

Manager 4: Enrolling Faculty and Staff into Instructor Led Training using Team Enroll

Use this process to 1) search for Instructor Led Classes and Modules that are not part of a Certification and 2) enroll faculty and staff into them.

1. Click the **Manager** Icon.
2. Under **My Team Enrollments**, click **Add Learning** to open the **Team Enroll** page.

The screenshot shows the M Learning dashboard. The top navigation bar includes the M Learning logo, a user profile icon with a red '1' notification, a 'Browse' dropdown, a search bar with the text 'Enter Keyword, ID or Description', and a 'Need Help?' link with the name 'Debra Demeester'. The left sidebar contains a menu with 'Home', 'Search for People', 'My Team Learning', 'My Reports', and 'My Analytic Reports'. The main content area is titled 'For help and resources, visit our website.' Below this, there are two sections: 'My Team Certifications' and 'My Team Enrollments'. The 'My Team Certifications' section has a table with columns 'Name' and 'Due Date', listing two entries for Richard Rabbit. Below the table is a 'View All...' link and an 'Add Certifications' button. The 'My Team Enrollments' section has a table with a 'Name' column, listing 'Richard Rabbit' and 'Uriah Unicom'. At the bottom right of this section is a red '2' icon and an 'Add Learning' button.

3. Remove any check marks in **Include Contact as Learner** unless user plans on attending the learning activity.
4. Assure your **Uniqname** is correct in the **Contact Name** field.
5. Click the **Next** button to open the **Search** page.

The screenshot shows the 'Team Enroll' page in the M Learning system. The top navigation bar is the same as in the previous screenshot. The left sidebar is expanded to show 'Team Enroll' as the selected option. The main content area is titled 'Team Enroll' and features a progress bar with four steps: '1. Enrollment Contact', '2. Offerings', '3. Enrollment Management', and '4. Receipt'. Below the progress bar, there is a red '3' icon and a checkbox labeled 'Include Contact as Learner' which is checked. The 'Contact Name*' field contains the text 'ddemeest' and is highlighted with a red '4' icon. Below this is a 'Select Organization' dropdown menu with the value '309612 UMHS Learning Management Srvc'. There is also a checkbox labeled 'Set me as the contact' which is checked. At the bottom right, there is a red '5' icon and a 'Next' button.

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6. Enter **Course Name** or **Offering ID** in the Search Field.
7. Refine results by using any or all of these search filters:
 - Select Web-Based Training or Instructor Led Training in the **Learning Catalog** drop down.
 - Change the **Location** to “Any Location” using the drop down arrow.
 - Pick a time range using the **Starting** drop down.
8. Click **Search**.

Important: If the results remain lengthy, see **Tips for Effective Filtering of Results** at the end of this job aid.

9. Review **Results** for the course name, date and time of interest, location and open seats.
10. Click the **Register** button below the offering to open the **Create Team Enroll** page.

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- Click **Set Learner** to enroll one person OR the **Add Learners** hyperlink to add more than one (for the same date/time).

Create Team Enroll

1.Order Contact >>> 2.Offerings >>> 3.Order Management >>> 4.Receipt Expand All | Collapse All

▼ Ambulatory Nurse and Medical Assistant Course (MC-AC1002C) (Instructor-Led, ID: 10004540, Seats: 18)

Notes | **Add Learners** | Remove Offering

Learner	Status	Actions
No Learner Assigned	Confirmed	<div style="display: flex; gap: 10px;"> Set Learner Remove From Cart </div>

11
Add Learners

Set Learner
Remove From Cart

Continue Shopping Finish Team Enroll

- Search for the learner(s) name(s) using **Search Person** pop-up box.
- Click the **Select Box** next to the name(s) in the results.
- Click the **Select** button if prompted.

Note: if using “Set Learner” (#11 above), once the name is selected the pop-up immediately returns the user to the **Create Team Enroll** page and removes “No Learner Assigned”

Search Person, Internal

Population* Uniqname

UMID First Name

Last Name Organization

Manager Search Depth* Location

Domain Person Type

Security Roles Manager

Include All Suborganizations

Search

People Print | Export | Modify Table

Select	First Name	Last Name	Uniqname	Person Type	UMID	Organization	Location	Manager
<input checked="" type="checkbox"/>	Richard	Rabbit	TEST4		TEST4	01C Testing Org		DDEMEEST
<input type="checkbox"/>	Uriah	Unicorn	TEST6		TEST6	01C Testing Org		DDEMEEST

13
Select
Close

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15. Confirm correct learner name(s).
 - If **No Learner Assigned** remains on the **Create Team Enroll** page, click the **Remove from Cart** hyperlink.
16. Click **Continue Shopping** to search for additional classes to add to the **Create Team Enroll** order page.
17. Click **Finish Team Enroll** button to open the printable Confirmation.

Create Team Enroll

1.Order Contact >>> 2.Offerings >>> 3.Order Management >>> 4.Receipt Expand All | Collapse All

▼ Ambulatory Nurse and Medical Assistant Course (MC-AC1002C) (Instructor-Led, ID: 10004540, Seats: 18)

[Notes](#) | [Add Learners](#) | [Remove Offering](#)

Learner	Status	Actions
16 Richard Rabbit	Confirmed	Remove From Cart

Continue Shopping
Finish Team Enroll

Tips for Effective Filtering of Results

Search

- Instructor-Led

Starting: In Next Six Months Show exact matches only Location: Any Location

Showing 14 out of 14 results for "MC-IP1005C"

Page View Table View

Sort By: Relevance Relevance Alphabetical Start Date Recently Added Recently Modified

50 results per page 50 results per page 10 results per page 15 results per page 20 results per page 25 results per page 30 results per page 35 results per page 40 results per page

▼ Refine/Expand search

- ▶ Resource Type
 - Courses
- ▶ Delivery Types
 - Instructor-Led
- ▶ Location
 - Any
- ▶ Start Date
 - In Next Six Months
- ▶ Categories
 - Any
- ▶ Competencies
 - Any
- ▶ Languages
 - Any
- Hide courses

Option 1: At the initial search (Step 7), identify the type of learning activity (WBT or ILT) and/or use the exact code or course name, if known. This may result a manageable list and further filtering may not be needed.

Option 2: Limit results by using the "Starting" drop down.

Option 3: The "Sort By" drop down may provide options to assist in focusing the search.

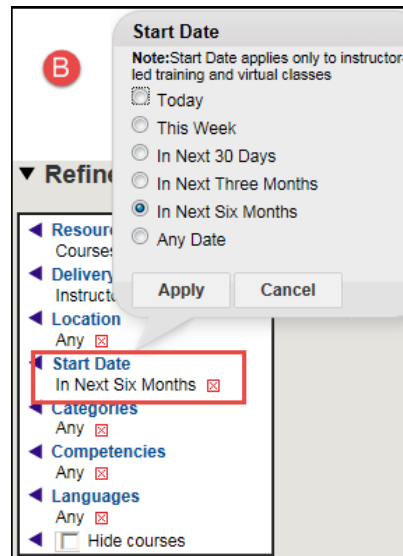
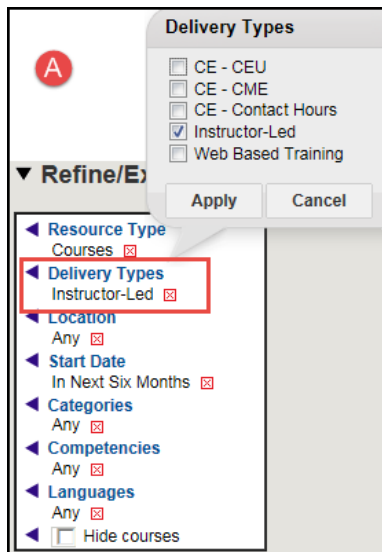
Option 4: The "Results per Page" drop down options could assist in easier scanning of results.

See "More Filters and Comments" below.


Next Page: More Filters and Comments related to options in the "Refine and Expand Search" box:

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I. Click the associated hyperlink to use **Delivery Type (A)** or **Start Date (B)** to further limit results.



II. **Resource Type – Courses:**

- The system defaults to hide the actual **Course** description (**Course Icon**) and show only the Modules and/or ILTs associated with the search parameters.
- To see descriptions and other information provided under the **Course**, change the resource parameter to **Learning Catalog** or **All** (browsers may affect the options) or click the  next to **Courses (C)**.



III. The following options are currently not used:

- Location (defaults to “any” – unable to change)
- Categories/Competencies (not in use at this time)
- Language (not applicable)