

## Enroll Learners Using an Excel Spreadsheet

**When to use:** When you need to streamline the process of adding numerous learners to the same session.

### Prepare the Excel Worksheet

- 1) Open a Learner Upload Excel Spreadsheet
- 2) Save the spreadsheet
  - a. Use the Session Name or Session Date to name the file
  - b. Select the file type “.xls (Excel 97 – 2003 workbook)” from the dropdown menu in the “**Save As**” dialog box
- 3) Enter the information for the first learner in Row 4, following the labels on each column. (Email Address in column A, First name in column B, etc.)
- 4) If norms need to be indicated for the session, enter the number for each norm in Column G
- 5) Continue until all learners have been listed, then save the spreadsheet

### Log into MAX

- 1) Navigate to <https://www.tracommax.com/>
- 2) Enter both your **User Name** and **Password** (both are case sensitive)
- 3) Click “**LOGIN**”

### Find the Session

- 1) Under **SESSIONS** tab, click “**Manage Session**”
- 2) Click on the Session name

### Go to Learner Enrollments

- 1) Click “**Start Now**” or “**View/Edit**” under **Learner Enrollment**
- 2) Click “**Add Learners via Excel Upload**”
- 3) Click “**Browse**”
- 4) Find and select the completed spreadsheet, click “**Upload**”

### Verify the Upload was Successful

- 1) The **Verify Learner Upload** screen will display new Learners (Learners added successfully) and rejected Learners
- 2) Click “**Save**” to add the new Learners to the session, or click “**Cancel**” to abort the upload