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Where do I assign training?

- **If your organization hosts your study:** Assign training for Oracle Life Sciences InForm, Oracle Life Sciences Central Designer, Oracle Life Sciences Central Coding, or Oracle Life Sciences IRT Cloud Service in **Oracle Health Learn Manager**.
- **If Oracle hosts your study:**
  - Assign training for Oracle InForm, Oracle Central Designer, Oracle Central Coding, or Oracle IRT in the **Oracle Life Sciences User Management Tool (UMT)**.
  - Assign training for the Oracle User Management Tool (UMT) and other training not associated with a study (such as a later release of Oracle User Management Tool (UMT) in **Oracle Health Learn Manager**.
- **If you only use Oracle Life Sciences Clinical One Platform to manage training:** For this application, only in-product training is required. In-product training is assigned to you based on user roles and permissions. For more details on Oracle Clinical One Platform training, see [In-product training](#).

Who is this guide for?

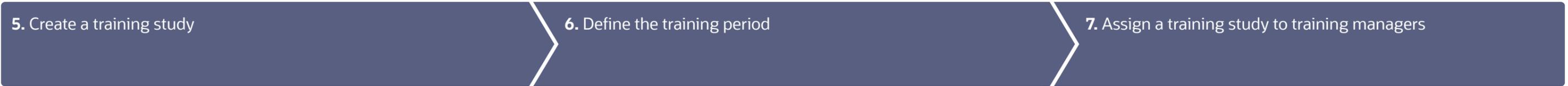
- **Training administrators** and **training managers** who need to manage training for Oracle InForm, Oracle Central Designer, Oracle Central Coding, Oracle IRT, or Oracle User Management Tool (UMT).
- **Delegated administrators** who need to provision training administrators and managers in Oracle Health Sciences Identity and Access Management Service.
- **Oracle Health Learn Manager user managers** who need to provision users.

For details on Oracle Health Learn Manager computer and browser requirements, see the [Oracle Health Learn Manager Release Notes](#).

## How do I provision users?



## What are my tasks as a training administrator?



## What are my tasks as a training manager?



## How do I provision users?

### 1 Understand user roles and tasks

At your organization, you can function in one or more of the following roles for Oracle Life Sciences IAMS, Oracle Health Learn Manager, or Oracle Health Sciences Learn.

- **Delegated administrators** work in **Oracle Life Sciences IAMS** and are responsible for:
  - Provisioning user accounts for training administrators and training managers.
- **Oracle Health Learn Manager user managers** work in **Oracle Health Learn Manager** and are responsible for:
  - Sharing the URL for Oracle Health Learn Manager with all Oracle Health Learn Manager training administrators and training managers.
  - Assigning users the appropriate roles.
- **Training administrators** work in **Oracle Health Learn Manager** and are responsible for:
  - Creating training studies.
  - Assigning each training study to one or more training managers.
- **Training managers** work in **Oracle Health Learn Manager** and are responsible for:
  - Assigning training to trainees (not applicable for training associated with a study in the User Management Tool), and sending reminders about incomplete training.
  - Checking the training that a trainee has completed, including running reports for assigned and completed training.
  - Reviewing the twice-daily training completion reports that are sent over email, for assigned studies.
- **Trainees** work in **Life Sciences Learn** to complete their training and are responsible for:

- Signing in to Life Sciences Learn and completing their assigned training. After a training manager assigns training to a trainee or sends a reminder, the trainee receives an email with a link to Life Sciences Learn.

**Note:** Trainees who don't have an Oracle account can create one for themselves by clicking the link to Life Sciences Learn in the email. They'll receive another email to verify their email address and then can take their assigned training.

## 2 How to get access to Oracle Life Sciences IAMS and Oracle Health Learn Manager

### > Oracle Life Sciences IAMS

**Who needs access?** Delegated administrators.

**How do I get my user name and password?** After Oracle creates your account in Oracle Life Sciences IAMS, you receive two emails, one with your user name and another with a temporary password and a link to reset your password.

**How do I get the product URL?** An Oracle Project Manager will send you the product URL.

**What if I want to add or change delegated administrators?** Contact Oracle Support.

### > Oracle Health Learn Manager

**Who needs access?** Oracle Health Learn Manager user managers, training administrators, and training managers.

**How do I get the product URL?** The URL is sent to the Oracle Health Learn Manager user manager, who is responsible for sharing it with all Oracle Health Learn Manager users.

**How do I get my user name and password?** Oracle Health Learn Manager is accessed with the same credentials used to access OHSIAMS.

### 3 Give users access to Oracle Health Learn Manager using Oracle Health IAMs

**Who does this?** A delegated administrator.

If you previously managed training using Oracle User Management Tool (UMT), the Oracle Health Learn Manager user managers, training administrators, and training managers at your organization might have already been created for you in Oracle Life Sciences IAMs. All you have to do is assign them the appropriate roles!

1. Sign in to Oracle Life Sciences IAMs.
2. Add any Oracle Health Learn Manager user managers, training administrators, or managers who haven't yet been created.  
For instructions on adding users, see [Create a user account](#) in the *Oracle Health Sciences Identity and Access Management Service Administrator Guide*.
3. For one Oracle Health Learn Manager user manager (and that might be you), assign the **AssignGlobalRoles** role (its Display Name is **AssignGlobalRoles**, and its Name is **ClinicalOne\_Production\_AssignGlobalRoles** or **clinicalone-CNE\_AssignGlobalRoles**).  
**Note:** Your organization might have additional Oracle Health Learn Manager user managers, but only one person needs the **AssignGlobalRoles** role. The role should be assigned to the person who will sign in to Oracle Health Learn Manager first. Then that person can create other users, including additional Oracle Health Learn Manager user managers, from within Oracle Health Learn Manager.
4. For training administrators (including yourself, if you are both a delegated administrator and a training administrator for your organization) and training managers, assign the **ClinicalOne\_Production** or **clinicalone-CNE** role.  
**Reminder:** If you are using Clinical One to deploy studies, you've probably set up the **AssignGlobalRoles** and **ClinicalOne\_Production** or **clinicalone-CNE** roles so that all role assignments must be approved. For details about how to approve the assignments, see [Activate approval for a role](#) in the *Oracle Health Sciences Identity and Access Management Service Administrator Guide*.

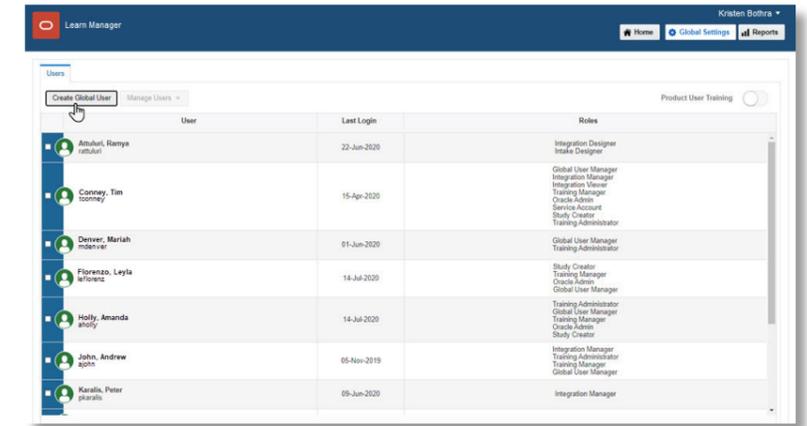
 Watch training on how to [create a user](#) and [how to assign a user](#).

## 4 Create user accounts in Oracle Health Learn Manager

**Who does this?** An Oracle Health Learn Manager user manager. Don't forget to create your own account!

1. Sign in to Oracle Health Learn Manager.
2. On the Home page, click **Global Settings**, along the top.
3. Click **Create Global User**.
4. From the **Full Name** drop-down, select the user's name. These are the users that have been given the **ClinicalOne\_production** role in OHSIAMS.
5. Click on the **Global Roles** field and select the appropriate role:
  - **Global User Manager**: Assign this to Oracle Health Learn Manager user managers at your organization.
  - **Training Administrator**: Assign this role to all training administrators.
  - **Training Manager**: Assign this role to all training managers.
6. Click **Create**.
7. Create additional users as needed.

[▶ Watch training.](#)



## 5 Create a training study

**If Oracle hosts your study:** The only training studies you need to create are for assigning training not associated with a study, such as training for the Oracle User Management Tool (UMT) or for a release you're considering upgrading to. You assign training associated with a study in Oracle User Management Tool (UMT), and you can view (but not change) it here.

**If your organization hosts your study:** Create a training study so you can assign training for InForm, Central Designer, Central Coding, and IRT.

1. Sign in to Oracle Health Learn Manager, open the **Training Study** drop-down, and select **Create Training Study**.

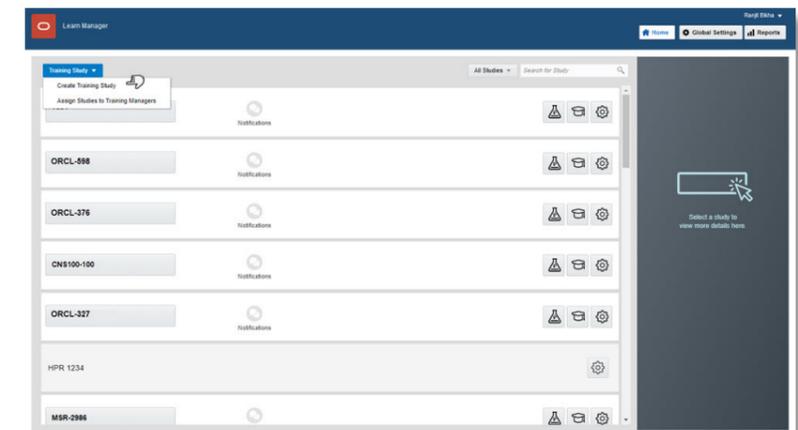
2. Enter the study name, and click **Save**.

**Tip:** The study name you enter here is for tracking the study, and it doesn't need to match the actual study name. You can edit the study name after it is created.

3. To create another study, click **Create Another Study**.

To return to the Home page, click **Close**.

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## 6 Define the training period

After creating a training study, you can define the training period at a study or organization level. For example, you may choose to extend the standard training period of 12 months to 36 or 48 months, or event set the training to never expire.

1. Sign in to Oracle Health Learn Manager, go to **Global Settings**, and make sure you select the **Training Settings** tab.
2. From the Training Valid Period drop-down, select the amount of time training at an organization should be valid for.  
For example, if you select 24 months, that means training at your organization is available for 24 months. After the training period of 24 months passes, users have to take the training again.
3. On the Confirmation dialog, read the message, and click **Proceed**.

**Tip:** You can also define a training's valid period in the context of a study. Any changes done at a study level overwrite the training settings configured at an organization level.

[▶ Watch training.](#)

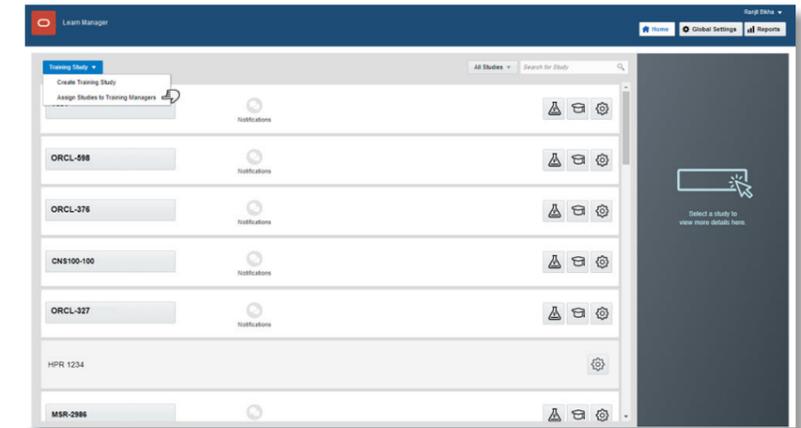


## 7 Assign the training study to training managers

Assign a study to a training manager so that they can manage training for the study, run reports on the study, and receive the twice-daily training completion report over email.

1. Sign in to Oracle Health Learn Manager, open the **Training Study** drop-down, and select **Assign Studies to Training Managers**.
2. In the table, locate the row for the training manager who will manage training for one or more studies, and click in the Study column for the user's row.  
All studies that the user manages training for appear.
3. Click again in the Study column for the user's row.  
A list of all training studies appears.
4. Select a study to assign it to the user. To assign the user to all current and future studies, select **All Studies**.  
**Tip:** You can assign a study to one or more training managers.
5. Click **Save**.

[▶ Watch training.](#)



## 8 Add or remove trainees from a study, and assign training to them

If your Home page includes training studies created in Oracle User Management Tool (UMT) you can only edit trainees' names, run reports, and receive the twice-daily training completion report over email.

1. Sign in to Oracle Health Learn Manager, click the study settings button  for the study you want to add a trainee to, and select **Open Settings**.

**Tip:** To see all training that a user has completed across all organizations and studies, select the user, and expand Training History on the right.

2. Click **Add Trainee**.

### 3. To add one trainee at a time:

- a. To the right above the table, click **Add Row**.
- b. In the blank row that appears in the table, enter details about the trainee and select the training the trainee must take.
- c. Repeat steps a and b to add more trainees, if necessary.

**Tip:** To assign a trainee to more than one course, add more rows with the same trainee details and a different course. Alternatively, you can assign additional training once the trainee has been assigned to the first course.

- d. After you're finished adding trainees, click **Save**.

An assignment email is sent to the trainee(s). The training is marked as **Complete** and no email is sent if the trainee completed the training in the last 12 months, as long as the trainee completed the training **under the same email address**.

### To add multiple trainees at the same time:

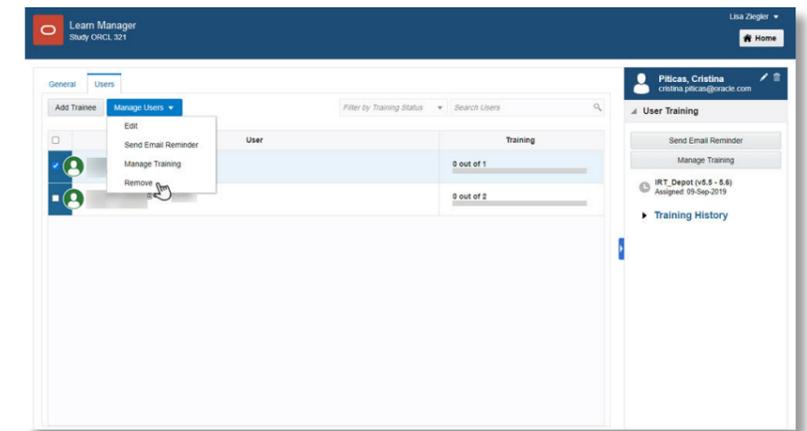
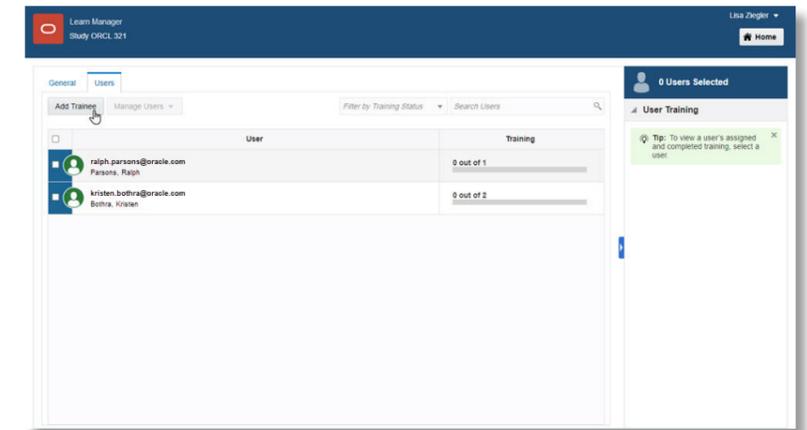
- a. Click **Training Assignment Template**, and save the spreadsheet template to your computer.
- b. Fill in the fields in the spreadsheet. Make sure you enter details in all columns.
- c. Save and close the spreadsheet.
- d. Click **Upload File**, and then navigate to and select the file.

The details from the spreadsheet appear in the table.

- e. Click **Save**.

An assignment email is sent to the trainee(s). The training is marked as **Complete** and no email is sent if the trainee completed the training in the last 12 months, as long as the trainee completed the training **under the same email address**.

**Tip:** To remove trainees from a study, select the trainees, and from the **Manage Users** drop-down, select **Remove**.



## 9 Assign training, or remove assigned training

If your Home page includes training studies created in Oracle User Management Tool (UMT), you can't change training assignments here. You must perform this task in Oracle User Management Tool (UMT).

### To assign training:

1. Sign in to Oracle Health Learn Manager, click the study settings button  for a study, and select **Open Settings**.

2. Select one or more trainees who need to be assigned the same training.

**Tip:** To see all training that a user has completed across all organizations and studies, select the user, and expand **Training History** on the right.

3. From the **Manage Users** drop-down, select **Assign Training**.

4. Click in the empty field, and select the appropriate training from the drop-down.

5. Click **Save**.

An assignment email with the joining instructions is sent to the trainees, unless they have completed the training within the last 12 months. If a trainee has already completed the training and the trainee has the same email address in both studies, the training status is marked as Complete.

### To remove assigned training:

1. Sign in to Oracle Health Learn Manager, click the study settings button  for a study, and select **Open Settings**.

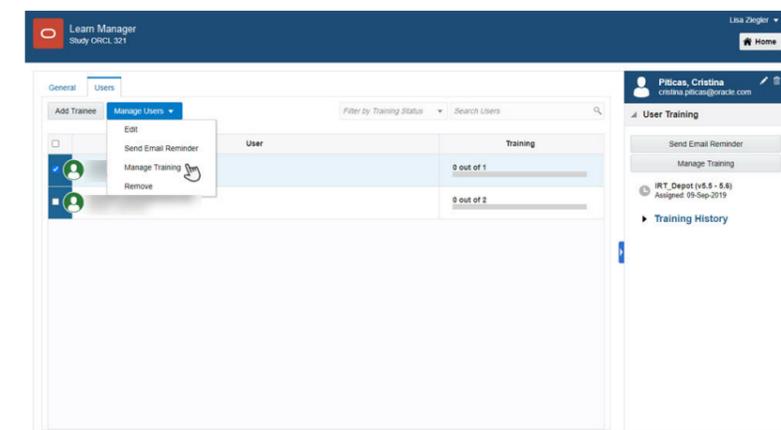
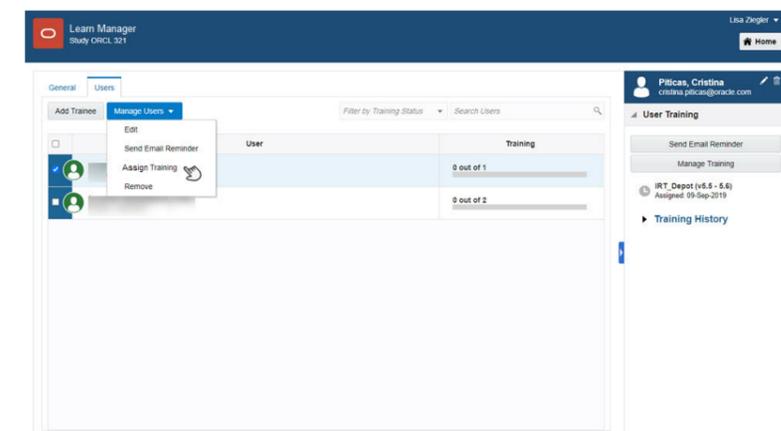
2. Select one trainee. You must remove training from one trainee at a time.

3. From the **Manage Users** drop-down, select **Manage Training**.

4. In the dialog box, click the X on each course that you need to remove.

5. Click **Save**.

An email notification is sent to the trainee when courses have been removed from their training history.



## 10 Send an email reminder to trainees who haven't completed training

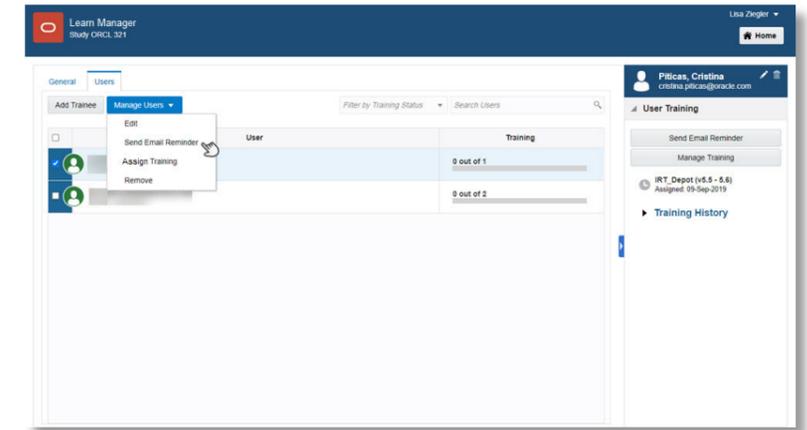
You can send an email reminder for all training studies on your Home page, including any training studies created in Oracle User Management Tool (UMT).

1. Sign in to Oracle Health Learn Manager, click the study settings button  for a study, and select **Open Settings**.

2. Select the trainees who should receive the training email reminder.

**Tip:** To select all trainees, select the column-level checkbox on the left in the table. Reminder emails are sent only to trainees who have incomplete training.

3. From the **Manage Users** drop-down, select **Send Email Reminder**.



## 11 View a report of all assigned and completed training

You can run training reports for all training studies which are assigned to you as a Training Manager.

1. To run a report:

a. Sign in to Oracle Health Learn Manager.

b. On the Home page, click **Reports**, along the top.

c. Select **Life Sciences Learn Training Report**.

d. On the right, make sure **Settings** is expanded, and fill in the fields.

**Tip:** Use a combination between **Date Range** and **Training Status** to get the best search results.

e. Click **Run Report**.

**Tip:** While the report is running, you can navigate away from the **Reports** page and continue working.

2. To download a report:

a. In the lower right, expand Download Reports and locate the report.

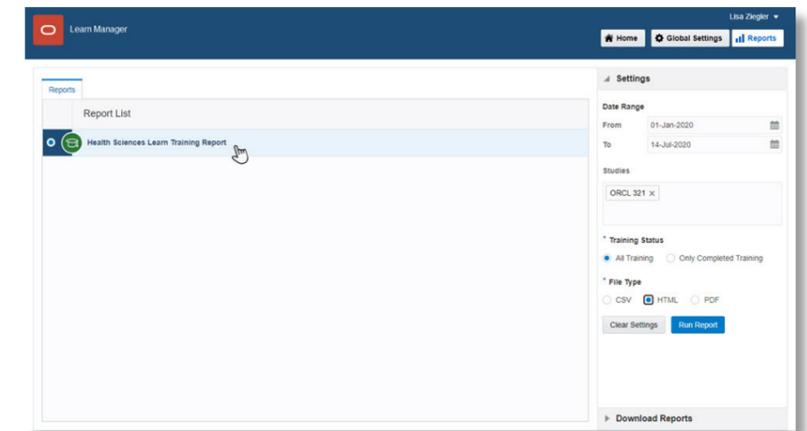
b. Click the **Download** link.

**Tip:** To view CSV, HTML, and PDF files, make sure your browser isn't blocking pop-ups.

**Reminder:** All dates in reports are in the UTC (Coordinated Universal Time) time zone, which corresponds to the Greenwich Mean Time zone.

**Note:** Every 12 hours you receive a notification by email for any completed training in your studies in the previous 12 hours.

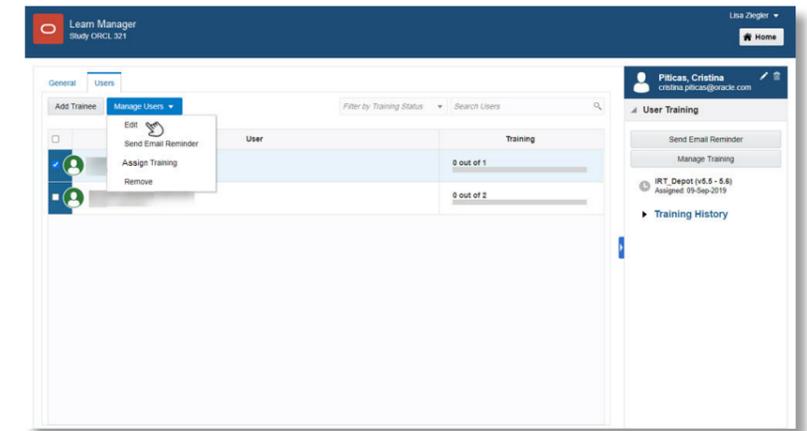
[▶ Watch training.](#)



## 12 Change a trainee's name

If your Home page includes training studies created in Oracle User Management Tool (UMT), you have to change trainees' name in both places: Oracle User Management Tool (UMT) and Oracle Health Learn Manager.

1. Sign in to Oracle Health Learn Manager, click the study settings button  for a study, and select **Open Settings**.
2. Select the trainee.
3. From the **Manage Users** drop-down, select **Edit**.
4. Modify the details.
5. Click **Save**.



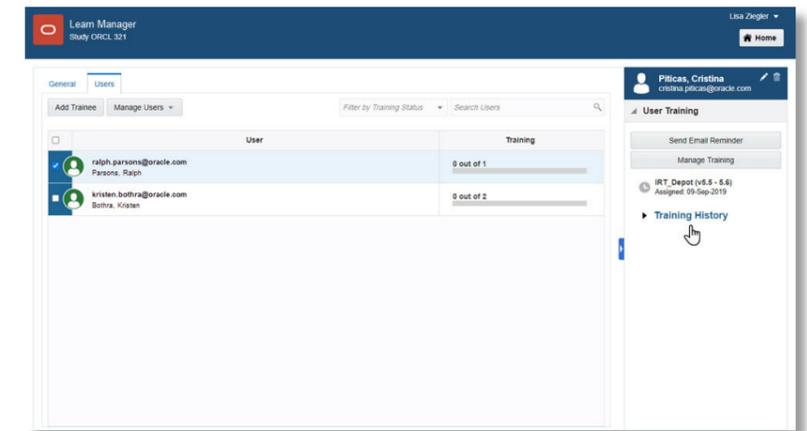
## 13 Check a trainee's training status and history

### Check training status:

You can check a trainee's status for all training studies on your Home page, including any training studies created in Oracle User Management Tool (UMT).

1. Sign in to Oracle Health Learn Manager, click the study settings button  for a study, and select **Open Settings**.
2. Select a trainee.
3. On the right, make sure **User Training** is expanded.

All training assigned to the trainee is listed. If the user completed the training, the completion date appears. For incomplete training, the date the training was assigned appears.



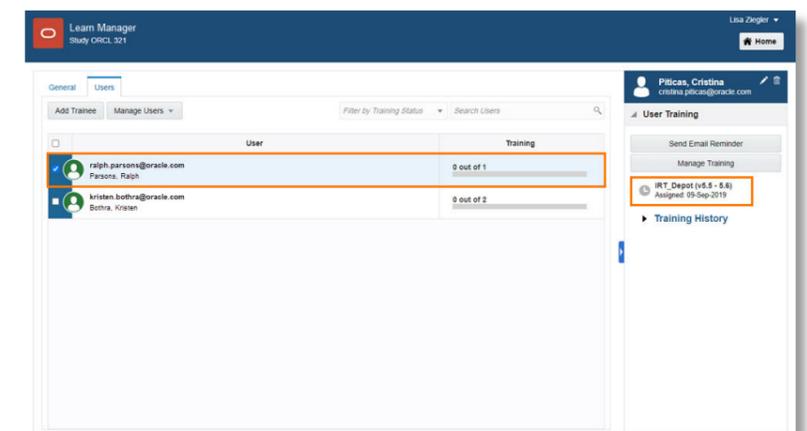
### See training history:

You can see a trainee's history for all training studies on your Home page, including any training studies created in Oracle User Management Tool (UMT).

1. Sign in to Oracle Health Learn Manager, click the study settings button  for a study, and select **Open Settings**.
2. Select a trainee.
3. On the right, click and expand **Training History**.

All training completed by the trainee across studies and organizations is listed.

[Watch training.](#)



**Note:** You can also download and print a user's training completion certificate. Moreover, for users with previously completed training - if no information is available in the Training Certificates section - you can generate their training certificates. On the **Users** tab, select a user, click **Manage users** and from the drop-down list select **Generate Certificates**.

 **You're done!**

Find out more about the **Oracle Health Learn Manager!**

### Get more information

See the [Oracle Learn Manager](#) Release Notes on the Oracle Help Center.

### Other resources

Watch short [training videos](#) on the Oracle Help Center.

### Contact Support

For assistance, contact [Life Sciences Cloud Support](#).

### Can't find what you need?

Write to us at [clinical\\_one\\_doc\\_feedback\\_us\\_grp@oracle.com](mailto:clinical_one_doc_feedback_us_grp@oracle.com)