How to Create Site Roles

GlobalLearn version 2.6

TRIAL INTERACTIVE

APPLICABLE TO:

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

● GlobalLearn

Site Roles are customizable labels that allow to define the learning requirements of site personnel granularly, not by their company affiliation or personal identity, but by the role(s) they perform within the chosen Study(ies).

1 Log in to Global Learn and navigate to the **Company Dashboard**. Select **Manage Site Roles.**

1 Manage Site Roles

Set up your site roles so that when site team members are added to your sites, you can select a role for them.
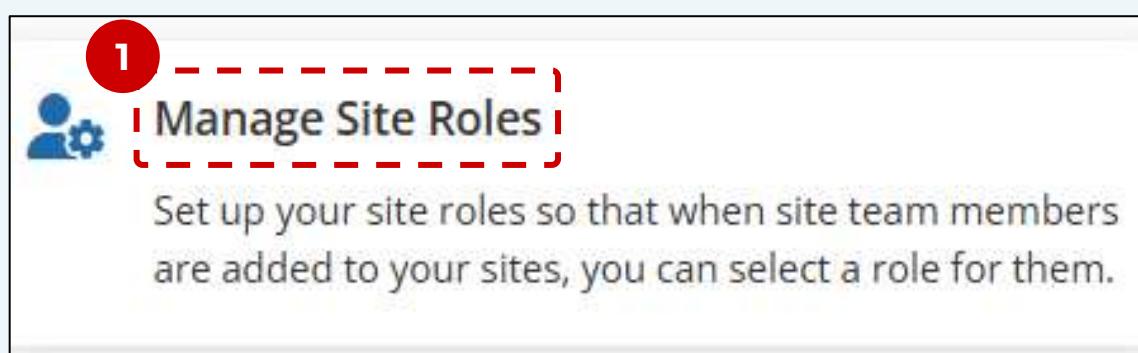
2 Click on the **Add Site Role** button.

Total Site Roles

2 ⊕ Add Site Role
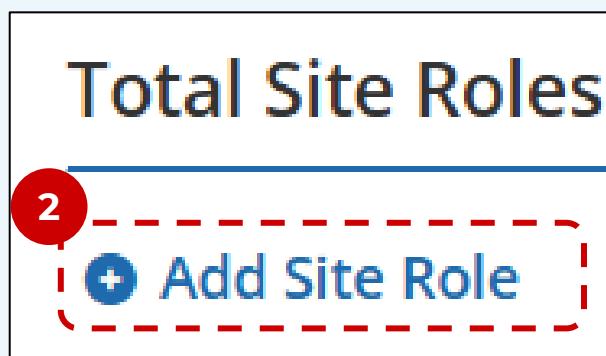
3 **Add a name** to identify the role. Review the status and finally, click on **Save Changes**.

You can change the status to **Inactive** if you want the role to <u>not</u> be used for the time being. Changing status to **Active** will make it possible to assign the roles to users and training courses.

Add

Name	*	**3a** Research Nurse
Status		Active ▾

3b Save Changes | Cancel
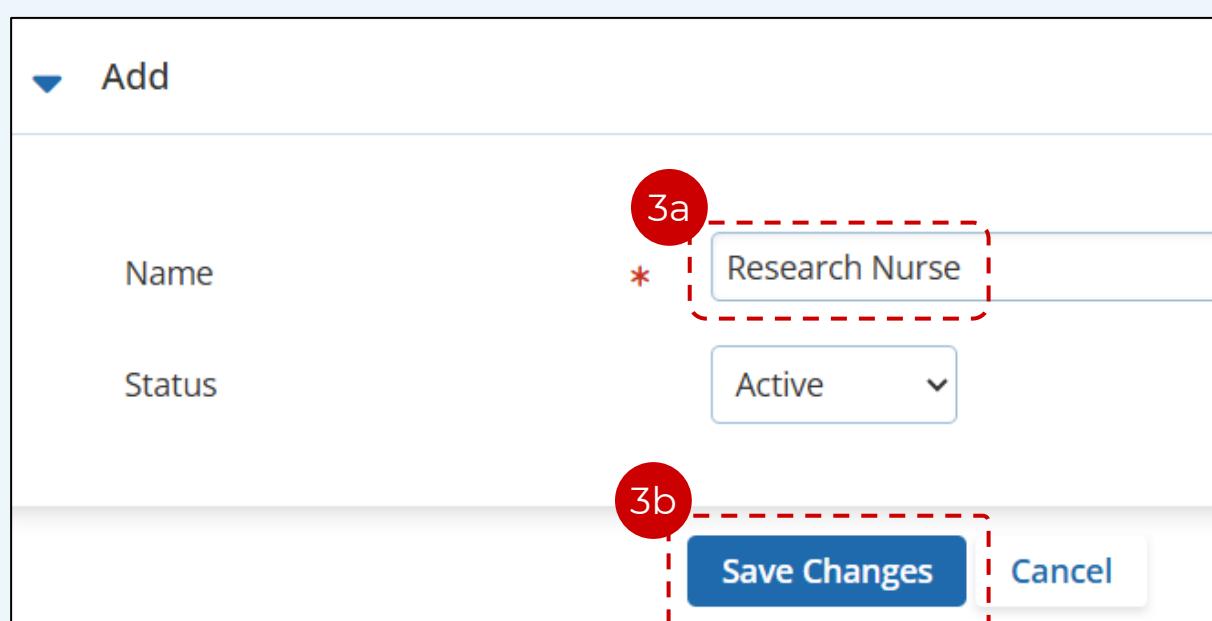
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4 To **Edit** a Site Role use the cog symbol. Role Name and Status can be altered.

☐ Principal Investigator   🧪 3   **ACTIVE**   ⚙ **4**
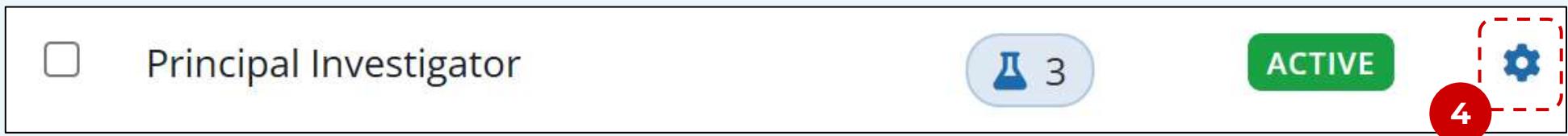
5 Site Roles can be <u>deleted</u> as long as they're not in use (i.e. courses
or users are matched to the role).
To do so, select a role via checkbox,
then click on the **Delete** button.

Total Site Roles **10**   Act

5

➕ Add Site Role   🗑 Delete

10 Site Roles 1 Selected