How to Assign Training to Site Roles

GlobalLearn version 2.6

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APPLICABLE TO:

- ● Company Admin
- ○ Manager
- ○ Instructor
- ○ Learner

● GlobalLearn

> In the Studies & Sites module, courses are assigned not to individuals, but to Site Roles. This Job Aid guides the user in matching courses to Roles.

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

1
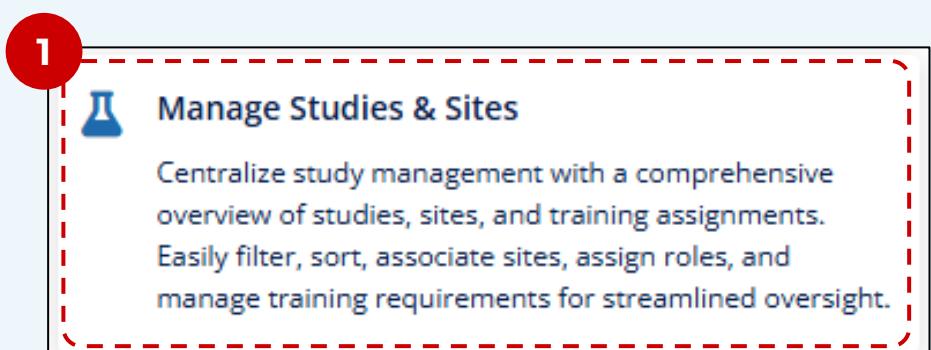
🧪 Manage Studies & Sites

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.
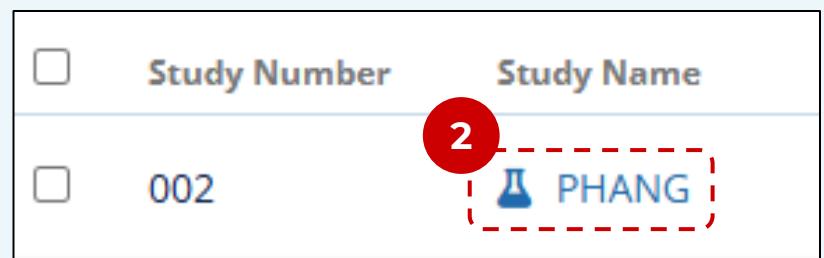
☐	Study Number	Study Name
☐	002	🧪 PHANG

2

3 Switch to **Training Assignments**.

Available Learning Plans **2**   **3** Training Assignments **3**

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

General Info   Available Cours

4 ⊕ Add Training Assignment   ✎ Edit

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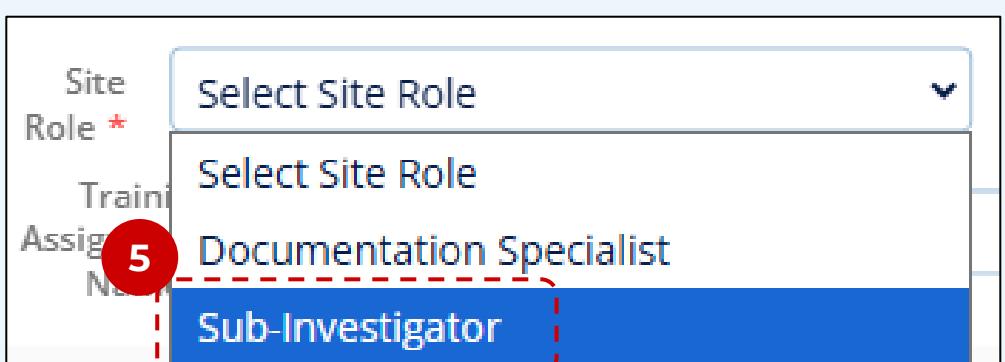
Site Role *   Select Site Role ⌄

Select Site Role

Documentation Specialist

5 Sub-Investigator

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6 Select any **courses** or **Learning Plans** that 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

	Name	Intended Site Role	Version	Description
☑	🎓 Data Entry...	3	1.0	
☐	🎓 First Day a...	3	1.0	
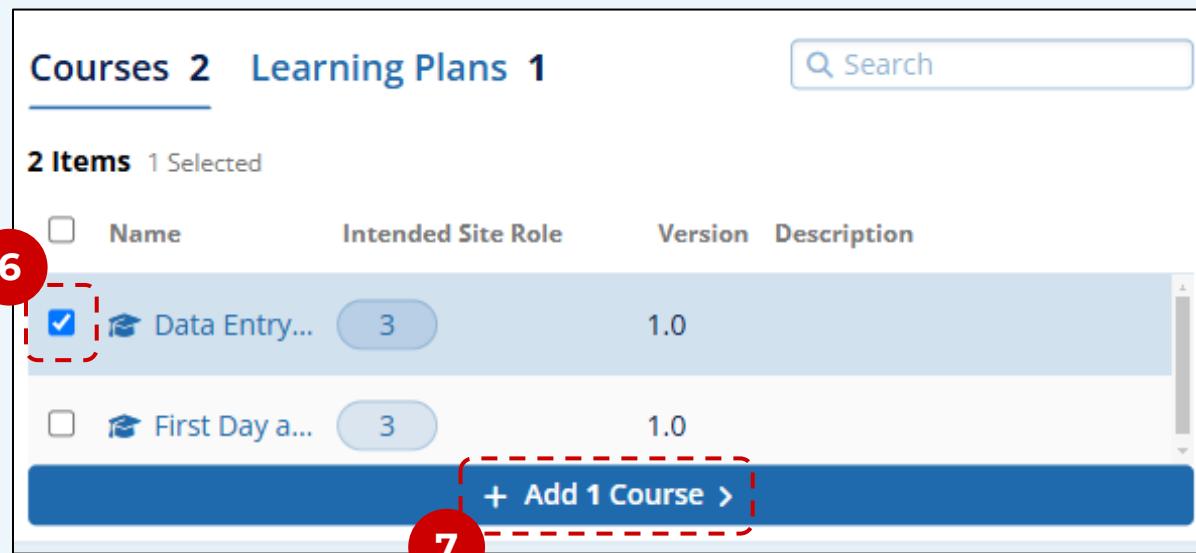
Courses **2**   Learning Plans **1**   Search

2 Items 1 Selected

+ 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.
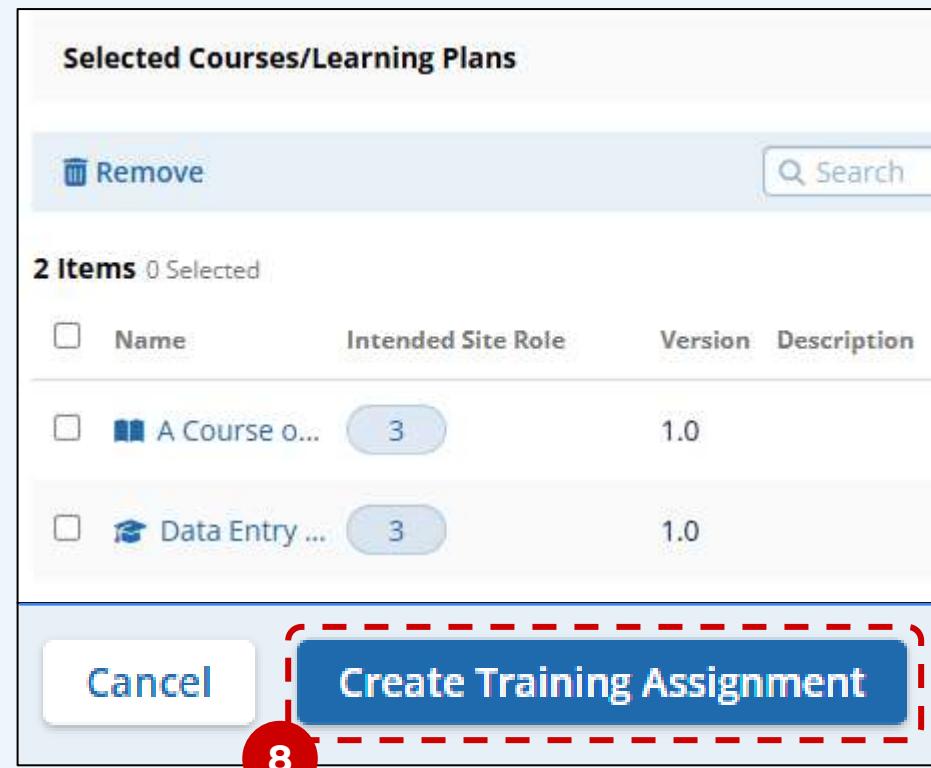
Selected Courses/Learning Plans

🗑 Remove   Search

2 Items 0 Selected

	Name	Intended Site Role	Version	Description
☐	📖 A Course o...	3	1.0	
☐	🎓 Data Entry ...	3	1.0	

Cancel   **Create Training Assignment**

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