Managing enrolments using mass update functionality

Themis Training Administrator is used to manage class size, confirm enrolments, manage waiting lists if required and confirm attendance. A mass record update function is available in TTA to manage multiple enrolments (e.g.: updates to learner status, adding manual enrolments, etc).

When updating a learner enrolment record, the status of the enrolment record will determine the action you should take.

<table>
<thead>
<tr>
<th>Current Status</th>
<th>Update Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Forwarded to Supervisor</td>
<td>Do not update the status. Themis will update status to Supervisor Endorsed once the supervisor approves the workflow notification.</td>
</tr>
<tr>
<td>Employee/Supervisor Cancelled</td>
<td>No action required. This status defines any staff who have withdrawn their training application or have not been approved for the class by a supervisor.</td>
</tr>
<tr>
<td>Request Forwarded to Training Unit or Supervisor Endorsed</td>
<td>If the application is successful, update status to: Enrolment Confirmed. If the application is unsuccessful, update status to: Application Unsuccessful. If the class is full and a waitlist is required, update status to: Waitlist. If the class has been cancelled, update the status to: Training Cancelled.</td>
</tr>
<tr>
<td>Enrolment Confirmed</td>
<td>If the participant attended the class, update status to: Attended. If the participant did not attend, update status to: No Show.</td>
</tr>
</tbody>
</table>

Note: there are two paths that you may follow to access the Enrollments screen:
- select the Enrollments function in the class record
- select the Enrollments and Subscriptions function on your Personal Home Page

This reference card provides instructions on managing your enrolments using both the paths listed above.

Using the Enrollments function in the class record

Note: you may use either the search function (as outlined in the process below) or the expand functionality (⊕) within the Browse by Provider hierarchy to locate the appropriate course. Refer to the Navigating the Themis Training Administrator Catalog reference card for further details on these functions.

1. On your Personal Home Page, select the Catalog Administration function. The Catalog screen will display.

2. Use the Search function to retrieve the course for which you wish to update enrolments.
   - Enter the full or partial name of the course (use the % wildcard to widen the search) in the search field and click the Go button.

   The Catalog Search results table will display.
3 Navigate to the Class screen for the desired course.
   • Click on the View in Hierarchy icon in the Catalog Search results table.
     The selected course and all associated offerings will display.
     ![Catalog Search results table]

   • Locate the appropriate offering in the Catalog Object table and click on the Classes link.
     The Classes screen will display.
     ![Classes screen]

   • Click on the appropriate Class name link in the classes table.
     The Class screen will display.
     ![Class screen]

4 Click on the Enrollments link in the menu on the top left of the class screen.
   The Enrollments screen will display. The Enrollments table will contain a list of staff currently enrolled in the class.

   Note: the information in this table will differ slightly from the information displayed via the Enrollments and Subscriptions screen.

   ![Enrollments screen]

5 Tick the Select checkbox for the records you wish to update.
   • Click the Select All link if you wish to select and update all records in a single action.

6 Click the Update Enrollments button.
   The Update Enrollment Status screen will display.
7 Update the enrolment status as required.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Select the appropriate status from the drop-down list.</td>
<td>Refer to the table on page 1 for status definitions and usage.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> the status you select in this field will determine whether additional fields will display.</td>
</tr>
<tr>
<td>Reason for Change</td>
<td>Select an appropriate reason for the status change from the drop-down list.</td>
<td><strong>Note:</strong> if none of the reasons in the drop-down list are suitable, please select Initial Enrolment. If you do not select a reason, this field will display as Rejected by Supervisor in the learner’s class enrolment record.</td>
</tr>
<tr>
<td>Authorised By</td>
<td>Tick this checkbox to record your username as the authoriser of the change.</td>
<td></td>
</tr>
</tbody>
</table>

8 Click on the Apply button.

The Update Enrollment Status screen will close and a confirmation message will display advising that your changes have been applied and the enrollment status will be updated in the table.

**Using the Enrollments and Subscriptions function**

1 On your Personal Home Page, select the Learner Enrollments and Subscriptions function.

The Enrollments and Subscriptions screen will display.

2 Enter search criteria for the class for which you want to review enrolments.

The main search criteria are listed below. However, you may enter criteria in any of the other search fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Click on the LOV to search for and select the class for which you wish to review enrolments.</td>
<td></td>
</tr>
<tr>
<td>Enrollment Status</td>
<td>Select the desired application status from the drop-down list.</td>
<td>Use this field if you wish to retrieve and update all enrolment records within a specific status (e.g.: Request Forwarded to Training Unit, Supervisor Endorsed, etc).</td>
</tr>
</tbody>
</table>

3 Click on the Go button to perform your search.

The enrolment records matching your search criteria will display in the table on the Enrollment and Subscriptions screen.
4. Tick the **Select** checkbox for the records you wish to update.
   - Click the **Select All** link if you wish to select and update all records in a single action.

![Select Enrollments](image)

5. Click the **Update Enrollments** button.
   The Update Enrollment Status screen will display.

![Update Enrollment Status](image)

6. Update the enrolment status as required.

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</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Select the appropriate status from the drop-down list.</td>
<td>Refer to the table on page 1 for status definitions and usage. <em>Note:</em> the status you select in this field will determine whether additional fields will display.</td>
</tr>
<tr>
<td>Reason for Change</td>
<td>If changing the status to <em>Employee/Supervisor Cancelled</em>, select the reason for the cancellation from the drop-down list.</td>
<td></td>
</tr>
<tr>
<td>Authorised By</td>
<td>Tick this checkbox to record your username as the authoriser of the change.</td>
<td></td>
</tr>
</tbody>
</table>

7. Click on the **Apply** button.
   The Update Enrollment Status screen will close and a confirmation message will display advising that your changes have been applied and the enrollment status will be updated in the table.