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QuickGuide: Adding Study Team Members using Roles

When a user creates a new study in CTO stream he/she becomes the 'Project Owner' and has exclusive access to the study. In order for others (i.e., researchers and research team members at the provincial level and at each site, sponsors/CROs as applicable) to access the study, they must be given a role. This must be done by the Project Owner (The person who created the study in CTO Stream) or by someone with the relevant permissions/access to the form. Each role comes with a pre-set level of access (what a person can see) and permissions (what a person can do). These roles are more fully described in the *Collaboration – Roles and Sharing* manual.

To add other users to a study:

1. Log in to CTO Stream and click on the study in your Projects table.
2. Click on the application you wish to grant access to in the Project tree (it will then be highlighted in grey)
    a. To give a role on the study overall, select the Provincial Initial Application
    b. To give a role at a specific site, select that site's Centre Initial Application
3. Once an individual has a role on the study, they can assign roles to other staff. **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. In the pop-up window, 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. Click the green "Share Role" button to share the role.
5. A green bar will appear on the screen displaying the message "Form Shared Successfully" when completed.

Tips:

- **Putting an individual's contact information in the application form does not automatically grant them access, they will still need to be added using roles for them to see the form in CTO Stream.** This includes the Provincial Applicant/Principle Investigator.
- Only users with a CTO Stream account can be given a role on a study. You will receive an error message ("User does not exist in system") when trying to give a role to a user that does not yet have an account. Please contact CTO to request an account for this individual if this happens.
- An individual cannot give more access/permissions than what they have themselves. For example, a user with a 'centre study staff' role at one site cannot give the 'provincial study staff' role to someone else.
- Different roles will appear in the drop-down list depending on whether you are on a provincial application or centre application. If you don't see the role you're looking for, check to make sure you've selected the right application form from the project tree.

Questions?
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