Enrolling users

(This video is taken from the [Courses and categories](#) course in the Totara Academy, where you can access more resources and learning materials - including other videos).

Enrolment methods

There are a large number of course enrolment methods available with Totara Learn. Before they can be used all enrolment method plugins must be enabled by a Site Administrator from the quick-access menu by going to *Plugins > Enrolments > Manage enrol plugins.*

Enrolment Method	Description
Manual enrolments	Individual users are manually enrolled by a Site Administrator, Editing Trainer or another role with appropriate permissions.
Guest access	Users can view course materials but not participate.
Self enrolment	User can choose to enrol themselves onto a course.
Audience sync	Users who are members of an audience will be enrolled, and when they are not members they will be unenrolled.
Program	User has been enrolled by enrolling in a program or certification - courses are enrolled on when program or certification rules allow.
Category enrolments	Users are enrolled in all courses in a category.
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.
Publish as LTI tool (Experimental)	Use this together with the LTI authentication plugin, to allow remote users to access selected courses and activities.
Course meta link	Makes it possible for one course, called a meta-course, to bring in enrolments from other courses. The course meta link plugin needs to be enabled both on the site level (by the Site Administrator) and within the course.
MNet remote enrolments	Allows a remote MNet host to enrol their users into our courses.
PayPal	Users purchase enrolment with PayPal.
Seminar direct enrolment	Allows users not enrolled in a course to sign up to a seminar event and enrols them in the course.
Learning Plan	Totara enrols Learners in courses in their approved learning plan.

> ⚠ Enrolment methods must be enabled at the site level to be available within Courses. This can be done via the quick-access menu within *Plugins > Enrolments > Manage enrol plugins.*

Each course can enrol users using different enrolment methods. The enrolment methods can be hidden and have their settings changed and reordered.

Manual enrolment

This enables users to be enrolled manually via *Course administration > Users > Enrolled users.*

It allows the Editing Trainer of the course to manage individual or collective enrolment to their course themselves. To manually enrol a user follow these steps:

1. Go to **Course administration** > *Users > Enrolled users.*
2. Select the **Enrol users** button at the top right or bottom left of the page.
3. From the **Assign roles** dropdown choose the appropriate role.
4. Select enrolment options as required.
5. Browse or search for the user.
6. Select 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, select the **Finish enrolling users** button.

The user will then appear in the list of enrolled users and will no longer be available in the search list.

Default site settings for manual enrolment

As a Site Administrator you can configure a number of site-wide default settings for the manual enrolment method.

Setting	Description	Notes
Enrolment expiration action	Specifies what happens when user enrolments reach expiration date.	Please note that 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 be 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 Learner, and may be altered by an Editing Trainer in a course.	-
Default enrolment start	Set the time and date that Learners will be enrolled in a course. The default is **Now**, but it can also be set to **Today**, and **Course start**.	-
Default enrolment duration	This sets the default length of enrolment in new courses.	-
Notify before enrolment expires	Specifies if the Trainer (or optionally Learners) should be notified before the expiration.	-
Notification threshold	Specify how many weeks, days, hours, minutes or seconds in advance users are notified before the enrolment expiration.	-

⊙ There was a bug with manual enrolment expiry notifications that has been fixed in 11.3 and 12.4+.

If you have any courses whose **Notify before enrolment expires** setting has been set to **Enroller and enrolled user** prior to this fix then you will need to visit the manual enrolments page for each course where this was the case and click the **Save changes** button, which will wash out invalid entries in a database.

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.

Guest access is enabled from the quick-access menu in *Plugins > Enrolments > Manage enrol plugins,* then you will need to ensure the eye icon is open for **Guest access**.

To allow guest access for a course:

1. Select the course using **Find courses**.
2. In *Course administration > Users > Enrolment methods,* ensure Guest access is enabled (showing an open eye icon).
3. If the **Guest access** method is not listed then select **Add method** and select **Guest access** from the dropdown box.

You will also need to show the guest login button on the login screen. This can be enabled by going via the quick-access menu to *Plugins > Authentication > Manage authentication* and setting the **Guest login button** to **Show**.

If you'd like to log users who access the site via guest login, then select *Server > Cleanup > Log guest access* under the quick-access menu. You can also get **Guest** users to agree to the site policy under the quick-access menu via *Security > Site policies*. Guests then have to agree to the site policy before accessing a course with guest access.

Default site settings for guest access

As a Site Administrator you can go to *Plugins > Enrolments > Guest access* under the quick-access menu to configure site-wide defaults for guest access in courses.

- **Add instance to new courses:** Any new course will have the Guest access enrolment plugin included
- **Allow guest access:** Selecting **Yes** will mean the new course will allow guest access to them

Clicking the **Advanced** button next to **Allow guest access** will hide this setting in a course and will instead display a **Show more** link to click on to access the setting.

⚠️ Guest access can be turned on by default in all new courses and you can also:

- Require each course with guest access to have a password for guests
- Use or ignore Totara's standard password policy for guest access passwords
- Offer the first letter of the password as a hint if required

Auto-login guests

To automatically log in guests when they access a course with guest access:

1. *Users > Permissions > User policies* under the quick-access menu.
2. Tick the **Auto-login guests** box.
3. Under the quick-access menu via *Plugins > Authentication > Manage Authentication*, you must have **Guest login button** set to **Show**.
4. Under the quick-access menu via *Security > Site policies* you can check **Open to Google** setting so that the Google search robot will be allowed to enter your site as a Guest. In addition, people coming in to your site via a Google search will automatically be logged in as a Guest.

Self enrolment

This allows users to enrol themselves into a course, either directly or via an enrolment key (course password). The Trainer does not then have to manually add Learners. 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 Learner and other users can be assigned the role of non-editing Trainer.

Default site setting for self enrolment

To change settings open the quick-access menu and navigate to *Plugins > Enrolments > Self enrolment.* Choose options for defaults that admin can set:

Setting	Description	Notes
Require an enrolment key	If this box is ticked then all courses with self enrolment enabled will need to have an enrolment key. The setting won't save until the Trainer adds a key - this is something to be aware of as this can cause confusion.	-
Use password policy	Tick this box if you want enrolment keys set by Trainers to follow the password policy of the site.	-
Show hint	Tick this box if you are prepared to allow the first letter of a key to be given as a hint.	-
Enrolment expiration action	Specifies what happens when user enrolments reach expiration date. Please note that 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 the hour for sending expiration notifications.	-
Add instance to new courses	If the Site Administrator selects this, then any new course created will include the self enrolment plugin.	-

Allow existing enrolments	Add the self enrolment method to new course.	-
Allow new enrolments	Users can self enrol in new course by default.	-
Use group enrolment keys	The setting for group enrolment keys in a course will be set to **yes** by default.	-
Default role assignment	Normally, when users self enrol they have the Learner role. If necessary that role can be changed by default here, for example if your Totara has a dedicated role you wish to use instead.	-
Enrolment duration	This sets the default enrolment length for new courses (but again, may be altered by the course Trainer).	-
Notify before enrolment expires	Specifies if Trainers (or optionally Learners) should be notified before the expiration.	-
Notification threshold	Specify how many days in advance should users be notified before the enrolment expiration.	-
Unenrol inactive after	This sets the default time after which a learner will be unenrolled if they haven't accessed the courses (Trainers may change this).	-
Max enrolled users	Adding a number here will specify the maximum number of users who can self enrol into new courses. Trainers in the course can change this. If it is left at 0, there will be no maximum.	-
Send course welcome message	If this option is selected you can select the email address that the welcome message is shown as being sent from: • **Send as first contact marked as course contact:** The user is set under *Quick-access menu > Appearance > Courses > Course contact* • **Send as first enrolment key holder:** The user that has the **enrol /self:holdkey** permission under *Course administration > Users > Permissions* • **Send as no-reply address:** The user that is set under the quick-access menu via *Plugins > Message outputs > email > No-reply address*	If the welcome message for the self-enrolment plugin is set to be from the course contact but there are no course contacts enrolled or the role is not enabled, the message will instead come from the no-reply email address. The message should display as "Do not reply to this email" <noreply@1217.test> (the no-reply email address would be specific to your site). If the message is sent from the course contact and more than one user has this role, the email is sent from the first user to be assigned the role. If the user is assigned the role in the course context, this overrides any role in the system context. If no users are assigned to the role at the course context it will go to the next user with the role at the system context.

Audience sync

The audience sync enrolment plugin allows you to make a course available to a specific audience in your Totara system.

To add the audience sync enrolment method to a course, from within the course follow these steps:

1. Go to *Course administration > Users > Enrolment methods*.
2. From the **Add method** dropdown list select **Audience sync**.
3. For the **Audience** setting select which audience you wish to sync and configure the optional settings.
4. You can optionally select a group from the **Add to group** dropdown, or select **Create new group** to add the audience to a new group.
5. Click **Add method**.

Any members of that audience will now be enrolled on the course and unenrolled if they are removed from the audience. You can go to *Course administration > Users > Enrolment methods* and click the edit icon alongside the **Audience sync** method to change any of the optional settings but not the audience.

You can add multiple audience sync enrolment methods on a single course for different audiences.

⚠ Only a Site Administrator or Site Manager can use this plugin.

Default site setting for audience sync

As a Site Administrator you can go to *Quick-access menu > Plugins > Enrolments > Audience sync* and configure the following settings.

Setting	Description	Notes
Default role	The role that will be assigned to members of the audience.	By default this is the Learner role.
External unenrol action	When a user is no longer a member of the audience they will be unenrolled from any enrolled learning for the audience. You can choose whether to: • **Unenrol the user from course**: This will remove the user and delete most of their data from the course • **Disable course enrolment and remove roles**: Suspends the user enrolment whilst retaining user data such as activity grades from the course	-

ⓘ Learning will be made available immediately to new users once they've self-registered. Audience membership as well as audience-based enrolled learning (i.e. course enrolment and certification/program assignment) will occur before new users first log in to the platform.

For existing users, audience membership and enrolment will occur when the relevant cron runs.

Program

Users can be enrolled on a course by enrolling in a program or certification. This enrolment method is not set up within a course as other methods are, instead courses are enrolled on when program or certification rules allow.

Default site settings for program enrolments

Setting	Description	Notes
Add instance to new courses	Add the program enrolment plugin to new courses.	-
Default role	The role that will be assigned to users when enrolled in a program.	-
Enrolment duration	Default length of time that the enrolment is valid (in seconds). If set to zero, the enrolment duration will be unlimited by default.	-
External unenrol action	There are a few options: • **Unenrol user from course**: This will delete most of the user's data from the course. • **Disable course enrolment**: User enrolment is suspended (the user can't access the course, but user data and settings are kept) and roles are kept as is. You might use this because in some cases. the user needs a role with some capability to be visible in the user interface, such as in the gradebook, assignments, etc. • **Disable course enrolment and remove roles**: The enrolment is suspended and roles assigned by the program enrolment instance are removed. Please note that user may disappear from gradebook and other areas.	-

Category enrolments

If you wish for a user to have access to all courses within a certain category then you can use the category enrolment method. This is done at the category level and the enrolment will then be inherited by all courses in the category.

To enrol a user in a category follow these steps:

1. As a Site Manager or Site Administrator, go to the category you want to add the user to.
2. Then go to *Quick-access menu > Category > Assign roles.*
3. Click the **Enrol users** button at the top right or bottom left of the page.
4. From the **Assign roles** dropdown choose the appropriate role.
5. Select enrolment options as appropriate.
6. Browse or search for the user.
7. 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.
8. When you have finished, click the **Finish enrolling users** button.

The user will then appear in the list of enrolled users and will no longer be available in the search list.

> ⚠ It is recommended to use audience sync to enrol users in courses in a category rather than category enrolments.

External database

You may use a external database (of nearly any kind) to control your enrolments. Fields from the external database should contain a field containing a course ID, a field containing a user ID, and optionally a field containing a role. These are compared against fields that you choose in the local course, user tables, and role tables. You can specify the database driver and connection parameters, and use the Test settings to check field mappings and connection to the database are OK.

It is also possible to create new courses in Totara using the course full name, shortname, course ID, course category from the external database.

Flat file

Users are enrolled with a CSV file. The flat file enrolment plugin allows bulk enrolment management (enrol or unenrol) of existing users in existing courses via a CSV file.

The file is processed by the flat file enrolment sync scheduled task and then deleted.

The file should include **action**, **role**, **user ID number**, and **course ID number**. **Start time** and **end time** are optional fields. Details of the file format are shown on the flat file settings page under the quick-access menu within *Plugins > Enrolments > Flat file (CSV).*

Enabling flat file enrolment

1. Go to the quick-access menu and go to *Plugins > Enrolments > Manage enrol plugins* and click the eye icon opposite **Flat file (CSV)**. When enabled, it will no longer be greyed out.
2. Click the **settings** link.
3. Configure as required (see details of settings below).
4. Click the **Save changes** button.

Setting	Description	Notes
File location	You should specify an absolute path for the upload file where it can be read and modified by the web server process. The file is automatically deleted after processing.	-
File encoding	Make sure you save the file (for example in a text editor) with the same encoding.	-
Notify enrolled users	You can choose to have an email sent to notify the Learners when the file has been processed.	-
Notify user responsible for enrolments	You can choose to have an email sent to notify the Trainers when the file has been processed.	-
Notify administrator	You can choose to have an email sent to notify the Site Administrator when the file has been processed.	-
External unenrol action	Select action to carry out when user enrolment disappears from external enrolment source. There are a few options: • Unenrol user from course • Keep user enrolled • Disable course enrolment and remove role	Please note that some user data and settings are purged from course during course unenrolment.
Enrolment expiration action	Select action to carry out when user enrolment expires, there are three options to choose from: • Keep user enrolled • Disable course enrolment and remove roles • Unenrol user from course	Please note that some user data and settings are purged from course during course unenrolment.

| Flat file role mapping | You can change the default role mappings (currently Moodle role short names) to Totara role short names. | - |

IMS enterprise

This method will repeatedly check for and process a specially-formatted text file in the location that you specify. The file must follow the IMS Enterprise specifications containing person, group, and membership XML elements.

Additionally, you can use the IMS Enterprise plugin to update a course full or short name, to create nested categories during course creation, update a user record, or to set/update an authentication type for a user (during creation and updates).

LDAP enrolment

Users are authenticated and then enrolled through LDAP.

Publish as LTI tool (experimental)

When used with the LTI authentication plugin it allows remote users to access selected courses and activities. In other words, Totara Learn functions as an LTI tool provider.

Once you have enabled the **Publish as LTI tool** (accessed through the quick-access menu via *Plugins > Enrolments > Manage enrol plugins*) you can then add it to your desired course.

1. From **Course administration** go to *Users > Enrolment method*.
2. From the **Add method** dropdown menu select the option **Publish as LTI tool (experimental)**.
3. Complete the settings as desired.
4. Click the **Add method** button.

To share this new LTI tool with others you will need to go to **Published as LTI tools** from the **Course administration** menu. Here you will need to take a note of the either the **Launch details** or **Registration URL** so that you can share these with the other Trainer who wishes to utilise your LTI content. If the other Trainer is also using a Totara site then they can then add your LTI using the External tool activity.

Published tools

A tool may be shared with another site by providing either launch details or a registration URL.

ⓘ More help

Name	Launch details ⓘ		Registration URL ⓘ	Edit
Course: Course 3	Cartridge URL	http://localhost/totaralms/enrol/lti/cartridge.php/1/f4d9	http://localhost/totaralms/enrol/lti/proxy.php/1/49fd9d2	✖ 👁 ⚙
	Secret	k2sdGFpVcKdSQfeEkTQ8XVaP2LPkDbn9		
	Launch URL	http://localhost/totaralms/enrol/lti/tool.php?id=1		

Add

Settings

Setting	Description	Notes
Custom instance name	The name to be given to the LTI instance once you publish it. This should be clear, concise and descriptive if possible.	-
Tool to be published	Choose from the entire course or a particular activity.	-
Enrolment duration	Length of time that the enrolment is valid, starting with the moment the user enrols themselves from the remote system. If disabled, the enrolment duration will be unlimited.	-
Start date	If enabled, users can access from this date onward only.	-
End date	If enabled, users can access until this date only.	-
Maximum enrolled users	The maximum number of remote users who can access the tool. If set to zero, the number of enrolled users is unlimited.	-
Role for teacher	The role assigned in the tool to the remote Trainer.	-
Role for student	The role assigned in the tool to the remote Learner.	-

Secret	A string of characters which is shared with the remote system (LTI consumer) to provide access to the tool.	-
Grade synchronisation	Whether grades from the tool are sent to the remote system (LTI consumer).	-
Require course or activity completion prior to grade synchronisation	You can decide if you want to require users to complete the activity/course before any grades are synced.	-
User synchronisation	Whether a scheduled task synchronises enrolled users in the remote system with enrolments in this course, creating an account for each remote user as necessary, and enrolling or unenrolling them as required. If set to no, at the moment when a remote user accesses the tool, an account will be created for them and they will be automatically enrolled.	-
User synchronisation mode	Whether remote users should be enrolled and/or unenrolled from this course.	-
User default values	You can set the default user values including: • Email display • City/town • Country • Timezone • Preferred language • Institution	-

Course meta link

You can have enrolment be inherited from another course, called a metacourse. The course meta link plugin needs to be enabled both on the site level by the Site Administrator and has to be enabled within the course.

To enable course meta link enrolments within a course follow these steps:

1. Go to *Course administration > Users > Enrolment methods.*
2. Select **Course meta link** from the dropdown menu.
3. Choose the course you wish to inherit enrolments from.
4. Click **Add method**.

MNet remote enrolments

Allows a remote MNet host to enrol their users into our courses. It is recommended to use Totara Connect for connecting remote Totara instances together.

> ⊕ The MNet remote enrolments plugin has been deprecated in Totara 13.

PayPal

PayPal setup

Before setting up PayPal enrolment in Totara you need to complete the following steps:

1. Go to https://www.paypal.com and create a PayPal account. You may wish to upgrade to a **Premier** account and have the account **Verified**.
2. Go to *Profile > Profile and settings > My selling tools > More selling tools > PayPal button language encoding.*
3. Check that your website's language is set to **Western European Languages**.
4. Click **More Options** and set the encoding setting to **UTF-8** (this should also be used for the IPN setting).
5. Go to *Profile > Profile and settings > My selling tools > Getting paid and managing my risk > Instant payment notifications > Update.*
6. Enable **IPN** (instant payment notifications) and set the **Notification URL** to your site's URL with **/enrol/paypal/ipn.php** appended. For example, your URL could be **https://mytotarasite.com/enrol/paypal/ipn.php**.

Enable PayPal enrolment

As a Site Administrator you can set up PayPal enrolment by following these steps:

1. Go to *Quick-access menu > Plugins > Enrolments > Manage enrol plugins.*
2. If it is not already enabled, enable the **Manual enrolment** plugin by clicking the eye icon (👁).
3. Enable the **PayPal** plugin by clicking the eye icon next to the plugin if it currently disabled (👁).
4. Click **Settings** next to the PayPal plugin and configure these settings:
   a. **PayPal business email:** This must exactly match the business email in your PayPal account. Note that this setting is case sensitive.

b. **Default role assignment:** This is the default role a user will be assigned when they purchase access to a course. Typically you would set this to **Learner**, but if required you can override this setting on a course-by-course basis.
c. Optionally configure any other settings.
5. Click **Save changes**.

Configuring PayPal in your courses

Once you have set up the PayPal enrolment plugin on your Totara site you can add it to courses using these steps:

1. Navigate to your course, then *Course administration > Users > Enrolment methods*.
2. If PayPal is not on the list of available enrolment methods, click the **Add method** dropdown menu and select **PayPal**.
3. On the next screen, optionally give the enrolment method a **Custom instance name**.
4. Set **Allow PayPal enrolments** to **Yes**.
5. Enter the **Enrol cost** and select the **Currency** to be used.
6. Optionally set an **Enrolment period**, **Start date** and **End date**.
7. Click **Add method**.

⚠ Note that if the **Self enrolment** plugin is enabled users will be able to enrol on the course for free.

Seminar direct enrolment

Allows users not enrolled in a course to sign up to a seminar event and enrols them in the course.

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

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

The amount of enrolments displayed on the course page is controlled by two settings:

- **Site level:** Under the quick-access menu go to *Plugins > Enrolments > Seminar direct enrolment plugin* where an admin can set a default value for all courses with the seminar direct enrolment method
- **Course level:** Under an individual course's seminar direct enrolment method where admin can set a different value

The values are; **All** (default), **2**, **4**, **8**, and **16** for both settings.

If you disable the seminar direct enrolment method, the users who are only enrolled by this method will have their enrolment disabled, but will remain enrolled in the course and specific sessions etc. They would then need to be enrolled with an alternative enrolment method e.g. self-enrolment, manual enrolment etc.

Deleting the seminar direct enrolment method will mean that users who are only enrolled by this method will be unenrolled from the course. This will remove activity and course completion information from the course as well as removing them from specific seminar events. They would then need to be enrolled with an alternative enrolment method e.g. self-enrolment, manual enrolment etc.

Learning plan

The Learning Plan enrolment module restricts interactive enrolment in courses. Where a course uses the Learning Plan enrolment plugin to manage interactive enrolments, only users who have the course listed as an approved component as part of an approved learning plan are permitted to self enrol.

Edit the site enrolment method

1. Select **Enrolments** on the quick-access menu, under *Plugins*.
2. Enable the enrolment method(s) that you wish to use in your Totara site.
3. To change the plugin setting, click on **Edit** opposite the enrolment plugin(s) you have chosen.
4. Select the **Save changes** button.

✓ As for authentication methods, you may choose more than one enrolment method. For example, if you have courses that learners must pay for and some free courses, you're able to use PayPal and internal enrolment.

Change the course enrolment method

1. Log in as a course administrator.
2. Select *Course administration > Users > Enrolment methods*.
3. Select **Edit, Hide, Delete** icon for the Enrolment method listed or choose **Add method** if the enrolment method is not listed.

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

Changing enrolled users

1. Click **Users** in the **Course administration** menu.
2. Click **Enrolled users**.
3. This will show all enrolled users in a table with their roles, groups, and enrolment methods.
4. Select the + or X in the table to change these.

Roles

To assign an enrolled user a role, click the **Assign roles** icon (a person with 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.

> ⚠ 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 within the quick-access menu via *Users > Permissions > Define roles.*
>
> Only roles which a user is allowed to assign are available to select.

Site Administrator as an enrolled user

The Site Administrator has access rights to all aspects of the system. This allows them to bypass the normal conditions and procedures a regular user must step through. This means that the site behaviour will be different to the behaviour you'd expect compared to a normal user/Learner.

The Site Administrator may wish to utilise the **Switch role to...** option within the *Course Administration* menu to view content from a learner's perspective and see how this content will appear. It is, however, recommended that when completing learning in a live setting you should create a new Learner account and not the Site Administrator login.

> ⓘ Our recommendation is to only use the Site Administrator account for site administration. For day-to-day use you should always create a limited access account that has the permissions required for your day-to-day activities.

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.

Searching enrolled users

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

Scheduled tasks

There are a number of scheduled tasks associated with different enrolment methods.

Enrolment method	Scheduled task	Purpose
Audience sync	Synchronise audience members	Add/remove members of dynamic audiences and enrol/unenrol them from the courses.
Flat file (CSV)	Flat file enrolment sync	To ensure all flat file enrolments have been synced into the relevant course(s).
IMS enterprise	Enrolment file processing	To ensure all IMS enterprise files have been processed and enrolments have been synced into

| file		the relevant course(s).
Publish as LTI tool	Publish as LTI tool grade sync	To ensure all grades have been synced into the relevant course(s).
	Publish as LTI tool users sync	To ensure all users have been synced into the relevant course(s).
Seminar direct enrolment	Process and notify expired Seminar enrolments	To ensure all enrolments made via a seminar activity are up-to-date, including enrolling users and removing those whose enrolments have expired.

Unenrolling users

When users are unenrolled from a course, it is important to note that certain data and access will be removed. This is true regardless of whether the user was manually unenrolled by a Site Administrator or Trainer, if the Learner unenrolled themselves from the course, or if they were removed from an audience assigned to the course.

For example, Learner A is enrolled on a course as they are part of a first aider audience, and they have signed up for a practical training session using the seminar activity, having already completed a prerequisite quiz. When Learner A is removed from the first aider audience, they will automatically be unenrolled from the course. In this instance, they would no longer be able to access the course, their quiz grade would be deleted, and their seminar reservation would be cancelled.

Therefore it is important to carefully consider when Learners are unenrolled using any of the described methods.

Totara Academy
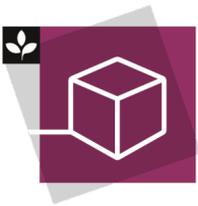
The Totara Academy has a whole course dedicated to using Courses and categories in Totara Learn. Here you can learn more on how to use courses and categories, see best practice, and give it a go yourself.