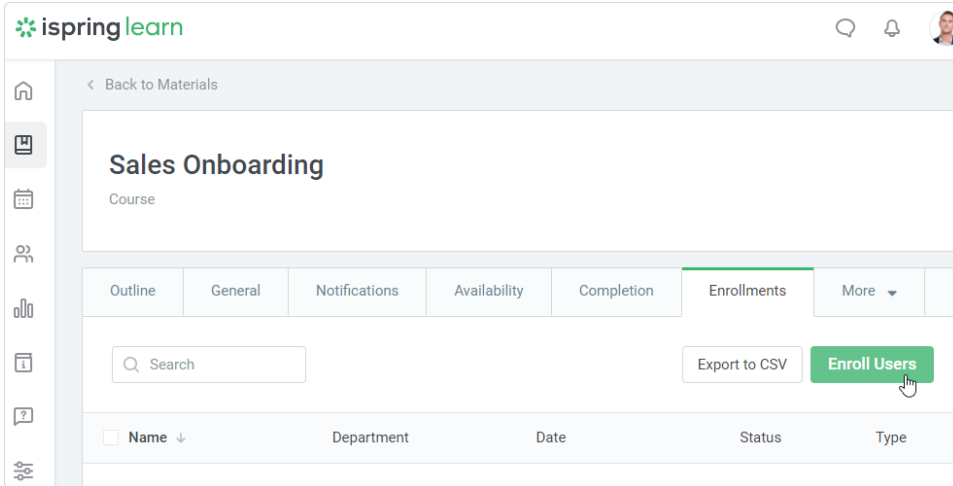


Enrollments

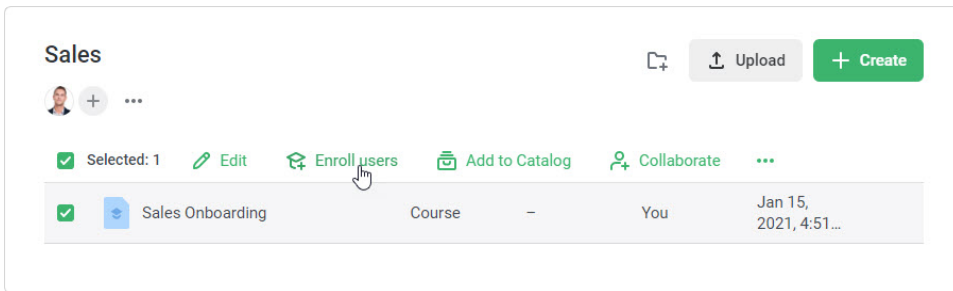
Creating an enrollment starts with selecting a course or a learning track. Furthermore, enrollments allow the gathering of different types of content together and enrolling learners in them.

Select a course to assign to your students in one of four ways:

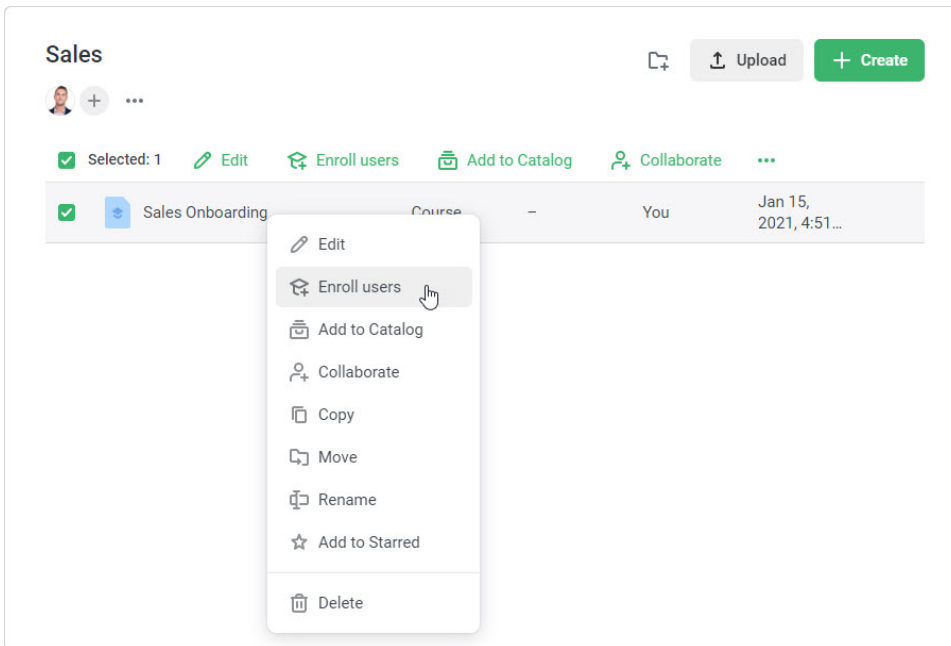
1. On the **Edit Course** page, open the **Enrollments** tab. Then, click the **Enroll Users** button.



2. The alternative is to select one or more courses in the **Courses** section and click the **Enroll Users** link in the upper menu. This method will be useful in case you want to choose multiple items for enrollment.

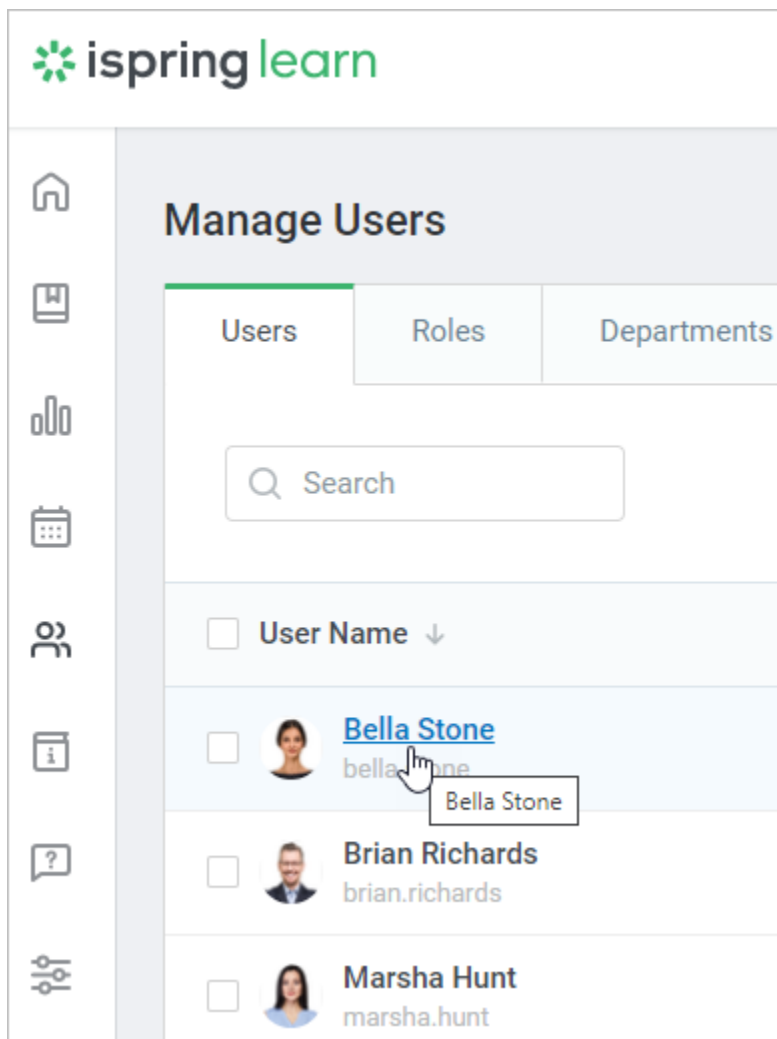


3. The third way is to right-click a course and select **Enroll Users** in the context menu. You can also choose multiple courses and click **Enroll Users** in the context menu.



4. The fourth option is to assign a course on a user's page. In this case, the order of the enrollment stages will be different.

- a. Go to the **Users** section and click on a user's name.



b. Open the **Enrolled Learning** tab. Next, click on the **Enroll: Course/Training** menu and select **Enroll Course**.

The screenshot shows the 'Edit user' interface for Bella Stone, who is a Department Administrator and Course Author. The 'Enrolled Learning' tab is active, displaying a summary of enrolled items: 7 Enrolled, 0 Completed, and 4 Trainings. A dropdown menu is open under the 'Enroll: Course/Training' button, showing 'Enroll Course' and 'Enroll Training' options. The 'Enroll Course' option is highlighted with a mouse cursor.

c. There will be three stages in the enrollment window: **Users** **Courses** **Parameters**.

If you return to the **Users** stage, you'll see that one user is already selected. But you can add more users: just start entering a name, login, or email and click on the matching user that appears.

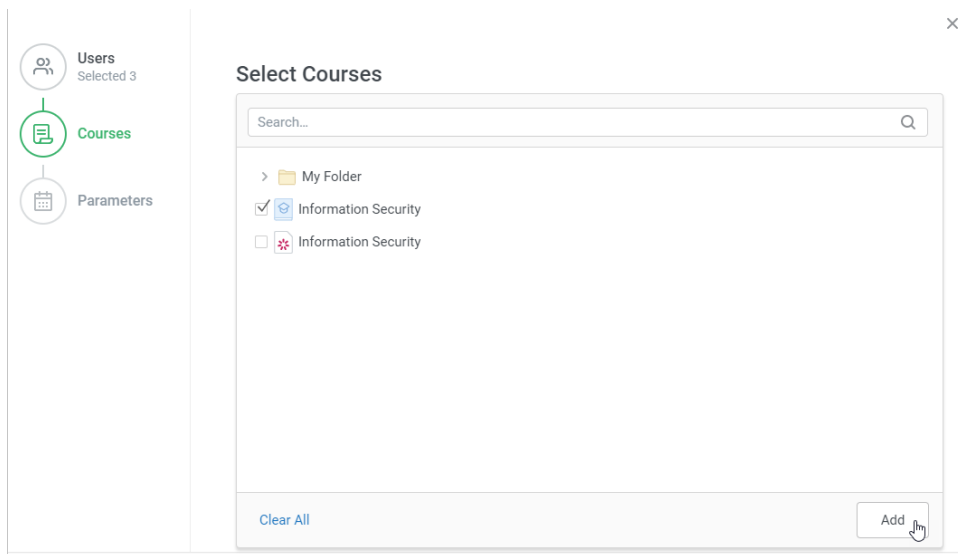
The 'Select Users' window shows the 'Users' stage with 1 user selected. A search bar contains the text 'nick', and a dropdown list displays 'Nick Moore (nick.moore)'. The 'Advanced Search' button is located to the right of the search bar. Below the search results, a table lists the selected user: Nick Moore (nick.moore) from the Department.

Click the **Advanced Search** button to select an entire department or group, or filter users by any of the profile fields.

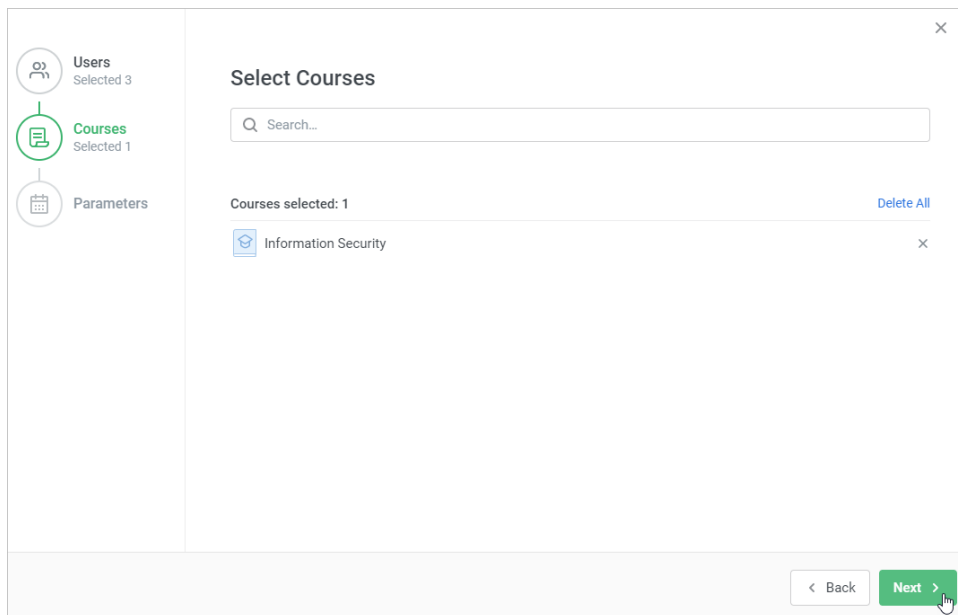
As soon as the user list is ready, click **Next**.

The 'Select Users' window shows the 'Users' stage with 3 users selected. The search bar is empty, and the dropdown list displays three users: Bella Stone (Director of Sales), Marsha Hunt (Sales Representative), and Nick Moore (Copywriter). The 'Next' button is located at the bottom right of the window.

d. In the next step, select a course or a learning track. Enter a course name in the search bar, choose a matching option, and click **Add**.



When the course list is ready, click **Next**.



e. In the **Parameters** step, you can set up the learning start date and time, and specify the due date.

i. Click the calendar icon in the **Start date** field. In the opened calendar, select the date and time, and click **OK**.

Users
 Selected 3

Courses
 Selected 1

Parameters

Specify Enrollment Settings

Start date: 09.03.2021 00:00

Course Name: Inform

<

March 2021

>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

09:30

▼

OK

ii. The second parameter you can change in this window is the due date. The following options are available:

Use course settings — the value from the [Availability](#) tab is auto-populated.

By Date — set up the time and date by which the content item should be completed.

For a period — specify the number of days, weeks, months, or years your learners can take to complete the course. **Note:** a month always has 30 days, and a year always has 365 days.

No Due Date — the content item is not time-limited, and your students can take as long as they wish to complete it.

For the **By Date** and **For a period** options, you can select the **Restrict access after due date** option. In this case, learners won't be able to take the course after the due date expires.

If you need to apply the completion settings to all assigned items, select **Apply to All**.

Specify Enrollment Settings

Start date: 09.03.2021 09:30

Course Name: Information Security

Due Date: Unlimited

Calendar: March 2021

Selected date: 10

Options: ☒ Restrict access after due date, ☒ Apply to all

Time: 10:00

OK

- iii. If a course includes a training, select a session in which users will be enrolled. If you choose **The participant selects the session**, that will mean users will select a session in [the user portal](#) on their own.

Specify Enrollment Settings

Start date: 23.04.2021 09:00

Course Name: Sales Onboarding

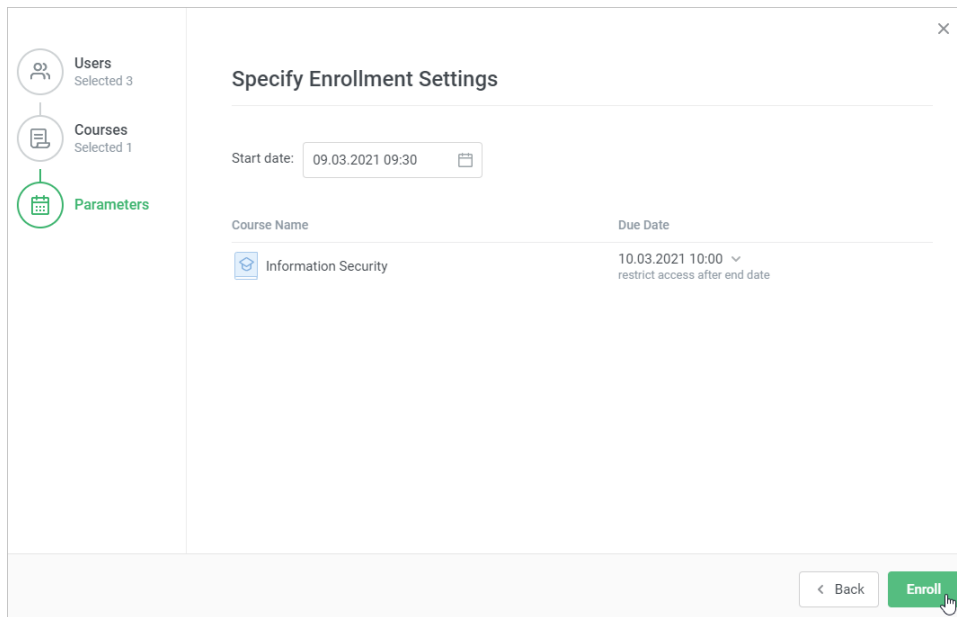
Due Date: 30.04.2021 09:00 (restrict access after end date)

Session Selection: Session 3 (Apr 23, 2021, 10:30 AM)

Confirmation: The participant selects the session

- f. When you complete all these steps, click the **Enroll** button. Now all of your students will receive a notification in the user portal and to their email addresses. Also, the assigned content will appear in the **My Courses** section of the user portal, and learners can begin studying it.

You can also [edit](#) and [cancel](#) enrollments, [reset their progress](#), or [export all of them to a CSV file](#).



The dialog box is titled "Specify Enrollment Settings" and has a close button (X) in the top right corner. On the left side, there is a vertical sidebar with three items: "Users" (Selected 3), "Courses" (Selected 1), and "Parameters" (highlighted with a green circle). The main area contains the following fields:

- Start date:** A text input field showing "09.03.2021 09:30" with a calendar icon to its right.
- Course Name:** A text input field showing "Information Security" with a small blue icon to its left.
- Due Date:** A text input field showing "10.03.2021 10:00" with a dropdown arrow and the text "restrict access after end date" below it.

At the bottom right, there are two buttons: a grey "Back" button with a left arrow and a green "Enroll" button with a mouse cursor pointing at it.

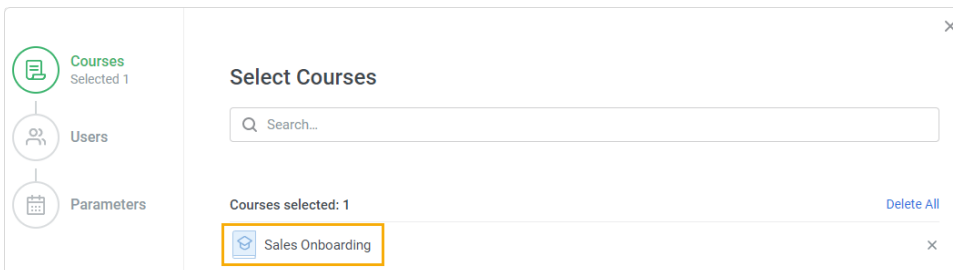
In the opened window, create the enrollment.

- [Step I: Courses](#)
- [Step II: Users](#)
- [Step III: Parameters](#)

Step I: Courses

At this step, the following actions are available:

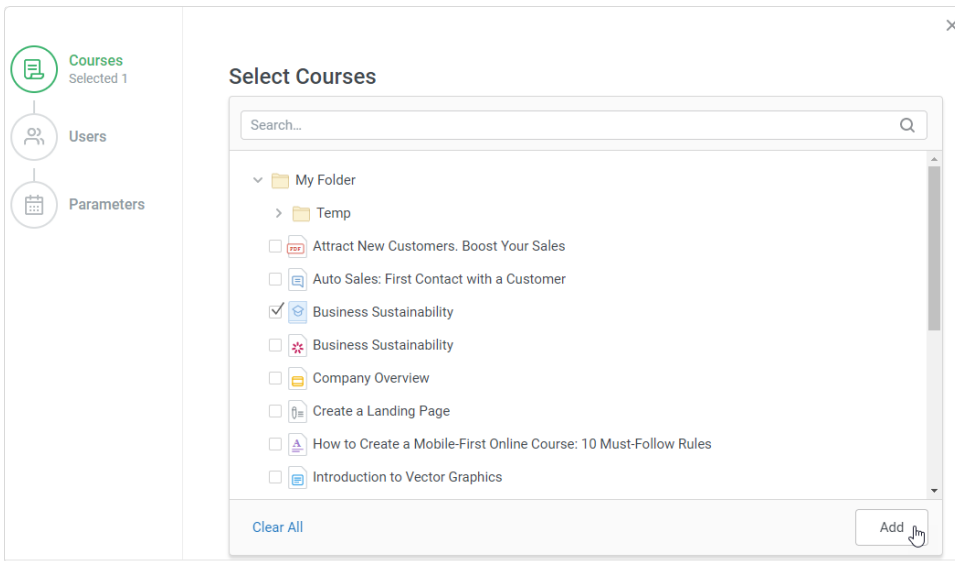
1. Viewing content items that you have chosen to assign.



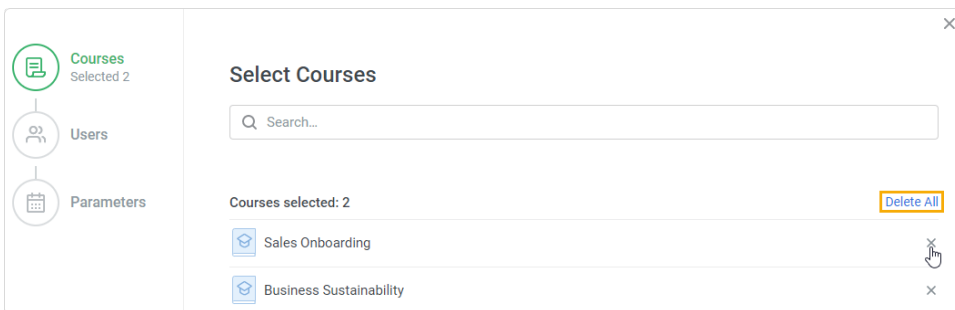
The dialog box is titled "Select Courses" and has a close button (X) in the top right corner. On the left side, there is a vertical sidebar with three items: "Courses" (Selected 1, highlighted with a green circle), "Users", and "Parameters". The main area contains the following elements:

- Search bar:** A text input field with a magnifying glass icon and the placeholder text "Search..."
- Courses selected:** A text label showing "1" with a "Delete All" link to its right.
- Course list:** A list of course items. The first item, "Sales Onboarding", is highlighted with a yellow border and has a small blue icon to its left.

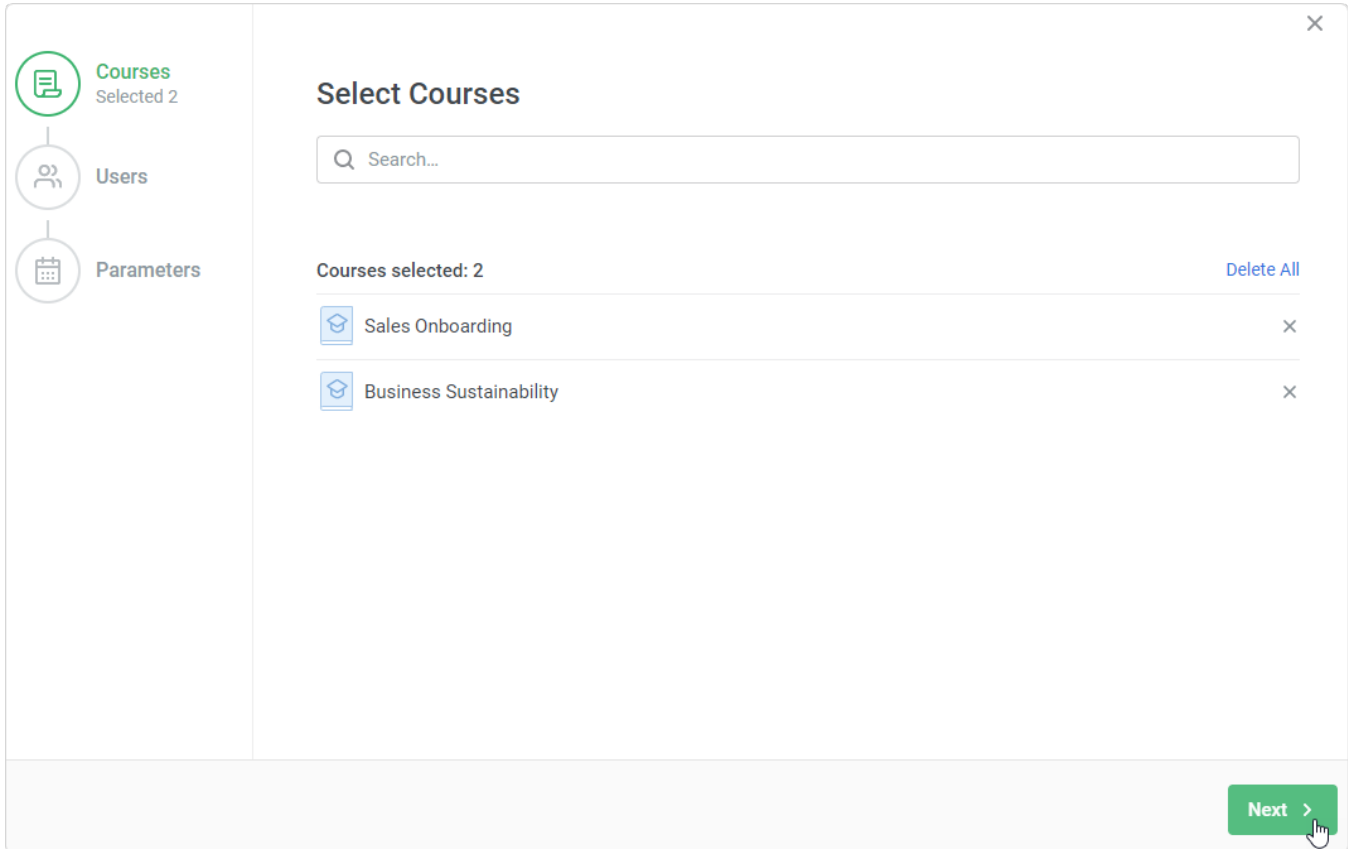
2. Adding extra courses to the list of assigned items.
To do this, click the search bar, choose needed content items, and hit the **Add** button.



3. Deleting content from the list. Select a course by hitting a cross or click the **Delete All** link if you want to empty the list completely.




As soon as the content list is ready to be assigned, click **Next** or select the **Users** step.

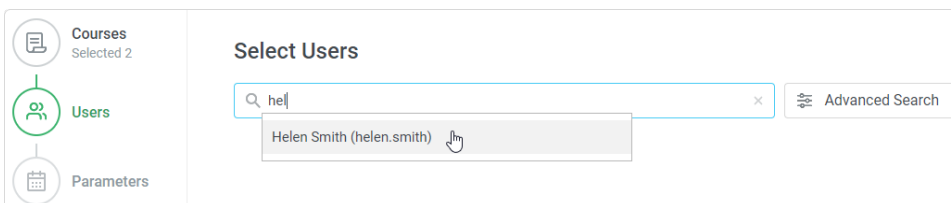


Step II: Users

At the **Users** step, build a list of learners who will study the content.

1. Start entering the first name, last name, login, or email of a user and left-click the matching option.

 If the course is assigned to the administrator, all [previews](#) of course modules made from the admin portal will be accounted for in the [reports](#).



2. If you can't locate the learner, use the **Advanced Search** option.



Here, the following filters are available:

- Department
- Position
- Group
- Login
- Email
- First Name
- Last Name


- Country
- Other required [profile fields](#)

Select Users

Filter by: Department ▾ | Job Title ▾ | Group ▾ | More ▴

Back to Search

Login
 Email
 First Name
 Last Name
 Education



Assign courses to users belonging to a specific department or multiple departments. For instance, assign the Rules of Effective Negotiating course to the entire Sales department.

Select Users

Filter by: Department ▴ | Job Title ▾ | Group ▾ | More ▾

Back to Search

Search...

☐ Head Office

- ☐ Accounting and Finance
- ☐ Human Resources
- ☐ Marketing
- ☐ Product Development
- ☒ Sales Department
- ☐ Technical Support Department

☐ New York Branch Office

Clear Add

Also, you can enroll an entire group of users in a course. Let's say you want to enroll all learners of the SMM group in the Setting Up Ad Targeting course.

Select Users

Filter by: Department ▾ | Job Title ▾ | Group ▴ | More ▾

Back to Search

Select group

Search...

Adobe After Effects for Beginners
 HTML Basics
 Intro to Digital Marketing
 SMM

Specify param

Filtering by other parameters works the same way. Sort users by a specific value and assign the courses to be taken.

3. To remove (deselect) a user from the list, click the "x" next to their name. If you want to empty the list completely, click **Delete All**.





Select Users

Advanced Search


Users selected: 2


Department


Delete All

	Helen Smith Sales Manager	Head Office	
	Ronald Kray	My Company	

To go on to the next step, hit **Next** or click the **Parameters** step.

 Courses
Selected 2

 Users
Selected 3

 Parameters

Select Users

Filter by:

Department

 |

Job Title

 |

Group

 |




More

Clear Filter

Users selected: 3

Department

Clear All

	Emily Sohail	My Company	<input checked="" type="checkbox"/>
	Helen Smith Sales Manager	Head Office	<input checked="" type="checkbox"/>
	Ronald Kray	My Company	<input checked="" type="checkbox"/>

Back

Next

Step III: Parameters

In this step, you can set up the start date and time to start studying the content, specify the completion date, select a training session if a training is included in a course, or allow learners to choose a session on their own.

1. Click the calendar icon in the **Start date** field. In the opened calendar, select date and time and click **OK**.

2. The second parameter that you can change in this window is the due date. The following options are available:

Use course settings — the value from the [Availability](#) tab is auto-populated.

By Date — you set the time and date by which the content item should be completed.

For a period — specify the number of days, weeks, months, or years your learners can take to complete the course. **Note:** a month always has 30 days, and a year always has 365 days.

No Due Date — the content item has no time limitation and your students can take as long as they wish to study it.

For the **By Date** and **For a period** options, you can select the **Restrict access after due date** option. In this case, learners won't be able to study the content after the course's due date has passed.

If you need to apply the completion settings to all assigned items, select **Apply to All**.

Finally, click **OK**.

3. If a course includes a training, select a session in which users will be enrolled. If you choose **The participant selects the session**, the users will be able to select a session in [the user portal](#) by themselves.

Specify Enrollment Settings

Start date: 23.04.2021 09:00

Course Name: Sales Onboarding
Advanced Sales Tactics Webinar

Due Date: 30.04.2021 09:00
restrict access after end date

Session 3
Apr 23, 2021, 10:30 AM

The participant selects the session

Session 3
Apr 23, 2021, 10:30 AM

- If an assigned course includes a training, the users who enrolled in the course don't receive notifications about a training being assigned.
- The training start date coincides with the course start date.

Specify Enrollment Settings

Start date: 23.04.2021 09:00

Course Name: Sales Onboarding
Advanced Sales Tactics Webinar

Due Date: Unlimited

Session 3
Apr 23, 2021, 10:30 AM

- Sometimes a training doesn't have any sessions that start after the course start date. In that case, the only available option will be **The participant selects the session**.

Specify Enrollment Settings

Start date: 23.04.2021 09:00

Course Name: Sales Onboarding
Advanced Sales Tactics Webinar

Due Date: Unlimited

The participant selects the session

The participant selects the session

- Let's suppose that you assigned the learner a course that includes a training and enrolled them in a specific session.

Specify Enrollment Settings

Start date: 23.04.2021 09:00

Course Name: Sales Onboarding
Advanced Sales Tactics Webinar

Due Date: Unlimited

Session 3
Apr 28, 2021, 9:30 AM

And you made the course start date later than the start date of the selected session. In that case, you'll see an error because the learner won't be able to open a training in their portal.

The dialog box titled "Specify Enrollment Settings" has a sidebar with "Courses Selected 1", "Users Selected 3", and "Parameters". The main area contains an error message in a yellow box: "Some of the selected participants are enrolled in the session that will start before they get access to the course or after the course's completion date. Change the start date, the completion date, or select another training session." Below this, the "Start date" is set to "03.05.2021 09:00". Under "Course Name", "Sales Onboarding" is selected, and "Advanced Sales Tactics Webinar" is listed below it. The "Due Date" is set to "Unlimited". A dropdown menu shows "Session 3" with the date "Apr 28, 2021, 9:30 AM".

To resolve this error:

- Make the course start date earlier than the start date of the selected session.

The dialog box shows the "Start date" changed to "26.04.2021 09:00". An arrow points from this date to the "Session 3" dropdown, which still shows "Apr 28, 2021, 9:30 AM". The other settings remain the same.

- Change the start date of the selected session so it will start later than the course.

The "Session 3" details view shows the session time as "When: Apr 28, 2021, 9:30 AM – 10:30 AM (UTC-04:00)" and "Capacity: Unlimited". A menu is open with options "Edit Session" and "Delete".

- e. If a course has a due date, then sessions taking place later than the course completion date won't be displayed in the menu.

The dialog box shows the "Start date" as "26.04.2021 09:00". Under "Course Name", "Sales Onboarding" is selected, and "Advanced Sales Tactics Webinar" is listed below it. The "Due Date" is now set to "26.04.2021 10:30". The dropdown menu shows "The participant selects the session".

- f. If, after the administrator clicks on the **Enroll** button, it turns out that there aren't enough available seats in the session, then an error message will appear. In this case, the administrator should enroll learners in another session or increase the number of available seats in the training session.

Specify Enrollment Settings

Start date: 23.04.2021 00:00

Course Name

Sales Onboarding

Advanced Sales Tactics Webinar

Due Date

Unlimited

Session 4
Jun 16, 2021, 9:30 AM, no seats left

Insufficient seats remaining

- g. After being enrolled in a course including a training, the learner receives the following notifications:
- about [the course being enrolled](#)
 - about [a training session approaching](#) (a reminder sent out X days before the session start date) — if a training session was selected (the administrator chose the session when enrolling the learner in the course or the learner selected the session on their own)
 - about the training session being started — if a training session was selected (the administrator chose the session when enrolling the learner in the course or the learner selected the session on their own)
 - [course notifications](#)
 - notifications about [the training being changed](#)
 - notifications about [the training being canceled](#) (these aren't sent out if the administrator deleted a training from a course)

When you complete all these steps, click the **Enroll** button. Now, all your students will receive a notification in the user portal and in their email inbox. Also, the assigned content will appear in the **My Courses** section of the user portal, and students can start studying it.

You can also [edit](#) and [cancel](#) enrollments, [reset their progress](#), or [export all of them to a CSV file](#).

Courses
Selected 1

Users
Selected 3

Parameters

Specify Enrollment Settings

Start date: 23.04.2021 09:00

Course Name

Sales Onboarding

Advanced Sales Tactics Webinar

Due Date

30.04.2021 09:00
restrict access after end date

Session 3
Apr 23, 2021, 10:30 AM

< Back

Enroll