

- APPLICABLE TO:
- ☒ Company Admin

☐ Manager


☐ Instructor

☐ Learner
- ☒ GlobalLearn

Site Users are enrolled to courses automatically, after receiving their Site Role assignment(s). Which courses are assigned depends on the configuration of [Training Assignments](#) for the selected Role. See related job aid [How to Assign Training to Site Roles](#).


1 Log in to Global Learn and navigate to the [Company Dashboard](#). Select **Manage Studies & Sites**.

1

**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.

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

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


3 Switch to **Sites**.

3

Training Assignments 4

Sites 1

4 Select a **Site** by clicking on its name.

<input type="checkbox"/>	Site Number	Site Name
<input type="checkbox"/>	010	<div>4<div> Clinical General</div></div>

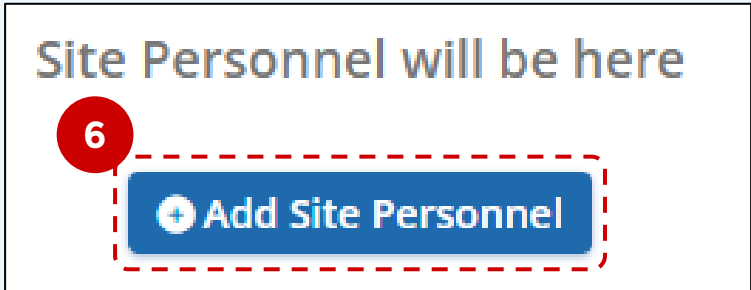
5 Switch to **Site Personnel**.

5

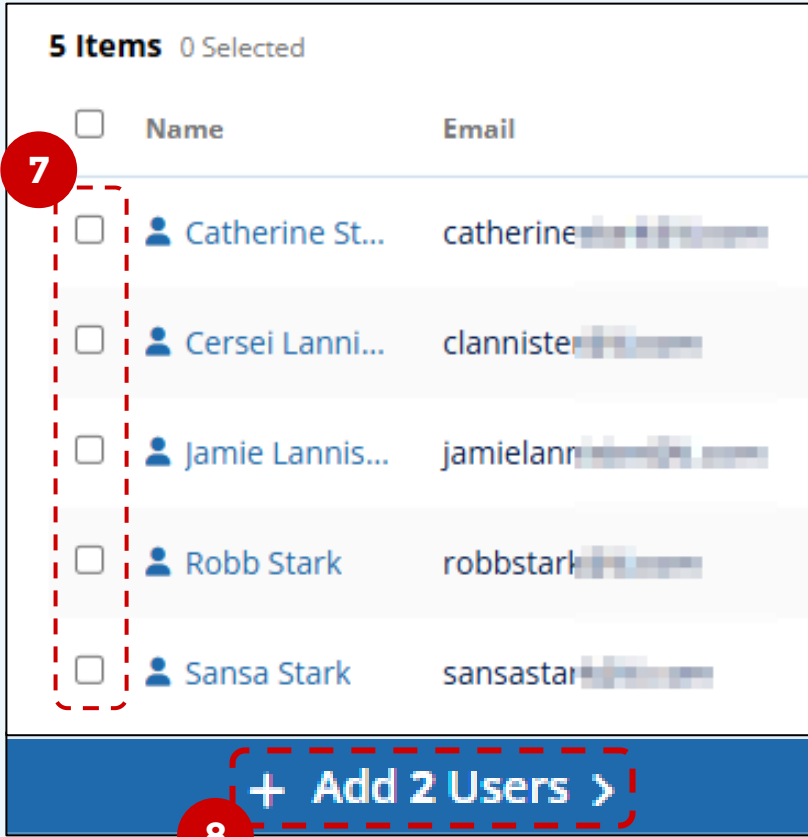
General Info

Site Personnel 0

6 Click on **Add Site Personnel** (located at the center or in the ribbon).

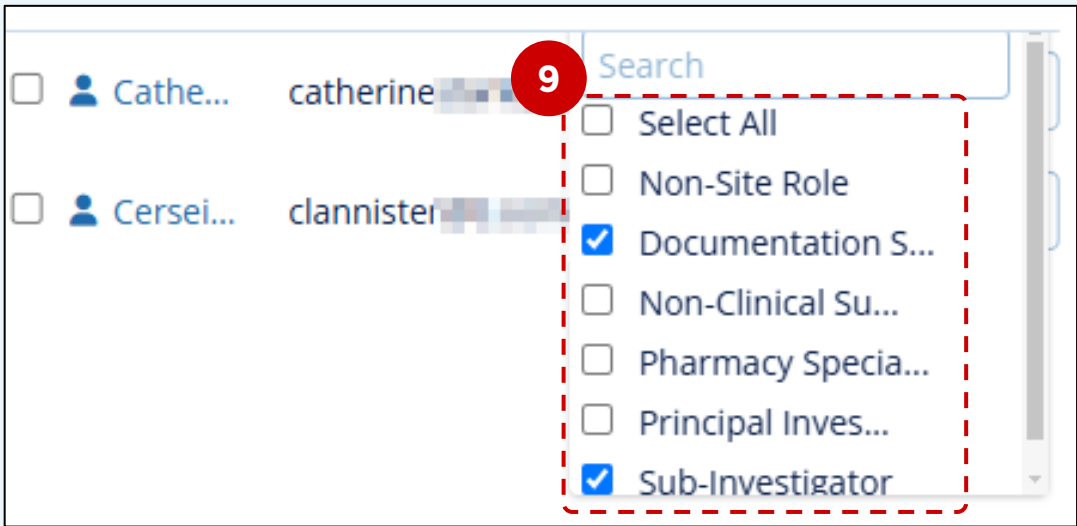


7 Select users that will be assigned to this site.

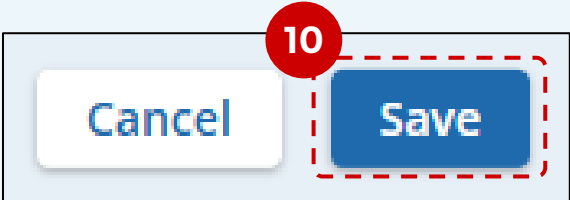


8 Click **Add User(s)**.

9 Review users in the right-hand column, add one or more **Site Roles** for each using the dropdown.



10 Save your changes.



11 You will be presented a recap window. **Save** to proceed or Cancel to go back and redo.

Save Changes?

The Users listed below will be enrolled to the active Study Training Assignments according to their Site Role.

2 Users

Name	Training Assignment	Courses	Learning Plan
<div><div></div>Catherine Stark</div>	Sub-Investigator	<div><div></div>1</div>	A Course on Comets
<div><div></div>Cersei Lannister</div>	Principal Investigator	<div><div></div>1</div>	Investigator Onboarding

Cancel

11

Save

12 You will be able to change any assignment as well as add new site users, using the **Manage Existing Assignments** button.

12

Manage Existing Users

Export