Assign Users in TRAIN – How To

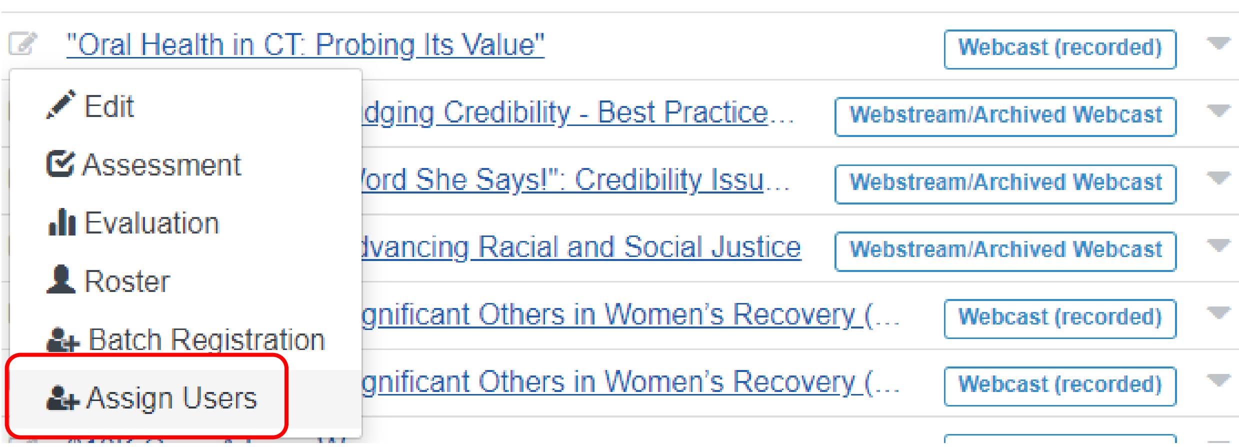
The Assign Users functionality in TRAIN allows administrators and course providers to add existing users to a courses' roster. Once added, administrators and course providers can adjust the registration record for those users as needed.

Sections:

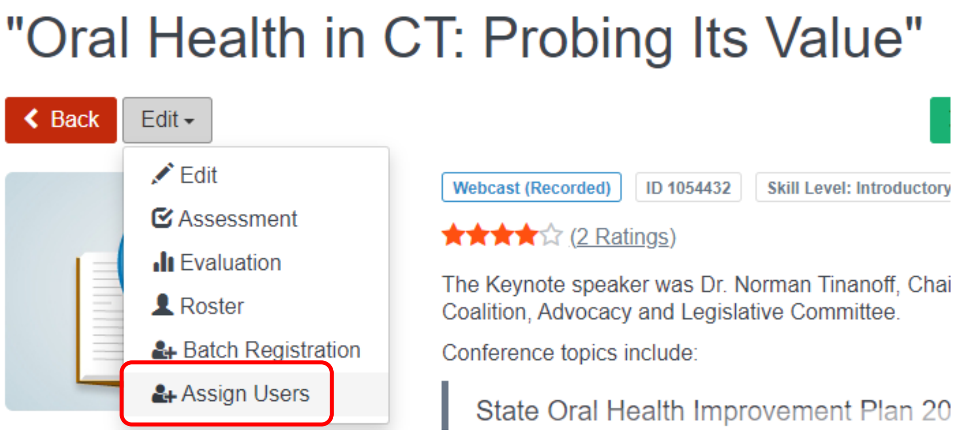
Where can I access this functionality?

The Assign Users functionality is available within the admin course search through the edit menu on the left side of the course record, the edit menu within the admin course details view of the course, or from within the course roster. Each location is shown below. Access to this functionality is given to those users with the "Batch Registration Manager" role at a group level where the course is available and to Course Providers who have edit rights to the course. Currently, this functionality is not available to the Live Event (In Person), Live Event (Online), Exercise, or Conference course types.

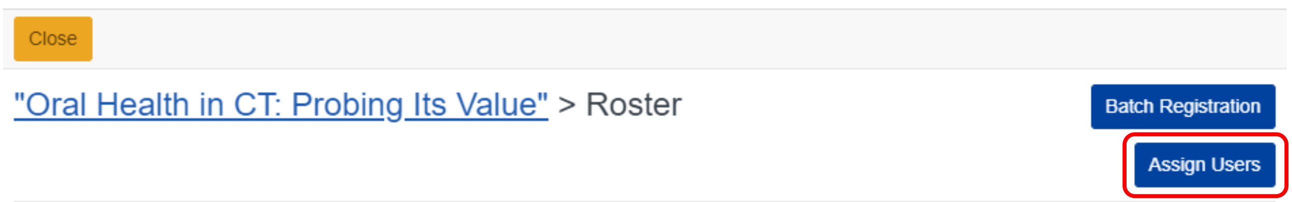
Admin course search through the edit menu on the left side of the course record



Edit menu within the admin course details view of the course



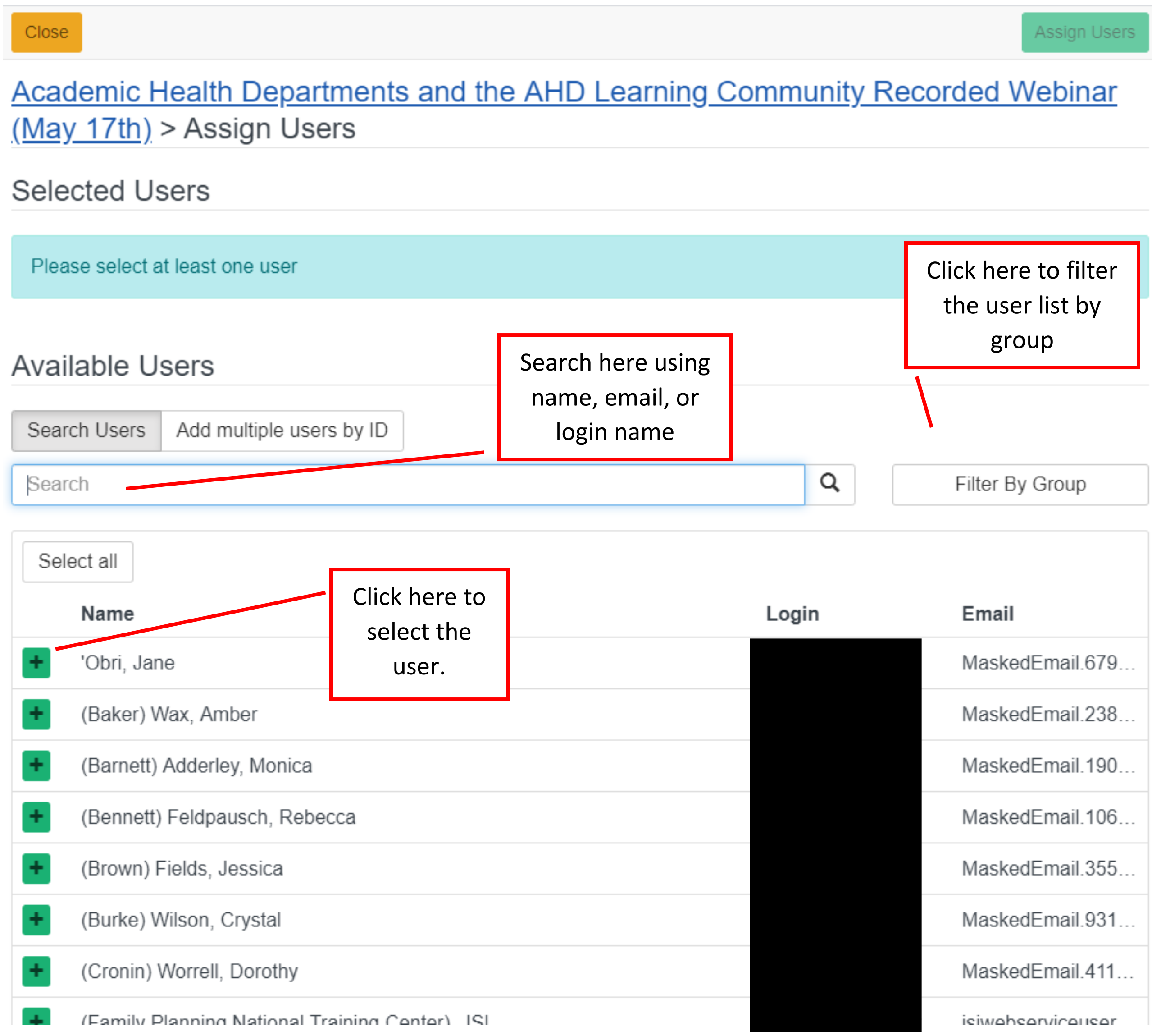
Within the course roster



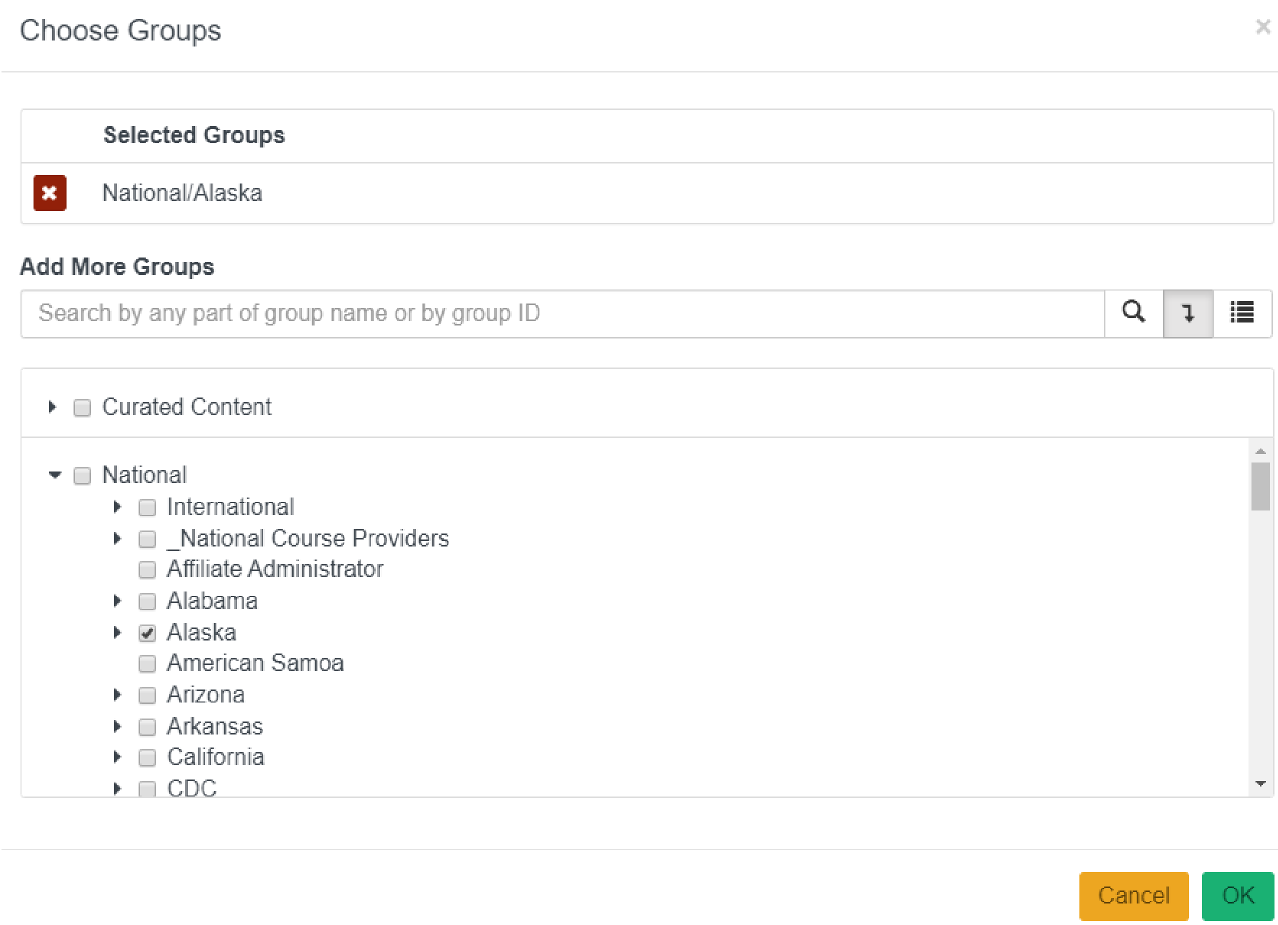
What does it do and how do I use it?

The purpose of the Assign Users functionality is to assign existing users in TRAIN to the course roster and give the administrator or course provider the ability to adjust those registration records as needed.

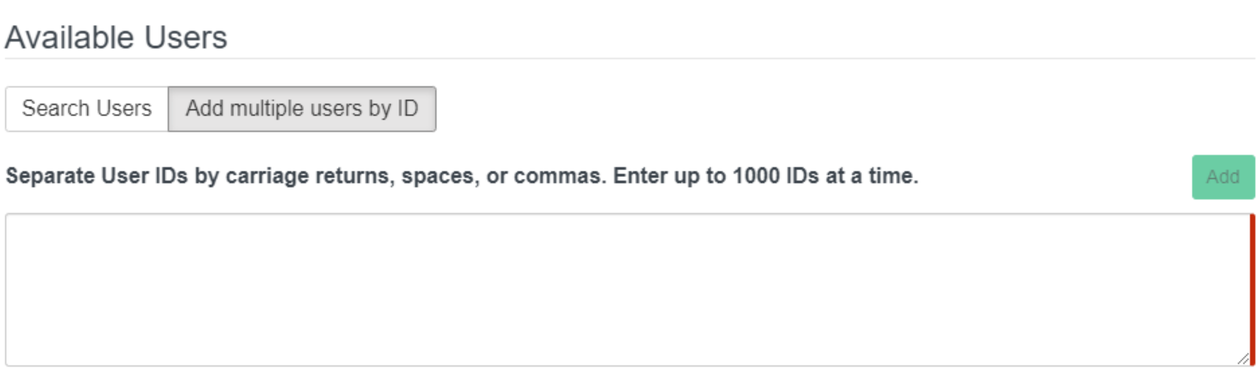
When you access the Assign Users interface, as shown below, you can search for users by entering in their name, email, or login name in the search box. Once you have found the user you are looking for, click the "+" button on the left hand side to select the user. The available users list shows up to 10 users at a time. If there are more than 10 users listed, the list will be paginated.



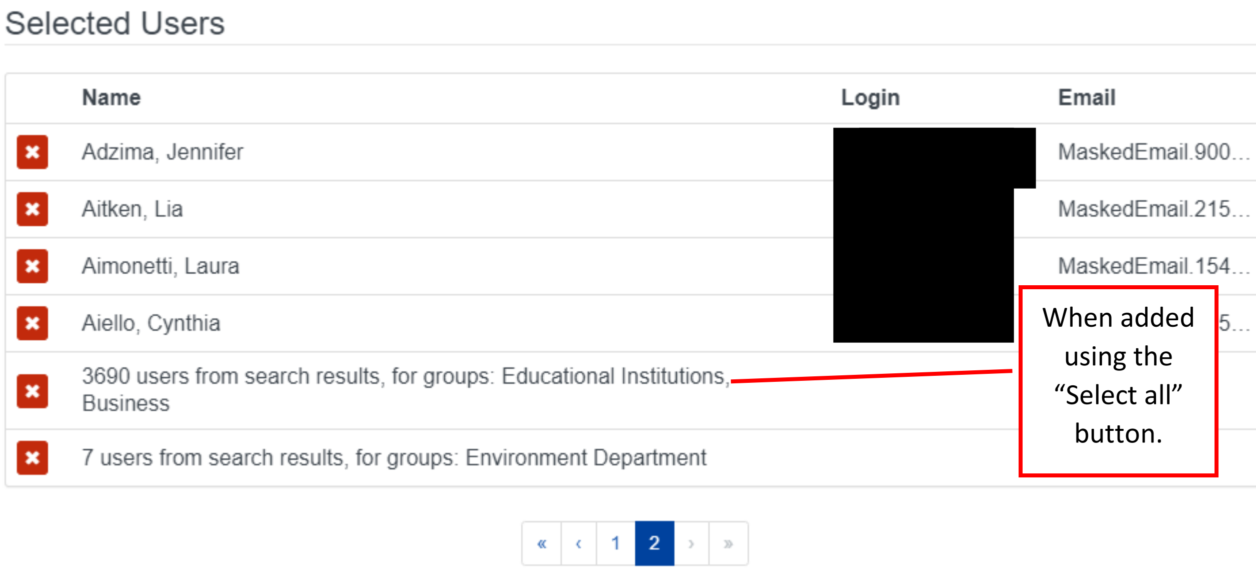
Alternatively, you can filter your available users list by group. Once you click the "Filter By Group" button found to the right of the search box, the below interface opens. Here you can type in the name of your group to search for it, enter the group ID if known, or find the group listed within the tree structure and check the box to the left of the group by which you want to filter your available users list. Once you have the desired group or groups in the "Selected Groups" list, click the "OK" button in the bottom right.



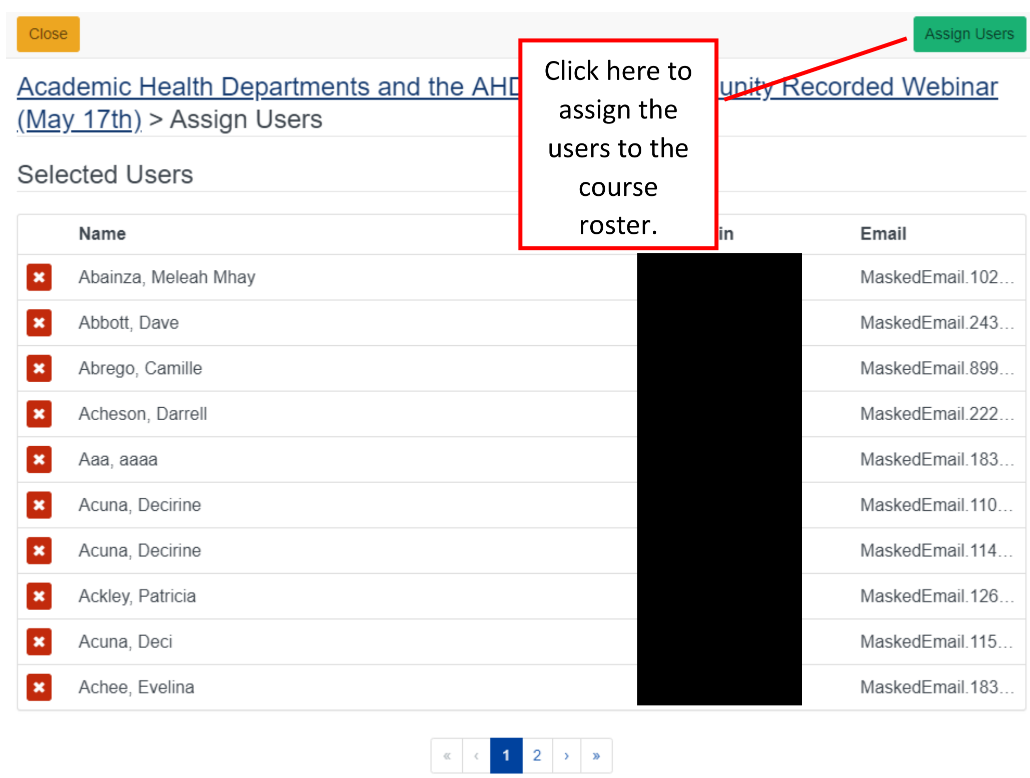
Another option to select users is by user ID. By clicking the "Add multiple users by ID" found above the search box, you are given the option to insert multiple user ID to add to you selected users list. Enter in the ID's, separated by a return, space, or comma, and then click the "Add" button on the right side.



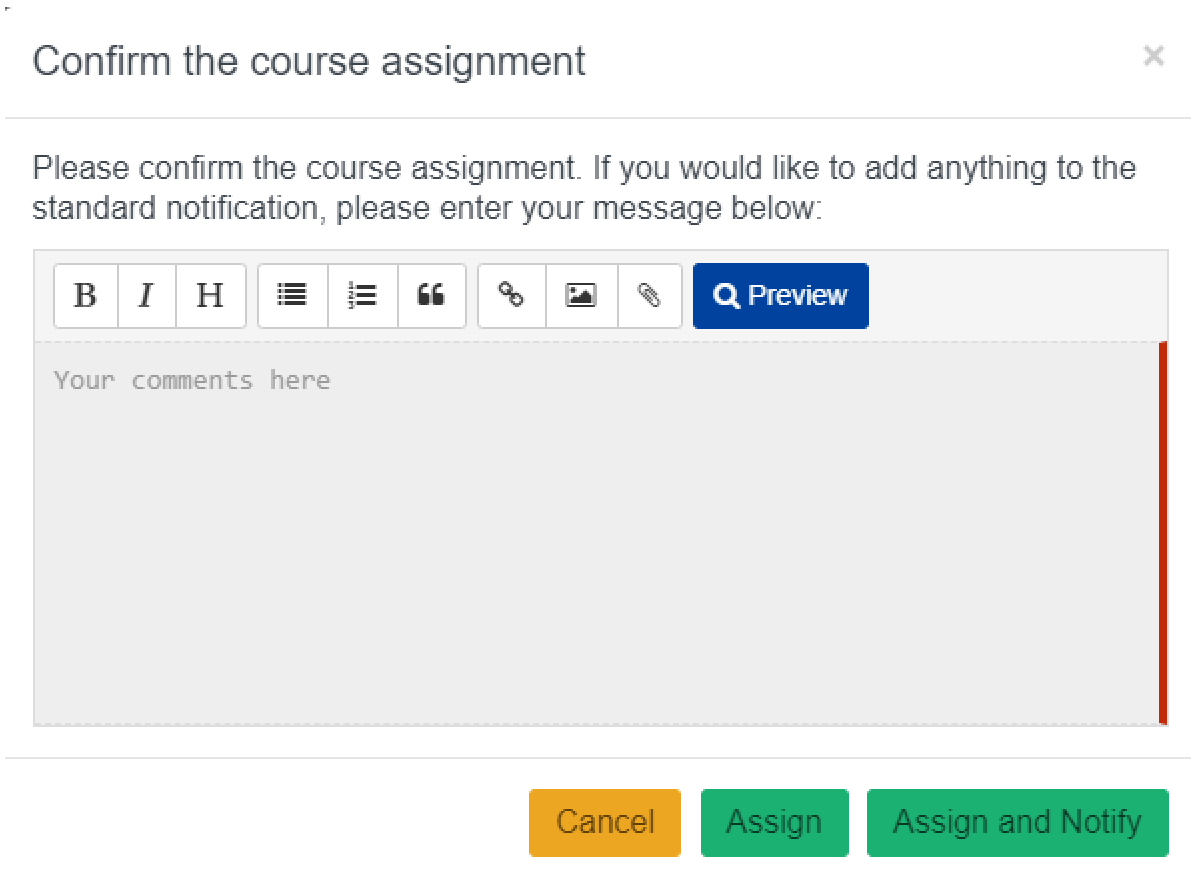
When selecting users from the available users list, you also have the option to “Select all.” This option can be useful if you need to add all users from a specific group. Once you click the “Select all” button, the users will be listed as a combined row within the selected users list at the top of the page as shown below.



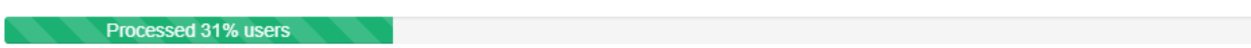
Once you have selected the users that you want to add to the course roster, they will be listed in the “Selected Users” section at the top of the page. The selected users list shows up to 10 users at a time. If there are more than 10 users, the list will be paginated. If you have all the users you need listed, click the “Assign Users” button in the top right to assign the users to the course roster.



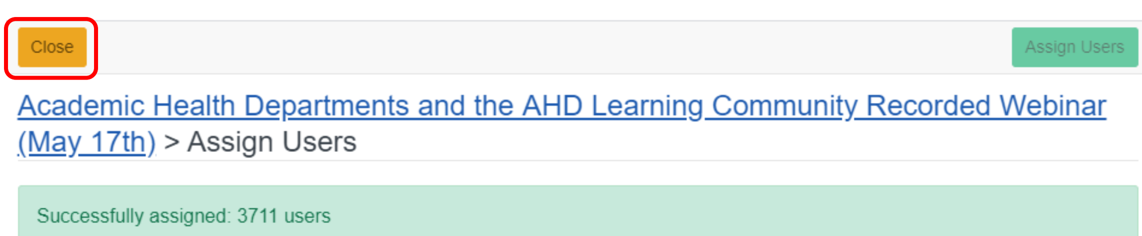
When you assign the users you will be presented with a window to confirm the assignment, as shown below. You can click “Cancel” if you wish to add more users before assigning them to the course. Clicking on “Assign” will make the assignment but will not send any notification to the user. Clicking on “Assign and Notify” will send the standard course registration notification to the user, along with any text that you enter in the text box shown below. Email notifications will only be sent to those users who have opted in the emails.



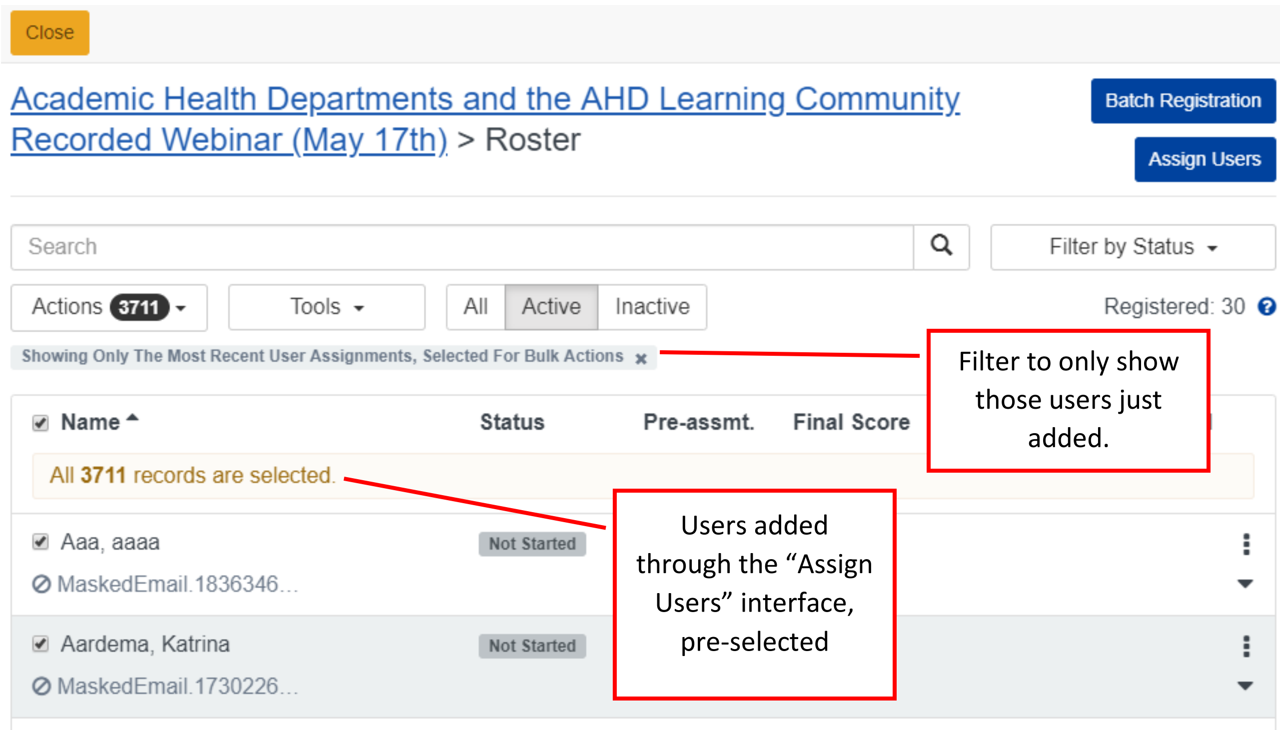
Once you click “Assign” or “Assign and Notify” the selected users will be added to the course roster. If you are adding a large number of users you may see the below status bar indicating the % complete.



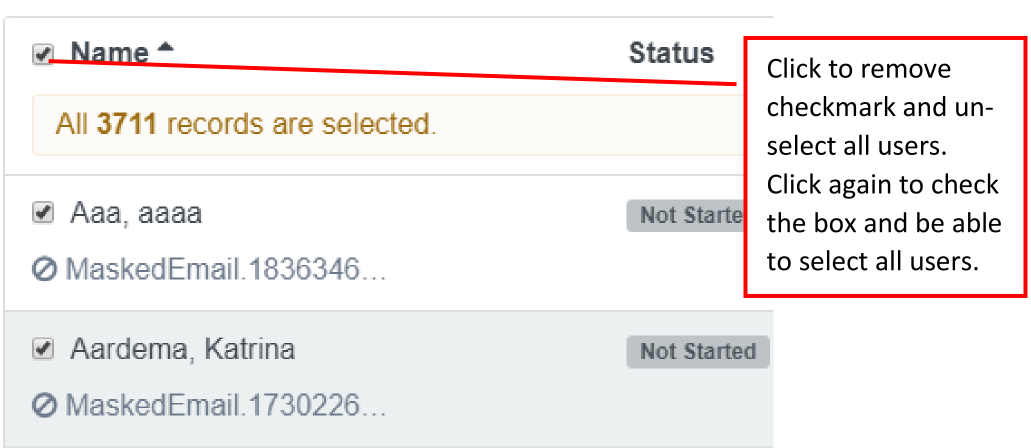
Once the users have been added, you will see the below message. At this point, you can click the “Close” button in the top left to go to the roster where you are able to adjust the registration information for the users you just added.



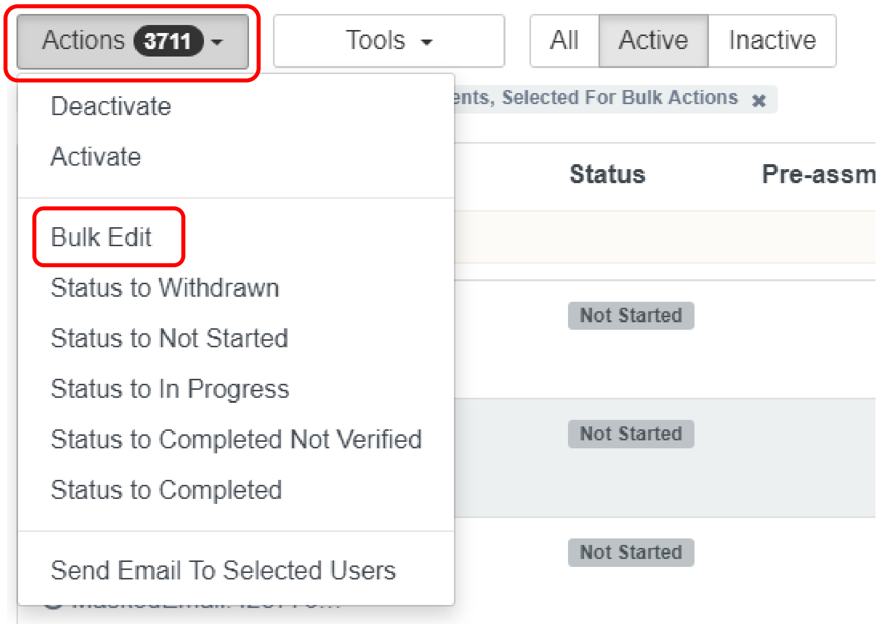
Once you are on the roster page, all of the users you just added to the roster will be pre-selected as show below. There will also be a filter added, also shown below, that will only show those users just added. The users are added in the "Not Started" status. At this point, you can close out of the roster if you do not need to adjust the users' registration records any further. Alternatively, you can remove the "Showing Only The Most Recent User Assignments, Selected For Bulk Actions" filter to view all users on the course roster.



If you do need to adjust the newly added users' registration records, you can do that now. You can do this for all of the users, or select a sub-set of the users. To select a sub-set you can click on the checkbox to the left of the "Name" column header. This will un-select all users and you can then check the box to the left of the users for which you wish to adjust the registration records. To select all users again, click the checkbox to the left of the "Name" column header then click the "Select all ### records" link that will appear.



Once you are ready to adjust the newly added users' registration records, click on the "Actions" dropdown under the search bar and then the "Bulk Edit" option.



You will be presented with the below window to edit the users' registration records. Here you can set the registration status, enter the pre-assessment or final score, and enter the completion date if necessary. While not show here, you can select the credit type as well if there are credit types available for the course. You can only enter a completed date if you select a terminal registration status. Updates will only be made if the checkbox to the left of the field is checked. This will happen by default once you enter a value into the field. If you enter a target date value, this will appear when the user views the course details page for the course. Click the "Save" button on the bottom right once you have completed your selections. You have now added users to the roster and updated their registration status.