

Job Aid: Registration Management

Course: Scheduling Management

Lab 5: Setting Registration Parameters

Lab 6: Registering Users for a Scheduled Offering

Lab 7: Reserving Slots for a Scheduled Offering

Prerequisites

- 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 configuring registration parameters, and registering users.

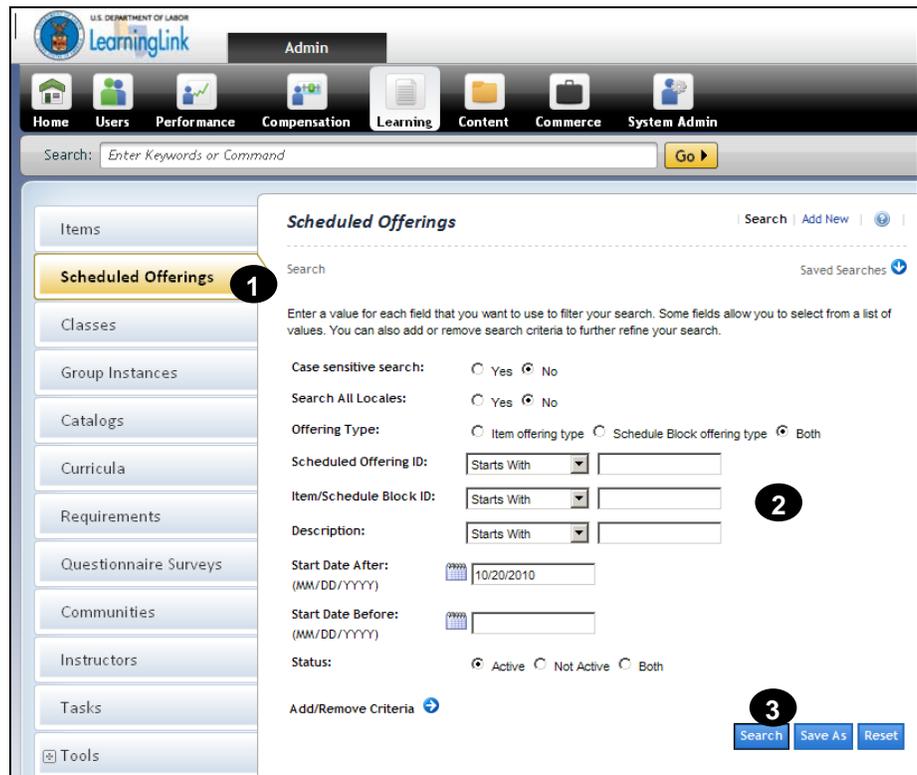
Tasks

- A. Set Self-Registration Parameters
- B. Set Registration Approval Process
- C. Register Users in an Offering
- D. Register Users in an Offering - from request list
- E. Add Slots to an Offering
- F. Reserve Slots in an Offering
- G. Change Registration Status of User

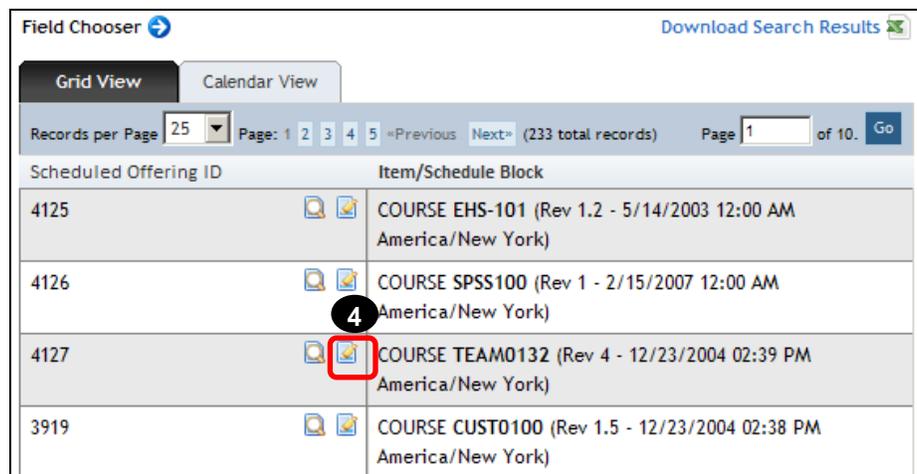
Task A. Set Self Registration Parameters

Note: Verify the Admin tab is selected.

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



- 4 Select the edit icon () for the scheduled offering.



Scheduled Offering ID	Item/Schedule Block
4125	COURSE EHS-101 (Rev 1.2 - 5/14/2003 12:00 AM America/New York)
4126	COURSE SPSS100 (Rev 1 - 2/15/2007 12:00 AM America/New York)
4127	COURSE TEAM0132 (Rev 4 - 12/23/2004 02:39 PM America/New York)
3919	COURSE CUST0100 (Rev 1.5 - 12/23/2004 02:38 PM America/New York)

- 5 Select the Summary tab of the scheduled offering.

Scroll down to the *Edit Registration* section of the screen.



- 6 Enter a registration cut-off date and time.
- 7 Set the minimum and maximum registration.
- 8 Select to check the Self Registration checkbox.
- 9 Select Apply Changes.

Edit the Registration for the Scheduled Offering

6 Registration Cut-off Date:
(MM/DD/YYYY)

Registration Cut-off Time:
(h:mm AM/PM)

Time Zone:

7 Minimum Registration:
(1000)

Maximum Registration:
(1000)

Registration Status: 0 of 25 enrolled, 0 waitlisted

Published Price: 0.00 US Dollar (USD) (Default)

8 Self Registration

Email confirmations to: Users Instructors Supervisors Contacts

9

Task B. Set Registration Approval Process

- 1 Select the Summary tab of the scheduled offering.
- 2 Select the approval process from the drop-down menu.
- 3 Check the Approval Required checkbox.
- 4 Select Apply Changes.

Summary 1

Catalog

Chargeback

Contacts

Cost Calculation

Cost Summary

Custom Fields

Materials

Notifications

Pricing

Registration

Scheduled Offering ID: 4127

Item: COURSE TEAM0132 (Rev 4 - 12/23/2004 02:39 PM America/New York)

Title: Project Team Communication Skills

Edit the Scheduled Offering
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

* = Required Fields

4

Description:

Group Instance:

* Domain:

Facility:

* Time Zone: Show in this Time Zone

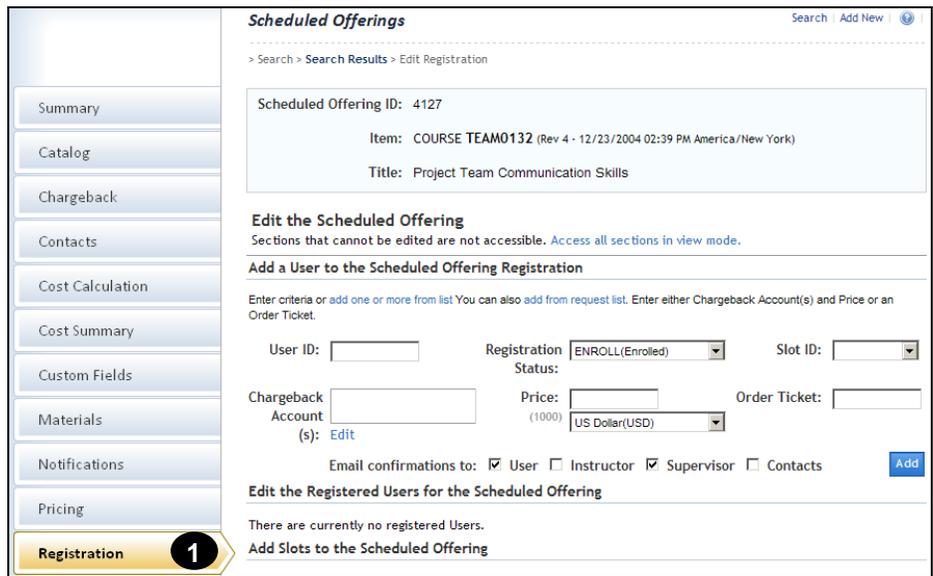
Approval Process ID: 2

Approval Required: 3

Note: Steps and users associated with approval processes are configured in the System Admin menu.

Task C. Register Users in an Offering

1 Select the **Registration** tab of the scheduled offering.
Scroll to the *Add a User to the Scheduled Offering Registration* section of the screen.



Scheduled Offerings Search Add New

> Search > Search Results > Edit Registration

Scheduled Offering ID: 4127

Item: COURSE TEAM0132 (Rev 4 - 12/23/2004 02:39 PM America/New York)

Title: Project Team Communication Skills

Edit the Scheduled Offering
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

Add a User to the Scheduled Offering Registration

Enter criteria or [add one or more from list](#) You can also [add from request list](#). Enter either Chargeback Account(s) and Price or an Order Ticket.

User ID: Registration Status: ENROLL(Enrolled) Slot ID:

Chargeback Account Price: Order Ticket:
(s): [Edit](#) (1000) US Dollar(USD)

Email confirmations to: User Instructor Supervisor Contacts [Add](#)

Edit the Registered Users for the Scheduled Offering

There are currently no registered Users.
[Add Slots to the Scheduled Offering](#)

2 Select the **add one or more from list** link to search for and select users to register.



Edit the Scheduled Offering
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

Add a User to the Scheduled Offering Registration

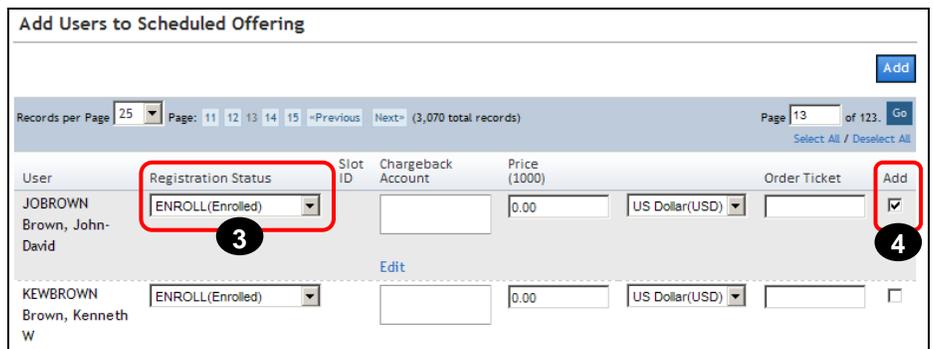
Enter criteria or [add one or more from list](#) You can also [add from request list](#). Enter either Chargeback Account(s) and Price or an Order Ticket.

User ID: Registration Status: ENROLL(Enrolled) Slot ID:

Chargeback Account Price: Order Ticket:
(s): [Edit](#) (1000) US Dollar(USD)

Email confirmations to: User Instructor Supervisor Contacts [Add](#)

3 Select the user Registration Status.
4 Check the **Add** checkbox.



Add Users to Scheduled Offering [Add](#)

Records per Page: 25 Page: 11 12 13 14 15 «Previous Next» (3,070 total records) Page 13 of 123. Go [Select All / Deselect All](#)

User	Registration Status	Slot ID	Chargeback Account	Price (1000)	Order Ticket	Add
JOBROWN Brown, John-David	ENROLL(Enrolled)			0.00	US Dollar(USD)	<input checked="" type="checkbox"/>
KEWBROWN Brown, Kenneth W	ENROLL(Enrolled)			0.00	US Dollar(USD)	<input type="checkbox"/>

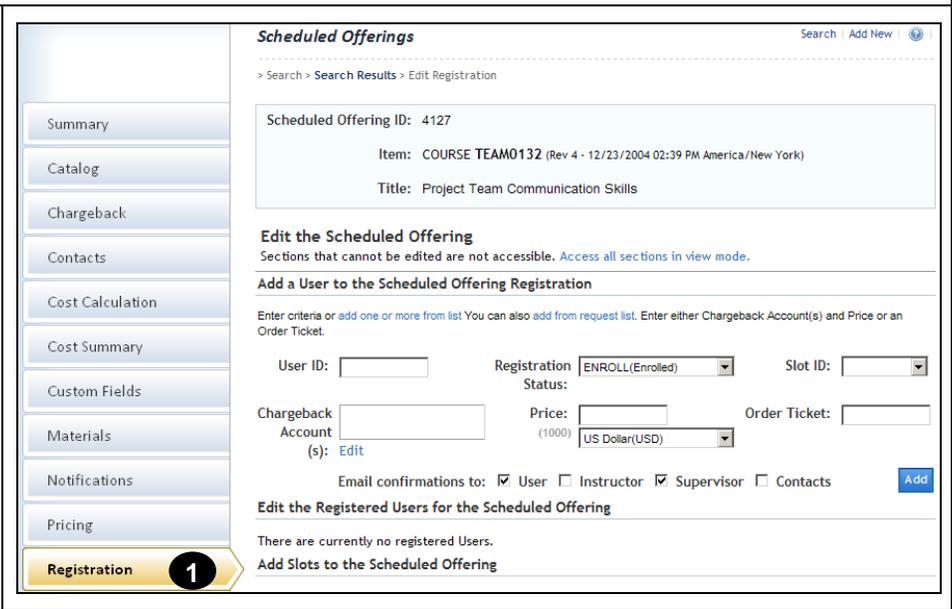
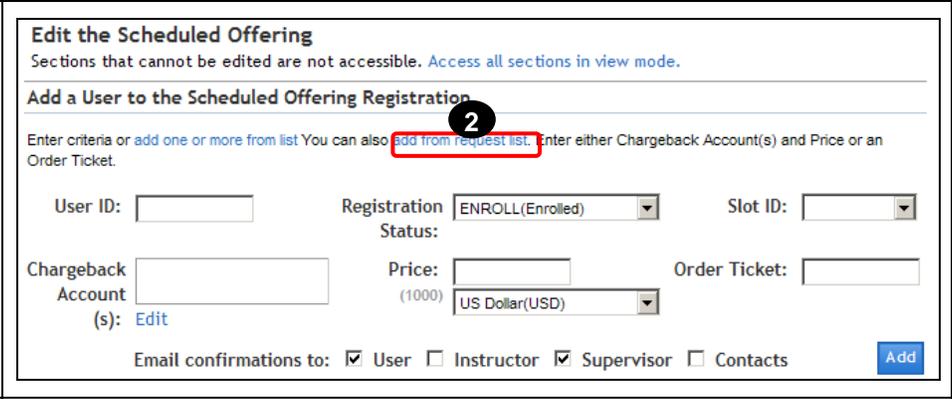
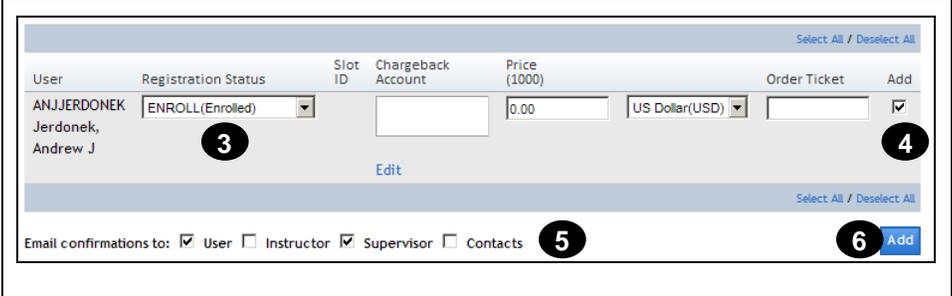
[Edit](#)

5 Select notification preferences.
6 Select **Add**.



Email confirmations to: User Instructor Supervisor Contacts [Add](#)

Task D. Register Users in an Offering - from request list

<p>1 Select the Registration tab of the scheduled offering.</p> <p>Scroll to the <i>Add a User to the Scheduled Offering Registration</i> section of the screen.</p>	
<p>2 Select the add from request list link to search for and select users to register.</p>	
<p>3 Select the user Registration Status.</p> <p>4 Check the Add checkbox.</p> <p>5 Check notification preferences.</p> <p>6 Select Add.</p>	

The user who requested this schedule is now enrolled.

Edit the Registered Users for the Scheduled Offering

[Select All / Deselect All](#)

[Remove](#) [Send Notification](#)

User	Org ID	Registration Status ▲	Slot ID	Chargeback	Shipping Information Recorded	Segment Attendance	Select
Jerdonek, Andrew J ANJJERDONEK	HR	ENROLL (Enrolled)	10/20/2010 10:33 PM America/New York	Account(s): Price: Currency ID: Order Ticket: Edit	Yes	0/3	<input type="checkbox"/>

[Select All / Deselect All](#)

Email confirmations to: Users Instructors Supervisors Contacts

Remove associated item from the learning plan

[Remove](#) [Send Notification](#)

Task E. Add Slots to an Offering

1 Select the Registration tab of the scheduled offering.

- Summary
- Catalog
- Chargeback
- Contacts
- Cost Calculation
- Cost Summary
- Custom Fields
- Materials
- Notifications
- Pricing
- Registration 1**

Scheduled Offerings

[Search](#) | [Add New](#) | [?](#)

> Search > Search Results > Edit Registration

Scheduled Offering ID: 4127

Item: COURSE TEAM0132 (Rev 4 - 12/23/2004 02:39 PM America/New York)

Title: Project Team Communication Skills

Edit the Scheduled Offering

Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

Add a User to the Scheduled Offering Registration

Enter criteria or [add one or more from list](#) You can also [add from request list](#). Enter either Chargeback Account(s) and Price or an Order Ticket.

User ID: Registration Status: ENROLL(Enrolled) ▼ Slot ID:

Chargeback Account(s): Price: (1000) US Dollar(USD) ▼ Order Ticket:

Email confirmations to: User Instructor Supervisor Contacts [Add](#)

Edit the Registered Users for the Scheduled Offering

There are currently no registered Users.

[Add Slots to the Scheduled Offering](#)

Scroll down to the *Add Slots to the Scheduled Offering* section of the screen.

- 2 Select the search icon (🔍) to search for and select the organization reserving slots.
- 3 Enter a number of slot reservations.
- 4 Check the email confirmation checkbox, if desired.
- 5 Select **Add**.

Add Slots to the Scheduled Offering

* = Required Fields

2 Organization ID

Reservation Date: (MM/DD/YYYY)

Reservation Time: (h:mm AM/PM)

Time Zone:

Number of Slots: (1000) 3

Registration Status:

Price Per Slot: (1000)

Chargeback Account (s):

4 Email confirmation to the Organization

5 **Add**

Slots have been reserved for this organization. Note the Slot ID.

Edit the Slots for the Scheduled Offering

Slot ID	Organization	Slots Reserved	Slots Used	Reservation Date (MM/DD/YYYY) Time (h:mm AM/PM) Time Zone	Chargeback Account (s)	Assigned Order Ticket	Remove
136	CUST Customers	5	0	10/20/2010 01:33 PM America/New York (Eastern Standard Time)			<input type="checkbox"/>

Apply Changes

Select All / Deselect All

4 Email confirmation to the Organization(s)

Apply Changes

Task F. Reserve Slots in an Offering

- 1 Select the **Registration** tab of the scheduled offering.

Scroll to the *Add a User to the Scheduled Offering Registration* section of the screen.

- Contacts
- Cost Calculation
- Cost Summary
- Custom Fields
- Materials
- Notifications
- Pricing
- Registration 1**

Edit the Scheduled Offering

Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

Add a User to the Scheduled Offering Registration

Enter criteria or add one or more from list. You can also add from request list. Enter either Chargeback Account(s) and Price or an Order Ticket.

User ID: Registration Status: Slot ID:

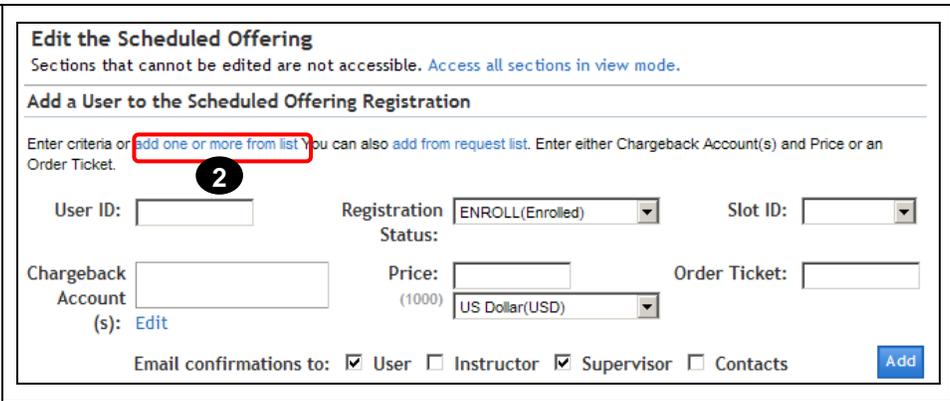
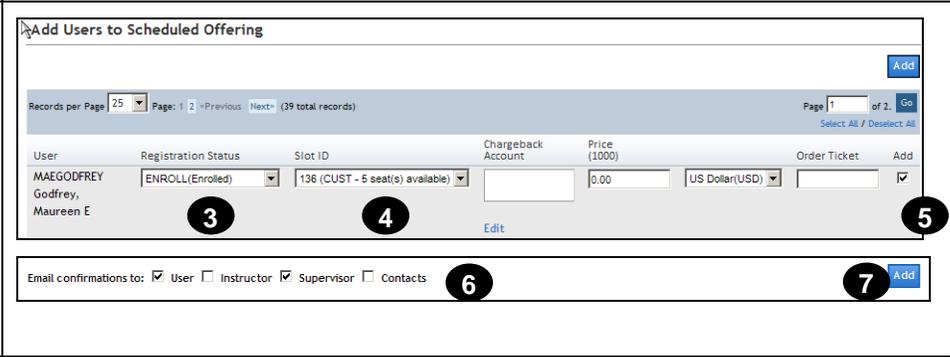
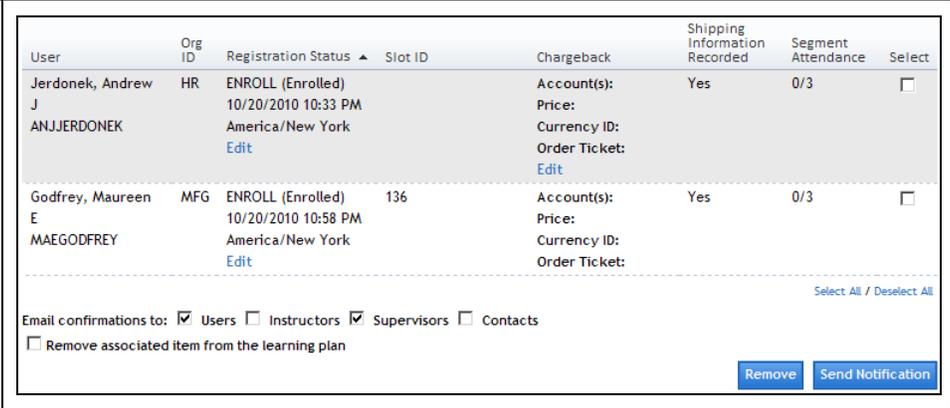
Chargeback Account (s): Price: (1000) Order Ticket:

Email confirmations to: User Instructor Supervisor Contacts **Add**

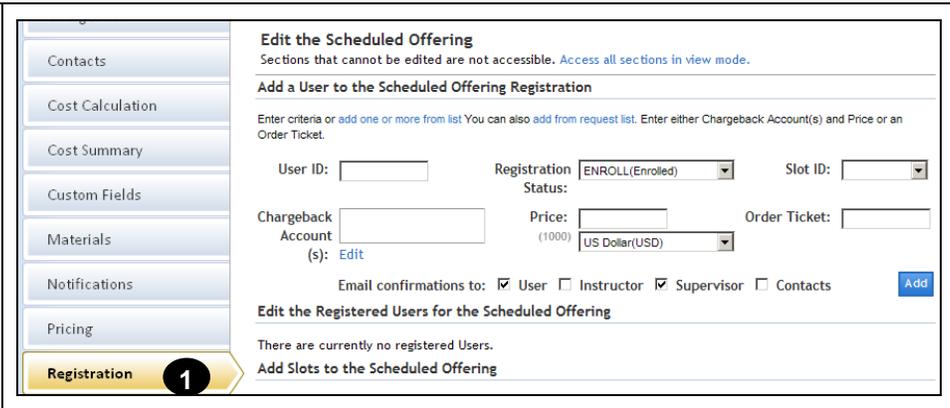
Edit the Registered Users for the Scheduled Offering

There are currently no registered Users.

Add Slots to the Scheduled Offering

<p>2 Select the add one or more from list link to search for and select users to register.</p>	
<p>3 Select the user Registration Status. 4 Select slot ID to use. 5 Check the Add checkbox. 6 Select notification preferences. 7 Select Add.</p>	
<p>The user has been registered in the scheduled offering, using one slot.</p>	

Task G. Change Registration Status of User

<p>1 Select the Registration tab of the scheduled offering.</p>	
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2 Scroll to the *Edit the Registered Users for the Scheduled Offering* section of the screen.

2 Select the **Edit** link for the user whose registration status you wish to change.

Edit the Registered Users for the Scheduled Offering

Select All / Deselect All

[Remove](#) [Send Notification](#)

User	Org ID	Registration Status	Slot ID	Chargeback	Shipping Information Recorded	Segment Attendance	Select
Jerdonek, Andrew J ANJJERDONEK	HR	ENROLL (Enrolled) 10/20/2010 10:33 PM America/New York Edit		Account(s): Price: Currency ID: Order Ticket: Edit	Yes	0/3	<input type="checkbox"/>
Godfrey, Maureen E MAEGODFREY	MFG	ENROLL (Enrolled) 10/20/2010 10:58 PM America/New York Edit	136	Account(s): Price: Currency ID: Order Ticket:	Yes	0/3	<input type="checkbox"/>

Select All / Deselect All

Email confirmations to: Users Instructors Supervisors Contacts
 Remove associated item from the learning plan

[Remove](#) [Send Notification](#)

3 Change the user Registration Status.
Change any other registration data, add comments, or select notification options.

4 Select **Apply Changes**.

5 Select **Back to Main Record**.

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.

5 [Back to Main Record](#)

Edit Registered User Details for Scheduled Offering 4127

User ID: ANJJERDONEK User Name: Jerdonek, Andrew J

Slot ID:

Registration Status: **CANCELLED** **3**

Registration Date: (MM/DD/YYYY)

Registration Time: 1:33 PM

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

Comments:

Send confirmation notification to: User Instructor Supervisor Contacts

4 [Apply Changes](#) [Reset](#)

The user's registration status has been changed.

Edit the Registered Users for the Scheduled Offering

Select All / Deselect All

[Remove](#) [Send Notification](#)

User	Org ID	Registration Status	Slot ID	Chargeback	Shipping Information Recorded	Segment Attendance	Select
Jerdonek, Andrew J ANJJERDONEK	HR	CANCELLED (Cancelled)		Account(s): Price: Currency ID: Order Ticket: Edit	Yes	0/3	<input type="checkbox"/>
Godfrey, Maureen E MAEGODFREY	MFG	ENROLL (Enrolled) 10/20/2010 10:58 PM America/New York Edit	136	Account(s): Price: Currency ID: Order Ticket:	Yes	0/3	<input type="checkbox"/>

If a user's status is Waitlist, the place on the waitlist will be indicated (for example, 1 of 5).

Edit the Registered Users for the Scheduled Offering

Select All / Deselect All
[Remove](#) [Send Notification](#)

User	Org ID	Registration Status ▲	Slot ID	Chargeback	Shipping Information Recorded	Segment Attendance	Select
Jerdonek, Andrew J ANJJERDONEK	HR	CANCELLED (Cancelled) 10/20/2010 11:08 PM America/New York Edit			Yes	0/3	<input type="checkbox"/>
Godfrey, Maureen E MAEGODFREY	MFG	ENROLL (Enrolled) 10/20/2010 10:58 PM America/New York Edit	136	Account(s): Price: Currency ID: Order Ticket:	Yes	0/3	<input type="checkbox"/>
Menz, Kristin M KRMMENZ	EHS	WAITLIST (Waitlisted 1/2) 10/20/2010 11:11 PM America/New York Edit		Account(s): Price: Currency ID: Order Ticket:	Yes	0/3	<input type="checkbox"/>
Rodrigue, Crystal D CRDRDRIGUE	IT	WAITLIST (Waitlisted 2/2) 10/20/2010 11:11 PM America/New York Edit		Account(s): Price: Currency ID: Order Ticket:	Yes	0/3	<input type="checkbox"/>

Notes