

Job Aid: Registration Assistant Tool

Course: Scheduling Management

Prerequisite Courses

- Introduction to Plateau Learning Administration
- Learning Needs Management
- Scheduling Management

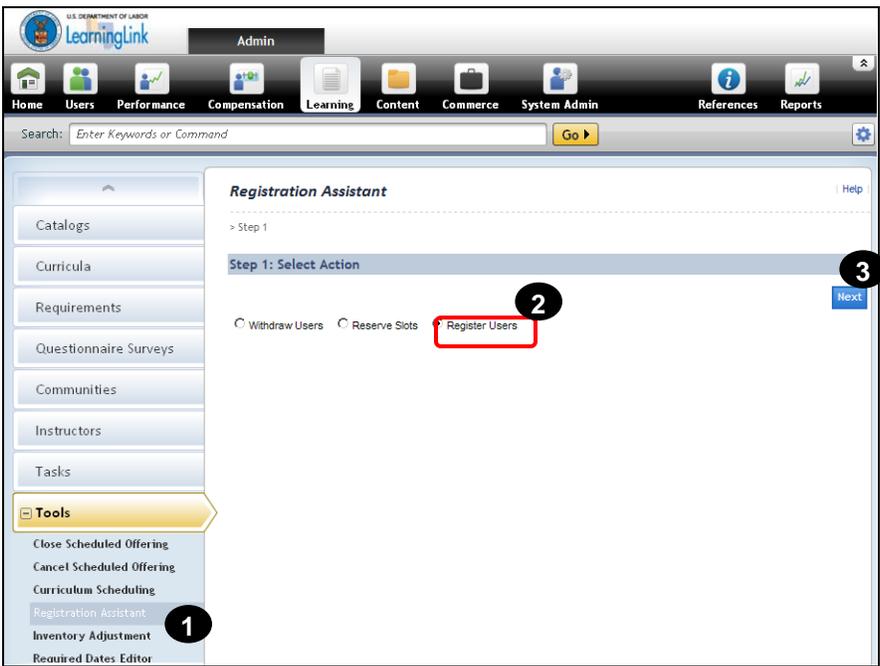
Description

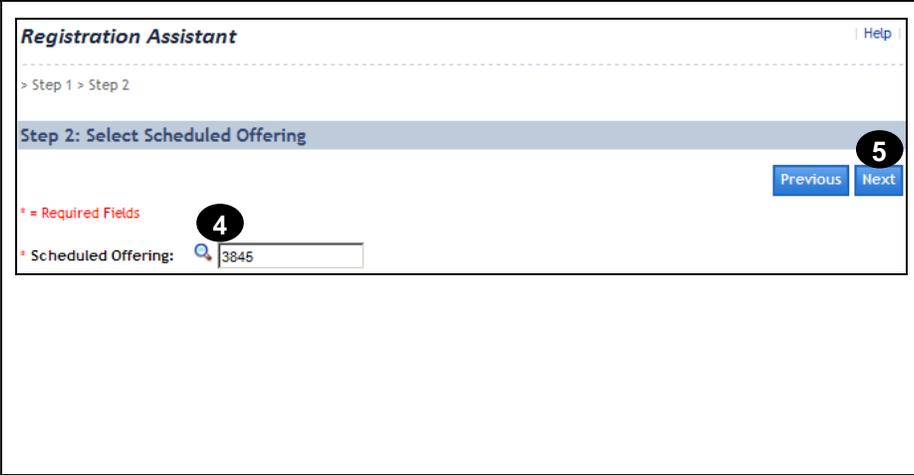
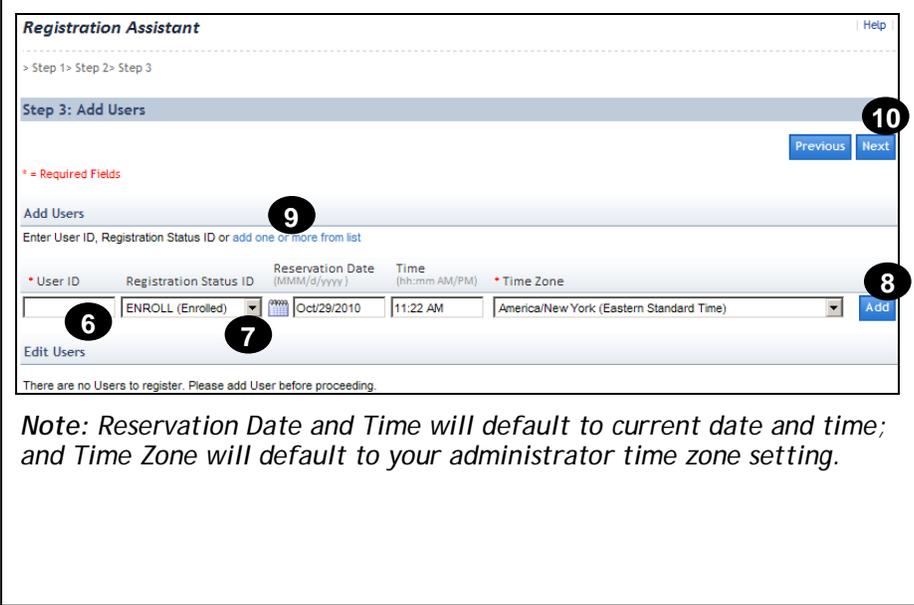
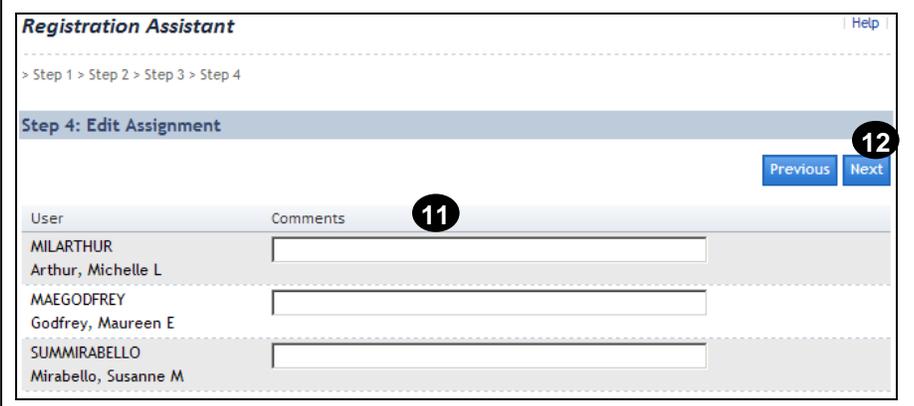
The purpose of this job aid is to guide administrators through the step-by-step process of using the Registration Assistant tool.

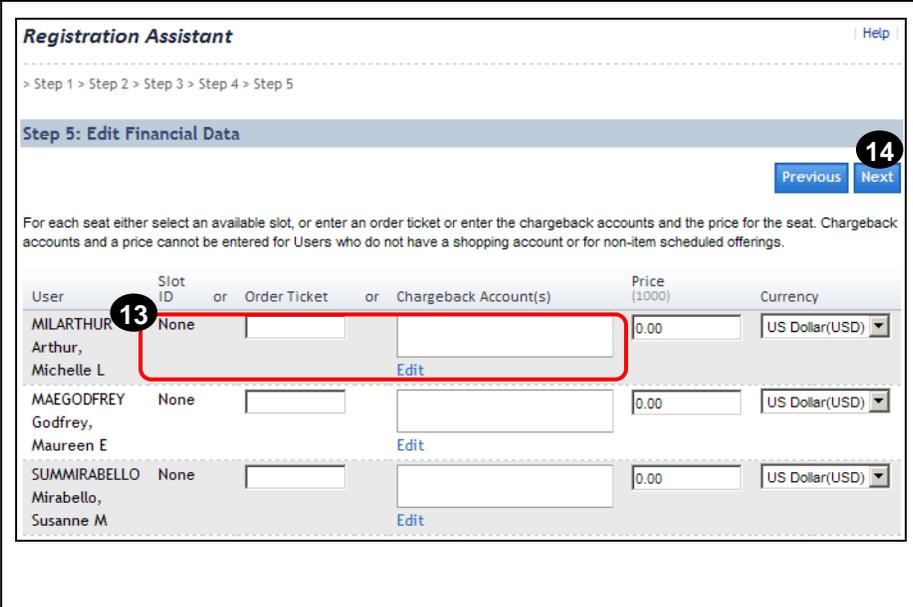
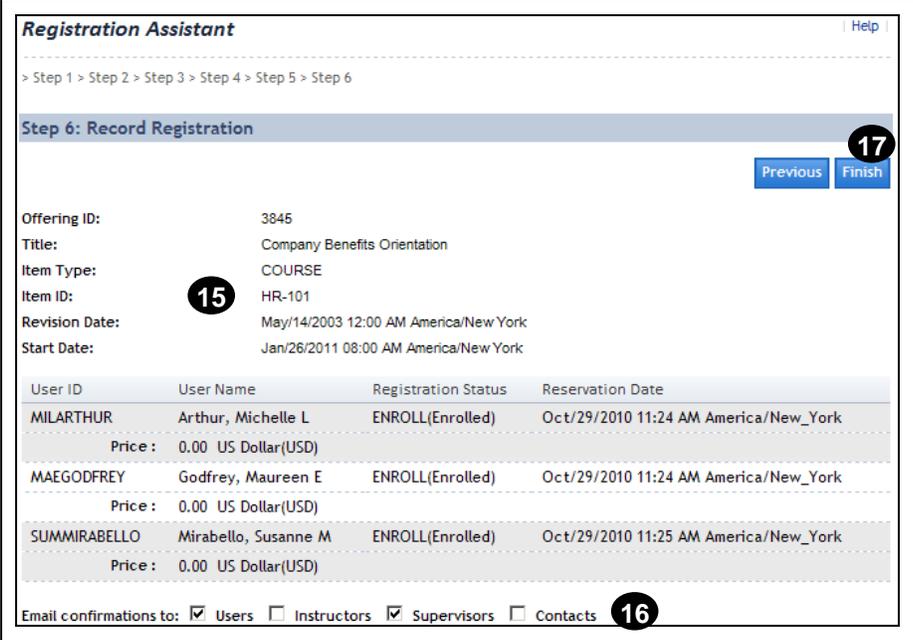
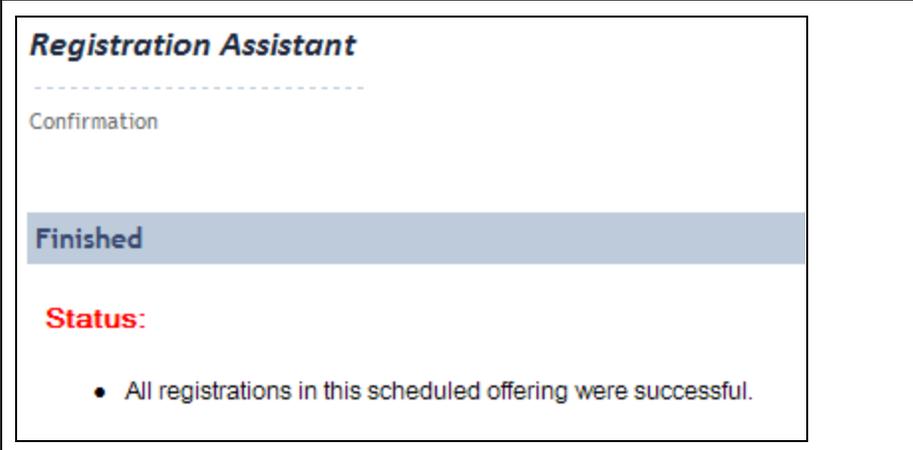
Tasks

- 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

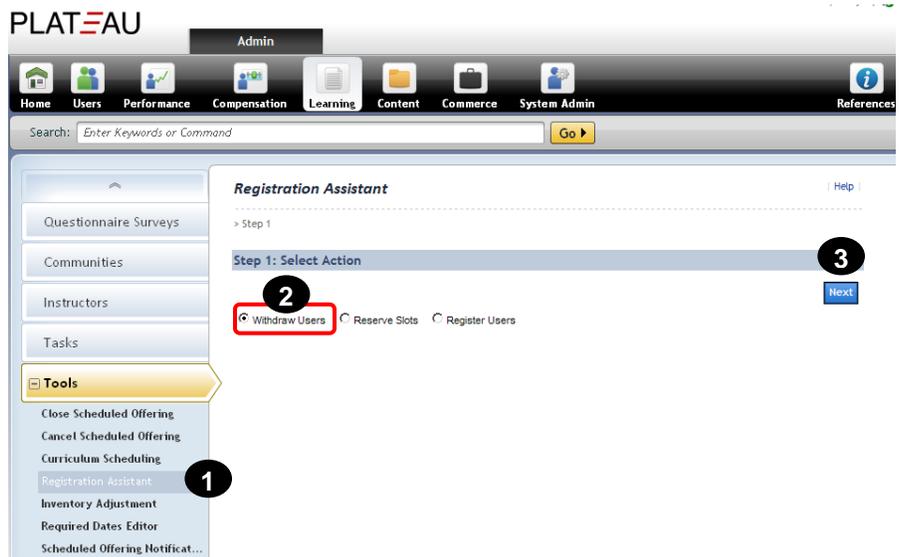
<p>1 Navigate to Learning > Tools > Registration Assistant.</p> <p><i>Step 1: Select Action of the Registration Assistant displays.</i></p> <p>2 Select Register Users.</p> <p>3 Select Next.</p>	
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<p>4 Step 2: Select Scheduled Offering of the Registration Assistant displays.</p> <p>4 Enter scheduled offering ID.</p> <p>or</p> <p>4 Select the search icon (🔍) to search for and select a scheduled offering.</p> <p>5 Select Next.</p>	
<p>6 Step 3: Add Users of the Registration Assistant displays.</p> <p>6 Enter user ID.</p> <p>7 Select Registration Status ID from drop-down menu.</p> <p>8 Select Add.</p> <p>or</p> <p>9 Select the add one or more from list link to search and select user(s) to add.</p> <p>10 Select Next.</p>	 <p><i>Note: Reservation Date and Time will default to current date and time; and Time Zone will default to your administrator time zone setting.</i></p>
<p>11 Step 4: Edit Assignment of the Registration Assistant displays.</p> <p>11 Enter any comments as necessary.</p> <p>12 Select Next.</p>	

<p>13 Step 5: Edit Financial Data of the Registration Assistant displays. Skip to Step 14 if no financial data is necessary.</p> <p>13 If applicable, select slot ID from the drop-down menu.</p> <p>or</p> <p>13 Enter an order ticket number.</p> <p>or</p> <p>13 Enter chargeback account.</p> <p>14 Select Next.</p>	 <p>Registration Assistant Help</p> <p>> Step 1 > Step 2 > Step 3 > Step 4 > Step 5</p> <p>Step 5: Edit Financial Data 14 Previous Next</p> <p>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.</p> <table border="1"> <thead> <tr> <th>User</th> <th>Slot ID</th> <th>or</th> <th>Order Ticket</th> <th>or</th> <th>Chargeback Account(s)</th> <th>Price (1000)</th> <th>Currency</th> </tr> </thead> <tbody> <tr> <td>MILARTHUR Arthur, Michelle L</td> <td>13 None</td> <td></td> <td></td> <td></td> <td></td> <td>0.00</td> <td>US Dollar(USD)</td> </tr> <tr> <td>MAEGODFREY Godfrey, Maureen E</td> <td>None</td> <td></td> <td></td> <td></td> <td></td> <td>0.00</td> <td>US Dollar(USD)</td> </tr> <tr> <td>SUMMIRABELLO Mirabello, Susanne M</td> <td>None</td> <td></td> <td></td> <td></td> <td></td> <td>0.00</td> <td>US Dollar(USD)</td> </tr> </tbody> </table>	User	Slot ID	or	Order Ticket	or	Chargeback Account(s)	Price (1000)	Currency	MILARTHUR Arthur, Michelle L	13 None					0.00	US Dollar(USD)	MAEGODFREY Godfrey, Maureen E	None					0.00	US Dollar(USD)	SUMMIRABELLO Mirabello, Susanne M	None					0.00	US Dollar(USD)
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<p>15 Step 6: Record Registration of the Registration Assistant displays.</p> <p>15 Review information.</p> <p>16 Select applicable email confirmation options.</p> <p>17 Select Finish.</p>	 <p>Registration Assistant Help</p> <p>> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6</p> <p>Step 6: Record Registration 17 Previous Finish</p> <p>Offering ID: 3845 Title: Company Benefits Orientation Item Type: COURSE Item ID: HR-101 Revision Date: May/14/2003 12:00 AM America/New York Start Date: Jan/26/2011 08:00 AM America/New York</p> <table border="1"> <thead> <tr> <th>User ID</th> <th>User Name</th> <th>Registration Status</th> <th>Reservation Date</th> </tr> </thead> <tbody> <tr> <td>MILARTHUR</td> <td>Arthur, Michelle L</td> <td>ENROLL(Enrolled)</td> <td>Oct/29/2010 11:24 AM America/New_York</td> </tr> <tr> <td>MAEGODFREY</td> <td>Godfrey, Maureen E</td> <td>ENROLL(Enrolled)</td> <td>Oct/29/2010 11:24 AM America/New_York</td> </tr> <tr> <td>SUMMIRABELLO</td> <td>Mirabello, Susanne M</td> <td>ENROLL(Enrolled)</td> <td>Oct/29/2010 11:25 AM America/New_York</td> </tr> </tbody> </table> <p>Price: 0.00 US Dollar(USD)</p> <p>Email confirmations to: <input checked="" type="checkbox"/> Users <input type="checkbox"/> Instructors <input checked="" type="checkbox"/> Supervisors <input type="checkbox"/> Contacts 16</p>	User ID	User Name	Registration Status	Reservation Date	MILARTHUR	Arthur, Michelle L	ENROLL(Enrolled)	Oct/29/2010 11:24 AM America/New_York	MAEGODFREY	Godfrey, Maureen E	ENROLL(Enrolled)	Oct/29/2010 11:24 AM America/New_York	SUMMIRABELLO	Mirabello, Susanne M	ENROLL(Enrolled)	Oct/29/2010 11:25 AM America/New_York																
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<p>A confirmation status notification displays.</p>	 <p>Registration Assistant</p> <p>Confirmation</p> <p>Finished</p> <p>Status:</p> <ul style="list-style-type: none"> All registrations in this scheduled offering were successful. 																																

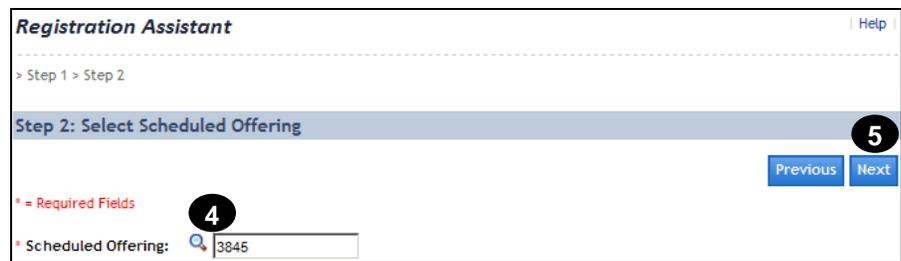
Task B. Use Registration Assistant to Withdraw Users from a Scheduled Offering

- 1 Navigate to Learning > Tools > Registration Assistant.
Step 1: Select Action of the Registration Assistant displays.
- 2 Select **Withdraw Users**.
- 3 Select **Next**.



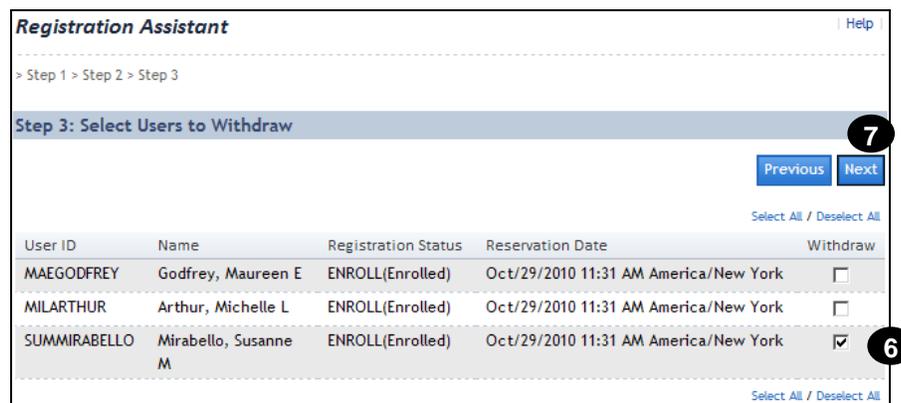
The screenshot shows the PLATEAU Admin interface. On the left, a navigation menu has 'Tools' expanded, with 'Registration Assistant' highlighted and marked with a circled '1'. The main content area shows 'Registration Assistant' with a breadcrumb '> Step 1'. Under 'Step 1: Select Action', three radio buttons are visible: 'Withdraw Users' (selected and circled with a '2'), 'Reserve Slots', and 'Register Users'. A 'Next' button is circled with a '3'.

- 4 *Step 2: Select Scheduled Offering of the Registration Assistant displays.*
- 4 Enter scheduled offering ID.
or
- 4 Select the search icon (🔍) to search for and select a scheduled offering.
- 5 Select **Next**.



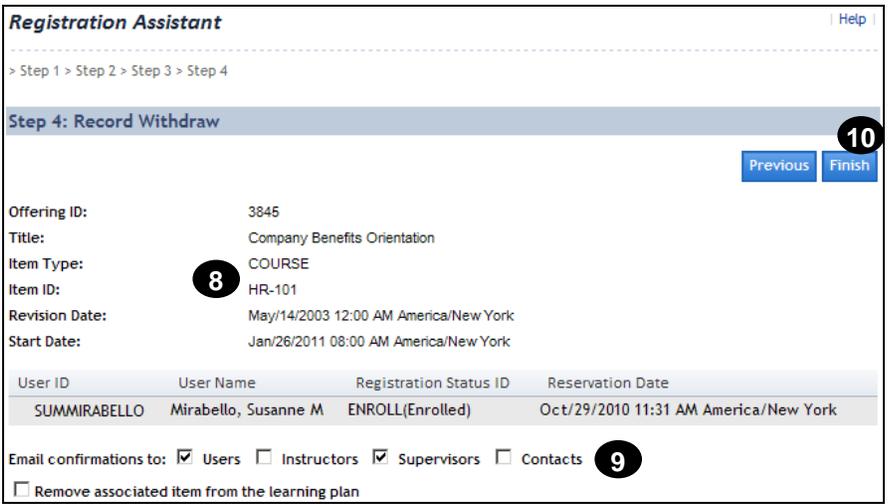
The screenshot shows 'Registration Assistant' with a breadcrumb '> Step 1 > Step 2'. The main heading is 'Step 2: Select Scheduled Offering', with a 'Previous' button and a 'Next' button circled with a '5'. Below, a search field is labeled '* Scheduled Offering:' with a search icon circled with a '4' and the value '3845' entered.

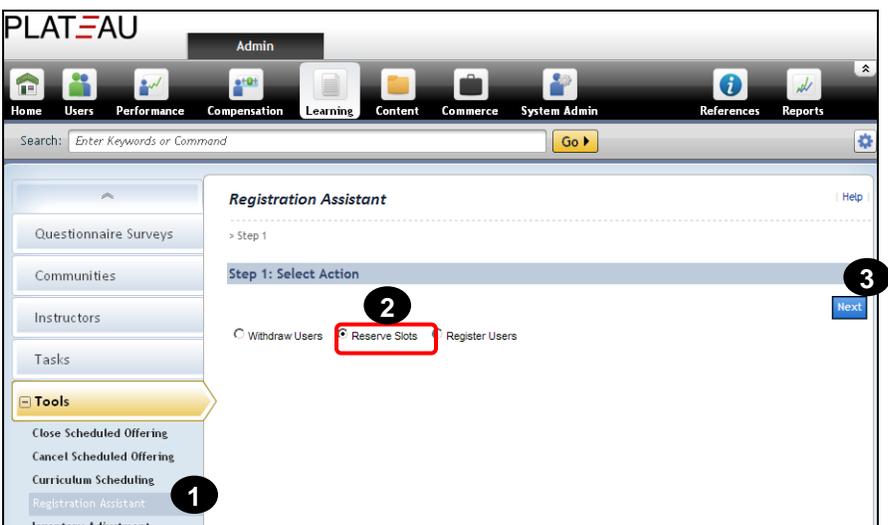
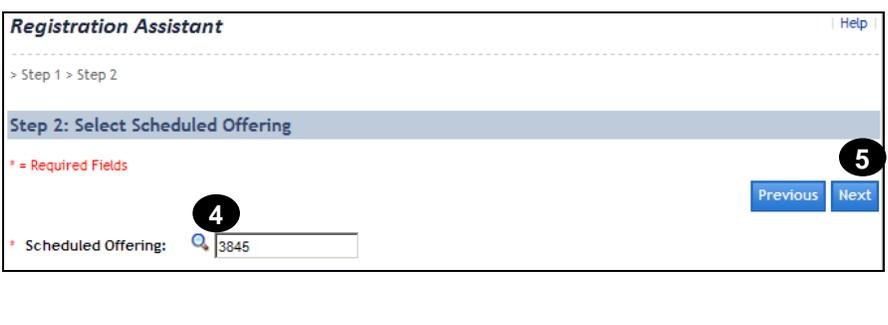
- 6 *Step 3: Select Users to Withdraw of the Registration Assistant displays.*
- 6 Select **Withdraw** checkbox for users you wish to withdraw from scheduled offering.
- 7 Select **Next**.

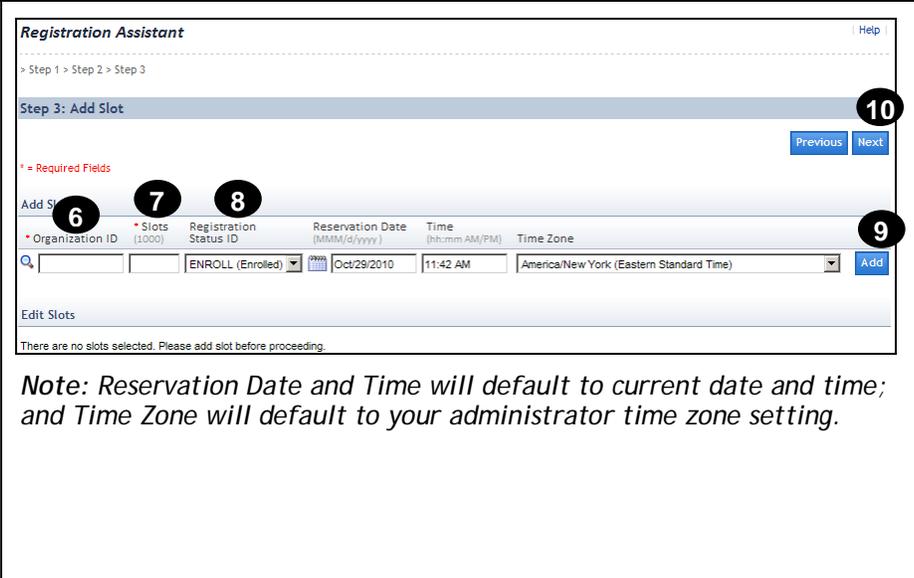
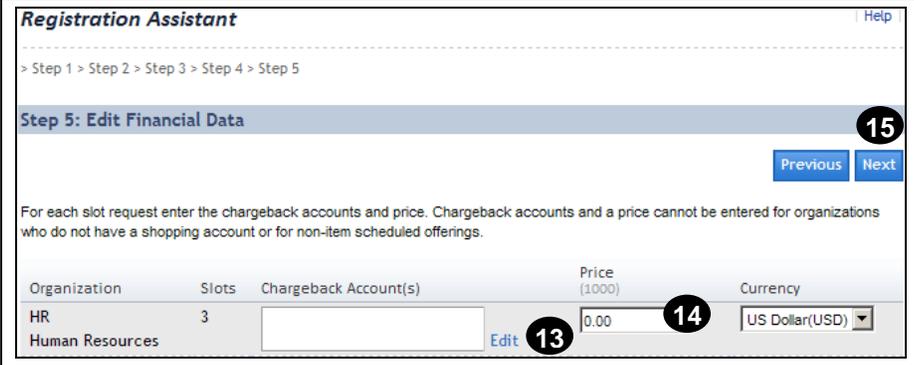


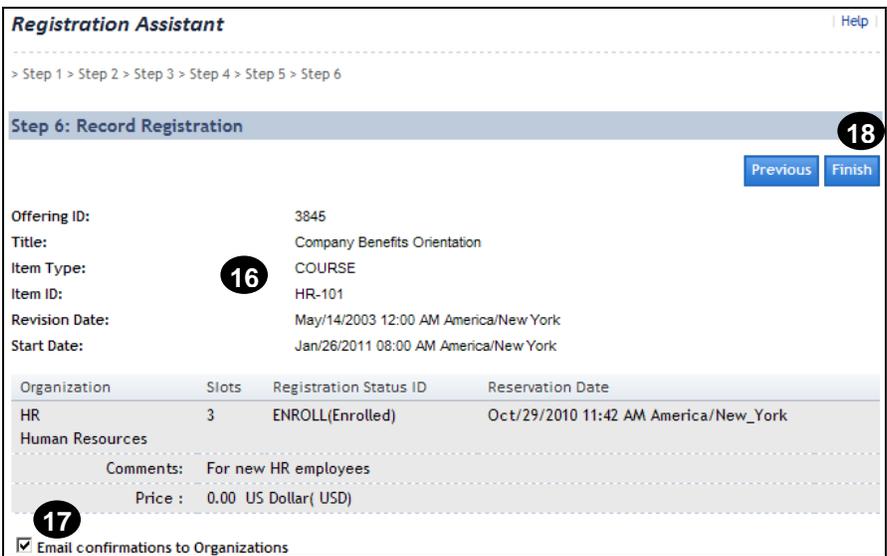
The screenshot shows 'Registration Assistant' with a breadcrumb '> Step 1 > Step 2 > Step 3'. The main heading is 'Step 3: Select Users to Withdraw', with 'Previous' and 'Next' buttons circled with a '7'. Below is a table with columns: User ID, Name, Registration Status, Reservation Date, and Withdraw. The 'Withdraw' column has checkboxes. The row for 'SUMMIRABELLO, Mirabello, Susanne M' has its checkbox checked and circled with a '6'. At the bottom right, there are links for 'Select All / Deselect All'.

User ID	Name	Registration Status	Reservation Date	Withdraw
MAEGODFREY	Godfrey, Maureen E	ENROLL(Enrolled)	Oct/29/2010 11:31 AM America/New York	<input type="checkbox"/>
MILARTHUR	Arthur, Michelle L	ENROLL(Enrolled)	Oct/29/2010 11:31 AM America/New York	<input type="checkbox"/>
SUMMIRABELLO	Mirabello, Susanne M	ENROLL(Enrolled)	Oct/29/2010 11:31 AM America/New York	<input checked="" type="checkbox"/>

<p>Step 4: Record Withdraw of the Registration Assistant displays.</p> <p>8 Review information on user to be withdrawn.</p> <p>9 Select applicable email confirmation options.</p> <p>10 Select Finish.</p>	
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<p>Task C. Use Registration Assistant to Add Slots in a Scheduled Offering</p>	
<p>1 Navigate to Learning > Tools > Registration Assistant.</p> <p>2 Select Reserve Slots.</p> <p>3 Select Next.</p>	
<p>4 Enter scheduled offering ID.</p> <p>or</p> <p>4 Select the search icon (🔍) to search for and select a scheduled offering.</p> <p>5 Select Next.</p>	

<p>6 Enter Organization ID for whom the slots are being reserved.</p> <p>or</p> <p>6 Select the search icon (🔍) to search for and select an organization ID.</p> <p>7 Enter number of slots.</p> <p>8 Select Registration Status ID from drop-down menu.</p> <p>9 Select Add.</p> <p>10 Select Next.</p>	 <p>Registration Assistant Help</p> <p>> Step 1 > Step 2 > Step 3</p> <p>Step 3: Add Slot 10</p> <p>Previous Next</p> <p>* = Required Fields</p> <p>Add Slot 6 7 8</p> <p>* Organization ID (1000) 6 * Slots 7 Registration Status ID 8 Reservation Date (MM/dd/yyyy) 9 Time (hh:mm AM/PM) 9 Time Zone 9</p> <p>🔍 [] [] ENROLL (Enrolled) [] Oct/29/2010 11:42 AM America/New York (Eastern Standard Time) [] Add</p> <p>Edit Slots</p> <p>There are no slots selected. Please add slot before proceeding.</p> <p><i>Note: Reservation Date and Time will default to current date and time; and Time Zone will default to your administrator time zone setting.</i></p>										
<p>11 Enter any comments as necessary.</p> <p>12 Select Next.</p>	 <p>Registration Assistant Help</p> <p>> Step 1 > Step 2 > Step 3 > Step 4</p> <p>Step 4: Edit Comments 12</p> <p>Previous Next</p> <table border="1"> <thead> <tr> <th>Organization</th> <th>Slots</th> <th>Comments 11</th> </tr> </thead> <tbody> <tr> <td>HR Human Resources</td> <td>3</td> <td>For new HR employees</td> </tr> </tbody> </table>	Organization	Slots	Comments 11	HR Human Resources	3	For new HR employees				
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<p>Skip to Step 15 if no financial data is necessary.</p> <p>13 Select the Edit link to select and enter one or more chargeback account.</p> <p>14 Enter price.</p> <p>15 Select Next.</p>	 <p>Registration Assistant Help</p> <p>> Step 1 > Step 2 > Step 3 > Step 4 > Step 5</p> <p>Step 5: Edit Financial Data 15</p> <p>Previous Next</p> <p>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.</p> <table border="1"> <thead> <tr> <th>Organization</th> <th>Slots</th> <th>Chargeback Account(s)</th> <th>Price (1000)</th> <th>Currency</th> </tr> </thead> <tbody> <tr> <td>HR Human Resources</td> <td>3</td> <td>[] 13</td> <td>0.00 14</td> <td>US Dollar(USD) []</td> </tr> </tbody> </table>	Organization	Slots	Chargeback Account(s)	Price (1000)	Currency	HR Human Resources	3	[] 13	0.00 14	US Dollar(USD) []
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HR Human Resources	3	[] 13	0.00 14	US Dollar(USD) []							

<p>16 Review information.</p> <p>17 Select email confirmation option.</p> <p>18 Select Finish.</p>	
<p>A confirmation status notification displays.</p>	



Notes