

Enrollware Roster Management

Quick Start Guide

Welcome to Enrollware! We've put together this short guide to help you get started creating class rosters and printing your certification cards. If you ever run into any difficulties or questions, please don't hesitate to send an email to support@enrollware.com.

Logging In

At this point, you should have received your initial username and password information in an email. To begin, open a web browser to www.enrollware.com and click the **Client Login** at the top right of the home page. That will take you to a login screen where you can enter your username and password. After successfully logging in, you'll be taken to your admin home page. It's recommended at this point to click on **My Account**, verify your information, and change your password.

Initial Setup

Before the first class roster is created, a few initial setup steps must be taken. Once these are setup, you'll probably not need to visit these screens very often but they will be available to edit and make changes any time you'd like.

1. **Course Types** – Before class rosters can be created, at least one course type must be configured. Under the **Settings** menu item, choose **Course Types** and then click the **New Course Type** button at the top right. Fill in the form and click **Update Course Type**.
2. **Locations** – At least one training location needs to be configured. Under the **Settings** menu item, choose **Locations** and then click the **New Location** button at the top right. Fill in the form and click **Update Locations**.
3. **Card Settings** – The training site/center information that is printed on each card is configured on this page. Access it under the **Settings** menu item by selecting **Card Settings**. Complete the form and click **Update Settings**.
4. **Instructors** – At least one instructor must be configured in the system. By default, the main administrator account is also set as an instructor, but you will no doubt need to add more. To do so, select **Users** under the **Settings** menu item, and click the **Add User** button. Choose a username and password for the instructor, fill in the information on the form and click the **Update User** button to save the information. Make sure to check the **instructor** and/or **instructor-assistant** role. In those roles, the instructors may log into the system and create rosters but are not allowed to create other users.

Creating Class Rosters

OK, the hard part is out of the way. Now to create your first class roster, simply navigate to your home admin screen (or **Classes and Students -> Classes**) and click the **Add a Class** button. That will take you to a short form where the specific class information is entered. When you are first creating the class, only the first 4 items in the form are initially required (Course, Instructor, Location, and Start Time). You can go back and edit the class at any time to supply the remaining information.

After the class is created, students can be added. From the class edit screen click the **Add Student** button and fill in the information. If the class has not yet been held, the status and test score fields may be left blank and filled in later for all students by clicking the **Edit Scores** button under the student list.

Once all of the student information and scores are entered, click the **Finalize Roster** button, which then is renamed to **View Roster**. From there you can view, print, or email the class roster.

Issuing Ecards

Clicking "**Print Cards**" on the class edit screen will navigate you to the eCard Export page, which is used to produce a file for import into your training organization's eCard system. There will be columns with the students First Name, Last Name, Email, and Phone number. Click the checkbox in front of fields to choose whether you want to assign an Ecard to the student.

Assign	First Name	Last Name	Email	Phone (optional)
<input type="checkbox"/>	Dan Test			

Course Date:	08/01/2018
File Format:	<input checked="" type="radio"/> AHA .xlsx <input type="radio"/> AHA .csv (retired) <input type="radio"/> ASHI .xls <input type="radio"/> ECSI .csv

Ensure the student and class information is correct. Select the file format that corresponds to your certifying organization, then click "Generate Import File" to create the file. Upload the resulting file to the organizations card issuance system.

Refer to the My Card documentation or the AHA Instructor Network for specific instructions on how to import the files to the AHA network. Refer to the ASHI or ECSI documentation for instructions on how to import files into those systems.

If you are interested in printing paper certification cards, click [here](#)

Additional instructions, FAQ's and Recent System Enhancements may be accessed by clicking on the **Help tab** located on the left hand side of your Admin page.