

## Course Enrolment

Enrolment, is the process of marking users as participants in the course, that includes both students and teachers. At the same time users are usually given a role in the course which specifies what they are allowed to do.

### Enrolment plugins

Totara provides a number of ways of managing course enrolment, called *enrolment plugins*. Click the links below for further information.

- **Manual enrolment:** The administrator or course teacher adds users manually.
- **Self enrolment:** A user can choose to enrol him/herself into a course.
- **Audience sync:** Users are part of a Audience which is added to the course.
- **Guest access:** Users can view course materials but not participate.
- **External database:** Users are enrolled from a database such as Access, MySQL.
- **Flat file:** Users are enrolled with a csv file.
- **IMS Enterprise:** Users are enrolled with this standard XML file format.
- **LDAP enrolment:** Users are authenticated and then enrolled through LDAP.
- **PayPal:** Users purchase enrolment with Paypal.
- **Face to face direct enrolment:** Allows users not enrolled in a course to sign up to a face-to-face session.

### Enrolled users

All course participants are enrolled in the course and assigned an appropriate role.

Enrolled users:

- Can be assigned to groups.
- Have grades.
- Can submit assignments.
- Are visible in the list of participants.
- Can subscribe to forums.
- Can participate in choices.

Only enrolled users are true participants in course.

The enrolled users page *Administration > Course administration > Users > Enrolled users* lists all users enrolled in the course, together with their last access time, roles, groups, and enrolment methods.

### Roles

To assign an enrolled user a role, click the 'Assign roles' icon (a plus sign) in the roles column then select the desired role.

To remove a role assignment, click the delete icon (a cross) next to the role name.

Notes:

1. Only roles which can be assigned in the course context type are available to select. The course context type may be set by an admin by editing the role via *Administration > Site administration > Users > Permissions > Define roles*.
2. Only roles which a user is allowed to assign are available to select.

## Groups

To add a user to a group (requires at least one group to have been created previously), click the 'Add to group' icon (a plus sign) in the groups column, select the desired group then click the 'Save changes' button.

## Enrolling users

See Manual enrolment for two methods of enrolling users.

## Searching enrolled users

The search facility allows a teacher to search for specific enrolled users. This is useful when a course has many users enrolled with different methods.

## Enrolment methods

Depending upon which enrolment methods are enabled for the site (by an administrator in *Administration > Site administration > Plugins > Enrolments > Manage enrol plugins*), some or all of the following are available within a course:

### Manual enrolment

- This enables users to be enrolled manually in *Administration > Course administration > Users > Enrolled users*.
- It allows the teacher of the course to manage individual or collective enrolment to their course themselves - for example: if a new student arrives to class unexpectedly with just a login to the site, they may be enrolled by the teacher into their course without any input from an administrator.
- See [Manual enrolment](#) for full details of how this can work in your course.

### Self enrolment

- This allows users to enrol themselves into a course, either directly or via an enrolment key ('course password') The teacher does not then have to manually add students.
- More than one instance of the self enrolment method can be used so that when users enrol themselves they are assigned different roles e.g. certain users can be assigned the role of student and other users can be assigned the role of non-editing teacher.
- The self-enrolment method also allows for users to enrol themselves into groups by using a group enrolment key.

### Guest access

- This allows those with the guest role to view the contents of a course.

- Users with the 'guest role' may be visitors who do not have an account on your Totara, or users who do have an account ('authenticated users') but who would just like to explore your course.
- It is possible to add an enrolment key so that only those guest users you wish to grant access can enter the course.
- Entering a course with guest access doesn't allow a user to participate in any activities; they can only view information.

### Audience sync

- A cohort is a set of users which has been added either to the site as a whole or to a particular category and which can then be made available in a course through the cohort-sync enrolment plugin.
- Only an administrator or a manager can use this plugin.

### Course meta link

- This allows users who are in another course to be automatically enrolled into your course as well. An example might be if a Totara site has a course for 'Staff Only' and a course for 'Totara Help'. If the 'Staff Only' course is added to the 'Totara Help' course with the course meta link plugin, then every time a new member of staff joins the 'Staff Only' course, they will automatically be enrolled in the 'Totara Help' course as well.
- Teachers can only select from courses in which they are teachers when using this method.

### PayPal

- This allows users to pay for a course. The PayPal enrolment plugin needs to be enabled site-wide by the administrator and the plugin needs to be added to a course by the administrator or a manager.
- The course teacher can select a cost (and currency for their course) along with other course-specific requirements.

### Face to face direct enrolment

- When enabled for a course the **face to face direct enrolment plugin** allows users not enrolled in a course to sign up to a face to face session. By signing up to the face to face session the user will be automatically enrolled into the course and will be given access to all other activities contained within the course.

#### Note

Where manager approval is required for face to face session sign up, the user will need to wait for this approval to be granted before gaining access to other activities.

## Managing enrolment methods

Managers and teachers (and any other users with the capability `moodle/course:enrolconfig`) can manage enrolment methods in *Settings > Course administration > Users > Enrolment methods*.

- To add a new method, select it from the dropdown menu.

- To remove any unused enrolment method, click the delete icon (X) opposite it.
- To temporarily disable an enrolment method, click the show/hide icon (an eye) opposite it. (This ensures that the settings are remembered if the enrolment method is later re-enabled).
- To change the order in which the enrolment methods are checked, use the up/down arrows. If a user can enrol via more than one enrolment method, the one highest in the list wins.

## Enrolment plugins

Totara provides a number of ways of managing course enrolment, called *enrolment plugins*.

### Setting the enrolment method(s)

To set an enrolment method:

1. Click on *Administration > Site administration > Plugins > Enrolments > Manage enrol plugins*.
2. Click on the *enable* checkboxes opposite your chosen enrolment plugin(s). If you wish, you may choose more than one enrolment method. For example if you have some courses which students must pay for and some free courses, you can use PayPal and self enrolment.
3. Click the 'Save changes' button.
4. Click the settings link opposite the enrolment plugin(s) you have chosen.
5. Configure the required settings and click the 'Save changes' button.
6. Repeat until you have edited all the plugins you have enabled.

The order in which enrolment plugins are applied can be set. This may be important for some plugins. It also affects the order of enrolment options on the course enrol page.

## Manual enrolment

The manual enrolments plugin allows users to be enrolled manually via a link in the course administration settings. The plugin has to be enabled by the site administrator (see [Enrolment plugins](#)) and should normally be enabled as certain other enrolment plugins, such as self enrolment, require it.

## Course settings

### Checking you have manual enrolment in your course

- In a course, go to *Administration > Course administration > Users > Enrolment methods*.
- Make sure Manual enrolments has its 'eye' opened.

### Editing manual enrolment settings

Managers (and any other users with the capability enrol/manual:config) can edit the manual enrolment method in the course and set the default enrolment period and default role in *Administration > Course administration > Users > Enrolment methods*.

## Enrolling users

It is possible also for students and/or teachers to be notified when enrolments expire by selecting either 'Enroller only' or 'Enroller and enrolled user' from the dropdown 'Notify before enrolment expires' and a time in 'Notification threshold'.

### Method 1

Enrolling users method 1:

1. Go to *Administration > Course administration > Users > Enrolled users*.
2. Click the 'Enrol users' button at the top right or bottom left of the page.
3. Use the 'Assign roles' dropdown if you wish to change the role.
4. Select enrolment options as appropriate.
5. Browse or search for the user. (Note that when searching for users, exact matches are listed first).
6. Click the Enrol button opposite the user. The user will indent in the list and the enrol button will disappear, indicating that the user is enrolled.
7. When you have finished, click the 'Finish enrolling users' button (or simply close the enrol users box).

The user will then appear in the list of enrolled users.

Note: The enrolment option 'Recover user's old grades if possible' is not ticked by default and is easy to miss. An admin can make it so that the checkbox is ticked for all courses on the site by enabling the setting 'Recover grades default' in *Administration > Site administration > Grades > General settings*.

### Method 2

Enrolling users method 2:

1. Go to *Administration > Course administration > Users > Enrolment methods*.
2. Click the 'Enrol users' icon in the edit column opposite manual enrolment.
3. Select users from the not enrolled users list, using Ctrl + click to select multiple users.
4. Click the add button to add the users to the enrolled users list.

## Editing individual enrolment start and end dates

Editing enrolment start and end dates

Enrolment start and end dates may be edited for individual students as follows:

1. Go to *Administration > Course administration > Users > Enrolled users*.
2. Click the edit icon in the enrolment methods column for a particular user.
3. Edit dates as required, then click the 'Save changes' button.

## Admin settings

The manual enrolment plugin may be enabled or disabled site-wide in *Administration > Site administration > Plugins > Enrolments > Manage enrol plugins*.

Site-wide settings, including default settings for manual enrolment in new courses, may be set via *Administration > Site administration > Plugins > Enrolments > Manual enrolments*.

- Enrolment expiration action: Specifies what happens when user enrolments reach expiration date. Please note that the option 'Unenrol user from course' purges grades, group memberships, preferences, and other user related data from the courses.
- Hour to send enrolment expiry notifications: Specify hour for sending expiration notifications.
- Add instance to new courses: If this is enabled, then whenever a new course is created, manual enrolments will automatically added to new courses.
- Enable manual enrolments: This specifies if enrol instances are enabled by default in new courses, it is strongly recommended to keep this setting enabled.
- Default role: This sets the default role, which is normally student and may be altered by a teacher in a course.
- Default enrolment duration: This sets the default length of enrolment in new courses.
- Notify before enrolment expires: Specifies if teacher or optionally students should be notified before the expiration.
- Notification threshold: Specify how many days should users be notified before the enrolment expiration.