

5: ENROLLMENT METHODS

WELCOME TO THE MOODLE ENROLLMENT TUTORIAL!

In this tutorial, you will learn:

- 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

NOTE: Since Moodle was originally developed in Australia, you may often see an alternate spelling of “enrollment” on user screens in Moodle, as well as in many Moodle training videos and documents.

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 your course. Selecting this choice allows you to use the course as an information resource for anyone who wants to visit, rather than as a graded course for enrolled students. Entering a course with guest access does not 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.

Participants enrolled in the course can interact with the course in ways. However, guest users cannot:

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

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 people who have created a user account on the Moodle server. Teachers can enroll or unenroll students at any time. 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.
- **Easy enrollment**—This option allows students to enroll themselves directly from the home page of the Moodle site. Students with video-enabled devices also can enroll from the home page using a QR code.

Teachers may also ask the Moodle server administrator to bulk enroll their students. Teachers must provide a list of their students in a specially formatted Excel spreadsheet.

MANUAL ENROLLMENT

VIDEO DEMONSTRATION:

Watch this 3 1/2-minute video to see a demonstration of manual enrollment.

<http://youtu.be/qZrjEjN3U2o>

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 User1
- Test User2
- Test User3
- Test User4
- Test User5
- Test User6

Enable editing in your course site, and then use the following steps to manually enroll students:

Step	Action	Notes
1.	From the course page, click the Course Management icon (located in the top nav bar to the left), and then click the Participants link (located in the right column).	The Participants screen will display. This screen allows you to view the list of enrolled users, enroll new users, and remove users. You can also edit the roles of users in the course, modify the dates of enrollment, and add or remove users from groups.
2.	Click the Enroll users button.	The Enroll users popup window displays.

Step	Action	Notes
3.	<p>Enter a first and/or last name in the search box in the popup window and click the Search button.</p> <p>For example, if you want to enroll a student named Ezra Wilson, you could search for Ezra, Wilson, or Ezra Wilson. The list displays all users who meet the criteria.</p>	<p>The window initially displays all registered users on the server, so the search function helps to narrow down the display.</p> <p>For training purposes, search on the name Test User. The search should reveal the list of Test User IDs. Click on each Test User show in the list to create a list of new enrollees.</p>
4.	<p>Using the Assign role dropdown menu, choose the role to be given to the new enrollee.</p>	<p>The list of available roles will only include roles that rank below that of teacher. Choose the Student roll. 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 the server administrator.
5.	<p>If desired, click the Show more link to expand the option area and modify enrollment options.</p> <p>The Recover user’s old grades if possible option allows you to retrieve a student’s grade should they accidentally be unenrolled and need to be enrolled again. It is a good idea to check this box.</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—Unchecked • Default enrollment duration— Unlimited • Starting from—Today’s date
6.	<p>Click the Enroll users button.</p>	<p>The display returns to the Participants screen. Notice that the newly enrolled users now appear in the Participants list.</p>

SETTING UP STUDENT SELF-ENROLLMENT

VIDEO DEMONSTRATION:

Watch this 3-minute video to see a demonstration of self-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 ask for an enrollment key when requesting a ctYOU.org course site, or you can change the enrollment key after you have accessed your new course.

To set up self-enrollment, follow these steps:

Step	Action	Notes
1.	<p>From the course page, click the Course Management icon, and then click the Enrollment methods link.</p> <p>Be sure self-enrollment is enabled (the eye icon should be open).</p>	<p>After clicking the Enrollment methods link, 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> <p>Notice that the Edit column also includes icons that allow you to delete the enrollment method or to disable it.</p>
2.	<p>If the Self enrollment option does not display in the Enrollment methods table, you can add it by selecting from the Add method dropdown list below the table.</p> <p>CAUTION: Deleting an enrollment method will delete any users who were enrolled using that method. Do not delete the Manual enrollment method, since most Teachers are manually enrolled in their course sites by the Moodle administrator.</p>	<p>Selecting Self enrollment from this dropdown list will add a new self-enrollment instance to the available methods, and will also open the settings page.</p> <p>If the Self enrollment option appears in the Enrollment methods table, continue to the next step.</p>

Step	Action	Notes
3.	In the Self enrollment row, click the gear icon in the Edit column.	<p>This will open a settings page for Self enrollment.</p> <p>It is not necessary to delete enrollment types. However, in some cases, you may need more than one self-enrollment type in a course.</p>
4.	<p>Field: Custom instance name</p> <p>Enter a unique name for this instance of self-enrollment.</p>	<p>Because you can add multiple self-enrollment instances to your course, you must ensure that each instance of self-enrollment is given a unique name, such as Self-Enrollment—Fall.</p>
5.	<p>Field: Enable existing enrollments</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 self enroll.</p>
6.	<p>Field: Enrollment key</p> <p>Enter an enrollment key that students will use to enroll in the course. To see the characters that you type, click the eye icon to unmask the enrollment key. The key for the Self enrollment option does not have any special character requirements.</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 type in: the enrollment key.</p> <p>NOTE: Users only need to type the enrollment key the first time they access the course.</p>
7.	<p>Field: Use Group enrollment keys</p> <p>Select Yes or No.</p> <p>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 and 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 screen), only their own group enrollment key (created on the Groups settings screen). • Have students use the master course enrollment key as usual, if you do not want to immediately place them in a group.

Step	Action	Notes
8.	<p>Field: Default assigned role</p> <p>From the Default assigned role dropdown list, select the 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.
9.	<p>Field: Enrollment duration</p> <p>Click the Enable checkbox to activate the duration dropdown 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>
10.	<p>Field: Notify before enrollment expires</p> <p>Select the desired setting from the dropdown list.</p> <p>If this field is set to No, the Notification threshold fields are inactive.</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
11.	<p>Field: Notification threshold</p> <p>Select the amount of time prior to expiration that users will be notified.</p>	<p>This setting becomes enabled when the Notify before enrollment expires setting has been set to Yes.</p>
12.	<p>Field: Start date</p> <p>Click the Enable box to activate this field. Enter the desired date to open self-enrollment.</p>	<p>If enabled, users can enroll themselves from this date onward only.</p>
13.	<p>Field: End date</p> <p>Click the Enable box to activate this. Enter the desired date for self-enrollment to be disallowed.</p>	<p>If enabled, users cannot enroll themselves after this date.</p>

Step	Action	Notes
14.	Field: Unenroll inactive after Select the number of days to automatically unenroll inactive users.	Use this field to automatically unenroll any users who have not accessed a course for a specified time. The default is Never , so that even inactive users will remain enrolled in the course until they are manually unenrolled.
15.	Field: Max enrolled users Enter the maximum number of enrolled users. Leave this field at 0 to allow unlimited enrollments.	This setting specifies the maximum number of users who can self enroll. The default of 0 means “no limit.”
16.	Field: Send course welcome message.	This setting ensures users receive an automated welcome message via email when they self-enroll in a course (unless otherwise specified). The default message reads as follows: Welcome to [Course name]. 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].
17.	Field: Custom welcome message Enter a customized welcome message for users who enroll in your course.	A custom welcome message may be added as plain text or Moodle-auto format, including HTML tags and multi-lang tags. The following placeholders may be included in the message: <ul style="list-style-type: none"> • Course name [\$a->coursename] • Link to user’s profile page [\$a->profileurl]
18.	Click the Save changes button.	The Enrollment methods page displays.

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

After ensuring that the **Self enrollment** option 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: **test.user5** (lowercase with a dot in between)
- Password: **TestU\$er5** (with a capital T and U, a dollar sign, and the number five)

ENABLING THE EASY ENROLLMENT OPTION

The **Easy Enrollment** option allows users to enroll in a course (or a group within a course) using the **Enrollment Code** box located on the home page of the Moodle server. However, before students can enroll using the Easy Enrollment option, the server administrator must activate it on the server, and the teacher must enable it in the course.

Follow these steps to enable the Easy Enrollment options:

Step	Action	Notes
1.	From the course page with editing turned on, click the Course Management icon, and then click the Enrollment methods link.	The Enrollment methods page will display.
2.	In the Add method dropdown menu, choose Easy enrollments .	The Easy enrollments settings page will display.
3.	Ensure the Enabled dropdown is set to Yes .	Selecting No turns off the Easy Enrollment option for the course.
4.	If you wish to limit the time students are enrolled in the course, click the checkboxes to Enable the settings for Enrollment Begins and/or Enrollment Ends .	This step is optional.
5.	The six-digit code that appears in the Enrollment codes field is the code you will must provide to your future students. If you are using groups in your course, the Easy Enrollment plugin will generate an enrollment key for each group.	You can click the Regenerate Codes box and click the Save changes button to regenerate the Easy Enrollment code.

NOTE: The Easy Enrollment option also allows students to enroll in a course using a QR code generated by the course. Teachers must provide a handout to students that includes the QR code. To enroll using the QR code method, students must have a computer device with a camera. Students click the QR code button next to the enrollment key field, and then hold the QR code up to the camera on their device. Upon successful enrollment, the Moodle site will automatically direct the students to the course.

MODIFYING ENROLLMENT METHODS

Should you wish to add, remove, or change the settings for your course enrollment, you can do so by clicking the **Course Management** icon and the **Enrollment methods** link.

- To change the order in which the enrollment methods are checked, use the up/down arrows to place the options in the preferred order. If a user can enroll using more than one enrollment method, the one highest in the list wins.
- To disable an enrollment method, click the **eye** icon in the **Edit** column to hide it. The link to a disabled enrollment method displays gray in color. Disabling allows you to re-enable this method at a later time rather than recreating it again later.

IMPORTANT REMINDER: Do not delete or hide the manual enrollment option in your ctYOU.org course. You will lock yourself out of your course, since your Teacher status in your course 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 or Easy Enrollment options while a course is underway, because doing so will suspend any students who enrolled using these option.

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

Step	Action	Notes
1.	Click the Add Method dropdown list at the bottom of the Enrollment methods table.	This list of enrollment methods available for adding displays.
2.	Select from the available methods. Most likely, your only choices will be Easy Enrollments and Self-Enrollment.	<p>If you have the option to select Guest Access, the method will be immediately added to the Enrollment Method table.</p> <p>If you select Self-Enrollment, the Settings screen displays. The following steps are for this situation.</p>
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.

Enrollment Methods

Step	Action	Notes
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/311/en/Participants>
- https://docs.moodle.org/311/en/Enrolment_methods
- https://moodle.org/plugins/enrol_easy

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 contact the General ctYOU.org Support Staff listed under Division Contacts on ctYOU.org.