

## Job Aid: Registration Management

### Purpose

The purpose of the Registration Management job aid is to guide you through the step-by-step process of configuring registration parameters and registering users.

In this Job Aid, you will learn how to:

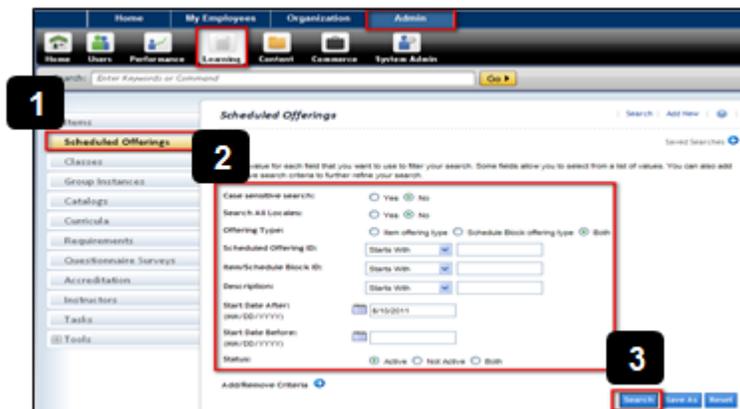
- Set Self Registration Parameters
- Set Registration Approval Process
- Register Users in an Offering
- Register Users in an Offering – from request list
- Add Slots to an Offering
- Reserve Slots in an Offering
- Change Registration Status of User



### Task A. Set Self Registration Parameters

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

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter criteria to search for a scheduled offering.
3. Click **Search**.





4. Click the **Edit** icon for the scheduled offering.

Scheduled Offering ID	Title	Item/Schedule Block
601850	Release the Pressure Webinar	NFED 1322012 (Rev 1 - 7/6/2010 09:27 AM America/New York)

Select the **Summary** tab of the scheduled offering.

5. Scroll down to the **Edit the Registration** section of the screen.
6. Enter a **Registration Cut-off Date** and **Time**. For example, 06/01/2011 and 12:01 PM.
7. Set the **Minimum** and **Maximum Registration**.
8. Click the **Self Registration** checkbox.
9. Click **Apply Changes**.

The screenshot shows the 'Edit the Registration for the Scheduled Offering' form. On the left, a navigation menu has the 'Summary' tab highlighted (5). The form fields include: 'Cancelled Date:' (6), 'Registration Cut-off Date:' (7) set to 5/31/2011, 'Minimum Registration:' (8) set to 25, 'Registration Cut-off Time:' (7) set to 02:59 AM, 'Maximum Registration:' (8) set to 50, 'Time Zone:' set to America/New York, and 'Published Price:' set to 0.00 US Dollar (USD) (Default). There is a 'Self Registration' checkbox (9) which is checked. Below this are checkboxes for 'Email confirmations to:' with options for 'Users', 'Instructors', and 'Contacts'. At the bottom, there are buttons for 'Apply Changes' (10), 'Reset', 'Copy Scheduled Offering...', and 'Delete'.



## Task B. Set Registration Approval Process

1. Select the **Summary** tab of the scheduled offering.
2. Select the **Approval Process ID** from the drop-down menu.
3. Click the **Approval Required** checkbox.

**Note:** You will not be able to click the **Approval Required** checkbox if the **Approval Process ID** is not entered. If you do not know the Approval Process ID or there is not one to select, move on to the next step.

4. Click **Apply Changes**.

The screenshot shows the 'Summary' tab selected in the left-hand navigation menu. The main content area displays the following fields: Description (Webinar), Group Instance, Domain (VALU), Facility, Time Zone (America/Los Angeles (Pacific Standard Time)), Approval Process ID (selected), Approval Required (checked), and Contact (VALU Contractor Support Team). At the top right, the 'Apply Changes' button is highlighted with a red box and a '4' in a black circle. Other buttons include 'Reset', 'Copy Scheduled Offering...', and 'Delete'. A '1' in a black circle points to the 'Summary' tab, a '2' in a black circle points to the 'Approval Process ID' dropdown, and a '3' in a black circle points to the 'Approval Required' checkbox.



## Task C. Register Users in an Offering

1. Scroll down and select the **Registration** tab of the scheduled offering.
2. Scroll to the **Add a User to the Scheduled Offering Registration** section of the screen.

The screenshot shows the 'Registration' tab selected in the left-hand navigation menu. The main content area displays the 'Add a User to the Scheduled Offering Registration' section. The 'Registration' tab is highlighted with a red box and a '1' in a black circle. The 'Add a User to the Scheduled Offering Registration' section is highlighted with a red box and a '2' in a black circle. The form includes fields for User ID, Registration Status (ENROLLED/Invited), Slot ID, Chargeback Account(s), Price, and Order Ticket. There are also checkboxes for 'Email confirmations to:' User, Instructor, Supervisor, and Contacts. A 'SAB' button is visible at the bottom right. Below the form, it states 'Edit the Registered Users for the Scheduled Offering' and 'There are currently no registered Users.'

3. Complete the **User ID** field. Click the **add one or more from list** link to search for and select users to register.
4. Select the user **Registration Status** from the drop-down menu.
5. Select **Email confirmations to** preferences.

6. Click **Add**.



### Task D. Register Users in an Offering – from request list

1. Select the **Registration** tab of the scheduled offering.
2. Scroll to the **Add a User to the Scheduled Offering Registration** section.
3. Click the **add from request** link to search for and select users to register.

Note: If there are users in the request list, select a user and proceed to the next step. If there are no users in the request list, click **Back to Main Record**.

4. Select the user **Registration Status**.
5. Select **Email confirmations to** preferences.
6. Click **Add**.

User	Registration Status	Need By Date	Slot ID	Chargeback Account	Price (\$)	Order Ticket	Add
KRAUS, NANCY J	ENROLL/Enrolled				0.00	US Dollar/USD	<input type="checkbox"/>



### Task E. Add Slots to an Offering

1. Select the **Registration** tab of the scheduled offering.
2. Scroll to the **Add Slots to the Scheduled Offering** section of the screen.
3. Click the **Search** icon to search for and select the organization requesting the reserved slots.
4. Complete the **Number of slots** field.

5. Click the **Email confirmation to the Organization** checkbox if desired.
6. Click **Add**.

The screenshot shows a web form titled "Add Slots to the Scheduled Offering". On the left is a navigation menu with "Registration" highlighted. The form contains several fields: "Number of Slots" (callout 4), "Reservation Date" (5/10/2011), "Reservation Time" (12:08 PM), "Time Zone" (America/New York), "Registration Status" (ENROLL/Enrolled), "Price Per Slot" (0.00), and "Chargeback Account(s)". At the bottom, there is a checkbox for "Email confirmation to the Organization" (callout 5) and an "Add" button (callout 6). A search icon (callout 3) is also visible near the top left of the form area.

## Task F. Reserve Slots in an Offering

1. Select the **Registration** tab of the scheduled offering.
2. Scroll to the **Add a User to the Scheduled Offering Registration** section of the screen.
3. Click the **add from request list** link to search for and select users to register.

The screenshot shows a web form titled "Add a User to the Scheduled Offering Registration". On the left, the "Registration" tab is selected. The form includes a search bar with the text "Enter criteria or add one or more from" (callout 3) and a link "add from request list". Below this are fields for "User ID", "Registration Status" (ENROLL/Enrolled), "Slot ID", "Chargeback Account(s)", "Price" (1000,001.01), and "Order Ticket". At the bottom, there are checkboxes for "Email confirmations to:" (User, Instructor, Supervisor, Contacts) and an "Add" button.

4. Select the user **Registration Status** from the drop-down menu.
5. Select the **Slot ID** from the drop-down menu.
6. Click the **Add** checkbox.
7. Select **Email confirmations to** preferences.
8. Click **Add**.



**Specify Users To Register**

User	Registration Status	Next Due Date	Slot ID	Chargeback Account	Price (S) (0000.00,00)	Currency	Order Ticket	Add
KRAUS,NANCYD18	ENROLL(Enrolled)				0.00	US Dollar(USD)		<input type="checkbox"/>
KRAUS, NANCY J								<input type="checkbox"/>

User  Instructor  Supervisor  Contacts



## Task G. Change Registration Status of User

1. Select the **Registration** tab of the Scheduled offering.
2. Scroll to the **Edit the Registered Users for the Scheduled Offering** section of the screen.
3. Click the **Edit** link for the user whose registration status you wish to change.

**Edit the Registered Users for the Scheduled Offering**

User	Org ID	Registration Status	Slot ID	Chargeback	Shipping Information Recorded	Segment Attendance	Select
USER01, TMS T	VALU.12341000	ENROLL (Enrolled)		Account(s): Price:	No	0/3	<input type="checkbox"/>
TMSUSER01		5/10/2011 12:26 PM America/New York		Currency ID: Order Ticket: Edit			<input type="checkbox"/>

Users  Instructors  Supervisors  Contacts

Remove associated item from the learning plan

4. Select a **Registration Status** from the drop-down menu. Change any other registration data, add comments, or select notification options.
5. Click **Apply Changes**.

**Note:** Admins who withdraw a user from an offering will see a warning if this item is a prerequisite for another enrollment. The admin has the option to withdraw or cancel the user from the dependent offering.



**Edit Registered User Details for Scheduled Offering 601850**

User ID: TMSUSER01      User Name: USER01, TMS T

Slot ID:

**4** Registration Status: ENROLL(Enroll)

Registration Date: 5/10/2011

Registration Time: 12:26 PM

Time Zone: America/New York (Eastern Standard Time)

Comments:

Send confirmation notification to:  User  Instructor  Supervisor  Contacts

**5**

6. The user's registration status has been changed.

**Note:** If a user's status is Waitlist, the place on the waitlist will be indicated (for example, 1 of 3).

USER01, TMS T TMSUSER01	VALU.1	<b>6</b> WAITLIST (Waitlisted 1/3) 5/10/2011 12:26 PM America/New York <a href="#">Edit</a>	Account(s): No Price: Currency ID: Order Ticket: <a href="#">Edit</a>	No 0/3 <input type="checkbox"/>
Smith, Joe DAI_USER_04	TMS	WAITLIST (Waitlisted 2/3) 5/10/2011 12:34 PM America/New	Account(s): No Price: Currency ID: Order Ticket: <a href="#">Edit</a>	No 0/3 <input type="checkbox"/>