Overview

This document describes the steps the primary requestor (e.g., person who submitted the Phase I request) should take to invite additional users/researchers to their VPR-CLS study linkage request. Please note that each invited user will be treated as a secondary requestor. Secondary requestors will receive all system notifications that the primary requestor does and be able to access all sections of the linkage request the primary requestor does. The only exception to this is access to the "Encrypted Study Data File (pre-validation)" data file. That file is only accessible to the user who uploaded it to the linkage request and the individual at IMS who will validate it.

Workflow – How to Invite Additional Users to a Request

To invite a collaborator to your request, first submit the Phase I request. Then do the following:

1. On your request page, under the **More** dropdown, select **Invite Users**. Information regarding how to invite users to your request will appear.

2. In the emails portion of this Invite Users page, enter the email address of the user you wish to invite to the request and then click "Invite". You can invite multiple users by entering multiple e-mails. Please separate each email with a semicolon.
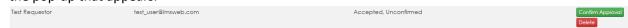

3. After clicking "Invite", the invited user(s) will receive an email containing a special URL. If the invited user does not have an IMS Login account with Multi-Factor Authentication already, then the user will be instructed to create one before clicking the URL.

4. Once the invited user has an IMS Login account with Multi-Factor Authentication, they should click the provided URL in the email. This will bring them to the My Requests page on the VPR-CLS. They will need to click "Accept" under the Actions column of the Active Invitations sub-heading.

Request Name	Request Type	Requestor	Status	Date Created	Date Modified	Actions
Active Invitations						
Test Request	Data Request	Tester Tester	⟳ Phase I NAACCR Review	October 27, 2023, 9:47 a.m.	October 27, 2023, 9:48 a.m.	Accept

5. Once the Accept button is clicked, you will be notified that the invited user has accepted their invitation and that you need to do a final approval of their access. Click the provided link in the email. This will bring you to the "Invite Users" tab of your request.

6. Confirm that the invited user's name and email look correct. If they do, click the "Confirm Approval" button under the "Actions" column on the Invite Users page. Click "Grant Access" on the pop-up that appears.

Test Requestor	test_user@imsweb.com	Accepted, Unconfirmed	Confirm Approval / Delete

7. The invited user will receive a notification that they can now access the request and will now be treated as a secondary requestor.

How to Remove a User from a Request

You may delete a mistaken invite via the "Delete" button under the "Actions" column. The deleted user will be notified. Please note, that only invited users can be removed.

The primary requestor cannot be removed from a request. If you would like to change the name of the primary requestor, please notify IMS (vpr-cls@imsweb.com) and Castine Clerkin (cclerkin@naaccr.org).