# How to Manage a Course Roster

This HelpDoc assists instructors with managing and grading a Credit Hours (formerly Non-Credit) course roster in the Learnsoft system.

A detailed article on how to manage course rosters can be found HERE.

Additional articles and resources can be found at the Learnsoft Knowledge Base.

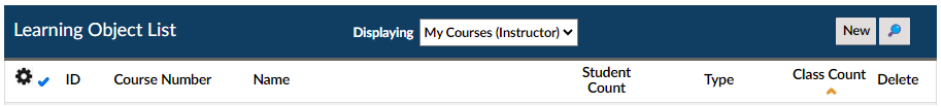
Quick links to sections below:


How to Manage a Course Roster

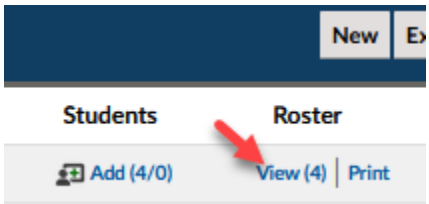
- Updating Completion Status and Grades
- Actions Menu and Updating Student Status
- Complete Course Instance
- Print Roster
- Export Roster
- Email to Users on Roster
- Manually Adding Users to the Roster
- Canceling Enrollment
- Moving a Participant from One Instance to Another


From your instructor view:

1. Scroll down to the Learning Object List
2. Locate the course
3. Click on the "View" Link under the Column titles "Class Count"



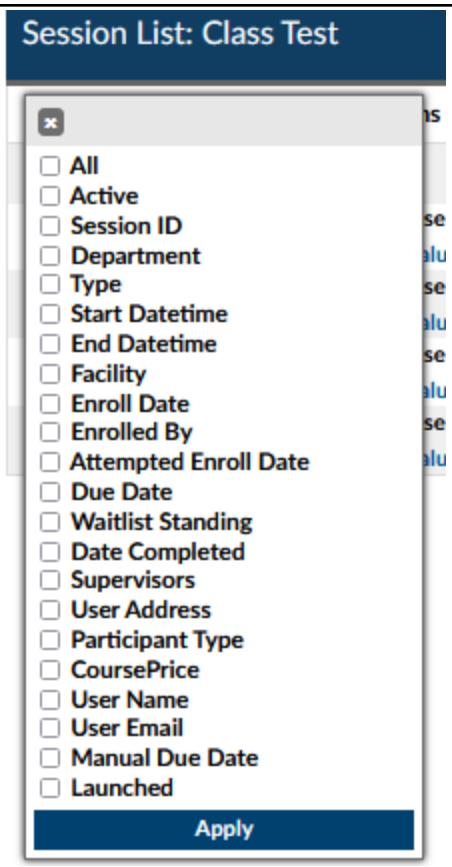
4. Click the "View" Link under the roster column for the instance you need to review or update.



5. Locate the gear icon on the far left of the Roster table to add or remove columns on the roster view. Some of the most common fields:

- **ID** - Session ID that correlates the student to the Instance
- **Employee ID** - Employee ID for the enrolled students.
- **Active** - True if the student has an active status and False is the student is inactive in the LMS.
- **Department** - Primary department the user is affiliated with
- **Start Date** - Start Date of the Course if applicable
- **End Date** - End Date of the Course if applicable
- **Enroll Date** - Date and time the students were enrolled in the course

Return to Top



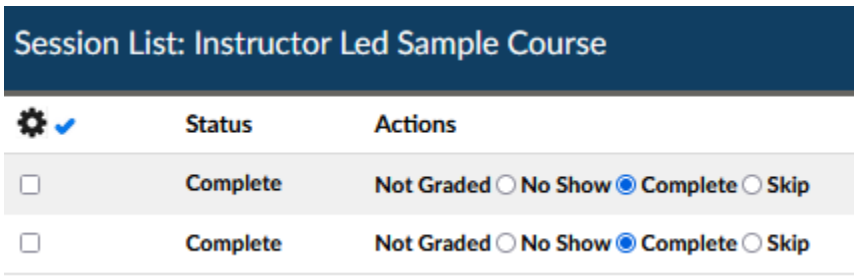

## Updating Completion Status and Grades

From the Roster, Users can be marked under the Actions column with options depending on the course settings.

A Classroom course will have completion/attendance options for:

- "**No Show**" status for this session. If the "Allow No Show' feature was marked at the instance level for this session, the student will be able to move into another date for this classroom course.
- Mark user(s) record as "**Complete**" for this classroom course

**Not a graded course option**



- The defaulted selection is **Skip**, so the status will not update the roster for the user, allowing the instructor to come back at a later time and update the record.

An Online course will have completion options for:

- **Incomplete** the user did not complete course.
- **Complete** will be marked automatically by completion of the online course requirements and can be marked manually to update the roster.
- The defaulted selection is **Skip** so the status will not update the roster for the user.

If the course is Pass/Fail

- **Pass** to indicate has successfully completed the requirements.
- **Fail** to indicate the user has not successfully completed the requirements.

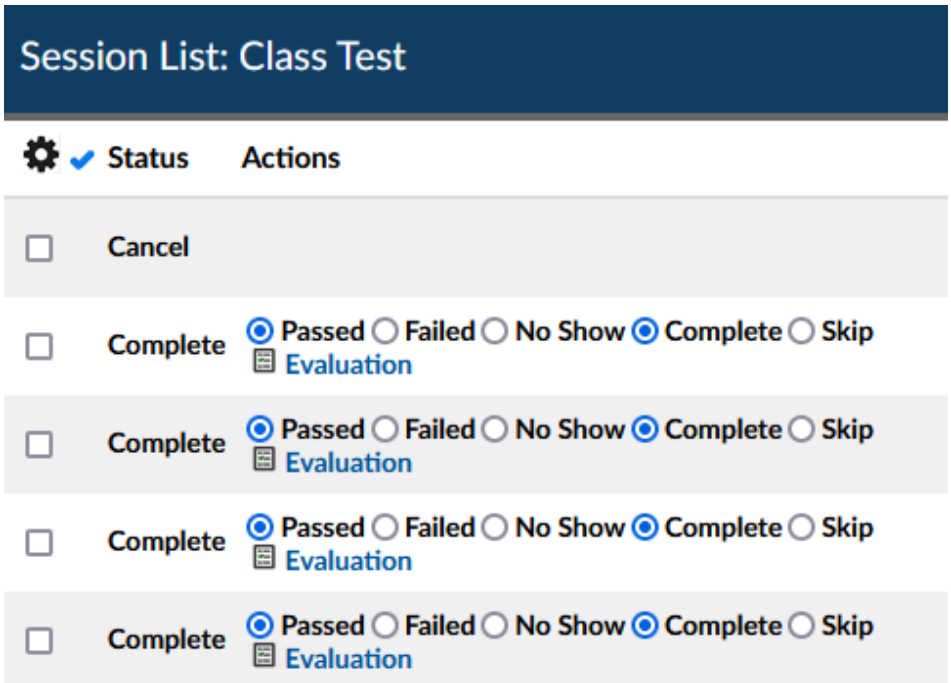
If the course is graded and requires a passing Score

- **Score** is a text entry box to enter the score
- **Req** is the required score for passing

If the course grants Credit Units/Hours/Others

1. **Units | Hours | Others** is a text entry box to enter the credits
2. **Req** is the (max) number of credits as

**For Pass/Fail Option**



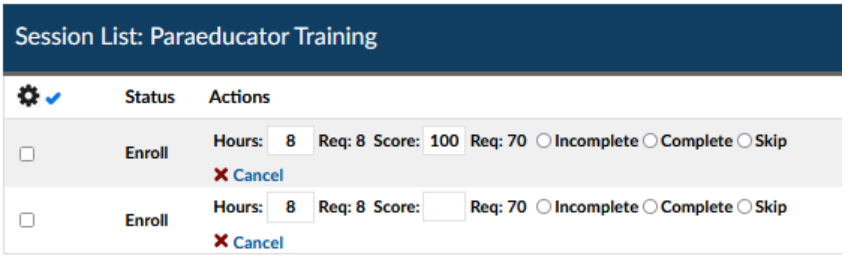

**Students must receive a passing score option**

set on the course settings

Other options for removing a user from the roster

- Cancel out of this instance by clicking "X **Cancel**"
- Moved to a new Instance by clicking "**Move**"
- Replaced by another participant by clicking "**Replace**"

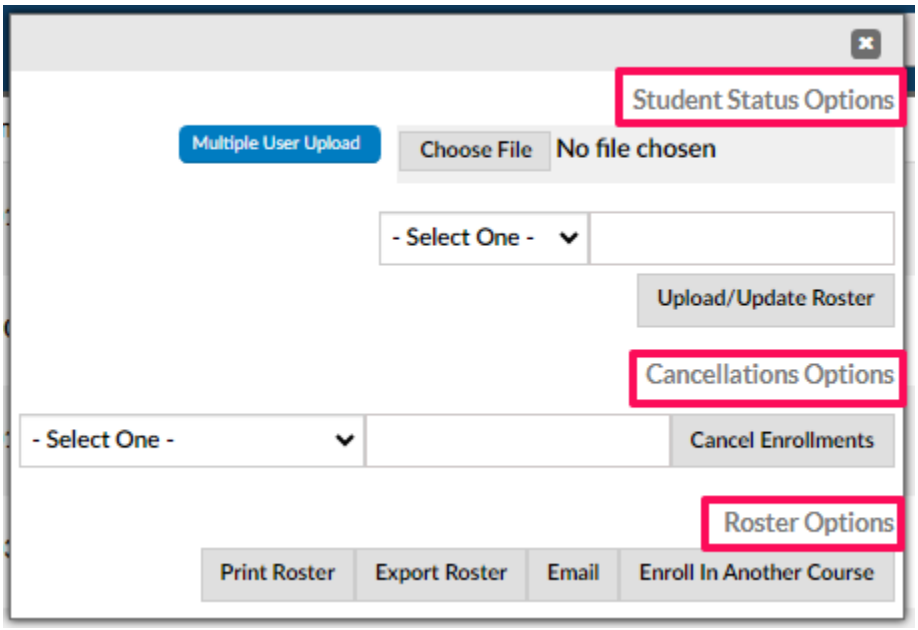
[Return to Top]



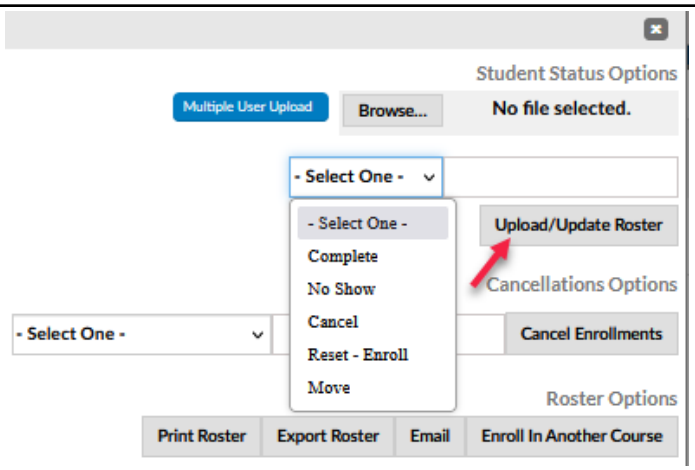

## Actions Menu and Updating Student Status

There are three key sections to the Actions menu:

1. Student Status Options
2. Cancellation Options
3. Roster Options



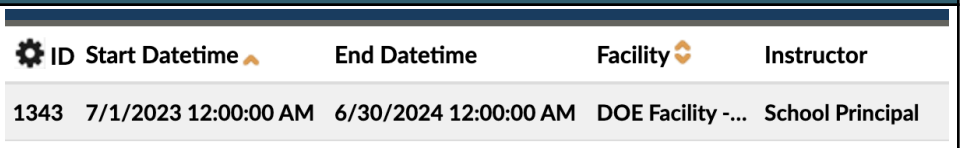

Select the **Status Type** (no show, cancel, complete) from the drop menu and click **[Upload/Update Roster]** to save this status for the selected users.



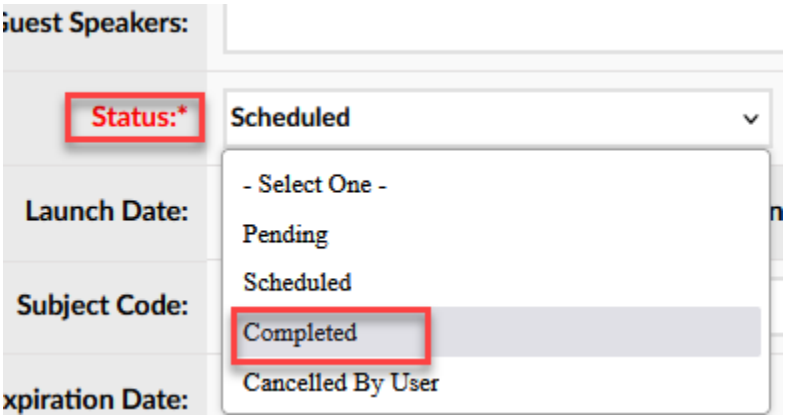
Return to Top

## Complete Course Instance

Go Back to step 2 to get to the Object Instance Level.
Click anywhere on the Instance




Click "Edit"
Change Status from "Scheduled" to
Completed.

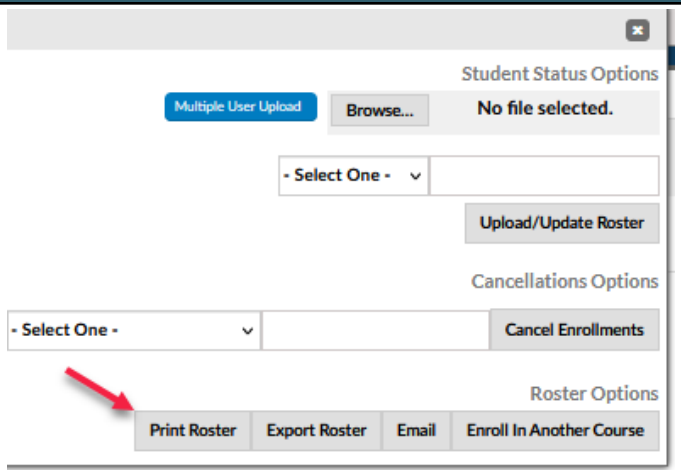



Return to Top

## Print Roster

Click the [Print Roster] button to open a print friendly version of the roster. This will include a header with the course instance details and then the records for all users in the Enrolled status.

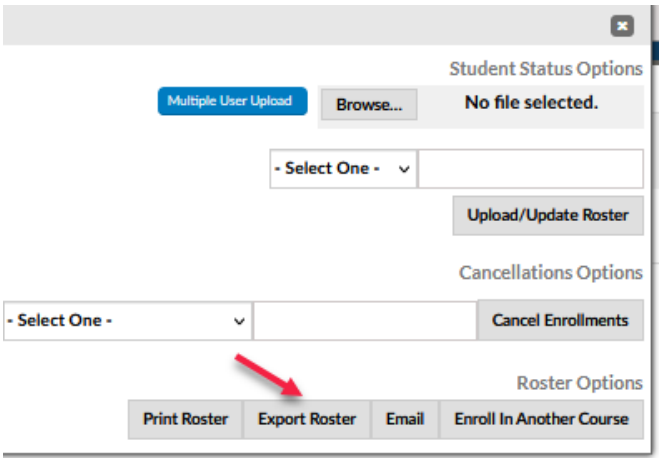
This is sometimes used as a physical sign-in sheet.




Return to Top

## Export Roster

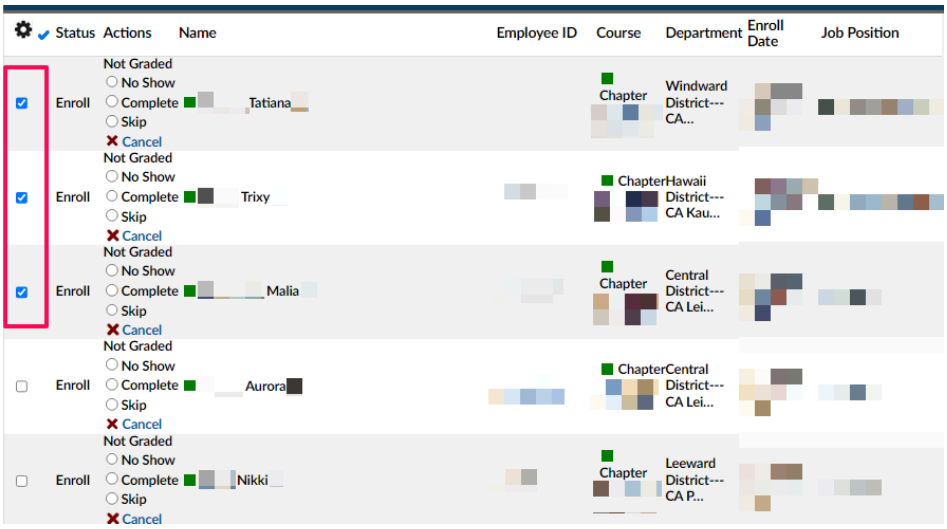
To Export a spreadsheet view of the Roster, click the **[Export Roster]** button.



[Return to Top](#)

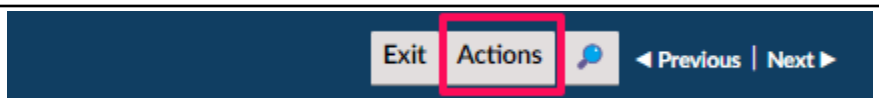
## Email to Users on Roster

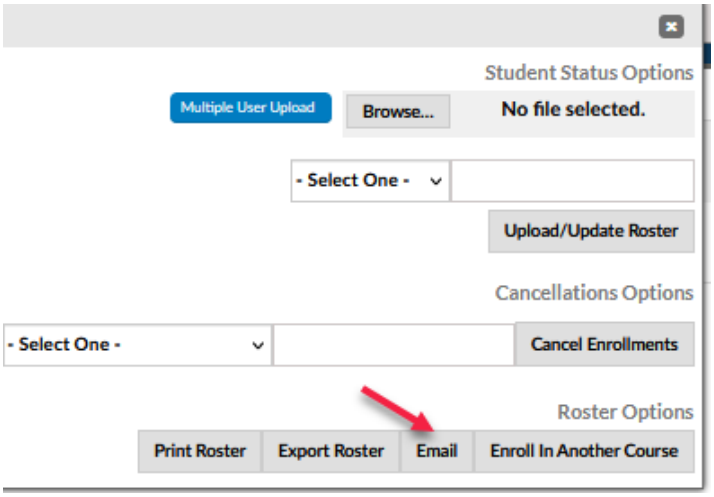
Select the user(s) by putting a check in the box to the left of their entry.




If you want to email the entire roster, scroll to the bottom of the page and click on Select All

Click **[Actions]** button to open the Actions menu, and then click the **[Email]** button.



The email defaults to BCC, if you don't want to use the BCC function, uncheck the blue check mark next to "Use BCC."

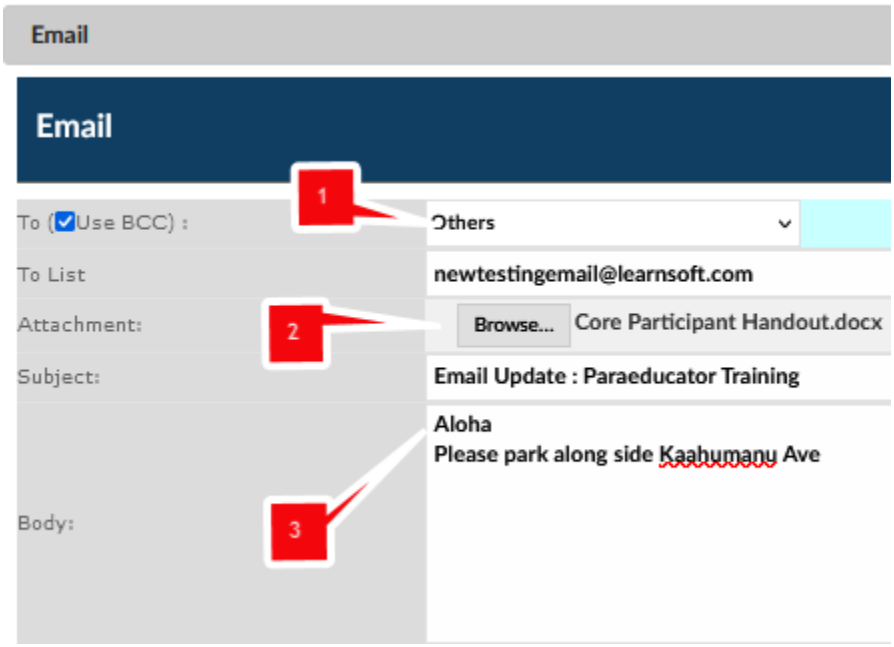
1. You can manually add others to the email by selecting from drop down options.

**To List** will be pre populated with the emails for the user that were selected.

**TIP** You can add additional email addresses to the **To List** by entering a comma after the last address and then the email address.

2. Click on the **Browse** button to add attachments
3. Enter the contents in the **Body** of the email

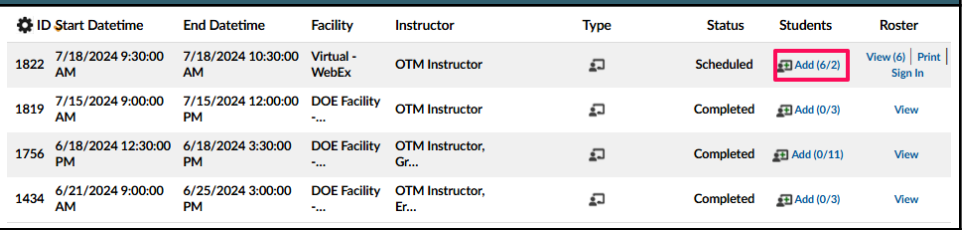
When you're ready to send your email, click on the **Send** button.



Return to Top

## Manually Adding Users to the Roster

From your Learning Object List, under the Students heading, click on the "Add" link for the instance in which you'd like to add a user to the roster.



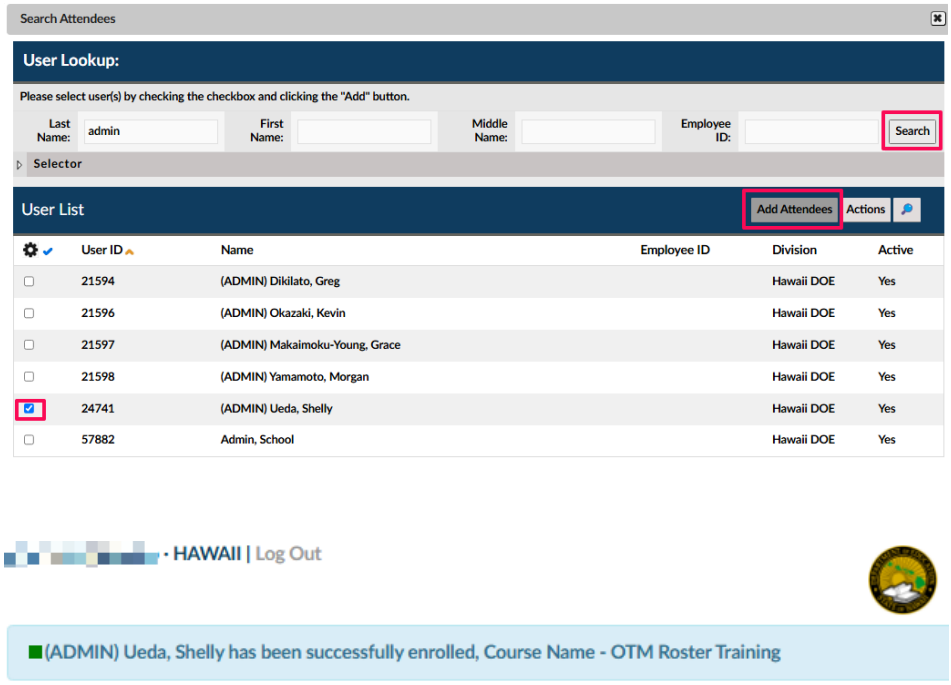
| ID | Start Datetime | End Datetime | Facility | Instructor | Type | Status | Students | Roster |
|---|---|---|---|---|---|---|---|---|
| 1822 | 7/18/2024 9:30:00 AM | 7/18/2024 10:30:00 AM | Virtual - WebEx | OTM Instructor | | Scheduled | Add (6/2) | View (6) \| Print \| Sign In |
| 1819 | 7/15/2024 9:00:00 AM | 7/15/2024 12:00:00 PM | DOE Facility -... | OTM Instructor | | Completed | Add (0/3) | View |
| 1756 | 6/18/2024 12:30:00 PM | 6/18/2024 3:30:00 PM | DOE Facility -... | OTM Instructor, Gr... | | Completed | Add (0/11) | View |
| 1434 | 6/21/2024 9:00:00 AM | 6/25/2024 3:00:00 PM | DOE Facility -... | OTM Instructor, Er... | | Completed | Add (0/3) | View |

In the User Lookup screen, enter the criteria (last name, first name, employee ID) you'd like to use, and click on the **Search** button. **TIP** Employee ID works the best

The results of your search will show up in the User List. Place a check mark in the box next to the user that you wish to add to the roster. Click on the **Add Attendees** button to add the user to the roster.

A system notification will confirm that the user has been added.

Return to Top

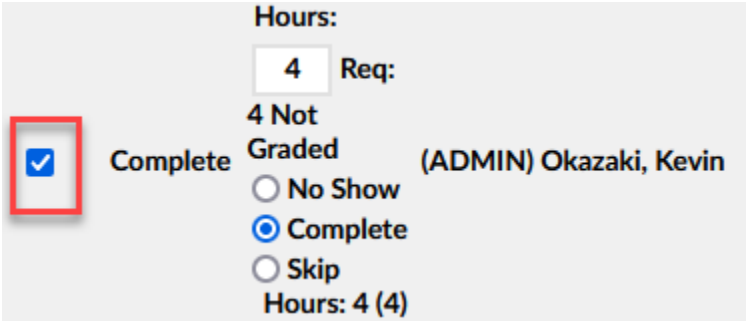


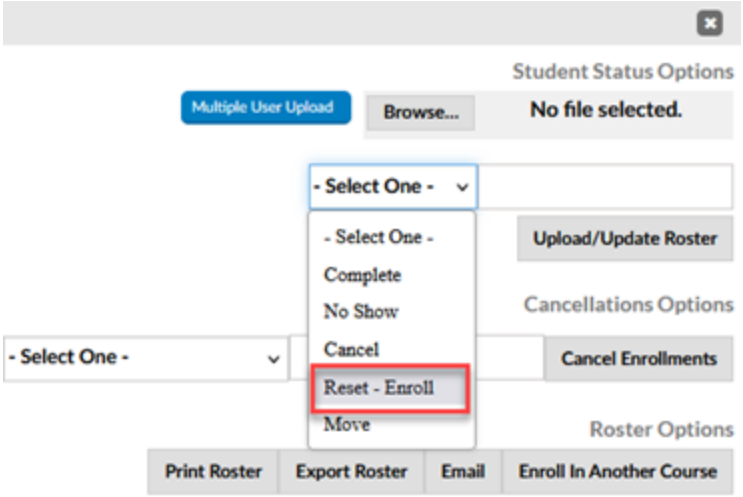
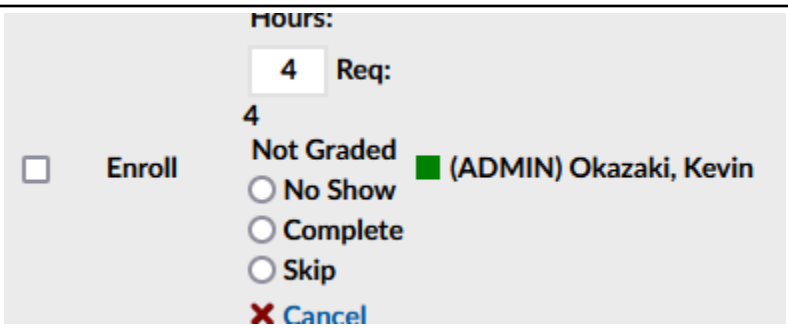
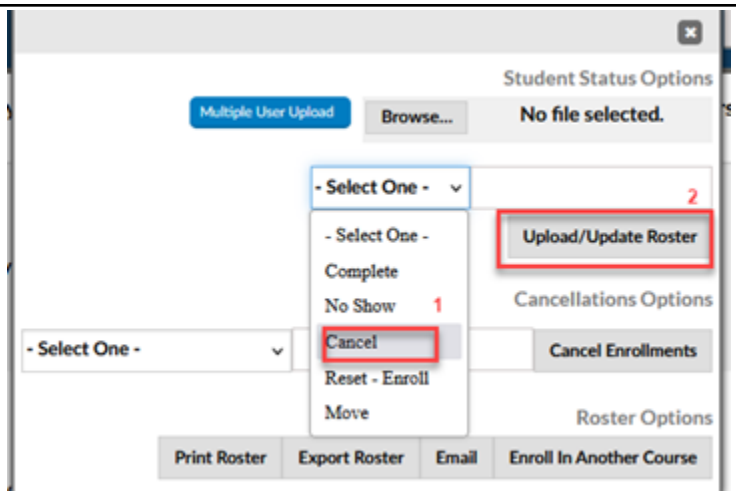

## Canceling Enrollment

Question: Employee has been marked complete on the roster but needs to be removed.

Answer: Technically, you can't remove a user once they are added to a roster. However, you can cancel their enrollment so that the course is not listed on their transcript.

From the roster, place a check next to the participant's name.

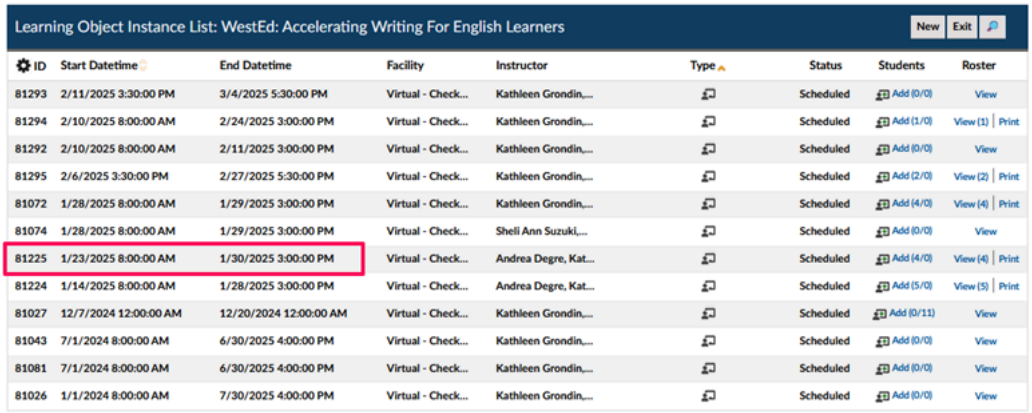


| | |
|---|---|
| Click on the “Action” Button. Select “Reset-Enroll” |  |
| Click Upload/Update Roster | |
| This will put the participant back in the “enrolled” status. |  |
| Once the participants’ status is reset to Enroll, place a check next to their name again and click on the Actions button once more<br>- This time, select the Cancel option and click on the Upload/Update Roster button |  |
| The roster will indicate the participant has been updated to the canceled status.<br>[Return to Top](#) | |

# Moving Participants from One Instance to Another

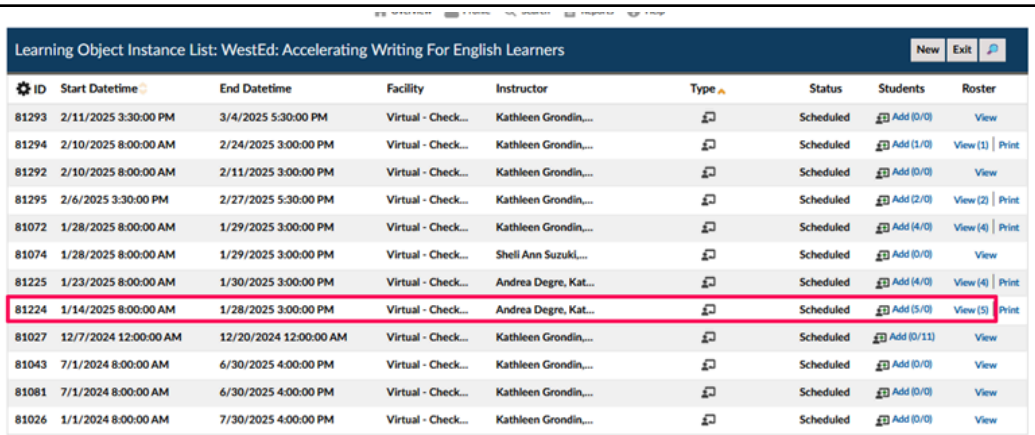
Take note of the date, time, and the Instance number you want to enroll the participant in.

Example: #81225 (1/23/2025 8:00 AM to 1/30/2025 3:00 PM)



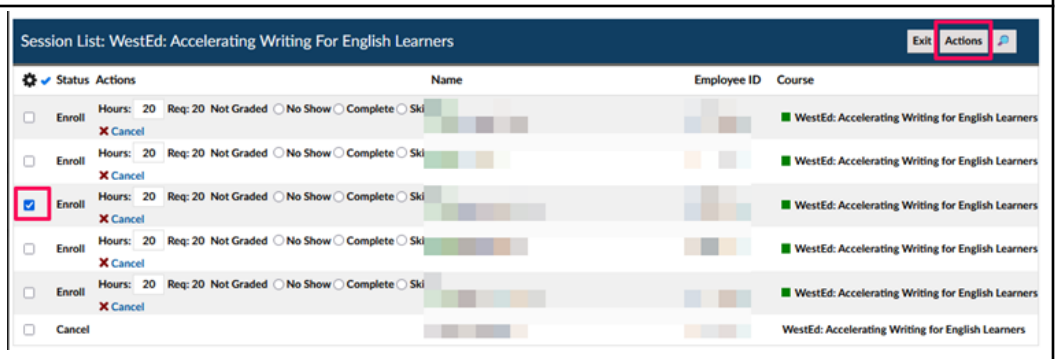

| ID | Start Datetime | End Datetime | Facility | Instructor | Type | Status | Students | Roster |
|---|---|---|---|---|---|---|---|---|
| 81293 | 2/11/2025 3:30:00 PM | 3/4/2025 5:30:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/0) | View |
| 81294 | 2/10/2025 8:00:00 AM | 2/24/2025 3:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (1/0) | View (1) \| Print |
| 81292 | 2/10/2025 8:00:00 AM | 2/11/2025 3:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/0) | View |
| 81295 | 2/6/2025 3:30:00 PM | 2/27/2025 5:30:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (2/0) | View (2) \| Print |
| 81072 | 1/28/2025 8:00:00 AM | 1/29/2025 3:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (4/0) | View (4) \| Print |
| 81074 | 1/28/2025 8:00:00 AM | 1/29/2025 3:00:00 PM | Virtual - Check... | Sheli Ann Suzuki,... | | Scheduled | Add (0/0) | View |
| 81225 | 1/23/2025 8:00:00 AM | 1/30/2025 3:00:00 PM | Virtual - Check... | Andrea Degre, Kat... | | Scheduled | Add (4/0) | View (4) \| Print |
| 81224 | 1/14/2025 8:00:00 AM | 1/28/2025 3:00:00 PM | Virtual - Check... | Andrea Degre, Kat... | | Scheduled | Add (5/0) | View (5) \| Print |
| 81027 | 12/7/2024 12:00:00 AM | 12/20/2024 12:00:00 AM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/11) | View |
| 81043 | 7/1/2024 8:00:00 AM | 6/30/2025 4:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/0) | View |
| 81081 | 7/1/2024 8:00:00 AM | 6/30/2025 4:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/0) | View |
| 81026 | 1/1/2024 8:00:00 AM | 7/30/2025 4:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/0) | View |

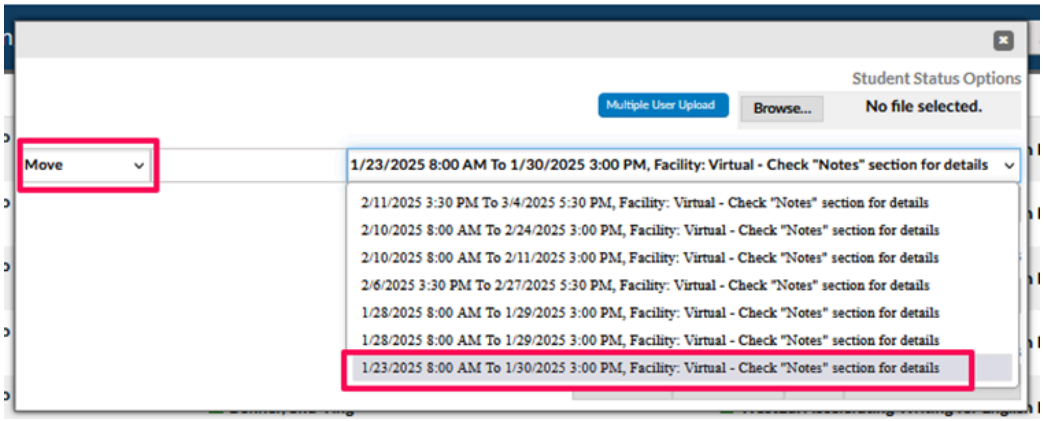
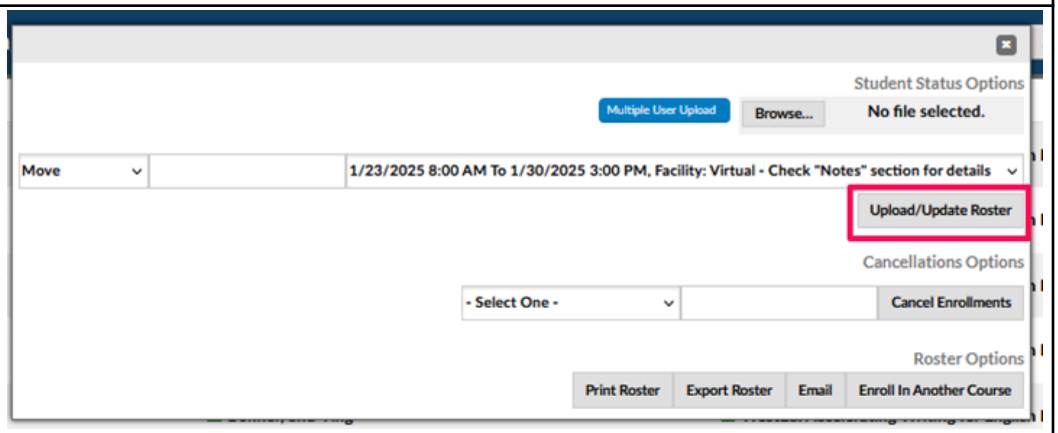
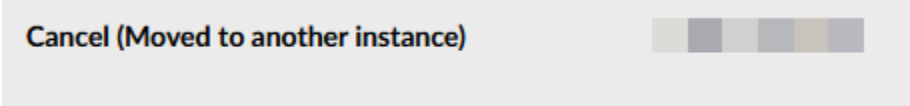
From the roster of the Instance you want to move from, click on “view” under the roster column




| ID | Start Datetime | End Datetime | Facility | Instructor | Type | Status | Students | Roster |
|---|---|---|---|---|---|---|---|---|
| 81293 | 2/11/2025 3:30:00 PM | 3/4/2025 5:30:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/0) | View |
| 81294 | 2/10/2025 8:00:00 AM | 2/24/2025 3:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (1/0) | View (1) \| Print |
| 81292 | 2/10/2025 8:00:00 AM | 2/11/2025 3:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/0) | View |
| 81295 | 2/6/2025 3:30:00 PM | 2/27/2025 5:30:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (2/0) | View (2) \| Print |
| 81072 | 1/28/2025 8:00:00 AM | 1/29/2025 3:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (4/0) | View (4) \| Print |
| 81074 | 1/28/2025 8:00:00 AM | 1/29/2025 3:00:00 PM | Virtual - Check... | Sheli Ann Suzuki,... | | Scheduled | Add (0/0) | View |
| 81225 | 1/23/2025 8:00:00 AM | 1/30/2025 3:00:00 PM | Virtual - Check... | Andrea Degre, Kat... | | Scheduled | Add (4/0) | View (4) \| Print |
| 81224 | 1/14/2025 8:00:00 AM | 1/28/2025 3:00:00 PM | Virtual - Check... | Andrea Degre, Kat... | | Scheduled | Add (5/0) | View (5) \| Print |
| 81027 | 12/7/2024 12:00:00 AM | 12/20/2024 12:00:00 AM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/11) | View |
| 81043 | 7/1/2024 8:00:00 AM | 6/30/2025 4:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/0) | View |
| 81081 | 7/1/2024 8:00:00 AM | 6/30/2025 4:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/0) | View |
| 81026 | 1/1/2024 8:00:00 AM | 7/30/2025 4:00:00 PM | Virtual - Check... | Kathleen Grondin,... | | Scheduled | Add (0/0) | View |

From the roster, place a check in the box next to the participant’s name and go to the action button



| | |
|---|---|
| In the first drop-down menu, select Move. When you do so the box will dynamically list the other instances for the object. This is where the information from step #1 above will be useful. Select the new instance |  |
| Click on the Upload/Update Roster button |  |
| If done correctly, the roster should indicate that the participant has been moved to another Instance and appear on the new instance. |  |