

# Course Enrollment Methods

Last Modified on 07/25/2022 2:40 pm CDT

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## Summary of All Methods

There are many methods that can be used to enroll users into a course. Below is a brief description of each enrollment method, as well as links to more in-depth instructions on how to utilize each of the methods listed.

### Learning Path

The Learning Path feature allows your organization to set a course of training involving multiple courses and Phishproof simulations (if applicable). This course or "path" of training can be set up in advance for months in advance or even the whole year (or more). The Learning Path creates a chain of educational milestones, and users will automatically be assigned the next milestone (course or simulation) based on the requirements you set in the Learning Path. (Requires Groups be set up first. Learn More about Groups here: [Creating and Editing User Groups](#))

### Individual User by Profile

Allows you to enroll users into courses or curricula individually using the find users feature.

### Individual Course by Course Settings

This allows you to enroll the user via the settings in the course.

### Through Curriculum

This allows you to bundle courses together for ease of enrollment and management and some additional completion rule options. Users can then be enrolled directly into the curriculum, or the curriculum can be used for enrollment by the other options below.

### By Group

Allows you to enroll users into courses or curricula by a specific group. This option enrolls all group members in training assigned to the group.

(Requires Groups be set up first. Learn More about Groups here: [Creating and Editing User Groups](#))

### Bulk by Spreadsheet

Allows you to enroll specific users by uploading a spreadsheet of email IDs. Anyone whose email ID is on the spreadsheet will be either enrolled or un-enrolled based on your selection.

### Self-Enrollment

Allows users to enroll themselves in courses or curricula.

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## Learning Path

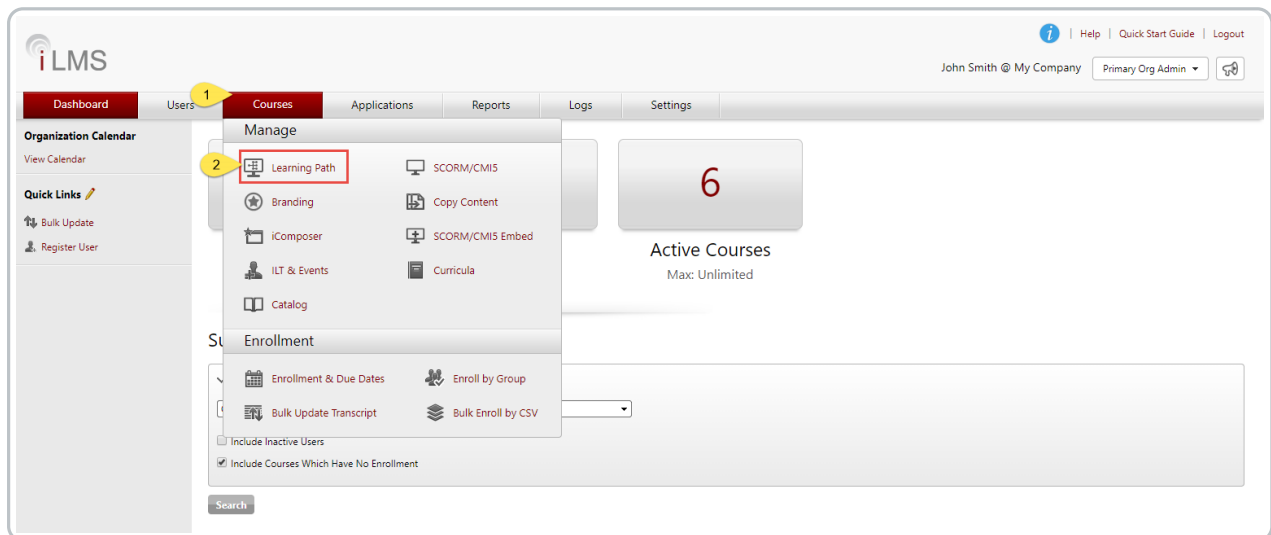
The Learning Path feature allows your organization to set a course of training involving multiple courses and Phishproof simulations (if applicable). This course or "path" of training can be set up in advance for months in

advance or even the whole year (or more). The Learning Path creates a chain of educational milestones, and users will automatically be assigned the next milestone (course or simulation) based on the requirements you set in the Learning Path.

## How to implement a Learning Path

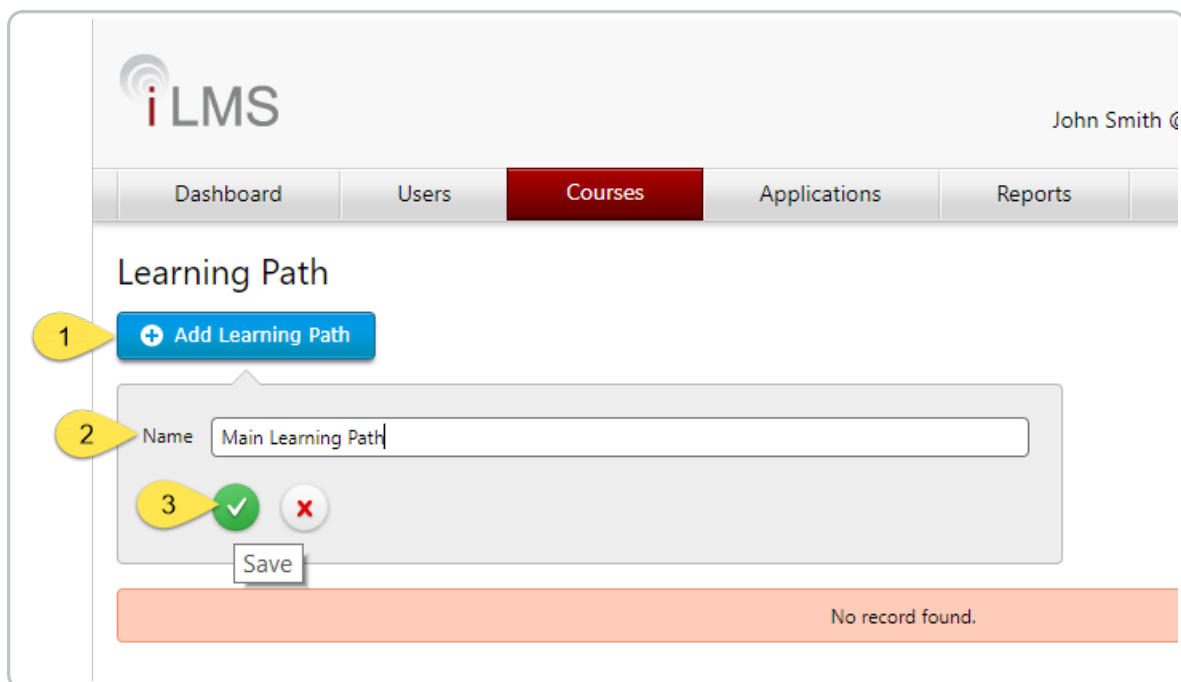
### Navigate to Learning Path sub-tab

At the org admin level, simply navigate to the Courses Tab -> then select Learning Path.



### Add Learning Path

Click the "Add Learning Path" button, type in a name: e.g. Main Learning Path, and click **Save**.



## Edit Learning Path

Click on the "Edit" icon next to the newly added Learning Path to begin adding courses and simulations. Once all settings are in place and saved, we will later return to this screen to Publish the Learning Path and kick off auto-enrollments.

iLMS

John Smith @ My Company Primary Org Admin

Dashboard Users **Courses** Applications Reports Logs Settings

### Learning Path

✓ The learning path "Main Learning Path" was added successfully.

Click here to modify the newly created learning path now. Or, click the corresponding edit icon to modify the newly created Learning Path at any time.

+ Add Learning Path

Name	Courses/Simulations	Groups	Publish	Edit	Delete
Main Learning Path	0	0	✓		

Page 1 of 1 100 items per page

Edit 1 of 1

## Add Courses, Phishing Simulations, and Policies

Now, let's build our learning path by adding courses, sims, or policies. In the add course dialog, courses uploaded to the Org will automatically populate in this dropdown list. You can also select a course by typing in a search query consisting of 3 or more characters.

iLMS

John Smith @ My Company Primary Org Admin

Dashboard Users **Courses** Applications Reports Logs Settings

### < Back Learning Path: Main Learning Path

! This Learning Path is NOT published. Complete all steps before publishing.

Educational Milestones Enroll via Groups

Note: You can add any number of courses and simulations to this Learning Path. To edit or delete a course/simulation, please hover over the course/simulation and select an action.

**COURSES** SIMULATIONS

Search

- S-141: Security Awareness Fundamentals-new
- S-161-SE: Social Engineering - Countermeasures & Incident Response-New
- S-173-PT: (test) Security Awareness – A Day In The Life

Start  
Enroll Immediately

1

Drop Course/Simulation Here

End

Save

Simply drag each course over to its Drop Zone. You can change the order of courses and simulations with the same drag and drop method.

**Note:** Please exercise caution if attempting to modify an Learning Path which has already been published and

is in mid-flight. It is not recommended to make modifications to portions of the Learning Path which have already been assigned to users.

Making changes to future items in the Learning Path that have not yet been reached should be fine.

The screenshot shows the iLMS interface for editing a learning path. The top navigation bar includes 'Dashboard', 'Users', 'Courses' (selected), 'Applications', 'Reports', 'Logs', and 'Settings'. The user is logged in as 'John Smith @ My Company' with the role 'Primary Org Admin'. The page title is 'Learning Path: Main Learning Path'. A warning message states: 'This Learning Path is NOT published. Complete all steps before publishing.' Below this, there are tabs for 'Educational Milestones' and 'Enroll via Groups'. A note says: 'Note: You can add any number of courses and simulations to this Learning Path. To edit or delete a course/simulation, please hover over the course/simulation and select an action.' The main area is divided into 'COURSES' and 'SIMULATIONS'. Under 'COURSES', a search bar and a list of courses are shown. A red dashed line indicates the path from 'Start' (Enroll Immediately) through step 1 to 'End'. A blue box labeled 'Drop Here' is positioned over the path, and a course 'S-141: Security Awareness Fundamentals-new' is being added to it. A 'Save' button is at the bottom right.

Org Admins can add all courses in one learning path for the whole year. Or set up multiple learning paths that automatically deploy based on Enrollment Rules.

The screenshot shows the iLMS interface for editing a learning path. The top navigation bar is the same as the previous screenshot. The page title is 'Learning Path: Main Learning Path'. A warning message states: 'This Learning Path is NOT published. Complete all steps before publishing.' Below this, there are tabs for 'Educational Milestones' and 'Enroll via Groups'. A note says: 'Note: You can add any number of courses and simulations to this Learning Path. To edit or delete a course/simulation, please hover over the course/simulation and select an action.' The main area is divided into 'COURSES' and 'SIMULATIONS'. Under 'COURSES', a search bar and a list of courses are shown. A red dashed line indicates the path from 'Start' (Enroll Immediately) through steps 1, 2, 3, and 4 to 'End'. A red box highlights the sequence of four courses added to the path: 'S-141: Security Awareness Fundamentals-new', 'S-161-SE: Social Engineering - Countermeasures & Incident Response-New', 'S-173-PT: (test) Security Awareness - A Day In The Life', and 'Security Awareness Essentials'. Each course has an enrollment rule: 'Enroll Immediately after Completion of Previous Course/Simulation'. A 'Save' button is at the bottom right.

## Add Simulations

Lets go ahead and add our Simulations before we set enrollment rules. Click on Simulations and then drag and drop various phishing simulations into the Drop Zone.

(Simulations can be previewed by clicking the option below the template name. This will open a preview of the template in another browser window.)

The screenshot shows the iLMS interface for configuring a Learning Path. The 'Courses' tab is selected, and the 'SIMULATIONS' section is highlighted. A list of simulations is shown on the left, including 'Excel Attachment 1B - Medium', 'Form Submission 2A - Easy', 'Google Docs 1B - Medium', 'Package Delivery 2B - Easy', 'System Admin 3 - Difficult', and 'USPS Package Delivery 3 - Difficult'. The main area displays a sequence of steps: 1. Start (Enroll Immediately), 2. S-114: Security Awareness Fundamentals-new, 3. Facebook 1 - Easy (highlighted with a red dashed arrow and a yellow circle with '2'), 4. S-161-SE: Social Engineering - Countermeasures & Incident Response-New, 5. S-173-PT: (test) Security Awareness – A Day In The Life, and 6. Security Awareness Essentials. A 'Drop Here' button is visible next to the Facebook 1 - Easy simulation. A 'Save' button is at the bottom right.

Similar to courses, Org Admins can add all simulations in one Learning Path for the whole year to automatically deploy based on Enrollment Rules. You can also change the order.

**Tip:** Start off with Easy templates, then Medium, and then Hard. Cycle back to Easy but switch up the type, e.g. Use Easy Link-Click first, then on the second time around use Easy Form Submission, and so forth.

## Set Enrollment Rules

Now, we are ready to set enrollment rules. Hover over the Start block and click on the edit icon.

< Back **Learning Path: Main Learning Path** ✎

ⓘ This Learning Path is NOT published. Complete all steps before publishing.

Educational Milestones    Enroll via Groups

Note: You can add any number of courses and simulations to this Learning Path. To edit or delete a course/simulation, please hover over the course/simulation and select an action.

COURSES    SIMULATIONS

Search

Google Docs 1B - Medium  
Preview | Type: Link Click

Package Delivery 2B - Easy  
Preview | Type: Link Click

USPS Package Delivery 3 - Difficult  
Preview | Type: Link Click

1 — S-141: Security Awareness Fundamentals-s-new

2 — Facebook 1 - Easy  
Type: Link Click  
Enroll Immediately after Completion of Previous Course/Simulation

3 — S-161-SE: Social Engineering - Countermeasures & Incident Response-New  
Enroll Immediately after Completion of Previous Course/Simulation

ⓘ Your changes will be lost. Be sure to save your changes by clicking the Save button below.

Select the enrollment rule for the initial course.

Once the Learning Path is published, iLMS will run the automated rule sets at **midnight** and course enrollment emails will be sent out according to the selected rule.

**Note:** All applicable enrollments occur at midnight per the rules set by the learning path.

Details for the operation of each of the enrollment rule options for initiating the Learning Path are listed below.

- **Enroll on Publish Date**

If this option is selected, users will be enrolled at midnight following publish.

- **Enroll \_\_\_ Days after Hire Date**

This option enrolls users the specified number of days after their hire date.

**Note:** Hire Date must be populated in the user profile for this to work properly.

This rule will enroll anyone with a hire date GREATER THAN or EQUAL TO the specified number of days.

- **Enroll on this Day \_\_\_\_**

If this option is selected, the current members of the assigned group will be enrolled on midnight of the date specified.

In the example below, we've selected the first one. Learners will be able to begin their first course the midnight after the Learning Path is published. Click **Save** to apply your selections.

Note: You can add any number of courses and simulations to this Learning Path. To edit or delete a course/simulation, please hover over the course/simulation and select an action.

**COURSES** **SIMULATIONS**

Search

Apple 2 - Medium (Form Submission)  
Preview | Type: Form Submission

Bank of America 1 - Easy  
Preview | Type: Link Click

Excel Attachment 1B - Medium  
Preview | Type: Attachment

Facebook 1 - Easy  
Preview | Type: Link Click

False Receipts 1C - Difficult  
Preview | Type: Link Click

Form Submission 2A - Easy  
Preview | Type: Form Submission

Gold Bank 1B - Medium

Your changes will be lost. Be sure to save your changes by clicking the Save button below.

**Start**  
Enroll on Publish Date

**Initial Course/Simulation**

Note: This enrollment rule will only be applicable to the first course or simulation in this Learning Path.

☒ Enroll on Publish Date

☐ Enroll  Days after Hire Date

☐ Enroll on this Day

✓ ✕

End

Save

Now, let's set the rules for subsequent courses. Rules for subsequent enrollments do differ from those of the initial enrollment. Details for each option are listed below:

- **Enroll Immediately after Completion of Previous Course/Simulation**

This will enroll a user at midnight following their completion of the previous course or simulation.

**Note:** If the user does not complete the previously assigned course, they will not be enrolled in the next one until completion has been met.

- **Enroll \_\_\_ Days after Completion of the Previous Course/Simulation**

This will enroll a user based on a number of days specified after completing the previous course/simulation.

**Note:** If the user does not complete the previously assigned course, they will not be enrolled in the next one until completion has been met.

- **Enroll in Regular Intervals of \_\_\_ Days**

This option will enroll the user(s) in a course/simulation in regular intervals of days specified regardless of completion.

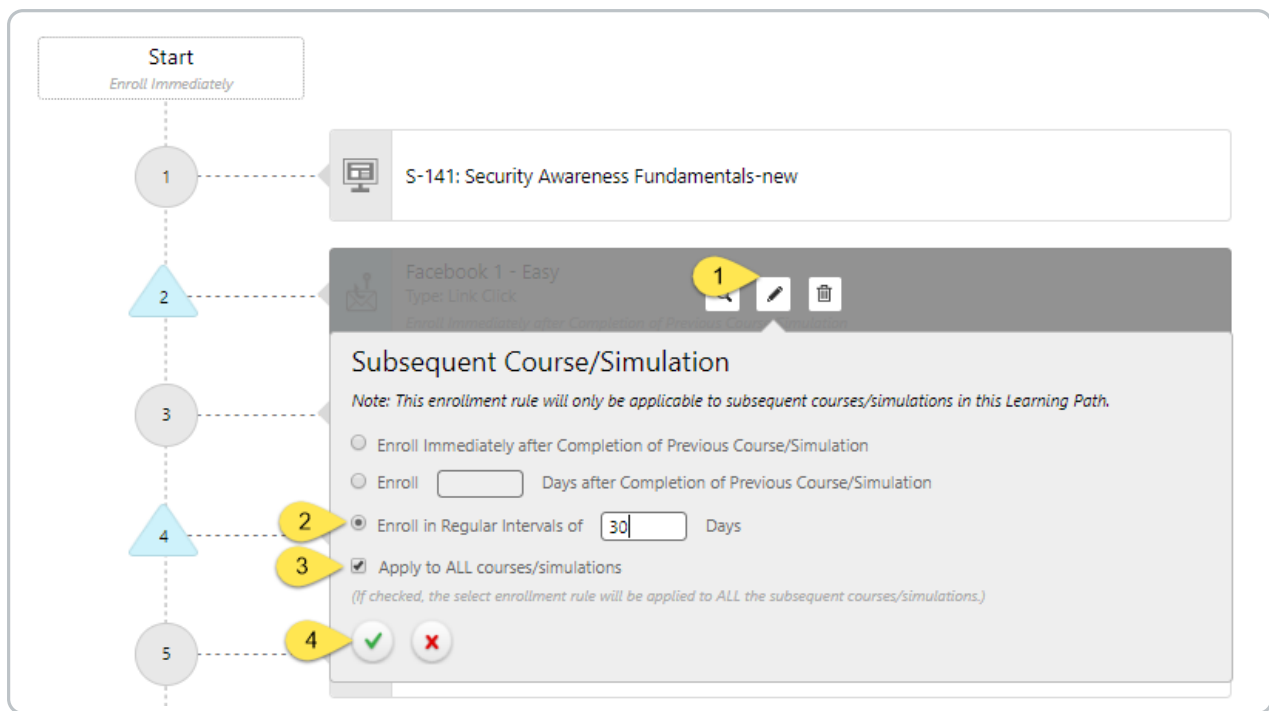
This is the recommended option.

We recommend having learners take courses/simulations once every month to keep security concepts fresh and forefront in mind. So we will set them at 30-day intervals. Hover over the second course or simulation and click the edit icon. Select the third option and enter the number of days. Check the box to apply this rule to all courses and simulations in this Learning Path. Click Save to apply your selections.

- **Apply to All Course/Simulations**

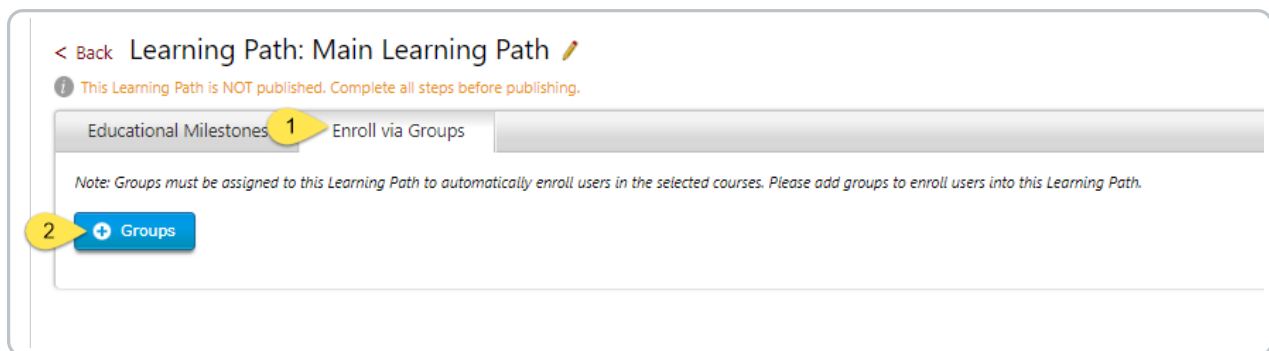
This checkbox will use the same settings for all other courses/simulations (aside from the initial)

**Note:** While hovering over a simulation, you have the option to view the phishing email template. Simply click the Preview icon and it will open in a new browser tab.



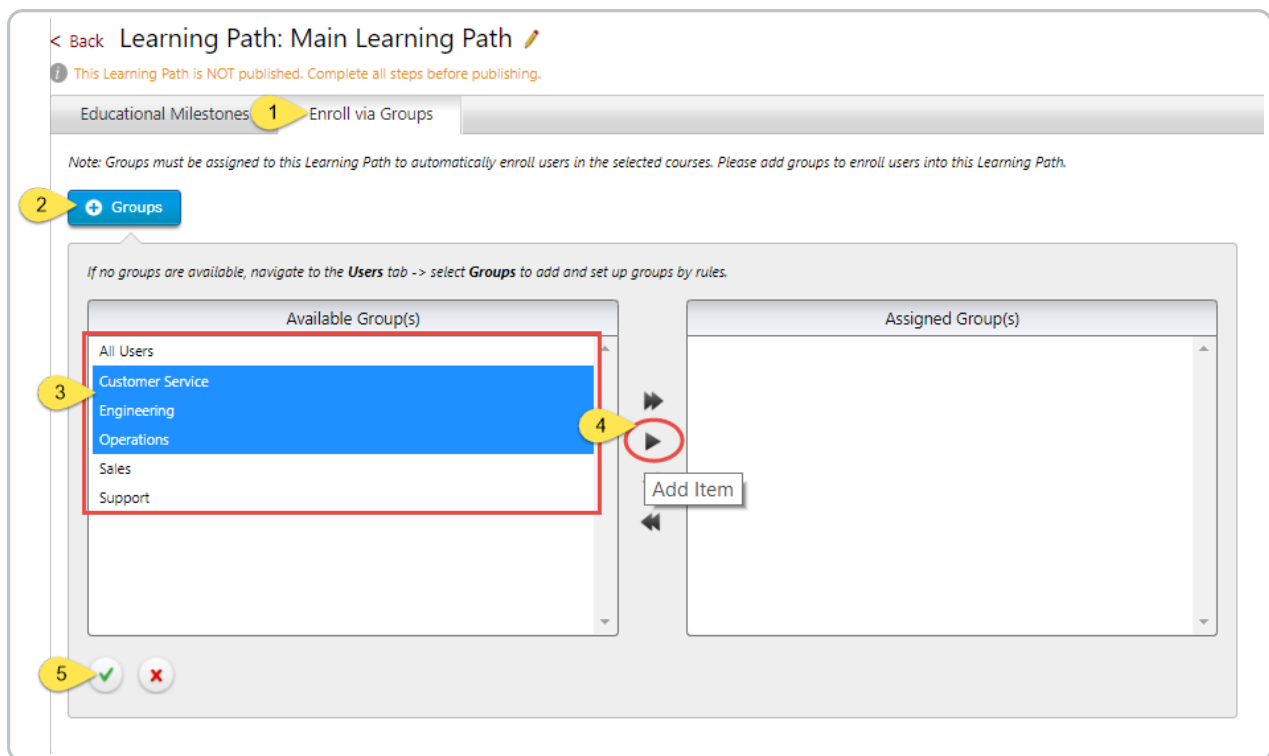
## Add Groups for Assignment

Learning Path Enrollments are by groups only. So, be sure to set up groups before publishing your Learning Path.

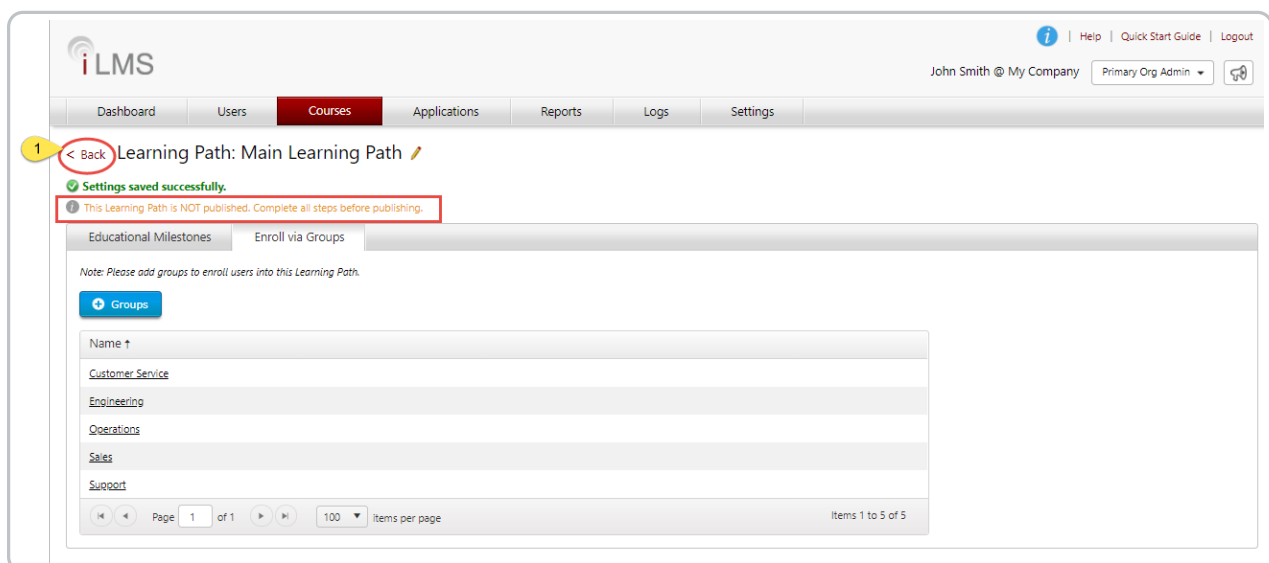


Click the Add Groups button to open the dialog. Click the double arrow to assign all groups or simply select applicable groups and shuffle them to the assigned groups bucket. Don't forget to save your settings by clicking the green check-mark.

**Note:** Hold down the CTRL key to select more than one group.



Once your groups have been added, there is one final step to complete your Learning Path and enable automatic enrollments. Click the Back button to return to the main Learning Path screen.






## Publish Learning Path

Lastly, confirm that the number of courses/simulations and groups match your selections. If your enrollment rules are set and there are no more changes, go ahead and click on the Publish icon. Your Learning Path will be published at midnight and the learners will receive course/simulation enrollment emails according to your selected rule sets.

**Learning Path**

[+ Add Learning Path](#)

Name	Courses/Simulations	Groups	Publish	Edit	Delete
Main Learning Path	8	5	1 		

Page 1 of 1 100 items per page [Publish](#) Items 1 to 1 of 1

Click OK to proceed.

staging.inspiredlms.com says

Clicking on Publish kicks off your Learning Path so that your set enrollment rules will begin enrolling users into courses/simulations tonight.


Going forward, the enrollment rules will run and based on any updated information, users will automatically be enrolled in the courses/simulations assigned to this learning path.

Are you ready to publish this Learning Path?

1 [OK](#) [Cancel](#)




You will receive a success message. And, the Learning Path will have a green check under the Publish column. If there is an error, please contact your Account Manager.

**Learning Path**

 **The Learning Path was published successfully.**

Your set enrollment rules will begin enrolling users into courses/simulations tonight. Going forward, the enrollment rules will run every night and based on any updated information, users will automatically be enrolled in the courses/simulations assigned to this learning path.

[+ Add Learning Path](#)

Name	Courses/Simulations	Groups	Publish	Edit	Delete
Main Learning Path	8	5			

Page 1 of 1 100 items per page Items 1 to 1 of 1

And there you have it, Learning Paths courses and assignment to groups in a nutshell.

## Individual User

When there is a need to enroll one user into some training as a single occurrence, this can be done via the user's profile. To access a user's profile, you can usually click on their name in any user list in iLMS.

To learn more about the user profile see the following: [User Profile and Transcript](#)

The last tab of the user profile will list all available courses in the iLMS. Courses in which the user is already enrolled will be checked, bolded, and will have the Enrollment Path (method by which they were enrolled) listed.

**Note:** The Enrollment Path column is very handy when troubleshooting course enrollments, or when encountering issues with un-enrollment from a course.

The user can be enrolled in new training from this menu. To do this, simply check the box next to the desired course and click the enroll button at the bottom of the list.

### Mandatory/Optional

Allows you to require that the course be mandatory or optional. Enroll Allows you to enroll the user into the selected course.

User: Jack LJack (1751@ilms.com)

Login as this user

Profile

Roles & Realm

Groups

Transcript

Enroll in Course/Curriculum

Enroll in Course/Curriculum

☐ Include Historical

S-141

<input type="checkbox"/> All	Course	Requirement Type	Enrollment Path
<input type="checkbox"/>	S-141-PT: Security Awareness Fundamentals - Pre-Post	<div>Mandatory</div>	
<input type="checkbox"/>	S-141: Dummy	<div>Mandatory</div>	
<input type="checkbox"/>	S-141: Security Awareness Essentials (2018)	<div>Mandatory</div>	
<input checked="" type="checkbox"/>	<b>S-141: Security Awareness Fundamentals - Adaptive Training</b>	Mandatory	Direct
<input type="checkbox"/>	S-141: Security Awareness Fundamentals - Standard	<div>Mandatory</div>	

Page size: 100

Page: 1 of 1

Items 1 to 5 of 5

Enroll

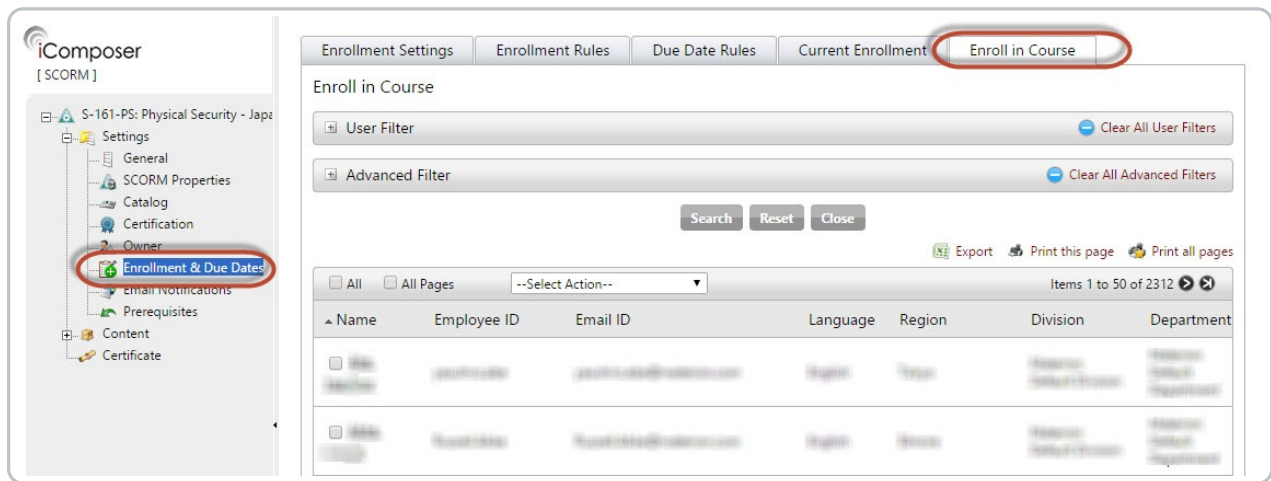
Close

## Individual Course

If there is a need to enroll select users into an individual course, users can be enrolled via the course setting window.

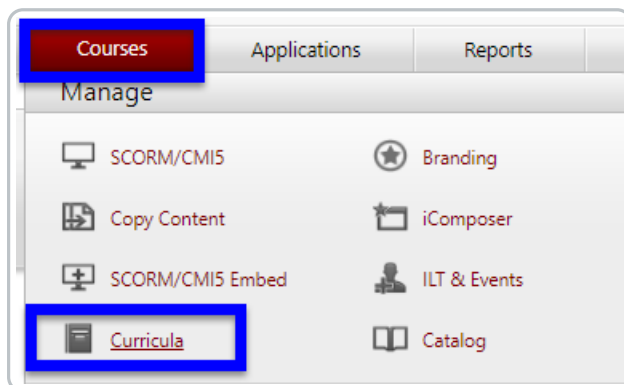
1. To enroll users through the individual course, first locate the course and click the title of the course.  
(Courses are listed under the Courses Tab -> SCORM/CM15 or iComposer)
  - This will bring up the course settings.
2. In the column on the left-hand side, select Enrollment Due Dates.
3. Then select the tab marked Enroll in Course.

4. From here you can select users by placing a check next to their name.
5. Once all desired users are selected simply go to the dropdown Select Action menu choose the Enroll in Course option.



## Curriculum

To enroll a user into multiple courses at once, one option is to bundle courses into a curriculum.



To create a new curriculum, click "+ Add Curriculum" option and input the desired name of the curriculum on the screen that follows. (To edit an existing curriculum, click the title of the curriculum)

## Curricula

*Note: A curriculum is a set of users who all get enrolled into a set of courses by virtue of being a member of the curriculum.*

[+ Add Curriculum](#)

☐ Include Historical

☐ All --Select Action--

Name	
<input type="checkbox"/> <a href="#">Security Awareness</a>	

☐ All --Select Action--

Once a curriculum has been created, courses can be added by clicking the to bring up the course selection menu. (Also on this page, there is the option to set up curriculum specific settings such as due date, etc. much like settings for a course. There is also the option to set completion criteria for the curriculum other than the standard complete all to pass.)

**Courses** | **Current Enrollment** | **Enroll in Curriculum**

[Edit Curriculum Settings](#)  
Opens curriculum settings, such as curriculum level prerequisites, certificate, time before due, completion rules etc.

[Edit Curriculum Completion Rules](#)

☐ Enable Curriculum Level Prerequisites

[+ Add/Remove Course\(s\)](#)

Course Name	Credits	Hours
No record found.		
Total	0	0

Page size: 100 ⌵

Page: 1 of 1

[Save](#) [Close](#)

Once the course selector comes up, move the desired courses to the right pane using the arrows and click save once all necessary courses have been added.

**Add/Remove Course(s)**

Course Name	Credits	Hours	Requirement Type	Order
No record found.				
Total		0	0	

Page size: 100 Page: 1 of 1 Items 1 to 0 of 0

Inspired eLearning LLC. - Google Chrome  
<https://www.inspiredlms.com/modules/groups/AddCurrCourses.aspx>

**Available Course(s)**













- GDPR: Introduction and Overview
- GDPR: Introduction and Overview - InfoSec
- GDPR: Key Principles of the GDPR
- H-115: Advanced Sexual and Workplace Harassment Prevention for Supervisors
- H-115: Advanced Sexual and Workplace Harassment Prevention for Supervisors
- HH-102 HIPAA HITECH Security(HTML5)
- ILT Event
- S-101: Basic Security Awareness (2017)
- S-103-TD: Security Awareness
- S-114: Information Security for Executives
- S-114: Information Security for Executives - RSA
- S-141-PT: Security Awareness Fundamentals - Pre-Post
- S-141: Dummy
- S-141: Security Awareness Essentials (2018)
- S-141: Security Awareness Fundamentals - Adaptive Training
- S-141: Security Awareness Fundamentals - Standard
- S-161-AP: Phishing - InfoSec
- S-161-AP: Phishing - RSA
- S-161-MD: Protecting Mobile Data and Devices (2016)
- S-161-MD: Protecting Mobile Data and Devices - RSA

**Curriculum Course(s)**

- S-161-AP: Phishing
- GDPR: General Data Protection Regulation
- GDPR: Transfers of Data Outside the EU

Save Close

After the courses have been successfully added. The order in which they appear in the curriculum can be changed using the up/down arrows in the right-most column. There is also the ability to edit an individual courses requirement type (mandatory vs. optional) by clicking the pencil icon to the left of the course title.

Course Name	Credits	Hours	Requirement Type	Order
 CSAM-1 S-161-SM: Appropriate Use of Social Media	0	0	Mandatory	 
 CSAM-2 S-161-AP: Defending Against Phishers	0	0	Mandatory	 
 CSAM-3 S-161-MD: Protecting Mobile Data and Devices	0	0	Mandatory	 
 CSAM-4 S-161-HS: "Internet of Things" & Home Security	0	0	Mandatory	 
Total		0	0	

Page size: 100 Page: 1 of 1 Items 1 to 4 of 4

Now that the curriculum has been created and the courses have been added. It can be used for enrollment via one of the other methods listed or you can enroll users directly into the curriculum by following the steps below:

1. Navigate to the Enroll in Curriculum tab
2. Place a check next to the users' names.
3. Select Enroll in Curriculum from the --Select Action-- drop-down menu

Curriculum: Curriculum Name

Courses

Current Enrollment

Enroll in Curriculum

User Filter

Clear All User Filters

Advanced Filter

Clear All Advanced Filters

Search

Reset

Close

Export

Print this page

All

--Select Action--

Items 1 to 7 of 7

Name	Employment	User Language	Region	Division	Department
<input checked="" type="checkbox"/> Johnson, Anna		English	My Company* Default Region	My Company* Default Division	M.R
<input type="checkbox"/> Jones, Alice	aj@inspire.com	English	My Company* Default Region	My Company* Default Division	M.R
<input type="checkbox"/> Ketz, Anna	ak@inspireme.com	English	My Company* Default Region	My Company* Default Division	M.R
<input type="checkbox"/> Papers, Ken	kp@inspireme.com	English	My Company* Default Region	My Company* Default Division	M.R
<input type="checkbox"/> R, M	mison.riggins@inspireme.com	English	My Company* Default Region	My Company* Default Division	My Company* Default Department
<input type="checkbox"/> Smith, Jane	js@inspireme.com	English	My Company* Default Region	My Company* Default Division	M.R
<input type="checkbox"/> Thompson, John	jt@inspireme.com	English	My Company* Default Region	My Company* Default Division	M.R

All

--Select Action--

Display 100 lines per page

Items 1 to 7 of 7

**Note:** To Un-Enroll a user from a course that was assigned via a curriculum the user will either need to be removed from the curriculum. Another option would be to remove the course from the curriculum, but this would of course impact all users who have been assigned the curriculum.

In either occurrence, only users who have a status of "Not Started" in the curriculum's courses will be un-enrolled.

Courses with a different status; such as, "In Progress", "Pass", or "Fail" will remain assigned.

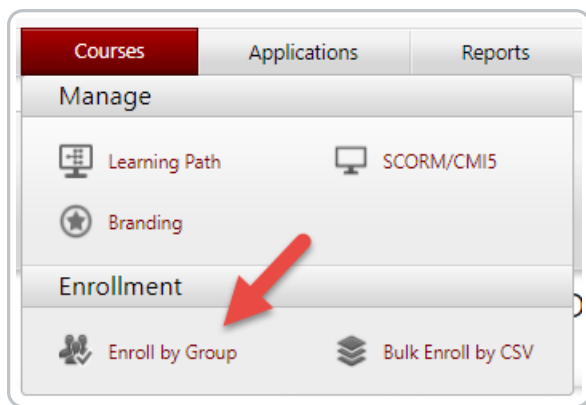
## Group

**Note:** Groups have their own set of email notifications. These must be set prior to user enrollment in courses in order to trigger notifications.

To learn more about how to set up enrollment emails for groups please see the article here: [Group Email Notifications](#)

### Assign a Course or Curriculum to a Group

After creating a group and setting up your email notifications, click the Courses tab then click on Enroll by Group.



Click on the green + button under Assign Course for the corresponding group.

Group Name ▲	Group Members	Courses	Assign Course	Email Notification
<a href="#">New Hires</a>	14	0		

In the Course selector, highlight the course(s) and click the arrow pointing towards the right, circled below, to add courses to the Group.

### Select Courses for: New Hires

☐ Include Historical
 

Search...

#### Available Course(s)

- Anti-Bribery: Working Responsibly with Third Parties
- Antitrust: Careful Communication with Competitors
- Antitrust: Careful Communication with Competitors SCORM
- Communicating Effectively with Project Stakeholders Simulation
- Conflicts Of Interest: Divided Loyalties
- Controlling Costs
- Core PMI® Values and Ethical Standards
- Create Work Breakdown Structure
- Defining and Sequencing Project Activities
- Developing and Controlling the Project Schedule
- Estimating Activity Resources and Durations
- Estimating and Budgeting Project Costs
- H-143 Preventing Workplace Harassment (All Employee Standard)
- H-147 Preventing Workplace Harassment and Discrimination for Supervisor
- Identifying Project Risks
- Integrated Initiation and Planning
- Integrated Project Change Control and Close
- Integrated Project Execution, Monitoring, and Control

#### Selected Course(s)

- AP-101: Phishproof

Next Cancel

You have assigned new course(s) to this group. Click "Next" to change their due date and requirement type to complete the settings.

After the course(s) has been added click next to set the **Requirement Type** and **Due Date**.

Set the Requirement Type to Mandatory or Optional.

**Set Due Date & Requirement Type**

*Note: You have added below course(s) into the selected list. Select "Checkbox" to modify requirement type and due date of the courses.*

Set Requirement Type
Set Due Date

Requirement Type Setting
☒ Mandatory
☐ Optional

☒ ☐

Requirement Type	Due Date
Mandatory	None

Set the Due Date that you would like for the course. The Due Date can be set to none, set to within X number of days after being enrolled, or set to a specific calendar date.

**Set Due Date & Requirement Type**

*Note: You have added below course(s) into the selected list. Select "Checkbox" to modify requirement type and due date of the courses.*

Set Requirement Type
Set Due Date

☒ All Course Name ▾

☒ AP-101: Phishproof

Save Cancel

Due Date Settings

☒ Due  Days after Enrollment (Time Before Due)
☐ All Enrolled users Due on this Day 
☐ Remove

☒ ☐

Due Date
None

Click **Save** to complete the assignment of the course(s) to the Group.

**Note:** If you wish to Un-Enroll a user from a course assigned by a group you must either remove the user from the group, or remove the course from assignment to the group.

**Note:** If a course is removed from Group assignment, then any users who have Not Started the course will be un-enrolled.

If users have a status of In Progress, Pass, or Fail, the course will remain even after it is unassigned from the group.

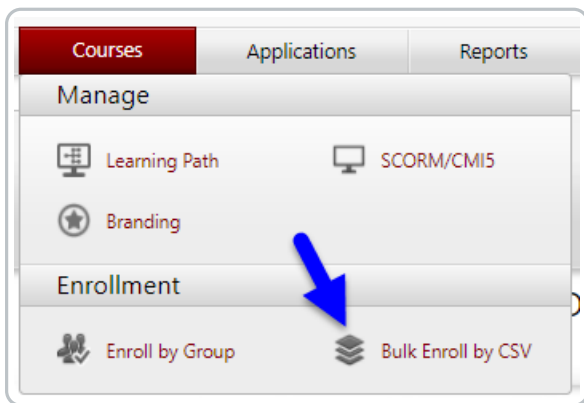
**Note:** Groups have their own set of email notifications. To learn more about how to set up enrollment emails for groups please see the article here: [Group Email Notifications](#)

## Bulk by Spreadsheet

The bulk course enrollment page allows you to quickly perform a one-time enrollment of multiple users into a particular course or curriculum.

**Location:**

Courses Tab -> Bulk Enroll by CSV



**Bulk Enroll/Un-Enroll by CSV** ?

Course: S-141: Security Awareness Essentials (2018) Enrolled User List | Un-Enrolled User List

Operation: ☒ Bulk Enroll ☐ Bulk Un-Enroll

Requirement Type: ☒ Mandatory ☐ Optional

Due Date: ☒ Default Course-Level Due Date ☐ Due Date

File Name:  No file chosen Download Template

Send the Following Emails: ☐ Enrolled in Course

- **Course Drop-Down**

This lists all of the available courses and curricula, from here you will be able to select the course into which you want to enroll or un-enroll users.

- **Enrolled User List**

Once a course has been selected you will be presented with the option to download the list of users that are currently enrolled in the selected course.

- **Un-Enrolled User List**

This will allow you to download the list of users that are currently not enrolled in the selected course.

- **Operation**

Bulk Enroll/ Bulk Un-Enroll - Allows you to choose whether to enroll or un-enroll all the users to a course in the iLMS.

- **Requirement Type**

Mandatory vs Optional

- **Due Date**

"Default Course-Level Due Date" will utilize the Due date settings set under the general settings for the selected course.

"Due Date" will allow you to select a specific date on which the course will be due.

- **File Name**

Choose File Opens a file directory browser to select the .csv file with the list of users.

- **Download Template**

Downloads a blank .csv file containing the text Email ID. To fill this out, simply list the e-mail of the users

under E-mail ID in column A.

- **Send the Following Emails**

Checking Enrolled in Course sends an e-mail to each user that is enrolled in the course as a result of the upload.

Once the desired settings are in place, click **Upload** to complete the bulk enrollment process.

## User Self Enrollment

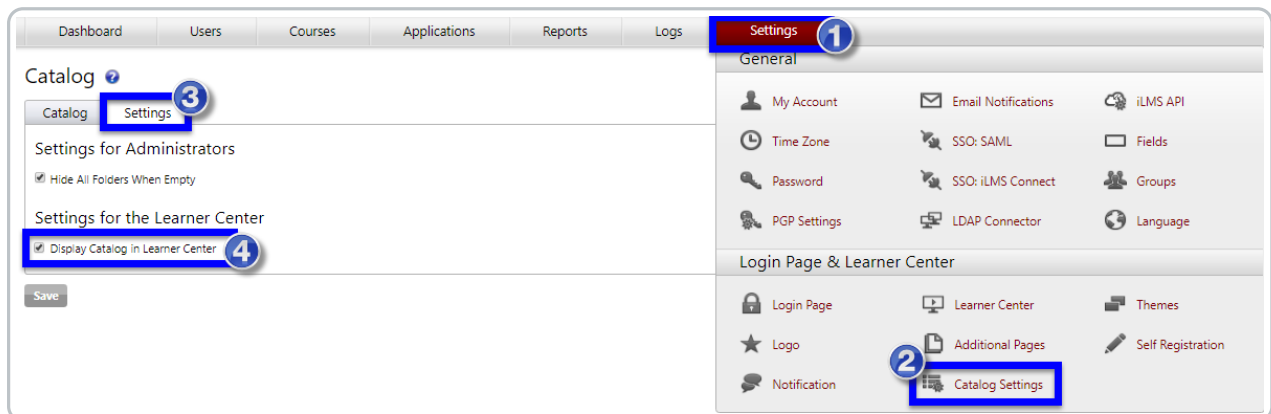
If your organization would like to grant users the option to enroll themselves in training from a catalog, the iLMS does offer self-enrollment.

To set up the ability for users to self-enroll there are a couple things that must be put in place.

- First, the Course Catalog must be enabled for view in the Learner Center
- Second, the course(s) must be set to visible in the Learner Center Catalog, and open-enrollment will need to be enabled for the course.

### Enabling Course Catalog in Learner Center

To make the Course Catalog visible in the Learner center follow the steps below:

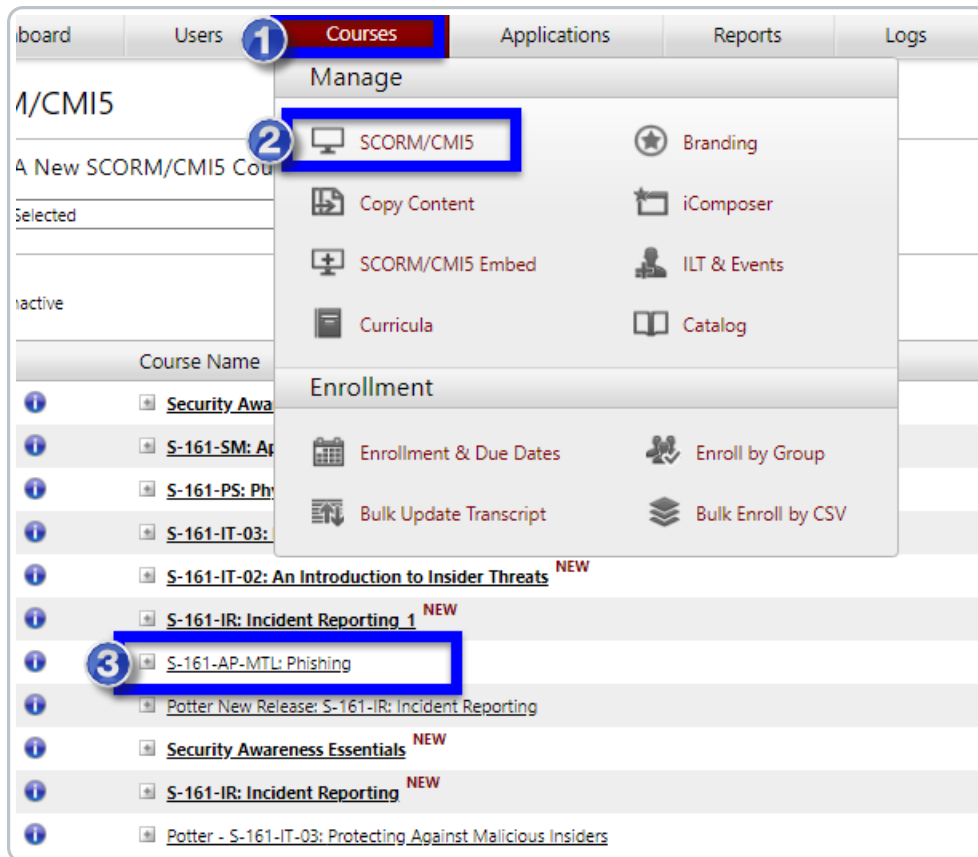


1. Click the Settings tab
2. Select Catalog Settings from the menu
3. Navigate to the Settings tab for the Catalog
4. Check the box for Display Catalog in Learner Center

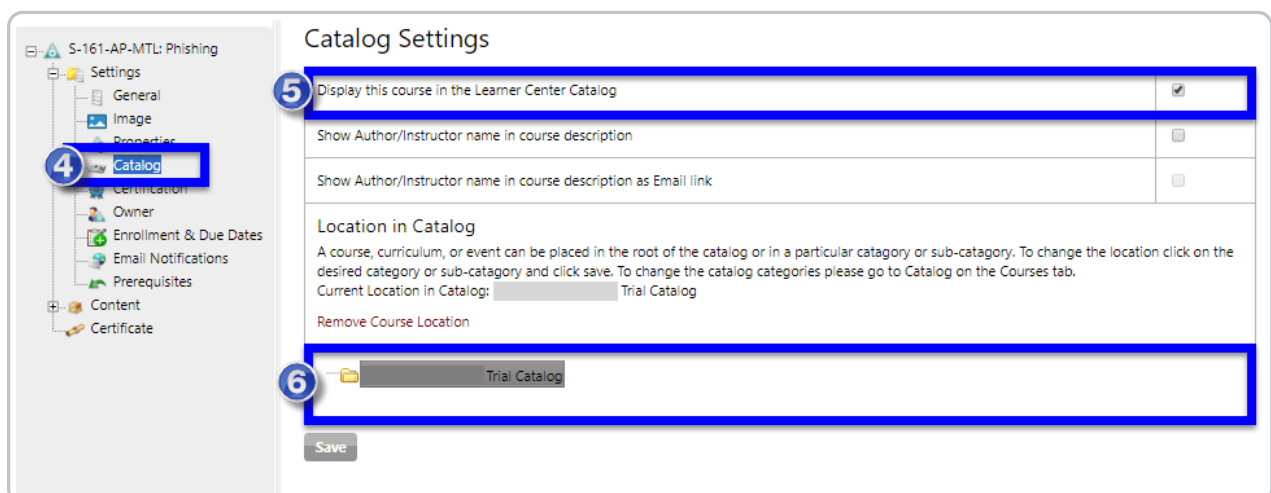
The catalog any applicable courses will now be visible to Learners in the Learner center when they log in.

### Enabling Open Enrollment and Catalog Display for the desired course(s)

For a particular course to be eligible for self-enrollment two-course settings must be enabled, one option displays the course in the catalog and the other allows Open Enrollment in the course for users without the assistance of an iLMS administrator. To locate and enable these settings follow the instructions below:

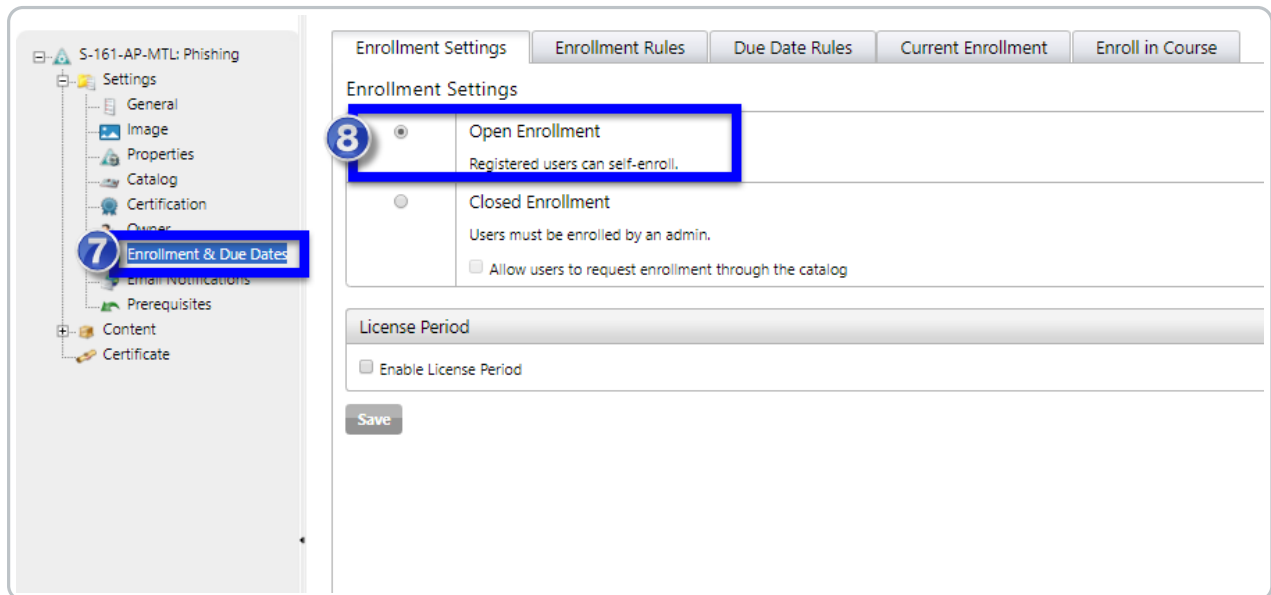


1. Click the Settings Tab
2. Select SCORM/CMIS from the menu to access the list of courses
3. Click the title one of the courses to bring up the settings for that course



4. Once in the Course Settings, navigate to Catalog in the left-hand column

5. Place a check to enable the option Display this course in the Learner Center Catalog
6. (Optional) Determine which folder the course will appear in if applicable



7. Once the Catalog settings for the course are established, navigate to Enrollment Due Dates
8. Select Open Enrollment to allow users to self-enroll without admin assistance.

The Catalog will now be visible to users in the Learner Center when they log in and they will have the ability to enroll themselves into training at-will and take course(s).



