



Entering Group Training

In order to record a group training, an enrollment record for each learner must exist. The date of the group training, the score received by the learner, and any applicable notes may then be entered on each learner's enrollment record.

How to Create the Enrollments

1. Navigate to “**Enrollments**” on the primary navigation dropdown.
2. Select the appropriate course for the group training.
3. Select the Users that attended the group training OR you may click “**Switch to Groups**” and select an entire group. When selecting a group, all members of that group will have an enrollment record created.
4. Click the “**Enroll**” button in the lower right corner.

The screenshot shows the 'Create New Enrollments' interface. At the top left, the 'Enrollments' menu item is highlighted. The main area is divided into two columns: 'Select Courses' and 'Select Users'. The 'Select Courses' column has a search bar and a list of courses. The 'Select Users' column has a search bar and a list of users. A 'Switch to Groups' button is located at the top right of the 'Select Users' column. At the bottom right, there is an 'Enroll' button and a 'Cancel' button. A 'Re-enroll completed users?' toggle is also present.

Now that you have Enrollment records created, you may update each with the results of the group training.

Recording Group Training for a Learner

1. Navigate to “**Users**” on the primary navigation dropdown.
2. From the list of users, without clicking the name, move to the right in the white bar and click the number of enrollments icon for the user as shown in the screen capture following. This will display a list of the course enrollments for this user.



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SMS Demo Site

Search for users

Users Pending Users Actions

Filter

User Type: All

User Status: All

Created After: Set Date

Created Before: Set Date

Filter by group

Apply

Name (A-Z)	Role	Enrollment Count	Actions
AF Aaron Fulk afulk@sms.test	Learner	10	3
AN Alfred Nobel anobel	Manager	11	3
AW Andy Warhol awarhol	Manager	12	3
BS Bill Smith bsmith@sms.test	Learner	17	4
BL Bob Learner boblearn	Learner	4	1

3. Hover with your mouse in the white bar for the course enrollment record for the group training topic (shown below), and then click on the card actions (three vertical dots) to display the sub menu. Click "Set Complete."

SMS Demo Site

Search for users

Users Enrollments Groups Actions

Users > Aaron Fulk > Enrollments

Total Number of Courses

6 Enrolled Courses

4 Completed Courses

SMS080 - Portable Fire Extinguishers - Extintores Portátiles	Not Started	Enrolled 13 Feb 2020	Due date Set Date	1
SMS040 - Grain Dust Explosions: The Chain Reaction - Explosiones de Polvo de Grano	Not Started	Enrolled 13 Dec 2019	Due date Set Date	1
SMS076 - Small Spill Response - Respuesta Contra Derrames Pequeños	Not Started	Enrolled 30 Nov 2019	Due date Set Date	1
SMS023 - Bloodborne Pathogens - Patógenos Transmitidos por Sangre	In Progress	Last Entered 22 Jan 2020		1
SMS072 - Forklift Safety - Seguridad al Operar Montacargas	Not Started	Enrolled 19 Sep 2019	Due date Set Date	1
SMS065 - Substance Abuse Awareness for Employees - Conciencia de Abuso de Sustancias	Not Started	Enrolled 22 May 2019	Due date Set Date	1

- View Details
- Unenroll
- Set Complete
- Set Expiry date
- Set Due date



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4. Complete the enrollment information for this user. Enter the score received on the test, and the date the group training was completed. Notes: Dates may be typed in or copy/pasted for quicker entry. Optionally, you may enter any relevant notes – notes are not required.
5. Click “Save”.

Manual Enrollment Completion

Aaron Fulk will be marked as complete for course SMS080 - Portable Fire Extinguishers - Extintores Portátiles

Status
Passed

Score

Date

Notes

Save Close

6. Repeat this procedure for other learners who participated in the group training. Navigate back to Users quickly by clicking “Users” as shown below.

SMS Demo Site

Search for users

Users

Info Enrollments Groups

Users > Aaron Fulk > Enrollments

Total Number of Courses

6 Enrolled Courses

4 Completed Courses

SMS080 - Portable Fire Extinguishers - Extintores Portátiles
Not Started · Enrolled 13 Feb 2020 · Due date Set Date

SMS040 - Grain Dust Explosions: The Chain Reaction - Explosiones de Polvo de Grano
Not Started · Enrolled 13 Dec 2019 · Due date Set Date

Following this process will create and update an Enrollment record for Group Trainings. This training will now show in each user’s training history as well as be available in all reports created by an Administrator or a Manager.