

5: ENROLLMENT METHODS

WELCOME TO THE MOODLE ENROLLMENT TUTORIAL!

In this tutorial, you will learn:

- How to manually enroll students
- How to set up student self-enrollment
- 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” in Moodle activities, 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 determines 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 can enroll students yourself or set up student self-enrollment.
- **Allowing access to anyone**—This is called **Guest** access, and it allows anyone to view your course, even if they do not have a user ID on your Moodle server. 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.

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

Participants enrolled in the course can interact with the course in ways. **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 students in their course or unenroll them 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.

Note: Teachers can have their students enrolled in bulk. Students that already have a user ID can be enrolled at the course level using a specially formatted list of names. The Moodle administrator can also create new user IDs for multiple classes of students and enroll them in their courses at the same time, using a specially formatted spreadsheet provided by the teacher. Ask your server administrator for more information.

MANUAL ENROLLMENT

VIDEO DEMONSTRATION:

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

<https://youtu.be/Jx3quQ0213c?si=FkO2bPH9gcFbuTeB&t=43>

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.	<p>On the course page, click the Participants link located in row of links below the course title.</p> <p>Note: The Participants link also appears on the Course Management screen under the Users column on the left.</p>	<p>The Enrolled users 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.</p>
2.	Click the Enroll users button.	The Enroll users popup window displays.

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Step	Action	Notes
3.	<p>In the popup window, type in the name of a student in the Select users search box 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>IMPORTANT: Be sure to select the right user name. Multiple users may have the same name, and a user may have more than one user ID.</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 make sure this box is checked.</p>	<p>Enrollment options allow you to control certain aspects of the user’s enrollment. The fields and default settings include:</p> <ul style="list-style-type: none">• Recover the user’s old grades if possible— Checked• Starting from—Today’s date• Enrollment duration— Unlimited
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 create the enrollment key after you have accessed your new course. You can change the enrollment key at any time.

To set up self-enrollment, follow these steps:

Step	Action	Notes
1.	<p>From the course page, click the Course Management button and then, under the Users column, click the Enrollment methods link.</p> <p>Note: From the course page, you can also access the Enrollment methods screen by clicking the Participants link and choosing Enrollment methods from the Enroll users dropdown menu.</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>On the Enrollment methods screen, be sure Self-enrollment (Student) is enabled. The eye icon in the Edit column (far right) of Self-enrollment (Student) should be open and the link to this enrollment method should appear black.</p>	<p>If the Self-enrollment (Student) option appears light gray and the eye icon is closed, enable this enrollment option by clicking the eye icon.</p>

Enrollment Methods

Step	Action	Notes
3.	If the Self enrollment option does not appear in the Enrollment methods list at all, you can add it by selecting from the Add method dropdown list below the list of enrollment methods.	Selecting Self enrollment from this dropdown list will add a new self-enrollment instance to the available methods, and it will also open the settings page. If the Self enrollment option appears in the Enrollment methods list, continue to the next step.
4.	In the Self enrollment row, click the gear icon in the Edit column.	This will open a settings page for Self enrollment . It is not necessary to delete enrollment types. However, in some cases, you may need more than one self-enrollment type in a course. CAUTION: Deleting an enrollment method will delete any users who were enrolled using that method. Do not delete the Manual enrollment method. Most Teachers are manually enrolled in their course sites by the Moodle administrator.
5.	Field: Custom instance name Enter a unique name for this instance of self-enrollment.	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.
6.	Field: Keep current self-enrollments active Select Yes or No.	If set to No, all existing self-enrolled users will no longer be able to access the course.
7.	Field: Allow new self-enrollments	This setting determines whether new students can self-enroll in the course.
8.	Field: Enrollment key 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.	If the field is left at the default, 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. Note: Users only need to type the enrollment key the first time they access the course.

Step	Action	Notes
9.	<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 the Self-enrollment 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.
10.	<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.
11.	<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>

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Step	Action	Notes
12.	<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
13.	<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>
14.	<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>
15.	<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>
16.	<p>Field: Unenroll inactive after</p> <p>Select the number of days to automatically unenroll inactive users.</p>	<p>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.</p>
17.	<p>Field: Max enrolled users</p> <p>Enter the maximum number of enrolled users. Leave this field at 0 to allow unlimited enrollments.</p>	<p>This setting specifies the maximum number of users who can self-enroll. The default of 0 means “no limit.”</p>

Step	Action	Notes
18.	Field: Send course welcome message.	<p>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:</p> <p>Welcome to [Course name].</p> <p>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>
19.	<p>Field: Custom welcome message</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]
20.	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)

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. (Remember, from the course page, you can also access the Enrollment methods screen by clicking the **Participants** link and choosing **Enrollment methods** from the **Enroll users** dropdown menu.)

Enrollment Methods

- 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 likely created 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 (Student) option 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.	On the Enrollment methods screen, click the Add Method dropdown list to display the available enrollment methods. Choose Self-enrollment .	The Self-enrollment settings screen displays. Note: In many cases, your only choice will be Self-enrollment . If you have the option to select Guest access , this method will be immediately added to the Enrollment method screen.
2.	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.
3.	Modify the remaining settings as desired for this instance of self-enrollment.	See the Self-Enrollment section of this tutorial for details.
4.	Click the Add method button.	The new method is added and is displayed in the Enrollment method screen. Note: If you want to delete the new self-enrollment method, click its trashcan icon under the Edit column.

Enrollment Methods

For training purposes, try out the **Guest access** option in your course site.

1. Follow the steps outlined in this tutorial to enable **Guest access** on the **Enrollment methods** screen.
2. Log out of Moodle.
3. Click the **Access as a guest** button on the Moodle log in page. You should see a message on the right side of the top navigation bar that reads, “You are currently using guest access.”
4. Navigate to your course page. Once in the course, you should see a shaded box under the course name indicating you are viewing the course as a guest.
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/401/en/Participants>
- https://docs.moodle.org/401/en/Enrolment_methods
- https://docs.moodle.org/401/en/Course_enrolment

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 ctYOU.org Support Staff listed under Contact Info on the ctYOU.org top navigation bar.

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