

## CFISA Enroll Users Into Training Course:

This guide will help you enroll one or more users into the course you have purchased.

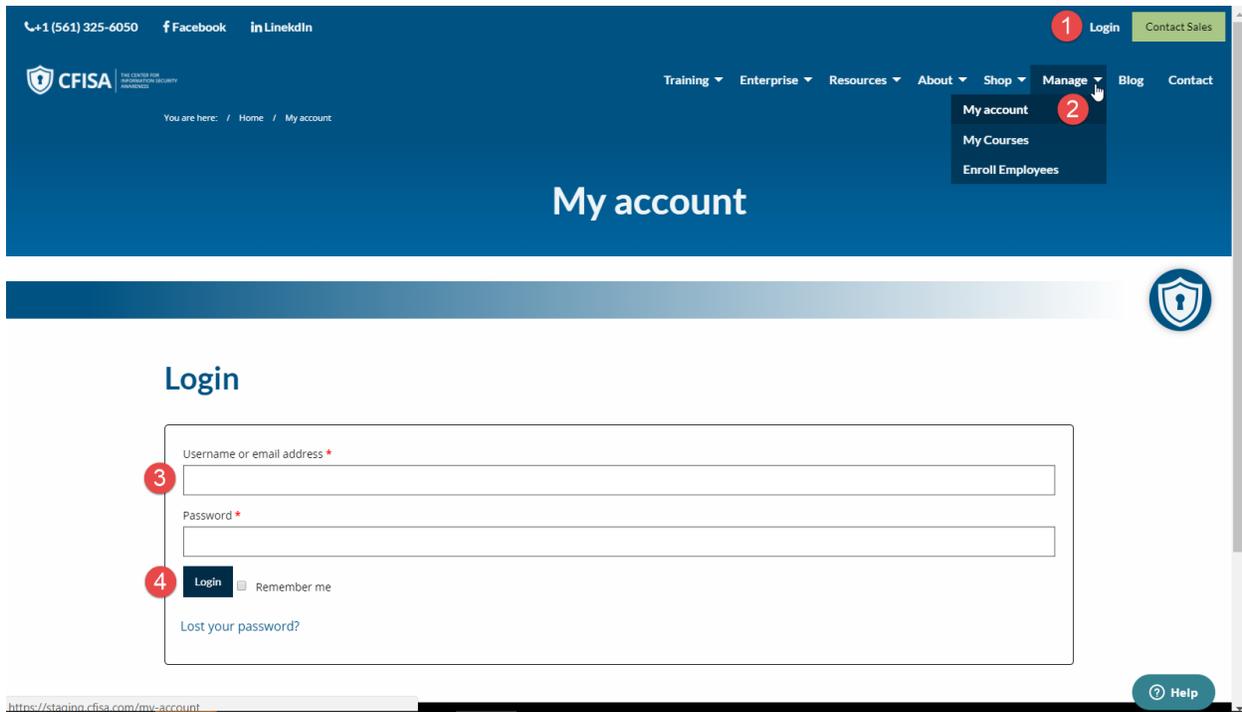
1) You can enroll employees/students via the [www.cfisa.com](http://www.cfisa.com) website or through an email you will receive when the purchase is complete.

### Email:

The email is titled “Enroll student in bulk”. It says “You can enroll yourself as a manager and your employees as students in the purchased products here: [Enroll Students](#)”. Please click on the link. If you are not logged into the site it will request you do so before proceeding (#3) below.

### Web Site:

Login into the system by selecting Login/Register (#1) or click Manage (#2) and select Enroll Employees. If you are not logged into the site it will request you do so before proceeding (#3) below.



The screenshot shows the CFISA website interface. At the top, there is a navigation bar with contact information (+1 (561) 325-6050), social media links (Facebook, LinkedIn), and a 'Login' button (marked with a red circle 1). Below the navigation bar is a main menu with options like Training, Enterprise, Resources, About, Shop, Manage (marked with a red circle 2), Blog, and Contact. The 'Manage' dropdown menu is open, showing 'My account', 'My Courses', and 'Enroll Employees'. The main content area is titled 'My account'. Below this is a 'Login' section with a form containing fields for 'Username or email address' (marked with a red circle 3) and 'Password', a 'Login' button (marked with a red circle 4), a 'Remember me' checkbox, and a 'Lost your password?' link. A 'Help' button is visible in the bottom right corner.

*Please note: Your password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 non-alphanumeric character(s) such as \*, -, or #*

**PLEASE NOTE:** Employees taking course(s) will receive an email with instructions to login and access your course.

## CFISA Enroll Users in Bulk or One at a time:

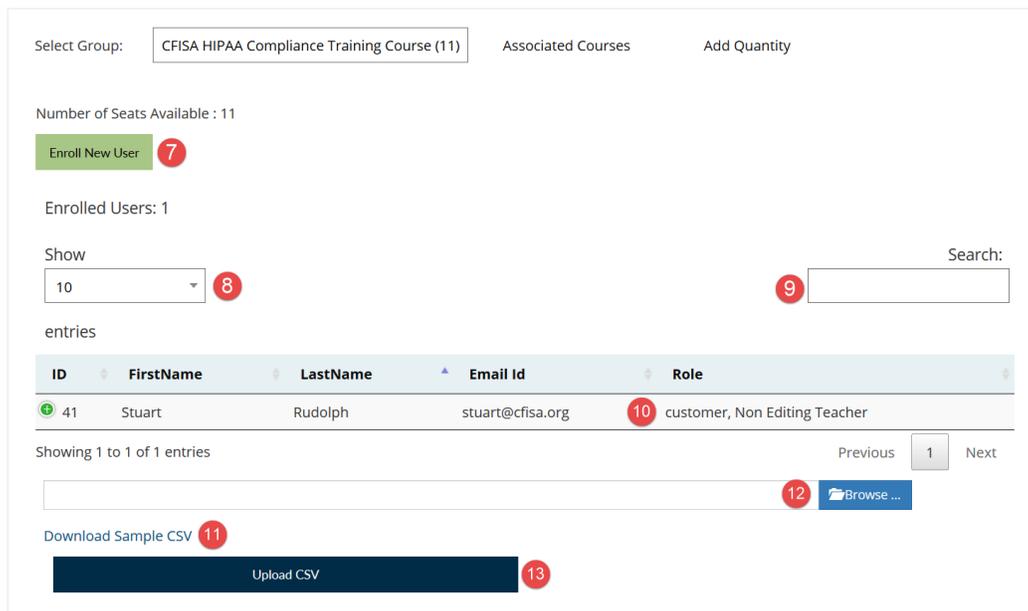
Once you have logged in you will access the enrollment page. At any time you can select Manage (#2 above) to access the enrollment page.

2) From the pull down list (#5) select the course (#6) in which you would like to enroll students. At any time you can purchase additional seat licenses by selecting Add Quantity (#7)



3) The enrollment page will allow you to enroll one or more users manually or by uploading CSV file.

**IMPORTANT NOTE:** We suggest you click on the green “Enroll New User” button (#7) and add yourself to the course so you will be assigned the Non Editing Teacher role (#10) allowing you to access and download course progress and completion reports.

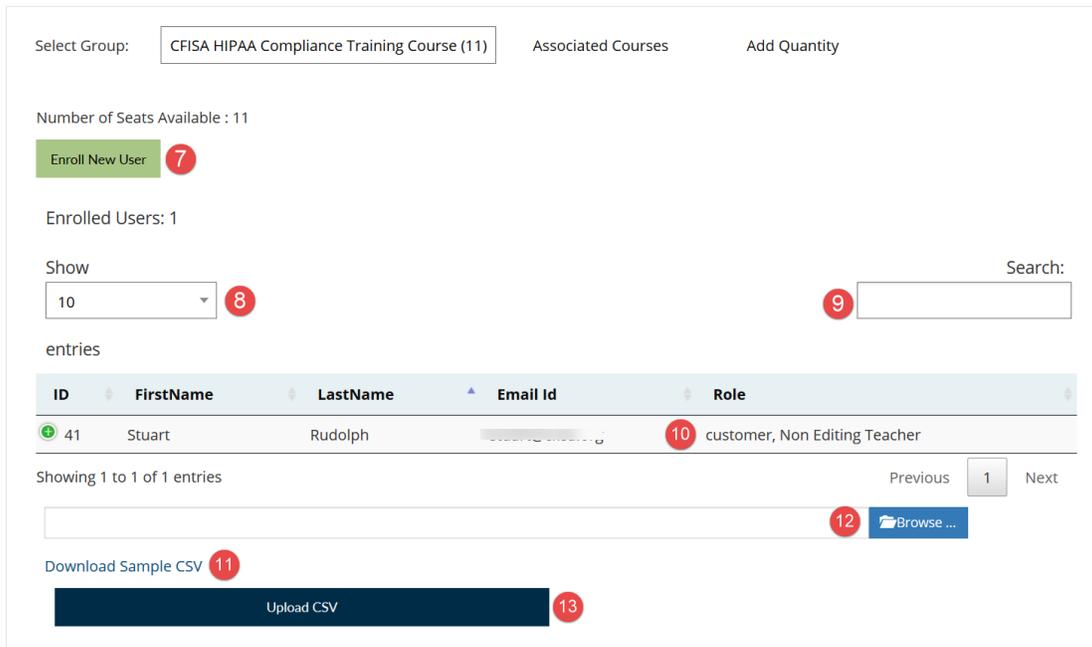


4) The enrollment page over view:

#7 - manually enroll students

#8 - change the amount of users viewed in the list

#9 - search for a student



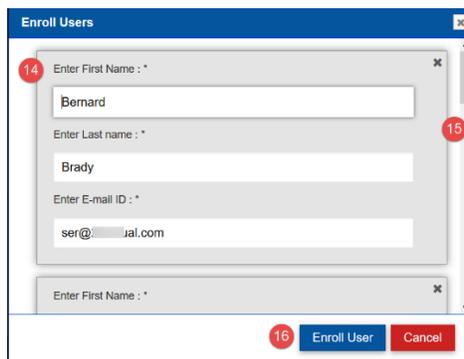
#10 – as noted above: First Student Enrolled has rights to access and download student progress and completion reports. (e.g. Administrator)

#11 - download a sample CSV. This file illustrates the information (First Name, Last Name and Email address). You can remove the sample names and replace with your list. Please save file as .CSV format.

#12 - once you file is ready you can select Browse to locate you list in your computer.

#13 – Select to Upload CSV (#12)

#14 - When the file is uploaded into the system you will be prompted to review the list to make any final changes. You can scroll the list (#15). Once you have completed review select Enroll User (#16).



5) When you approve the list you will be able to see

- How many seats still available (#17)
- Total enrolled users (#18)
- Sort the list view by clicking on the list header (#19)

Number of Seats Available : 6 17

Enroll New User

Enrolled Users: 6 18

Show:  Search:

entries

ID	FirstName	LastName	Email Id	Role
53	Bernard	Brady	ser@...al.com	subscriber
56	Stuart	Grady	stuart@...r.com	subscriber
57	Harry	Long	jahl@...!.com	subscriber
54	Janet	Perry	jan@...al.com	subscriber
41	Stuart	Rudolph	...	customer, Non Editing Teacher
55	Sam	Terman	...	subscriber

Showing 1 to 6 of 6 entries Previous 1 Next

Remove Browse...

[Download Sample CSV](#)

6) Your students will be enrolled in the course.

They will receive an email with a temporary password.

They must login and click on Manage (#20) and select my account. Then select Account Details from the list on the left (#21), Enter temporary password (#22) received in email. Enter new Password (#23) and confirm new password (#24) and then select Save Changes (#25)

