

How to Assign Training to Site Roles

GlobalLearn version 2.5

APPLICABLE TO:

- ☒ Company Admin
- ☐ Manager
- ☐ Instructor
- ☐ Learner
- ☒ GlobalLearn

1 Log in to Global Learn and navigate to the Company Dashboard. Select **Manage Studies & Sites**.


2 Enter a **Study** by clicking on its name.


3 Switch to **Training Assignments**.

4 Click on to **Add Training Assignment**.

5 Select a **Site Role** using the dropdown menu.

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 **Manage Studies & Sites**
Centralize study management with a comprehensive overview of studies, sites, and training assignments. Easily filter, sort, associate sites, assign roles, and manage training requirements for streamlined oversight.

<input type="checkbox"/>	Study Number	Study Name
<input type="checkbox"/>	002	2 <div> PHANG</div>

3


Available Learning Plans 2


Training Assignments 3

General Info

Available Courses

4

 Add Training Assignment

 Edit

Site Role *

5

Select Site Role

Select Site Role


Documentation Specialist

Sub-Investigator

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Select any **courses** or **Learning Plans** people with this role should take.
- 

If a course/LP you are looking for is not displayed here, check that the course/LP is..



a. categorized as a Site Course

b. assigned to the Study

c. matched to the intended Site Role

Courses 2 Learning Plans 1

2 Items 1 Selected

<input type="checkbox"/>	Name	Intended Site Role	Version	Description
<input checked="" type="checkbox"/>	 Data Entry...	3	1.0	
<input type="checkbox"/>	 First Day a...	3	1.0	

+ Add 1 Course >


- 7

Click **Add Course / Add Learning Plan**.



- 8

Review your selection in the right-hand column, and click **Create Training Assignment** to finalize.

Selected Courses/Learning Plans

 Remove

2 Items 0 Selected

<input type="checkbox"/>	Name	Intended Site Role	Version	Description
<input type="checkbox"/>	 A Course o...	3	1.0	
<input type="checkbox"/>	 Data Entry ...	3	1.0	

Cancel

Create Training Assignment

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Users will be enrolled to courses automatically, after receiving their Site Role assignment(s).