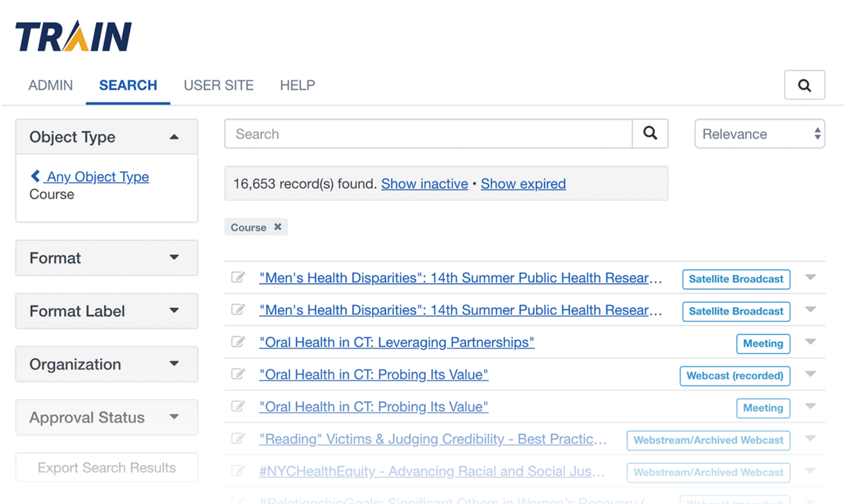
TRAIN Course Roster

The course roster is used to view users who are registered for courses on TRAIN. This feature gives course providers and admins an easy way to view a learner's registration status along with details regarding their registration. Course providers and admins are also able to edit details regarding a learner's registration record. This can be done either individually or for multiple users.

Admins only have access to learners within their permissions. Course providers, on the other hand, have access to all registrations. If a user is both the course provider for a given course and an admin, they will have access to all registrations. In addition, the course roster also provides access to the batch registration functionality; and for Live Events, the course roster provides access to the wait list so that learners may be moved from the waitlist to the active roster. Finally, the course roster provides easy access to a number of reports, including the roster export, assessment, and evaluation results. In this tutorial, we will explore the course roster functionality and delve deeper into these various features. Let's take a closer look.

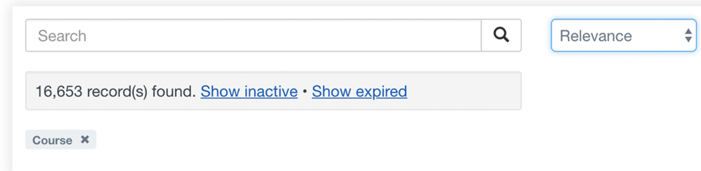
Searching Courses

▶ From the TRAIN homepage, click the 'Admin' link, then click the 'Search' link then select 'Course' from the 'Object Type' dropdown on the left side of the page. Alternatively, from the Admin page you can go to 'Content' and then to 'Find & Edit existing content.'



When you access the search page, a search bar will be available for you to perform a course search. To perform a search, simply type the course name in the provided text field, then click the magnifier icon or press the enter key on your keyboard to begin the search. You can also use the course ID number to search for your course. All incomplete, ready for approval, declined, more information requested, and approved courses that are available to you will be listed.

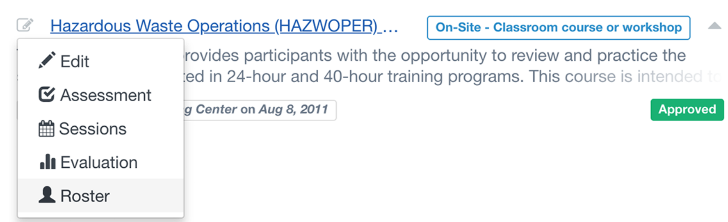
You may sort the list using the dropdown to the right of the search bar. You also have the option of showing inactive and or expired courses in your search by clicking the 'Show inactive' or 'Show expired' link, which are located beneath the search bar. There are also filters available to the left of the search results to further filter your results.



For this specific example, I will enter the following course in the search text field: Hazardous Waste Operations (HAZWOPER) 1029004.

Managing Courses

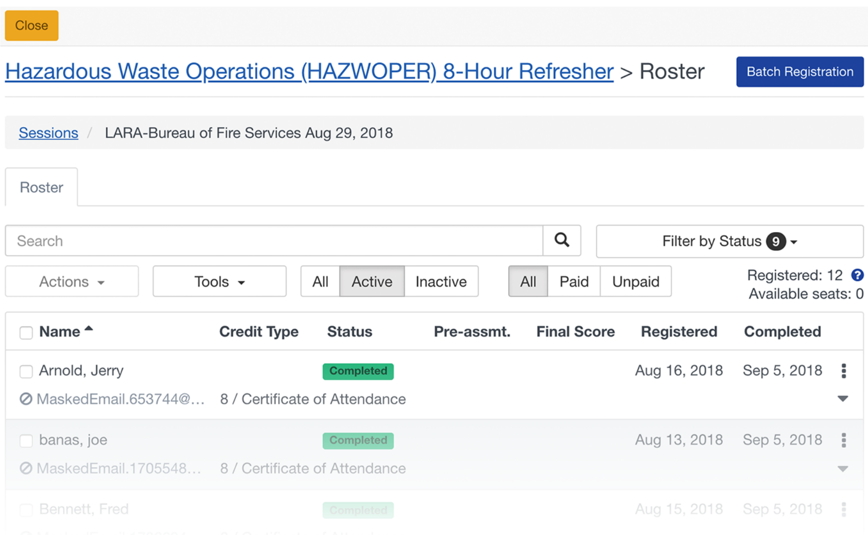
▶ When you click the down arrow to the right of a course title, you will see the courses type, course description, created by information and date, and the courses approval status listing as either approved, ready for approval, declined, more information requested, or incomplete. Click the edit icon to the left of the course title to manage it. In this case, we will manage the course roster.



Please note that courses that were created and approved in TRAIN will be accessible by all course providers within the same Organization as the course provider that created the course.

Edit Course Roster

▶ Since this is a live event course, the first page will list the available sessions. For non-live event or exercise course types, you will go directly to the roster. Listed here on the 'Course Roster' page for this course example is a listing of all course sessions. In this example, we will scroll to the August 29th session to manage the course roster. Some features on this page are common for all course formats; however, there is also specific information and functionality for Live Events.

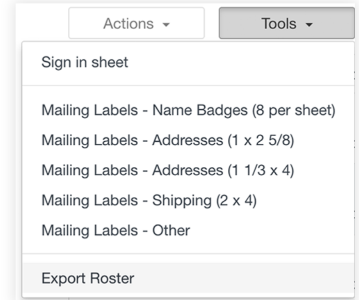


On the top of the page are navigation buttons - close and batch registration. The 'Close' button will close the 'Course Roster' page and redirect you back to where you first accessed the page. The 'Batch Registration' button will redirect you to the Batch Registration page within the same window.

Underneath these buttons is the course title followed by 'Roster.' The course title is a clickable link that will direct you to the 'Admin Course Details' page. For live event courses, underneath the course title will be a 'Sessions' link followed by the session name. The 'Sessions' link is a clickable link to return you to the list of sessions. Underneath this is the search and filter by status functionality. Here, you can either search by name/email or filter your search by course registration status options. The number of filters selected will be displayed within the 'Filter by Status' dropdown. Within the filter, you are also able to filter by those registration that have certificates associated with them.

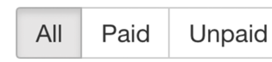
To perform a search, you must enter a learner's name or email address. You may also use the filter by status feature to refine your search results.

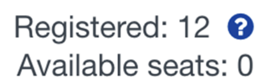
When you click the tools drop-down menu, you'll be presented a series of links to tools that are applicable for every registration in the course roster. You may access various sizes of mailing labels or export the course roster. For courses with assessments and/or evaluations associated with them, there with be the option to run assessment and evaluation reports as well.



By default, the 'Active' registration button is selected. You may click other options to refine the course roster listing. Clicking 'All' will show both active and inactive registrations within the same list, while clicking 'Inactive' will show only inactive registrations.

For courses that require payment, there is also an option to view 'All,' 'Paid,' or 'Unpaid' registrations.





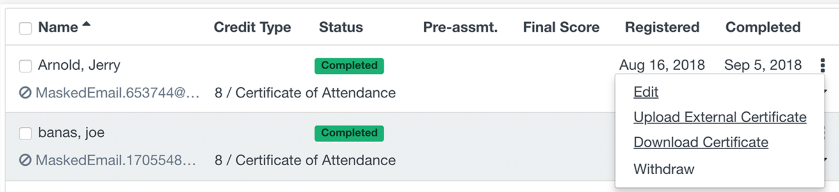
The 'Registered' feature on the right side provides you the number of total active course registrations excluding Not Started, Withdrawn, and Deactivated registrations. For courses with seat limits, the number of available seats will display under the total number of registered users.

Registration Management

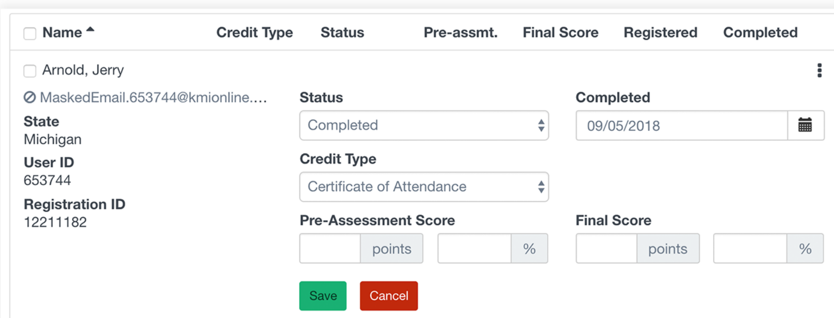
▶ By default, the listing of registered users is ordered alphabetically. Information for each registration is displayed in various columns, and you may click a column name to sort listings by Name, Credit Type, Status, Pre-Assessment Score (if applicable), Final Score (if applicable), Registered Date, and Completed Date. By default, sorting is organized by user's last name, A to Z. When you click on a specific column header, the sorting order will be reversed. When you click the drop-down arrow on the right of a registered users name, you will see additional registration information including State, User ID#, Registration ID#, Accreditation (if application), Downloaded Resources (if applicable), and Pre-Assessment/Post-Assessment details (if applicable). The Review 'Assessment' link is shown if the assessment settings allow for a review of assessment results. If an assessment was setup to manage allowed attempts, the attempts taken will be reported along with the final score.

Please note that only one record at a time can be expanded and edited. When another record is selected, the previous record will collapse.

The three-dot menu on the right provides you additional registration management options. The 'Edit' option is available for TRAIN admins who have edit rights for specific records. If you do not have permission to edit a course record, the user's email will be hidden; however, additional information will be shown (i.e., Registration ID and downloaded resources).



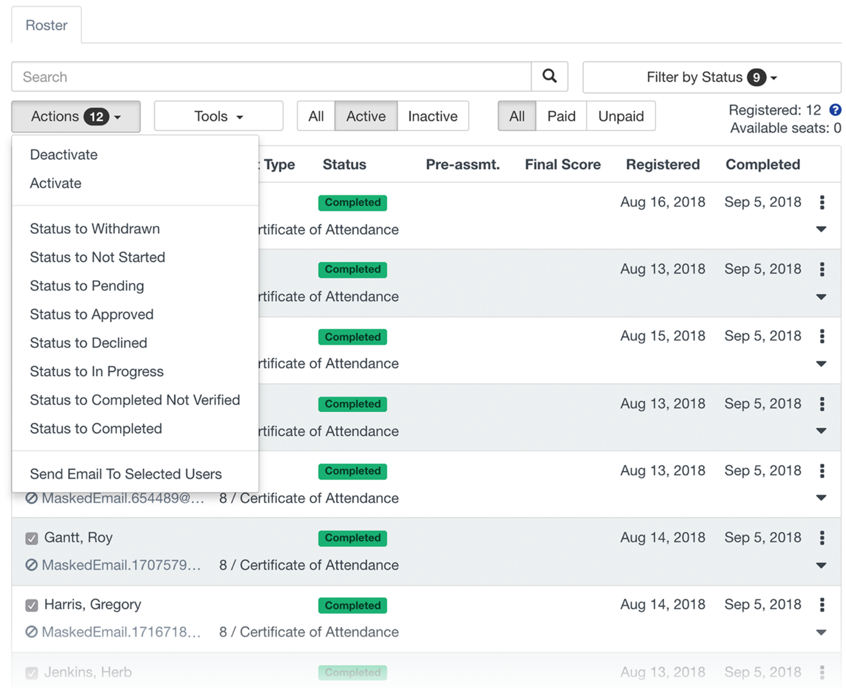
While editing a record, admins may edit a user's status, course credit type, completion date, and their pre-assessment or final score. If the score is reported by an assessment that allows or requires grading, the Pass or Fail option will be available for the grading selection. When you click the 'Save' button, you will then exit out of the edit mode for a specific record. A confirmation message will appear to confirm that the record is saved.



The 'Verify' option will change the status of the record to 'Completed' and will give the user access to any certificate that requires verification, while the 'Withdraw' option changes the status of the record to 'Withdrawn.'

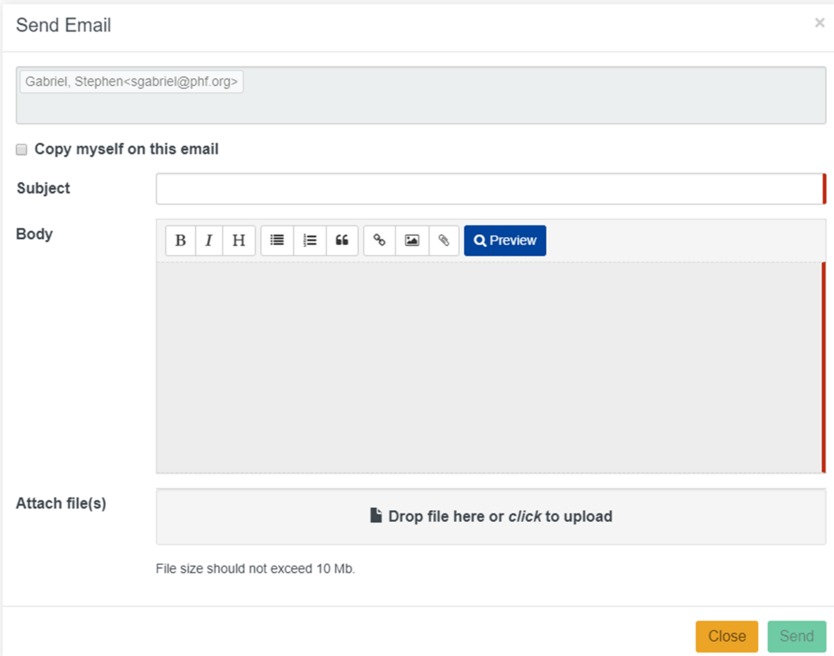
The 'Manage Receipt of Payment' option is available for courses that have an associated fee. Course registration status for applicable courses will be shown as 'Paid (Approved)' or 'Not Paid (Pending).' There is also a 'Download Certificate' option if the learner received or uploaded any certificate for the course.

If you need to edit a single field for multiple registrations, checkboxes in front of the records must be checked, and your desired action must be selected from the 'Actions' dropdown menu above. The number of selected records is shown in the actions control button. You are also able to select all records on the screen or all records overall by clicking the checkbox to the left of the 'Name' column header. The 'Actions' drop-down provides a list of actions that can be applied in bulk for selected records. You can Deactivate, Activate, or Send Email to Selected Users. You may also use the 'Actions' feature to change a learner's registration status. Selecting 'Completed' will verify the records and make any certificate that requires verification available to those users.



Send Email to Selected Users

▶ If you select the option to 'Send Email to Selected Users,' a pop-up Send Email page will appear. The read-only text field will contain the email address for each selected record that has opted in to receive emails from TRAIN.

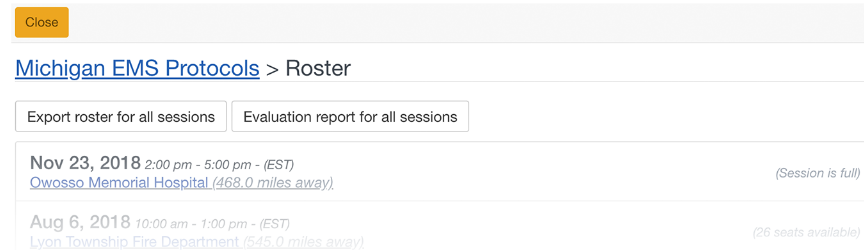


Please note that the 'Send Email to Selected Users' feature only works for learners who have opted-in to receive emails from TRAIN. If a learner has opted in to receive emails, an envelope icon will be shown in front of the learner's email address. If a learner has not opted-in to receive emails from TRAIN, the envelope icon will not be shown; and instead, there will be a circle with a line through it. If you only select users that are not opted in to receive emails, the following message will appear when attempting to send the email, *"There are no opted-in to receive email users selected."*

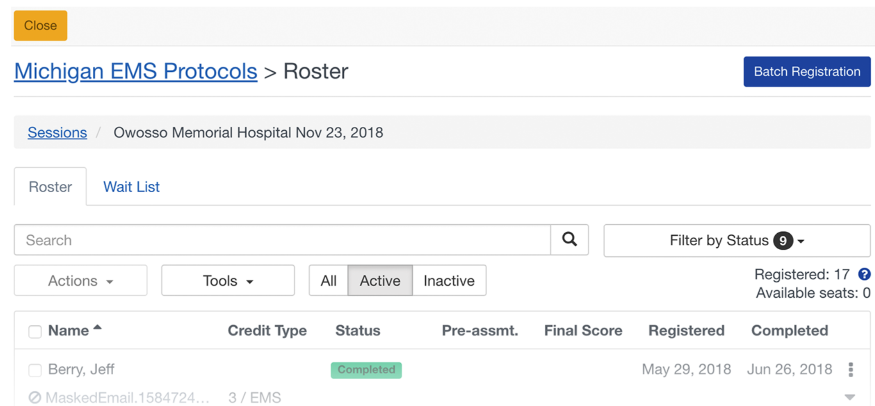
The 'Copy Myself on this Email' checkbox is unchecked by default. Simply check this box if you want to be copied on the email. Enter a subject for the email in the provided text field then enter your message in the body portion. You may also attach files to your email by first clicking the attachment drop down. Click 'Send' when you're ready to submit your email or click 'Cancel' to discard this feature. Upon successful submission, you will receive a confirmation message.

Live Events

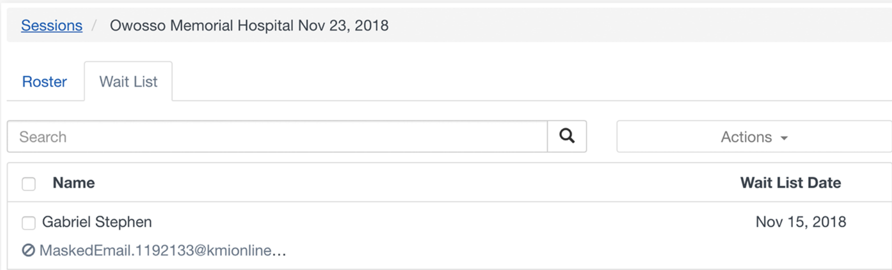
▶ When you generate a course roster for a live event or live event online course, a listing of course sessions will be shown first. At the top of the listing are options to generate 'Export Roster for All Sessions,' 'Assessment Export for All Sessions' (if applicable), or 'Evaluation Report for All Sessions.'



When you click a session, the roster for that session will generate along with the session location and date listed below the course title. If the session is configured to allow a wait list, a tab strip will be shown with 'Roster' and 'Wait List' options. The 'Roster' option will show session registrations for all course formats.



The 'Wait List' option will only show users in the 'Wait List' of the session with information related to a user's name and the date they were placed on the wait list. The wait list date shows the date when the registration was created. Management checkboxes are provided in front of each record along with an 'Actions' dropdown list with options to 'Move User to Course Roster,' 'Withdraw,' or 'Send Email.'



Inactive sessions are marked similar to the list of session on the Course Edit page. When you click an inactive session, the course roster page will be generated for it with the 'Deactivated' filter selected by default – thus presenting a listing of deactivated registrations. All actions for deactivated sessions will remain disabled until the session is activated.

Exercise Courses

▶ For exercise courses, the same functionality will be given as compared to functionalities related to Live Event courses. In addition, you will be able to edit the role for each registration by using the three dot menu and selecting 'Edit.'