

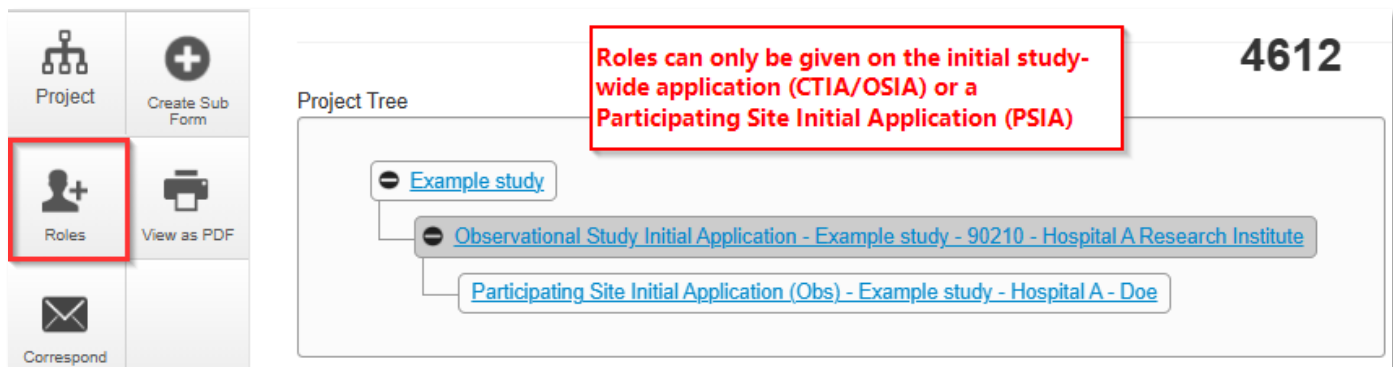
QuickGuide: Giving Project Access with Roles

A user who creates a new study in CTO Stream becomes the ‘Project Owner’ and initially is the only user who can access the newly created study in CTO Stream. Therefore, it is the Project Owners responsibility to provide other members of the lead study team, sponsors and/or CROs access to the study by giving them a role. Roles can be assigned by the Project Owner or anyone who else on the project who previously has been given a Role. **Note: Individuals must have a CTO Stream account to be given a role on the study.**

Each Role comes with a pre-set level of permissions. The specific access granted for each role can be found in the [Collaboration – Roles and Sharing](#) user manual on the CTO website.

How to give a Collaborator Role:

1. Login to CTO Stream and open the study from the Projects list in your Work Area.
2. If you want to give a someone a study-wide role, select the Clinical Trial Initial Application (CTIA) or the Observational Study Initial Application (OSIA) in the project tree and click on the ‘Roles’ button. If you want to give someone a site-level role, you must have the the site’s Participating Site Initial Application (PSIA) selected in the project tree.

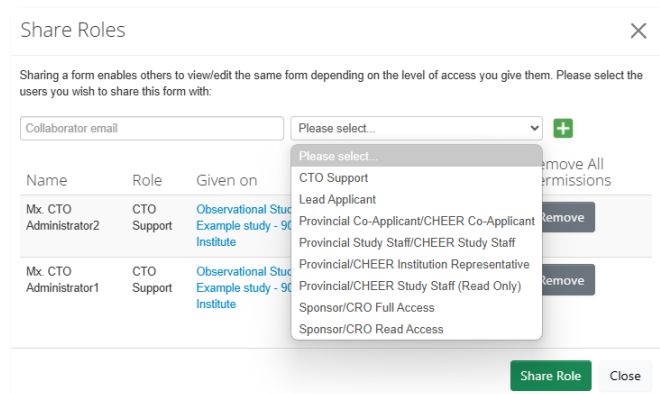


3. Users who have a role on the study can assign roles to other users. **Note: An individual cannot give more access/permissions than what they have themselves (i.e., a user with a “centre study staff” role at one site cannot give the “provincial study staff” role to someone else).**

4. Enter the email address of the user you want to give a role to in the “Collaborator Email” field, then select the correct role from the drop-down menu (Figure 2). Once the role is selected, click the green ‘Share Role’ button.

5. A green bar will appear on the screen displaying the message “Form Shared Successfully” to confirm the role was successfully given.

Listing the individual’s contact details in Section 1.0 of the application does not grant them access to the study in CTO Stream. A Role must be given to anyone who needs access to the project within CTO Stream.



Questions? Submit a support ticket at support.ctontario.ca