

## Enroll Learners without Email Addresses

**When to use:** Learners who do not have email addresses can be enrolled in sessions using SELF-PERCEPTION products only.

\*\*In order to use this feature, you must contact TRACOM to enable the setting.

### Session Setup

When setting up the session, select the setting **This session allows Learners without email addresses** in the initial Session Setup screen. The remainder of the settings will remain standard.

### Option 1 for Enrolling Learners

#### Add Learners via Excel Upload

Prepare the Excel Worksheet

- 1) Open a [Learner Enrollment Standard Spreadsheet](#) template.
- 2) Enter the information for the first learner in Row 4, following the labels on each column. (First name in column B, Last Name in column C etc.). \*You may leave the email address column A blank for these sessions.
- 3) Add all learners to the spreadsheet, then save the spreadsheet as file type “.xls (Excel 97 – 2003 workbook)” in the **Save As** dialog box. You may receive a Compatibility Checker warning, click Continue to save.

Log into MAX

- 1) Navigate to <https://www.tracommax.com/>
- 2) Enter your **USERNAME** and **PASSWORD**.
- 3) Click **LOGIN**.

Select Session

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

Go to LEARNER ENROLLMENT – View/ Edit

- 1) Click **Add via Excel Upload**.
- 2) Scroll to the bottom of the page, click **Browse**.
- 3) Find and choose the completed spreadsheet, click Open in dialog box, then **Upload** at the top of the page.

### 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 cancel the upload.

### **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 ENROLLMENT – View/ Edit

- 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).
- 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. To avoid confusion, do not share codes between Learners.

##### Provide Survey Codes to Learners

- 1) For Learners enrolled without email addresses, you must provide them their Survey Codes, site link and instructions.

Please adapt the sample text below to fit 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)

