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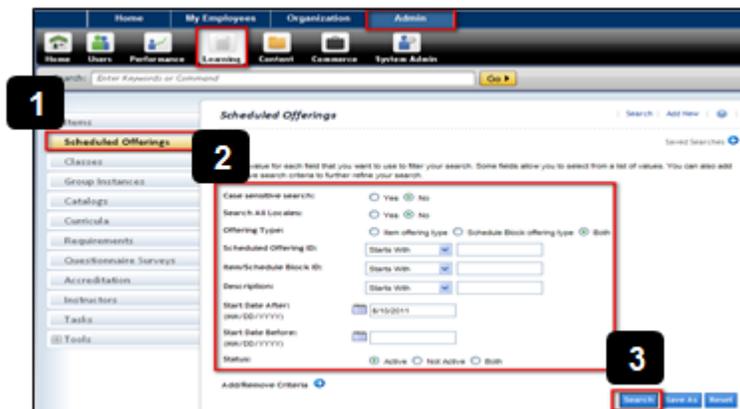
4. Click the **Edit** icon for the scheduled offering.

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**.

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**.

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.

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**.

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**.

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.

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**.

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.

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

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).