

## Enroll Learners without Email Addresses Using Self-Perception Profiles

**When to use:** Learners who do not have email addresses can be enrolled using Survey Codes. Learners with email addresses can be enrolled in the same session and must complete the registration process prior to completing their survey.

In order to use this feature, it must be allowed at the client level and on the Session Setup screen.

### Option 1

#### Add Learners via Excel Upload

##### Prepare the Excel Worksheet

- 1) Open a Learner Upload 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. (For Learners without an Email Address, leave the Email Address blank (in column A), First name in column B, etc.)
- 4) If the Norm and/or Report Language for this individual is not the default for the session, enter the appropriate number for each Norm in Column G
- 5) Continue until all learners have been listed, then save the spreadsheet once more

##### Find the Session

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

##### Navigate to the Learner Enrollment Screen

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

##### Verify that 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
- 3) **Download Survey Code Report** – see instructions below

## Option 2 Add Learners via Manual Entry

### Find the Session

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

### Go to Learner Enrollments

- 1) Click “**Start Now**” or “**View/Edit**” in the **Learner Enrollment** section
- 2) Click “**Add Learners via Manual Entry**”
- 3) Type in the required information (For Learners without an Email Address, leave the Email Address blank. You may change the Report Language and Report Norm, if needed)
- 4) Click “**Add Learner Now**”
- 5) After adding all Learners, Click “**Return to Learner Enrollment**”
- 6) **Download Survey Code Report** – see instructions below

### Download the Survey Codes Report

- 1) From the Learner Enrollment Screen, click “**Download the Survey Codes Report**” to open the Excel file. These are unique codes assigned to each individual. Do not share codes between Learners.
- 2) For Learners enrolled without email addresses, you must provide them their Survey Codes and log in instructions (see sample below). Please adapt the sample so that it fits your needs:

In preparation for your learning event on <#SESSION\_DATE>, please:

- 1) Navigate to <http://www.tracomlearning.com/?surveyCode=true>
- 2) Enter your unique Survey Code in the place provided and click Submit

Do not share this code with anyone. Your unique survey code is – (enter unique Survey Code here)

- 3) For Learners enrolled using email addresses, do not provide them their Survey Code. They will be required to register using their email addresses. If the session is set up to send invitations, Learners using email addresses will receive email instructions to register and complete their surveys.