Recording enrolments retrospectively

In certain circumstances you may need to enter class enrolments retrospectively (e.g.: a learner is accepted into a class after the enrolment period has closed or the class has commenced, or a group of learners from a class or seminar in the past needs to be recorded).

You will need to ensure the class enrolment period is open before you retrospectively enter enrolments. You may also need to amend the offering (and) course start date to encompass the class enrolment dates.

**Important:** once you open the enrolment period, the class will display on Themis Self Service and staff may enrol in the class (up until the end date you specify).

**Open class enrolment period**

1. Log in via your UOM Training Administrator responsibility and select the **Catalog Administration** function.
2. 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. Click on the **View in Hierarchy** icon in the Catalog Search results table.
   The selected course and all associated offerings will display.

4. Locate the appropriate offering in the Catalog Object table and click on the **Classes** link.
   The Class Results table will display a list of current classes.

5. Click on the appropriate **Class** name link.
   The Class screen will display.

6. Click on the **Update** button.
7 Scroll to the Enrollment section and change the Enrollment End Date to today’s date.

![Themis Reference Card](image1)

You may make any other changes to the class details at this stage if you wish (e.g.: maximum attendees).

8 Click on the **Apply** button to save your changes.

**Enter learner enrolments**

1 Click on the **Enrollments** link in the menu on the top left of the screen.

The Enrollments screen will display. The Enrollments table will contain a list of staff currently enrolled in the class.

2 Click on the **Add Enrollments** button.

The Bulk Enroll: Selected Learners screen will display.

3 Click on the **Add Learners** button.

The Add Selected Learners screen will display.

4 Search for the staff member/s you wish to add to the class.

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>Learner Name</td>
<td>Enter the name of the staff member for whom you wish to search.</td>
<td><strong>Note:</strong> the name should be entered in the format <strong>Surname, Title Given Names</strong> (e.g.: CATTLE, MR BRANDON%).</td>
</tr>
<tr>
<td>Manager</td>
<td>Click on the LOV to search for and select the name of the manager for whom you wish to retrieve a list of staff.</td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td>Click on the LOV to search for and select the department, faculty or section for which you wish to retrieve a list of staff.</td>
<td></td>
</tr>
<tr>
<td>Employee Number</td>
<td>Enter the employee number of the staff member for whom you wish to search.</td>
<td></td>
</tr>
</tbody>
</table>
A list of staff matching your search criteria will display.

5 Tick the **Select** checkbox for the staff member/s you wish to add to the class and click the **Add** button. The selected staff members will be added to the table. **Note:** the enrolments will be added at a status of *Enrolment Confirmed*, you will need to update these to *Attended* once you finish adding all staff and save your changes.

6 Click on the **Apply** button. You will receive a confirmation message advising that Themis is processing the enrolments. **Note:** there may be a short delay in updating the learners listed in the screen – to refresh the table, click on the **Enrollments** link in the top right of the screen.

7 Click on the **Enrollments** link in the menu to refresh the screen to display the staff you have added. **Note:** enrolments will be set to a status of *Enrolment Confirmed*. You will need to update this to *Attended*.

8 Tick the **Select** checkbox for the enrolment records you need to update.

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

10 Update the enrolment status.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Select <em>Attended</em> from</td>
<td></td>
</tr>
<tr>
<td></td>
<td>the drop-down list.</td>
<td></td>
</tr>
<tr>
<td>Reason for Change</td>
<td>Select <em>Initial Enrolment</em> from the drop-down list.</td>
<td><strong>Note:</strong> if you do not select a reason, this field will display as <em>Rejected by Supervisor</em> 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>

11 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 enrolment status will be updated in the table.