

5: ENROLLMENT METHODS

WELCOME TO THE MOODLE ENROLLMENT TUTORIAL!

In this tutorial, you will learn:

- Methods that can be used to enroll students into a course
- How to manually enroll students
- How to set students up to self-enroll
- How to allow guest enrollment

If you have not used one of CareerTech’s “How to Moodle” tutorials before, view the [instructions](#) for using it as a self-paced tutorial or as a resource for classroom instruction.

Before taking this tutorial, you should have a Moodle course site and be familiar with:

- Moodle navigation and course layout

To begin, select from the menu below or simply turn to the next page.

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INTRODUCTION

Course enrollment establishes who has access to your course and what role they have when interacting with the course.

When setting up a course on a Moodle LMS, you will need to determine the type of enrollment that you want for your course. You can choose between:

- **Restricting access to your course to those who are enrolled.** With this option, you have the option of enrolling students yourself, or setting up student self-enrollment.
- **Allowing access to anyone.** This is called Guest access, and it allows public access to view your course. Selecting this choice generally means that you will be using the course as an information resource for anyone who wants to visit rather than as a graded course for enrolled students, because entering a course with guest access doesn't allow a user to act as a participant.

You can modify the enrollment and access options from within your course at any time, so the choice you make when you request a course is not set in stone.

Enrolled users can interact with the course in ways that guest users cannot. Enrolled users can:

- Submit assignments
- Be assigned to groups
- Be assigned grades
- Subscribe to forums
- Participate in course activities
- Take a quiz

Although you can have enrolled students and also allow guests to access your course, be aware of how this affects the privacy of your students.

When restricted to enrolled users, student enrollment options include the following methods.

- **Manual enrollment** – The teacher enrolls each participant in the course by selecting from the list of users with Moodle login credentials. New students can be enrolled at any time, or current students can be unenrolled. Enrollment can be restricted to a valid date range.
- **Self enrollment** – Users can enroll themselves into a course by entering the enrollment key provided by the teacher and clicking the “Enroll me” button.

MANUAL ENROLLMENT

VIDEO DEMONSTRATION:

Watch this 2-minute video to see a demonstration of manual enrollment.

<http://youtu.be/Fc3RKc6mI74>

NOTE: Video demonstrations were not created by Oklahoma CareerTech, and they may use a different version of Moodle. However, the steps are similar to the ones that you will use.

You may use this tutorial as a practice exercise or to set up enrollment in your actual Moodle course. Before you begin any section of this tutorial as a practice exercise, check with your server administrator to ensure the following “test user” IDs have been established on your Moodle site:

- Test User 1
- Test User 2
- Test User 3
- Test User 4
- Test User 5
- Test User 6

Use the following steps to manually enroll students:

Step	Action	Notes
1.	In the Administration block, navigate to Course Administration > Users > Enrolled Users . In the Boost theme click the edit course gear icon and select More... On the Course Administration page, click the Users tab and click Enrolled Users .	The Enrolled Users page will display. This page allows you to view enrolled users, to enroll new users, and to remove users. You can also edit the roles of users, modify the dates of enrollment, and add or remove them from groups.
2.	Click the Enroll Users button.	The Enroll Users window displays.

Enrollment Methods

Step	Action	Notes
3.	<p>Enter any search terms in the search box at the top of the window and click Search.</p> <p>For example, if you want to enroll a student named Ezra Wilson, you could search for Ezra, for Wilson, or for Ezra Wilson. The list displays all users who meet the criteria.</p>	<p>The window initially displays all Moodle users, so the Search function helps to narrow down the display.</p> <p>For training purposes, search on the name “Test Student.” The search should reveal the Test Student user IDs.</p>
4.	<p>Select from the role drop-down list at the top of the window the role to be given to the newly enrolled user.</p>	<p>The list of available roles will only include roles that rank below that of teacher. Student is the role that you will use most often. Other options include:</p> <ul style="list-style-type: none">• Non-editing teacher – This role can grade in courses but not edit them. For example, a teacher’s assistant or substitute teacher.• Custom options – Various other roles may have been set up by your administrator.
5.	<p>If desired, click the arrow next to Enrollment Options to expand the option area and modify enrollment options.</p>	<p>Enrollment options allow you to control certain aspects of the user’s enrollment. The fields and default settings are:</p> <ul style="list-style-type: none">• Recover the user’s old grades if possible – Not checked• Starting from – Today’s date• Enrollment duration – Unlimited
6.	<p>Click Enroll next to the user’s name.</p>	<p>For training purposes, enroll Test User 1, Test User 2, Test User 3, Test User 4, and Test User 5 in your course.</p> <p>You can repeat this action for as many students as you need to enroll. Once you have clicked the enroll button for a user, the enroll button disappears but the display list remains. If necessary, you can repeat steps 3, 4, and 5 to find and modify options for each of the users who will participate in your course.</p>
7.	<p>Click Finish Enrolling Users.</p>	<p>The display returns to the Enrolled Users page. Newly enrolled users have been added to the list.</p>

SETTING UP STUDENT SELF-ENROLLMENT

VIDEO DEMONSTRATION:

Watch this 3-minute video to see a demonstration of manual enrollment.

<http://youtu.be/-2p0iHUiWv0>

NOTE: Video demonstrations were not created by Oklahoma CareerTech, and they may use a different version of Moodle. However, the steps are the same as the ones that you will use.

If you would like students to self-enroll in your course, you will first need to set up an enrollment key. You can do this as part of your course request, or you can add or change the enrollment key once your course has been created. You can also set certain other parameters for enrollment.

To set up self-enrollment, follow these steps:

Step	Action	Notes
1.	<p>In the Administration block, navigate to Course Administration > Users > Enrollment Methods.</p> <p>Ensure the self-enrollment is enabled (the eye icon should be open).</p> <p>In the Boost theme, click the edit course gear icon and select More... On the Course Administration page, click the Users tab and click on Enrollment Methods.</p>	<p>The Enrollment Methods page will display. This page allows you to view and change the methods available for enrolling users into your course, as well as modify settings for any of the available options.</p>
2.	<p>In the Self enrollment (Student) row, click the gear icon in the Edit column.</p> <p>NOTE: It is not necessary to delete enrollment types or make new ones. In some cases, you may need more than one enrollment type in a course.</p> <p>IMPORTANT: Do not delete or hide the manual enrollment option in your course. If you do, you will lock yourself out of your own course, since your Teacher status was set using manual enrollment.</p>	<p>This will open a settings page for Self Enrollment.</p> <p>Notice that the Edit column also includes icons that allow you to delete the enrollment method or to disable it.</p> <p>If the Self enrollment (Student) option does not display in the Enrollment Method table, you can add it by selecting from the Choose drop-down list below the table. Selecting Self-Enrollment from this drop-down list will add a new enrollment option to the available methods, and will also open the settings page.</p>

Enrollment Methods

Step	Action	Notes
3.	<p><i>Field: Custom Instance Name</i></p> <p>Enter a unique name for this instance of self-enrollment.</p>	<p>Because you can add multiple Self-Enrollment instances to the available Enrollment Methods, you must ensure that each instance of self-enrollment is given a unique name, such as Self-Enrollment Semester 1.</p>
4.	<p><i>Field: Enable existing enrollments</i></p> <p>Select Yes or No.</p>	<p>If set to No, all existing self enrolled users will no longer be able to access the course, and new users cannot enroll.</p>
5.	<p><i>Field: Enrollment key</i></p> <p>Enter a password that students will supply to successfully enroll in the course. To see the characters that you type, click to mark the Unmask box.</p>	<p>If the field is left blank, any user may enroll in the course by clicking the “Enroll me” button. Creating an enrollment key requires any user attempting to enroll in the course to supply the key. Note that a user only needs to supply the enrollment key ONCE, when they enroll in the course.</p>
6.	<p><i>Field: Use Group Enrollment Keys</i></p> <p>Select Yes or No.</p> <p>NOTE: For more information, see the Groups and Groupings tutorial.</p>	<p>In most cases, this will be set to No. This does not affect your ability to use groups in your course.</p> <p>Select Yes if your course uses groups <i>and</i> you want students to be immediately placed in specific groups upon enrollment. If this is the case, the student will enter the group enrollment key that you provide (instead of the self-enrollment key), which is specified on the group settings page.</p> <ul style="list-style-type: none">• Users in groups do not need to know the master course enrollment key (created on this self-enrollment settings page), only their own group enrollment key (created on the Groups settings page).• Users that you do not want to be placed immediately into a group can enroll by using the master course enrollment key as usual.

Enrollment Methods

Step	Action	Notes
7.	<p><i>Field: Default assigned role</i></p> <p>Select from the drop-down list for the default assigned role to be given to the user when enrolling.</p>	<p>In most cases, this will be Student. Other options include:</p> <ul style="list-style-type: none">• Non-editing teacher – This role can grade in courses but not edit them. For example, a teacher’s assistant.• Custom options – Various other roles can be set up by your administrator.
8.	<p><i>Field: Enrollment duration</i></p> <p>Click the Enable box first to activate the duration drop-down lists. Select the number and unit of time for the enrollment to be active.</p>	<p>If the Enable box is not marked, the enrollment duration is unlimited.</p> <p>If enrollment duration is enabled, each user that self-enrolls will be able to access the course for the specified length of time, starting with the moment the user enrolls using an enrollment key.</p>
9.	<p><i>Field: Notify before enrollment expires</i></p> <p>Select the desired setting from the drop-down list.</p>	<p>This setting determines whether enrollment expiry notification messages are sent. The options are:</p> <ul style="list-style-type: none">• No – No notification is sent• Enroller only – The notification is sent to the teacher• Enroller and enrolled user – The notification is sent to both the teacher and the student <p>If this field is set to No, the Notification threshold fields are inactive.</p>
10.	<p><i>Field: Notification threshold</i></p> <p>Select the number and unit that will determine the amount of time prior to expiration that users will be notified.</p>	<p>If activated, this stipulates the length of time before enrollment expiration that users will be notified.</p>
11.	<p><i>Field: Start Date</i></p> <p>Click the Enable box for this field to activate. Enter the desired date for self-enrollment to be enabled.</p>	<p>If enabled, users can enroll themselves from this date onward only.</p>

Step	Action	Notes
12.	<p><i>Field: End Date</i></p> <p>Click the Enable box for this field to activate. Enter the desired date for self-enrollment to be disallowed.</p>	<p>If enabled, users can enroll themselves until this date only.</p>
13.	<p><i>Field: Unenroll inactive after</i></p> <p>Select the desired setting to automatically unenroll inactive users.</p>	<p>Use this field to automatically unenroll any users who haven't accessed a course for a specified period of time. The default is Never, so that even inactive users will remain enrolled in the course until they are manually unenrolled.</p>
14.	<p><i>Field: Max enrolled users</i></p> <p>Enter the maximum number for allowed enrolled users. Leave this field at 0 to allow unlimited enrollments.</p>	<p>Specifies the maximum number of users that can self enroll. The default is 0, which means no limit.</p>
15.	<p><i>Field: Send course welcome message</i></p> <p>Click the box to enable this setting.</p>	<p>If the box is marked, users receive an automated welcome message via email when they self-enroll in a course. The message reads as follows:</p> <p style="padding-left: 40px;">Welcome to [Course name]</p> <p style="padding-left: 40px;">If you have not done so already, you should edit your profile page so that we can learn more about you: [link to profile page]</p>
16.	<p><i>Field: Custom welcome message</i></p> <p>Enter a customized welcome message for users who enroll in your course.</p>	<p>A custom welcome message may be added as plain text or Moodle-auto format, including HTML tags and multi-lang tags.</p> <p>The following placeholders may be included in the message:</p> <ul style="list-style-type: none"> • Course name [\$a->courseName] • Link to user's profile page [\$a->profileurl]
17.	<p>Click Save Changes.</p>	<p>The course page displays.</p>

For training purposes, try experimenting with the self-enrollment option. Before beginning, verify with your server administrator that “test user” IDs have been established.

Enrollment Methods

After ensuring that Self-Enrollment (Student) is enabled and reviewing the settings, try changing some of the self-enrollment settings. Log out of the server and then login as a student using the enrollment key you created. Use the following login credentials:

- User: testuser6
- Password: TestU\$er6

MODIFY ENROLLMENT METHODS

Should you wish to add, remove, or change the settings for your course enrollment, you can do so from the **Users > Enrollment Methods** page.

- To change the order in which the enrollment methods are checked, use the up/down arrows. If a user can enroll via more than one enrollment method, the one highest in the list wins.
- To disable an enrollment method, click the show/hide icon (eye icon) in the Edit column. A disabled method displays its name in grayed color. Disabling allows you to re-enable this method at a later time rather than recreating its settings.

IMPORTANT REMINDER: Do not delete or hide the manual enrollment option in your course. You will lock yourself out of your course, since your Teacher status was set using manual enrollment. You will also suspend students who were manually enrolled in the course. This error can only be fixed by a server manager or administrator. **Likewise, do not delete or hide the self-enrollment option while a course is underway, because doing so will suspend any students who enrolled using the self-enrollment option.**

To add a new enrollment method, use the following steps:

Step	Action	Notes
1.	Click the Add Method drop-down list at the bottom of the Enrollment Methods table.	This list of enrollment methods available for adding displays. Most likely, your only choice will be Self-Enrollment.
2.	Select from the available methods.	If you have the option of selecting Guest Access, the method will be immediately added to the Enrollment Method table. If you select Self-Enrollment, the Settings page displays. The following steps are for this situation.

Enrollment Methods

Step	Action	Notes
3.	Give the self-enrollment method a unique name in the Custom Instance Name field.	Each self-enrollment method that you add should be a unique instance, so it is important to give it a descriptive name.
4.	Modify the remaining settings as desired for this instance of self-enrollment.	See the Self-Enrollment section of this tutorial for details.
5.	Click Add Method .	The new method is added and is displayed in the Enrollment Method table.

For training purposes, try out the Guest Access option in your course site or a Moodle practice site.

1. Follow the steps outlined in this tutorial to enable Guest Access in your Enrollment Methods.
2. Log out of Moodle.
3. Log in as a Guest from the Moodle log in page.
4. Navigate to your course page.
5. Review any activities that you have set up for Guest Access. Notice that you are not able to fully participate in certain activities due to your guest role.

SUMMARY AND RESOURCES

This tutorial gave you information about allowing access and enrolling students in your Moodle course.

To learn more about these topics, visit:

- https://docs.moodle.org/33/en/Enrolled_users
- https://docs.moodle.org/33/en/Enrolment_methods

HOW TO USE THIS TUTORIAL:

This tutorial can be used as a self-paced lesson or as a lesson plan in a classroom setting.

- ***As a self-paced lesson.***

If this is a completely new skill for you, work through the tutorial from beginning to end. However, if you have some prior experience with the topic, use the menu hyperlinks on page one to jump to a topic that you want to learn.

Most topics include hyperlinks to video demonstrations. While the videos are useful, you don't have to watch them. All the information that you need is listed in the tutorial text and step instructions.

Use the exercises at the end of the tutorial to practice the skill. This will help to correct any misunderstandings or mistakes before you use the skill in your classroom.

- ***As a lesson-plan for a classroom.***

When teaching this skill in a classroom, use the tutorial for:

- ✓ **Motivation**—Use the tutorial introduction as a springboard for a deeper exploration of how instructors might use this functionality in their classrooms. Encourage discussion and contributions from your students.
- ✓ **Demonstration**—Once your learners understand the purpose and pedagogical value of the functionality, demonstrate the steps of the relevant tasks as listed in the tutorial, using your computer and an overhead projector.
- ✓ **Practice**—Use the tutorial example as a basis for student practice. Assist as necessary.
- ✓ **Reference**—Encourage learners to use the tutorial post-session as a reference when using the functionality.

Return to the tutorial [main menu](#).

We would appreciate feedback on this tutorial! Please send comments or suggestions to:

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