Training Withdrawal Options

Quick Reference Guide

www.iTacit.com

(This document was last revised on July 10, 2025)

Feature Overview

Take control of course enrollments with the new Withdrawing Approvals feature. This enhancement empowers training administrators to customize how users withdraw from courses - whether by enabling instant withdrawals, requiring approval, or preventing them altogether. It streamlines administrative workflows, reduces unnecessary requests, and ensures compliance with training policies - all while giving users a smoother, more intuitive experience.

When To Use This Feature

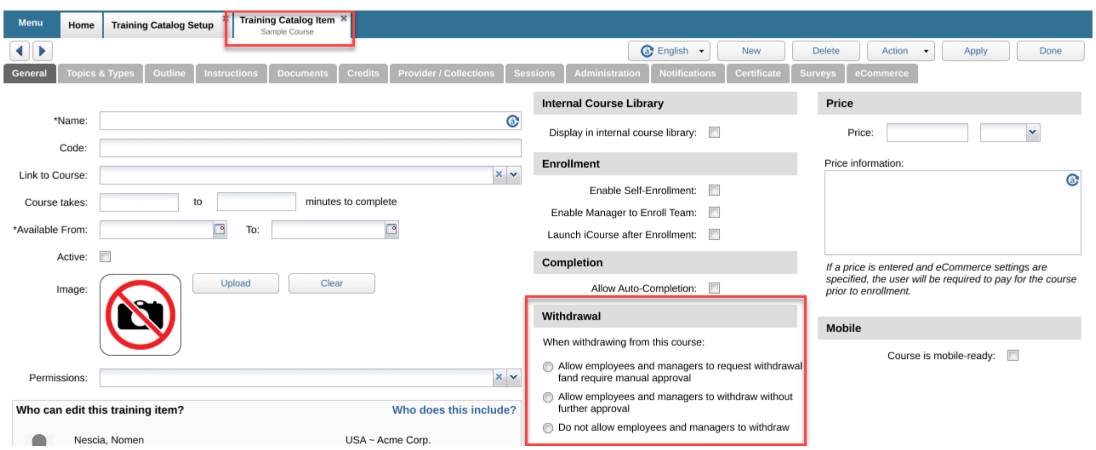
Imagine you're managing a compliance training program where some courses are mandatory, and others are optional. For optional courses, you might want to let users withdraw freely. For mandatory ones, you may want to block withdrawals or require approval. This feature gives you the flexibility to configure each course accordingly.

How To Use It (Step-by-Step)

FOR TRAINING ADMINISTRATORS

CONFIGURE WITHDRAWAL SETTINGS IN THE TRAINING CATALOG

1. Go to Admin > Menu > Training > Training Catalog Setup
2. Search and open a desired Training Catalog Item
3. Scroll down to the **Withdrawal** field set
4. Under "*When withdrawing from this course*:", choose one of the following options:
    a. **Require manual approval** - Users can request to withdraw; status becomes "Withdraw Requested".
    b. **Allow withdrawal without approval** - Users can withdraw instantly; status becomes "Withdrawn".
    c. **Prevent withdrawal entirely** - The withdrawal option is hidden from the UI and blocked from the user.

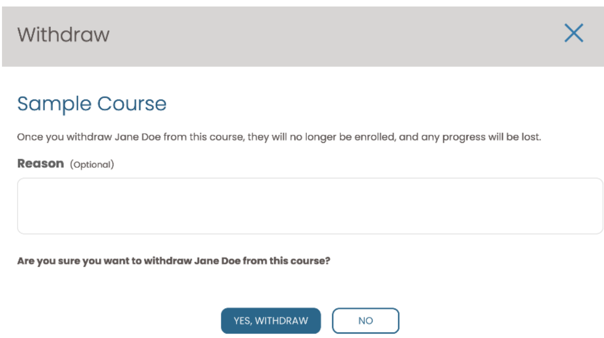


5. Click **Apply** to save changes

FOR MANAGERS

WITHDRAWING A TEAM MEMBER

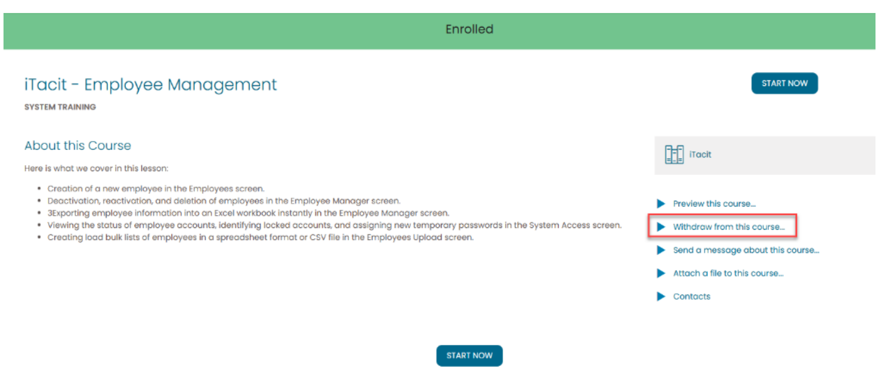
1. Go to My Teams and select the relevant team member
2. Open the course profile
3. Click **Withdraw from this course** (if available)
4. Review the updated confirmation
5. Confirm with **Yes, Withdraw**



FOR EMPLOYEES

WITHDRAWING FROM A COURSE

1. Navigate to My Activities or the Library
2. Open the course profile
3. If allowed, click **Withdraw from this course**
4. Depending on the course setting, you may see a confirmation message and be withdrawn immediately, or your request may be submitted for approval



Tips & Best Practices

- All existing and new courses default to requiring manual approval.
- Review withdrawal settings periodically to ensure they align with training goals.
- Use clear course descriptions to inform users about withdrawal policies.
- Before rollout, test each setting to ensure expected behavior in the UI and backend.