

Job Aid: Registration Assistant Tool

Purpose

The purpose of the Registration Assistant Tool job aid is to guide you through the step-by-step process of registering or withdrawing users from a Scheduled Offering and reserve slots (seats) in a scheduled offering.

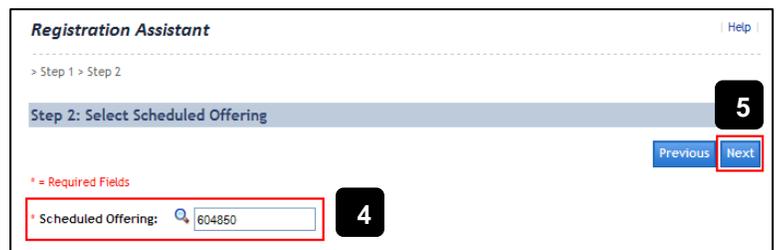
In this Job Aid, you will learn how to:

- Use Registration Assistant to Register Users in a Scheduled Offering
- Use Registration Assistant to Withdraw Users from a Scheduled Offering
- Use Registration Assistant to Add Slots to a Scheduled Offering

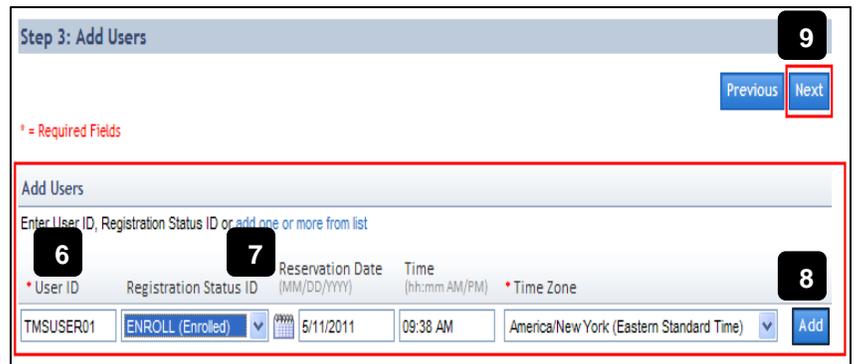
Task A. Use Registration Assistant to Register Users in a Scheduled Offering

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Learning > Tools > Registration Assistant**. *Step 1: Select Action* of the Registration Assistant displays.
2. Select the **Register Users** radio button.
3. Click **Next**. *Step 2: Select Scheduled Offering* of the Registration Assistant displays.
4. Enter the **Scheduled Offering ID** or click the **Search** icon to search for and select a scheduled offering.
5. Click **Next**. *Step 3: Add Users* of the Registration Assistant displays.



6. Enter the **User ID** or use the add one or click the **add one or more from list** link to search and select users to add.
7. Select the **Registration Status ID** from the drop-down menu.
8. Click **Add**.
Repeat steps 6 – 8 for each user being registered.
9. Click **Next**. *Step 4: Edit Assignment* of the Registration Assistant displays.
10. Enter any **Comments** as necessary.
11. Click **Next**. *Step 5: Edit Financial Data* of the Registration Assistant displays. Skip to Step 15 if no financial data is necessary.
12. If applicable, select the **Slot ID** from the drop-down menu or
13. Enter an **Order Ticket** number or
14. Enter **Chargeback Account**.
15. Click **Next**. *Step 6: Record Registration* of the Registration Assistant displays.



Step 3: Add Users 9

Previous Next

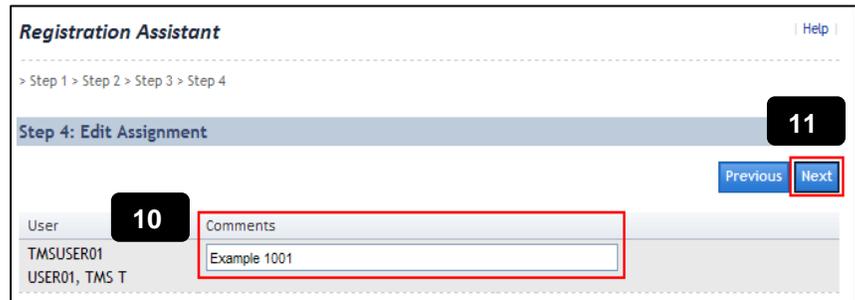
* = Required Fields

Add Users

Enter User ID, Registration Status ID or add one or more from list

User ID	Registration Status ID	Reservation Date (MM/DD/YYYY)	Time (hh:mm AM/PM)	Time Zone
TMSUSER01	ENROLL (Enrolled)	5/11/2011	09:38 AM	America/New York (Eastern Standard Time)

Add 8



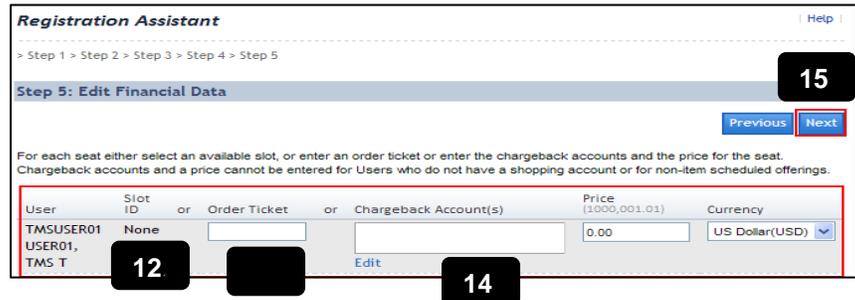
Registration Assistant Help

> Step 1 > Step 2 > Step 3 > Step 4

Step 4: Edit Assignment 11

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User	Comments
TMSUSER01 USER01, TMS T	Example 1001



Registration Assistant Help

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5

Step 5: Edit Financial Data 15

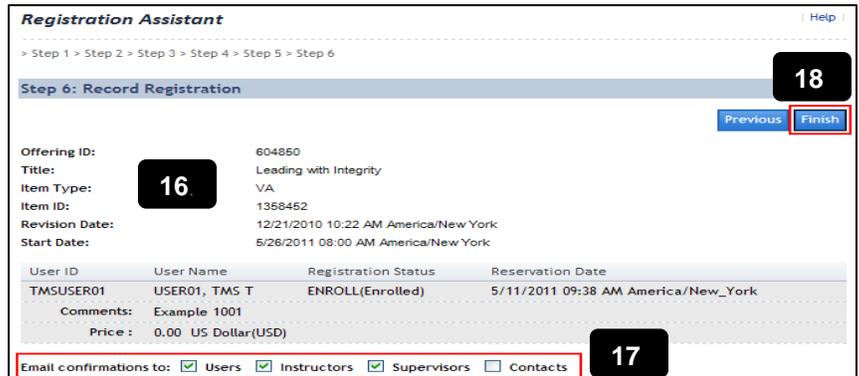
Previous Next

For each seat either select an available slot, or enter an order ticket or enter the chargeback accounts and the price for the seat. Chargeback accounts and a price cannot be entered for Users who do not have a shopping account or for non-item scheduled offerings.

User	Slot ID	Order Ticket	Chargeback Account(s)	Price (\$,000,001.01)	Currency
TMSUSER01 USER01, TMS T	None			0.00	US Dollar(USD)

Edit 14

16. Review the information.
17. Select **Email confirmations to preferences**.
18. Click **Finish**. A confirmation status notification displays.



Registration Assistant Help

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6

Step 6: Record Registration 18

Previous Finish

Offering ID: 604850
 Title: Leading with Integrity
 Item Type: VA
 Item ID: 1358452
 Revision Date: 12/21/2010 10:22 AM America/New York
 Start Date: 5/26/2011 08:00 AM America/New York

User ID	User Name	Registration Status	Reservation Date
TMSUSER01	USER01, TMS T	ENROLL(Enrolled)	5/11/2011 09:38 AM America/New York

Comments: Example 1001
 Price: 0.00 US Dollar(USD)

Email confirmations to: Users Instructors Supervisors Contacts 17

Task B. Use Registration Assistant to Withdraw Users from a Scheduled Offering

Note: Verify that the Admin tab is selected.

1. Navigate to **Learning > Tools > Registration Assistant**.
2. Select the **Withdraw Users** radio button.
3. Click **Next**. *Step 2: Select Scheduled Offering* of the Registration Assistant displays.



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Tools

- Cancel Scheduled Offering
- Curriculum Scheduling
- Registration Assistant
- Inventory Adjustment
- Required Dates Editor
- Scheduled Offering Notification

Registration Assistant Help

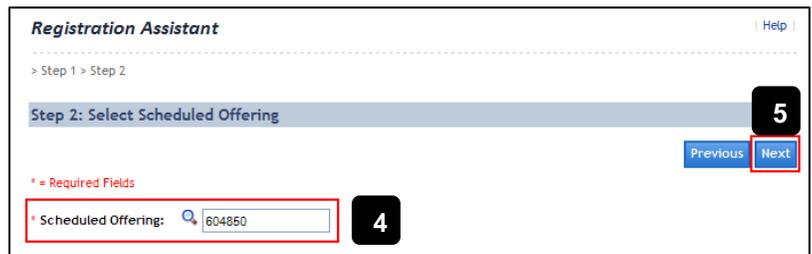
> Step 1

Step 1: Select Action 3

Next

Withdraw Users Reserve Slots Register Users

4. Enter the **Scheduled Offering ID** or click the **Search** icon to search for and select a scheduled offering.
5. Click **Next**. *Step 3: Select Users to Withdraw* of the Registration Assistant displays.



Registration Assistant Help

> Step 1 > Step 2

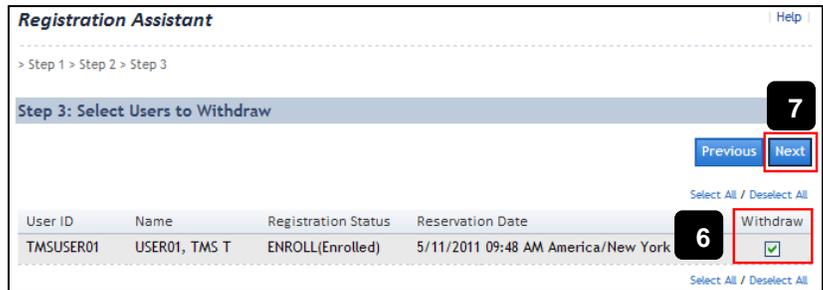
Step 2: Select Scheduled Offering 5

Previous Next

* = Required Fields

* Scheduled Offering: 604850 4

6. Click the **Withdraw** checkbox for the users you wish to withdraw from the scheduled offering.
7. Click **Next**. *Step 4: Record Withdraw* of the Registration Assistant displays.



Registration Assistant | Help

> Step 1 > Step 2 > Step 3

Step 3: Select Users to Withdraw 7

Previous **Next**

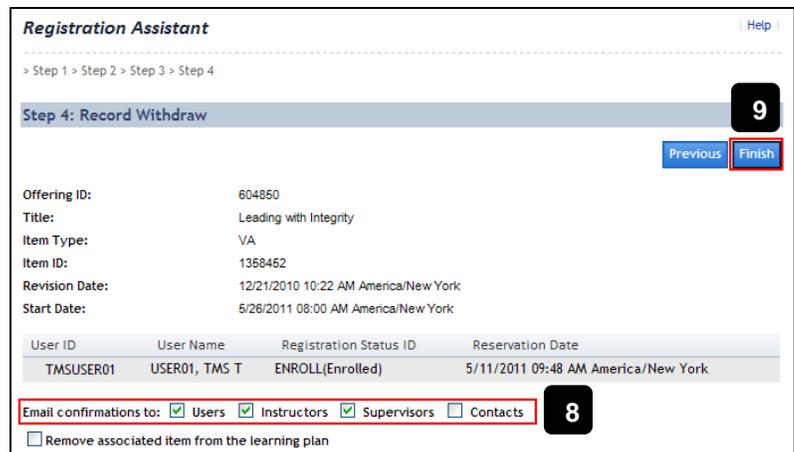
Select All / Deselect All

User ID	Name	Registration Status	Reservation Date
TMSUSER01	USER01, TMS T	ENROLL(Enrolled)	5/11/2011 09:48 AM America/New York

6 **Withdraw**

Select All / Deselect All

8. Select **Email confirmations to:** preferences.
9. Click **Finish**. A confirmation status notification displays.



Registration Assistant | Help

> Step 1 > Step 2 > Step 3 > Step 4

Step 4: Record Withdraw 9

Previous **Finish**

Offering ID: 604860
 Title: Leading with Integrity
 Item Type: VA
 Item ID: 1358452
 Revision Date: 12/21/2010 10:22 AM America/New York
 Start Date: 5/26/2011 08:00 AM America/New York

User ID	User Name	Registration Status ID	Reservation Date
TMSUSER01	USER01, TMS T	ENROLL(Enrolled)	5/11/2011 09:48 AM America/New York

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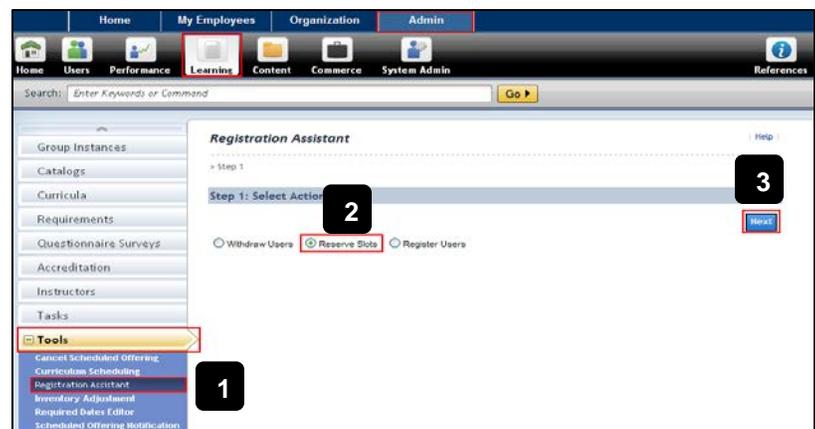
Remove associated item from the learning plan



Task C. Use Registration Assistant to Add Slots in a Scheduled Offering

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Learning > Tools > Registration Assistant**. *Step 1: Select Action* of the Registration Assistant displays.
2. Select the **Reserve Slots** radio button.
3. Click **Next**. *Step 2: Select Scheduled Offering* of the Registration Assistant displays.



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 Curriculum Scheduling
 Registration Assistant
 Inventory Adjustment
 Required Dates Editor
 Scheduled Offering Notification

Registration Assistant | Help

> Step 1

Step 1: Select Action 3

Withdraw Users Reserve Slots Register Users

2 **Next**

1



4. Enter the **Scheduled Offering ID** or click the **Search** icon to search for and select a scheduled offering.
5. Click **Next**. *Step 3: Select Users to Withdraw* of the Registration Assistant displays.

Registration Assistant

> Step 1 > Step 2

Step 2: Select Scheduled Offering

* = Required Fields

* Scheduled Offering:

6. Enter the **Organization ID** for whom the slots are being reserved or click the **Search** icon to search for and select an organization ID.
7. Enter the number of slots in the **Slots** field.
8. Select the **Registration Status ID** from drop-down menu.
9. Click **Add**.
Note: To reserve additional slots, repeat steps 6 – 9.
10. Click **Next**. *Step 4: Edit Comments* of the Registration Assistant displays.

Registration Assistant

> Step 1 > Step 2 > Step 3

Step 3: Add Slot

* = Required Fields

Organization ID (1000,001)	Slots	Registration Status ID	Reservation Date (MM/DD/YYYY)	Time (hh:mm AM/PM)	Time Zone
<input type="text" value="VALU.12341000"/>	<input type="text" value="004"/>	<input type="text" value="ENROLL (Enrolled)"/>	<input type="text" value="5/11/2011"/>	<input type="text" value="10:34 AM"/>	<input type="text" value="America/New York (Eastern Standard Time)"/>

11. Enter any **Comments** as necessary.
12. Click **Next**. *Step 5: Edit Financial Data* of the Registration Assistant displays.

Registration Assistant

> Step 1 > Step 2 > Step 3 > Step 4

Step 4: Edit Comments

Organization	Slots	Comments
VALU.12341000 TMS Organization	4	<input type="text" value="Example 1002"/>

13. Skip to Step 16 if no financial data is necessary.
14. Click the **Edit** link to select and enter one or more chargeback accounts.
15. Complete the **Price** field.
16. Click **Next**. *Step 6: Record Registration* of the Registration Assistant displays.

Registration Assistant

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5

Step 5: Edit Financial Data

For each slot request enter the chargeback accounts and price. Chargeback accounts and a price cannot be entered for organizations who do not have a shopping account or for non-item scheduled offerings.

Organization	Slots	Chargeback Account(s)	Price (1000,001.01)	Currency
VALU.12341000 TMS Organization	4	<input type="text" value=""/>	<input type="text" value="0.00"/>	<input type="text" value="US Dollar(USD)"/>

- 17. Review the information.
- 18. Select **Email confirmations to:** preferences.
- 19. Click **Finish**. A confirmation status notification displays.

Step 6: Record Registration

Previous Finish

Offering ID: 885

Title: DB_RS_ILT4_TITLE

Item Type: COURSE

Item ID: DB_RS_ILT4

Revision Date: 17 6/22/2012 02:42 AM America/New York

Start Date: 6/1/2013 10:00 AM America/New York

Organization	Slots	Registration Status ID	Reservation Date
AA	1	ENROLL(Enrolled)	8/5/2012 12:07 AM America/New_York

Price : 0.00 US Dollar(USD)

Email confirmations to Organizations 18