How to Enroll Users for Site Courses

GlobalLearn version 2.6

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 <u>Training Assignments</u> 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 <u>Company Dashboard</u>. 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

3 Switch to **Sites**.

Training Assignments 4   Sites 1

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

	Site Number	Site Name
☐		
☐	010	🏥 Clinical General
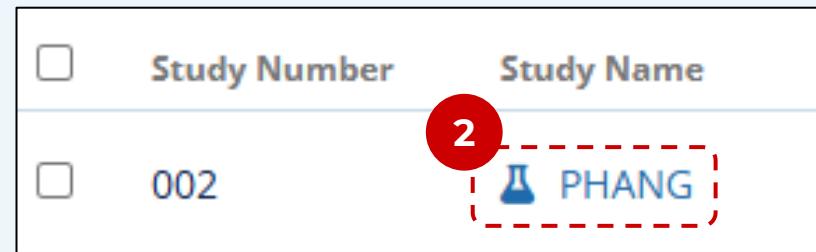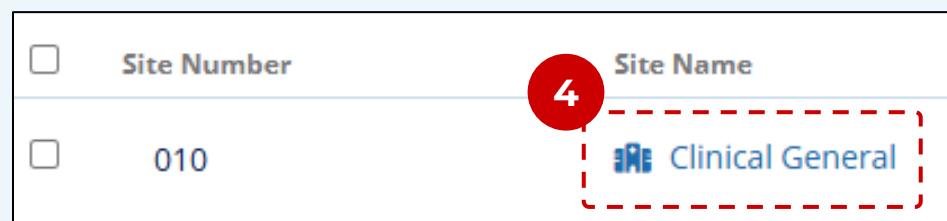
5 Switch to **Site Personnel**.

General Info   Site Personnel 0

TRANSPERFECT
LIFE SCIENCES

TRIAL INTERACTIVE

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

Site Personnel will be here

6

⊕ Add Site Personnel
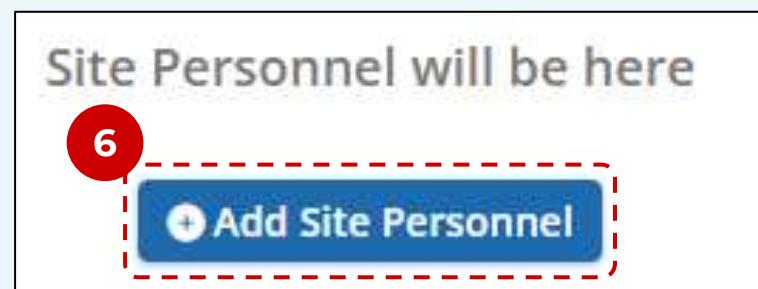
7 **Select** users that will be assigned to this site.

5 Items 0 Selected

Name	Email
☐ 👤 Catherine St...	catherine
☐ 👤 Cersei Lanni...	clanniste
☐ 👤 Jamie Lannis...	jamielann
☐ 👤 Robb Stark	robbstark
☐ 👤 Sansa Stark	sansastar

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

+ Add 2 Users ❯

8
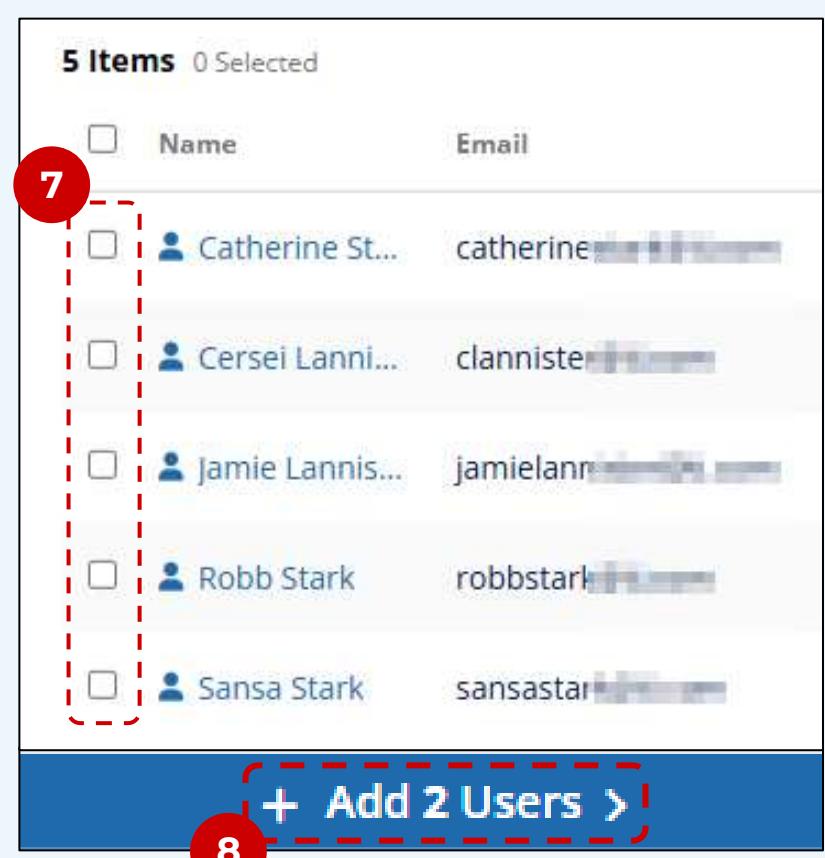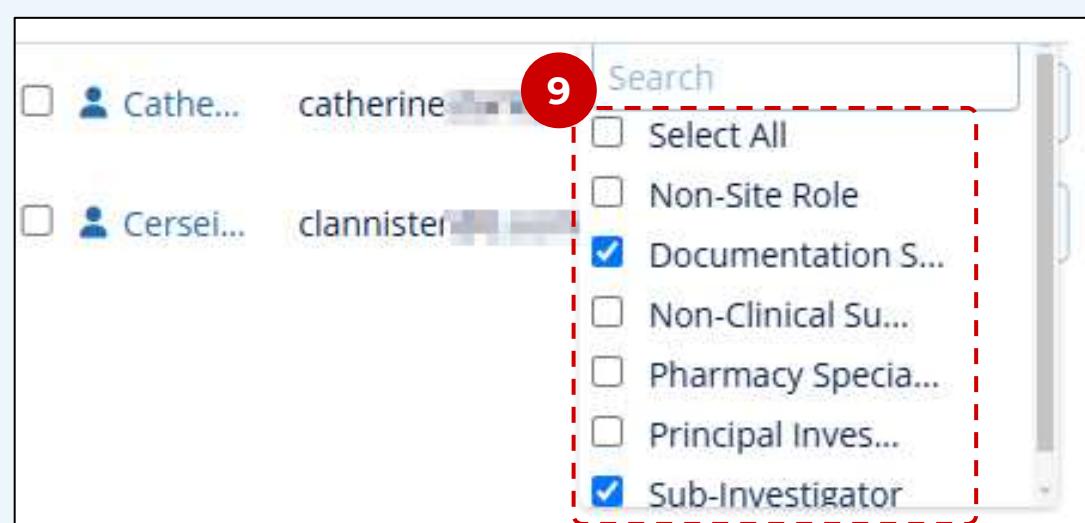
9 Review users in the right-hand column, add one or more **Site Roles** for each using the dropdown.

☐ 👤 Cathe...	catherine	Search
		☐ Select All
☐ 👤 Cersei...	clannister	☐ Non-Site Role
		☑ Documentation S...
		☐ Non-Clinical Su...
		☐ Pharmacy Specia...
		☐ Principal Inves...
		☑ Sub-Investigator
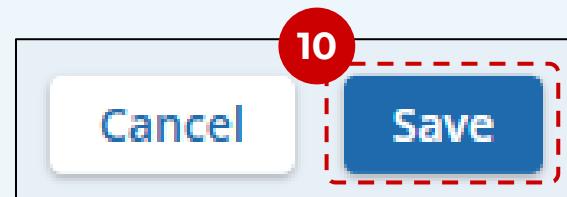
10 **Save** your changes.

10

Cancel   Save

11 You will be presented a recap window. **Save** to proceed or <u>Cancel</u> 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 Assigment	Courses	Learning Plan
👤 Catherine Stark	Sub-Investigator	🎓 1	A Course on Comets
👤 Cersei Lannister	Principal Investigator	🎓 1	Investigator Onboarding

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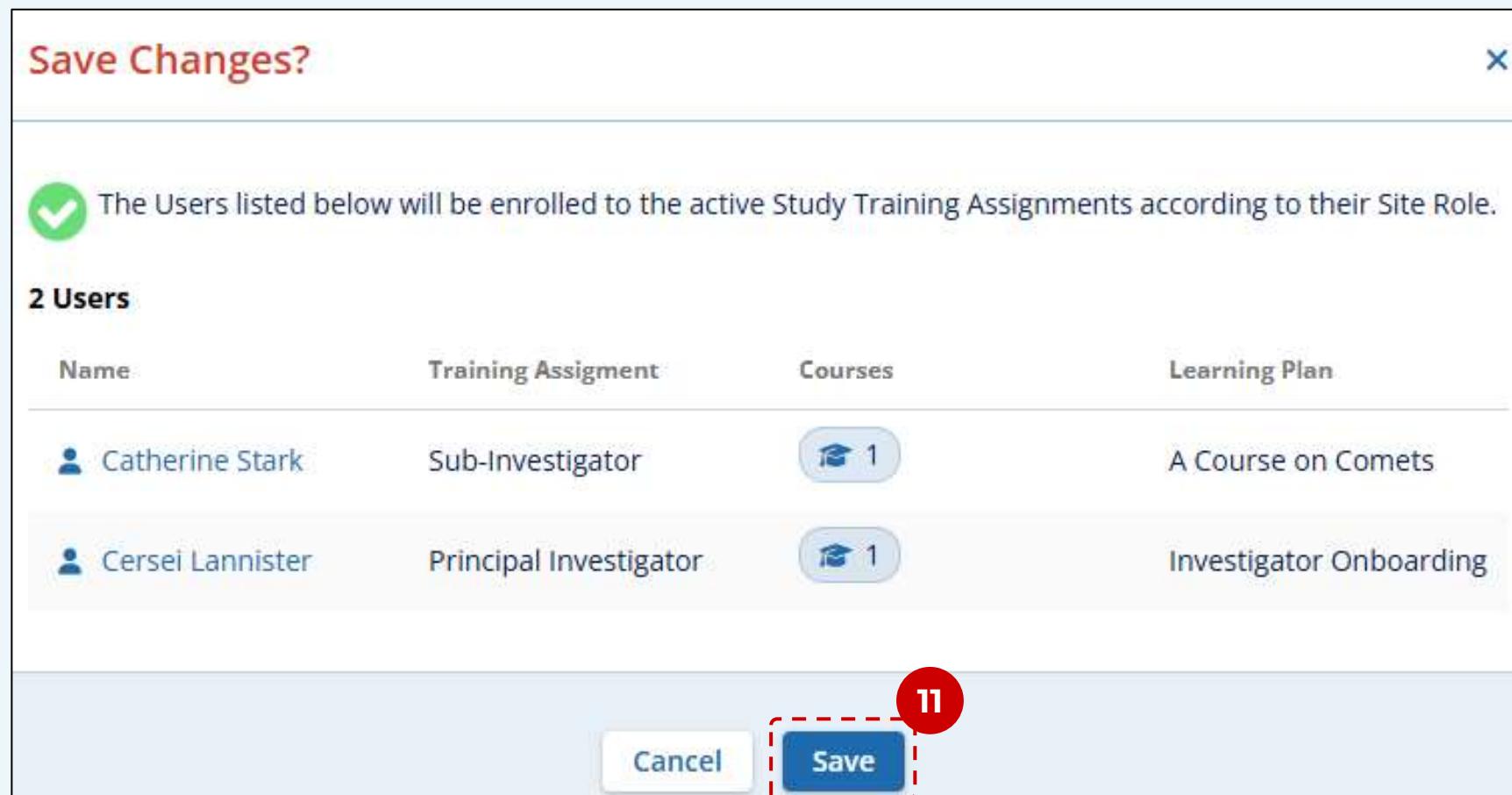
12 You will be able to change any assignment as well as add new site users, using the **Manage Existing Assignments** button.

⊕ Manage Existing Users   ⬆ Export ⌄