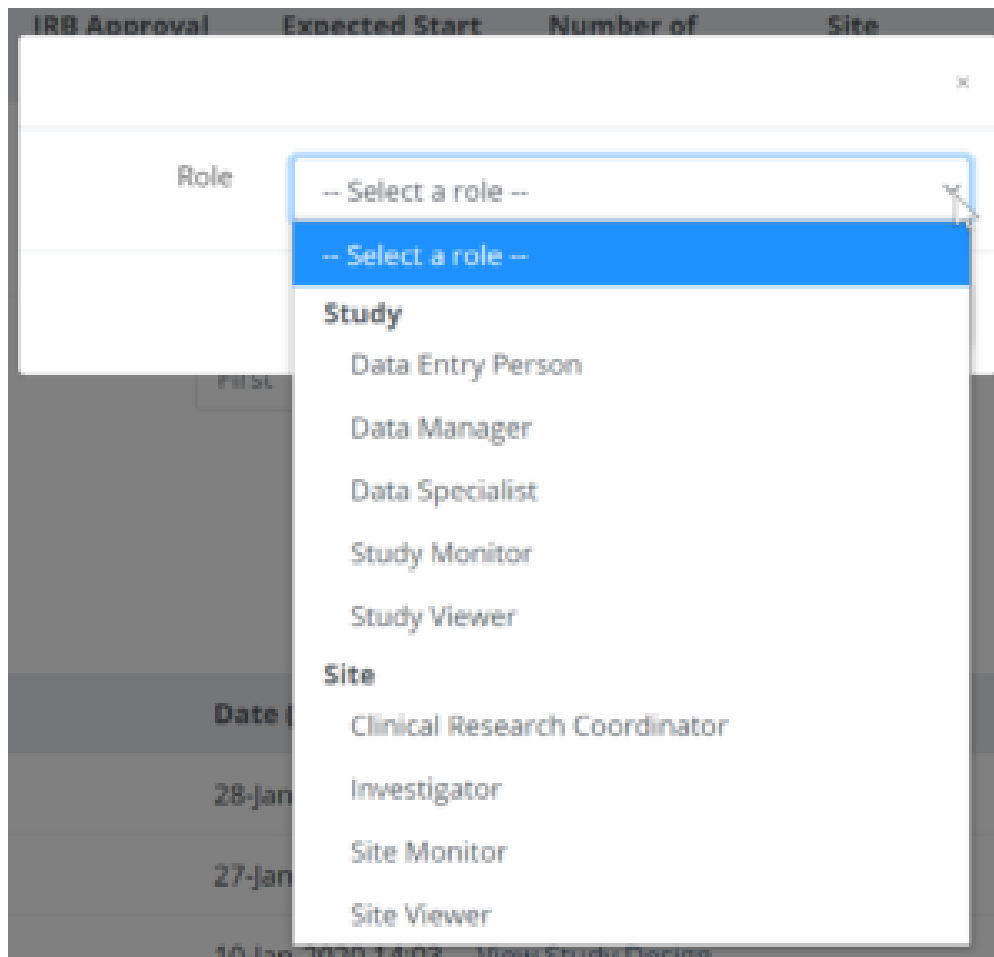
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Create User

2. If you select an existing user from the drop-down list, the system sends a new email invitation.

**Note:** The username and email of each user in the system must be unique.

4. When prompted, select a role for the user from the list of available roles:



**Note:** To provide access to another site, for example for a Monitor who is responsible for monitoring two sites, click in the **Site** box again and select additional site(s) as needed.

5. When finished granting the appropriate access, click **Invite**. An email is sent to the user, and they are listed in the **People** table on the **Share** screen.

### **Before a User can Access a Study, They Must Create a Password that Meets the Following Criteria:**

- Must be at least **8** characters in length
- Must contain at least one of each of the following types of characters:
  - Lower case letters (**a-z**)
  - Upper case letters (**A-Z**)
  - Numbers (**0-9**)
  - Special characters (**!@#\$%^&\***)

Approved for publication by Kerry Tamm. Signed on 2021-01-19 11:33AM

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