

# Enrolment

(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).

There are a large number of course enrolment methods available with Totara Learn:

Enrolment method	Description
<b>Manual enrolments</b>	An administrator or Editing trainer adds users manually.
<b>Guest access</b>	Users can view course materials but not participate.
<b>Self enrolment</b>	Allow users to enrol themselves into a course.
<b>Audience sync</b>	Enrol users who are members of an audience, then remove (unenrol them) from the course they are no longer members of that audience.
<b>Program</b>	Enrol a user in a course that is contained within a program or certification they have been enrolled on - courses are enrolled on when program or certification rules allow.
<b>Category enrolments</b>	Enrol users in all courses for a particular category.
<b>External database</b>	Enrol users from a database such as Access or MySQL.
<b>Flat file</b>	Enrol users with a CSV file.
<b>IMS Enterprise</b>	Enrol users with a standard XML file format.
<b>LDAP enrolment</b>	Authenticate and then enrol users through LDAP.
<b>Course meta link</b>	Make it possible for one course, called a metacourse, to bring in enrolments from other courses. The Course meta link plugin needs to be enabled both on the site level (by the site admin) and within the course.
<b>MNet remote enrolments</b>	Allow a remote MNet host to enrol users from that system onto courses in this Totara Learn site.
<b>PayPal</b>	Users purchase enrolment with PayPal.
<b>Seminar direct enrolment</b>	Allow users that are not enrolled in a course to sign up to a seminar event and then enrol them in that course.
<b>Learning Plan</b>	Enrol learners in courses that are 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 **Administration** block within *Site administration > 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 in *Administration > Course administration > Users > Enrolled users*.

It allows the trainer of the course to manage individual or collective enrolment to their course themselves. For example, if a new learner arrives to class unexpectedly with just a login to the site, they may be enrolled by the trainer into their course without any input from an administrator.

### On this page



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.

Setting	Description	Notes
<b>Enrolment expiration action</b>	Specifies what happens when user enrolments reach expiration date. Please note that option <b>Unenrol user from course</b> purges grades, group memberships, preferences and other user related data from the courses.	-
<b>Hour to send enrolment expiry notifications</b>	Specify hour for sending expiration notifications.	-
<b>Add instance to new courses</b>	If this is enabled, then whenever a new course is created, manual enrolments will automatically added to new courses.	-
<b>Enable manual enrolments</b>	This specifies if enrol instances are enabled by default in new courses, it is strongly recommended to keep this setting enabled.	-
<b>Default role</b>	This sets the default role, which is normally Learner and may be altered by a trainer in a course.	-
<b>Default enrolment start</b>	This feature sets the time for when learners are enrolled in a course. The default is <b>Now</b> , but it can also be set to <b>Today</b> and <b>Course start</b> .	-
<b>Default enrolment duration</b>	This sets the default length of enrolment in new courses.	-
<b>Notify before enrolment expires</b>	Specifies if trainer or optionally learners should be notified before the expiration.	-
<b>Notification threshold</b>	Specify how many weeks, days, hours, minutes or seconds that users are notified before the enrolment expiration.	-

## 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.

## Enabling guest access on the site

1. In *Administration > Site administration > Plugins > Enrolments > Manage enrol plugins*.
2. Ensure **Guest access** is enabled (has its eye open).

## Allowing guest access for a course

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

To show a guest login button on the login screen, go to *Administration > Site administration > Plugins > Authentication > Manage authentication*, where you'll need to scroll down and set the **Guest login button** to **Show**.

If you want to log users who login as guests, then you will need to go to *Administration > Site administration > Plugins > Logging > Standard log* and ensure the **Log guest access** setting is enabled (ticked).

To get Guest users to agree to the site policy select *Site administration > Security > Site policies* and enter the link for the policy in the **Site policy URL for guests** field. Guests then have to agree to the site policy before accessing a course with guest access.

## Default settings for guest access

Clicking on *Administration > Site administration > Plugins > Enrolments > Guest access* brings up the screen where admin can set 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 if needed the first letter of the password as a hint.

## Auto-login guests

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

1. In *Administration > Site administration > Users > Permissions > User policies*.
2. Tick the **Auto-login guests** box.
3. In *Administration > Site administration > Plugins > Authentication > Manage Authentication*, you must have **Guest login button** set to **Show**.
4. In *Administration > Site administration > 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 student and other users can be assigned the role of non-editing trainer.

**To change settings:**

1. Select *Administration > Site administration > Plugins > Enrolments > Self enrolment*. Choose options for defaults that admin can set:

Setting	Description	Notes
<b>Require an enrolment key</b>	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, something to be aware of as this can cause confusion.	-
<b>Use password policy</b>	Tick this box if you want enrolment keys set by trainers to follow the password policy of the site.	-
<b>Show hint</b>	Tick this box if you are prepared to allow the first letter of a key to be given as a hint.	-
<b>Enrolment expiration action</b>	Specifies what happens when user enrolments reach expiration date. Please note that option <b>Unenrol user from course</b> purges grades, group memberships, preferences and other user related data from the courses.	-
<b>Hour to send enrolment expiry notifications</b>	Specify hour for sending expiration notifications.	-

## Default enrolment settings in new courses

Setting	Description	Notes
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<b>Add instance to new courses</b>	If admin selects this, then any new course created will include the self enrolment plugin.	-
<b>Allow existing enrolments</b>	Add the self enrolment method to new course.	-
<b>Allow new enrolments</b>	Users can self enrol in new course by default.	-
<b>Use group enrolment keys</b>	The setting for group enrolment keys in a course will be set to <b>yes</b> by default.	-
<b>Default role assignment</b>	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.	-
<b>Enrolment duration</b>	This sets the default enrolment length for new courses (but again, may be altered by the course trainer).	-
<b>Notify before enrolment expires</b>	Specifies if trainers or optionally learner should be notified before the expiration.	-
<b>Notification threshold</b>	Specify how many days should users be notified before the enrolment expiration.	-
<b>Unenrol inactive after</b>	This sets the default time after which a learner will be unenrolled if they haven't accessed the courses (trainers may change this).	-
<b>Max enrolled users</b>	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.	-
<b>Send course welcome message</b>	If this box is checked then newly enrolled users will receive a welcome message by default.	-

## 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.



Only an administrator or a manager can use this plugin.

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

Setting	Description	Notes
<b>Default role</b>	The role that will be assigned to members of the audience.	By default this is the Learner role.

<b>External unenrol action</b>	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: <ul style="list-style-type: none"> <li>• <b>Unenrol the user from course:</b> This will remove the user and delete most of their data from the course</li> <li>• <b>Disable course enrolment and remove roles:</b> Suspends the user enrolment whilst retaining user data such as activity grades from the course</li> </ul>	-
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## Program

User has been enrolled by enrolling in a program or certification. Courses are enrolled on when program or certification rules allow.

Setting	Description	Notes
<b>Add instance to new courses</b>	Add the program enrolment plugin to new courses.	-
<b>Default role</b>	The role that will be assigned to users when enrolled in a program.	-
<b>Enrolment duration</b>	Default length of time that the enrolment is valid (in seconds). If set to zero, the enrolment duration will be unlimited by default.	-
<b>External unenrol action</b>	When a user is no longer a member of the program they will be unenrolled from any enrolled learning for the program. You can choose whether to: <ul style="list-style-type: none"> <li>• <b>Unenrol user from course:</b> This will delete most of the user's data from the course.</li> <li>• <b>Disable course enrolment:</b> 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 gradebook, assignments, etc.</li> <li>• <b>Disable course enrolment and remove roles:</b> 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.</li> </ul>	-

## Category enrolments

Users are enrolled in all courses in a category.



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

## External database

You may use an 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, 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 *Site administration > Plugins > Enrolments > Flat file (CSV)*.

## Enabling flat file enrolment

1. Go to *Site administration > 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
<b>File location</b>	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.	-
<b>File encoding</b>	Make sure, you save the file (for example in a text editor) with the same encoding.	-
<b>Notify enrolled users</b>	You can choose to have an email sent to notify the learners when the file has been processed.	-
<b>Notify user responsible for enrolments</b>	You can choose to have an email sent to notify the trainers when the file has been processed.	-
<b>Notify administrator</b>	You can choose to have an email sent to notify the administrator when the file has been processed.	-
<b>External unenrol action</b>	Select action to carry out when user enrolment disappears from external enrolment source. There are a few options: <ul style="list-style-type: none"> <li>• Unenrol user from course.</li> <li>• Keep user enrolled.</li> <li>• Disable course enrolment and remove roles.</li> </ul>	Please note that some user data and settings are purged from course during course unenrolment.
<b>Enrolment expiration action</b>	Select action to carry out when user enrolment expires, there are three options to choose from: <ul style="list-style-type: none"> <li>• Keep user enrolled.</li> <li>• Disable course enrolment and remove roles.</li> <li>• Unenrol user from course.</li> </ul>	Please note that some user data and settings are purged from course during course unenrolment.
<b>Flat file role mapping</b>	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.

## LDAP enrolment

Users are authenticated and then enrolled through LDAP.

## Course meta link

Makes it possible for one course, called a metacourse, to bring in enrolments from other courses. The Course meta link plugin needs to be enabled both on the site level by the site admin and has to be enabled within the course.

## 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 together

## PayPal

Users purchase enrolment with Paypal.

## Seminar direct enrolment

Allows users not enrolled in a course to sign up to a seminar event and enrolls 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 *Site administration > Plugins > Enrolments > Seminar direct enrolment plugin* where an admin can set a default value for all courses with 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.

## Disabling the seminar direct enrolment method behaviour

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 behaviour

The 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. Click **Enrolments** on the Site Administration 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. Click 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.

## Manually enrolling learners

Under **Users** in the Course Setting menu you are able to view the learners enrolled in the course and enrol individual learners and audiences.

1. Click **Users** in the **Course administration** menu.
2. Click **Enrolled users**.
3. Click the **Enrol Users** button to enrol individual learners.
4. Ensure the **Assign roles** dropdown box shows the role you are wanting to assign (default is Learner).
5. Select the **Enrol** button beside user from the list or Search for user.
6. When you have selected all the students select the **Finish enrolling users** button.

## 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.

## 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 method.
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 via *Administration > Site administration > 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 learners 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
<b>Audience sync</b>	Synchronise audience members	Add/remove members of dynamic audiences and enrol/unenroll them from the courses.
<b>Flat file (CSV)</b>	Flat file enrolment sync	To ensure all flat file enrolments have been synced into the relevant course(s).
<b>IMS enterprise file</b>	Enrolment file processing	To ensure all IMS enterprise files have been processed and enrolments have been synced into the relevant course(s).
<b>Seminar direct enrolment</b>	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.