Job Aid: Registration Management	Course: Scheduling Management Lab 5: Setting Registration Parameters Lab 6: Registering Learners for a Scheduled Offering Lab 7: Reserving Slots for a Scheduled Offering

Description

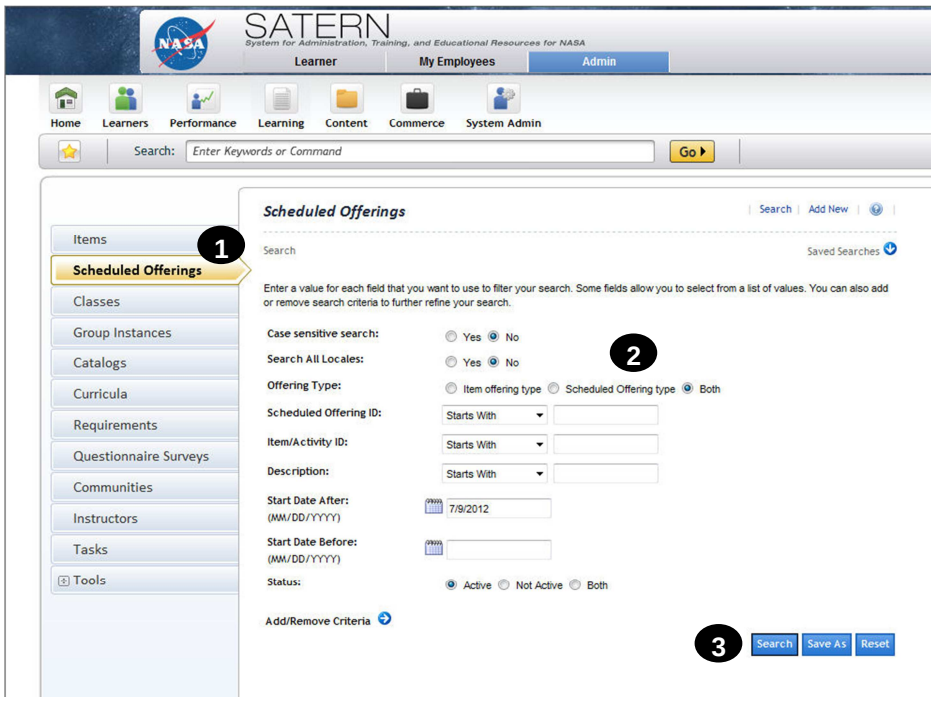
The purpose of this job aid is to guide Administrators through the step-by-step process of configuring registration parameters and registering Learners.

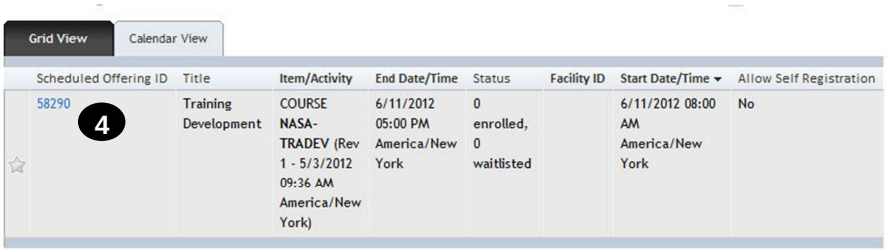
Tasks

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

Task A. Set Self-Registration Parameters

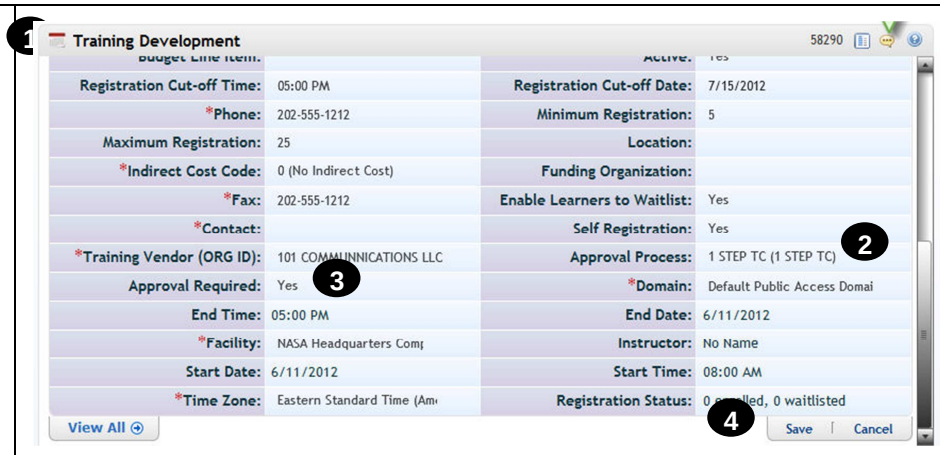
1. Navigate to **Learning > Scheduled Offerings.**
2. Enter criteria to search for a Scheduled Offering.
3. Click **Search.**



4	Click the Scheduled Offering ID link to access the scheduled offering in edit mode.	
	Scroll to the bottom of the core area to view Registration information. *(**Note**: you may need to click View All to see all available fields)*	
5	Enter a registration cut-off time as hh:mm AM/PM.	
6	Enter a registration cut-off date.	
7	Enter the minimum registrations.	
8	Enter the maximum registrations.	
9	Set the Enable Learners to Waitlist option to **Yes**.	
10	Set the Self Registration option to **Yes**.	
11	Click **Save**.	

Task B. Set Registration Approval Process

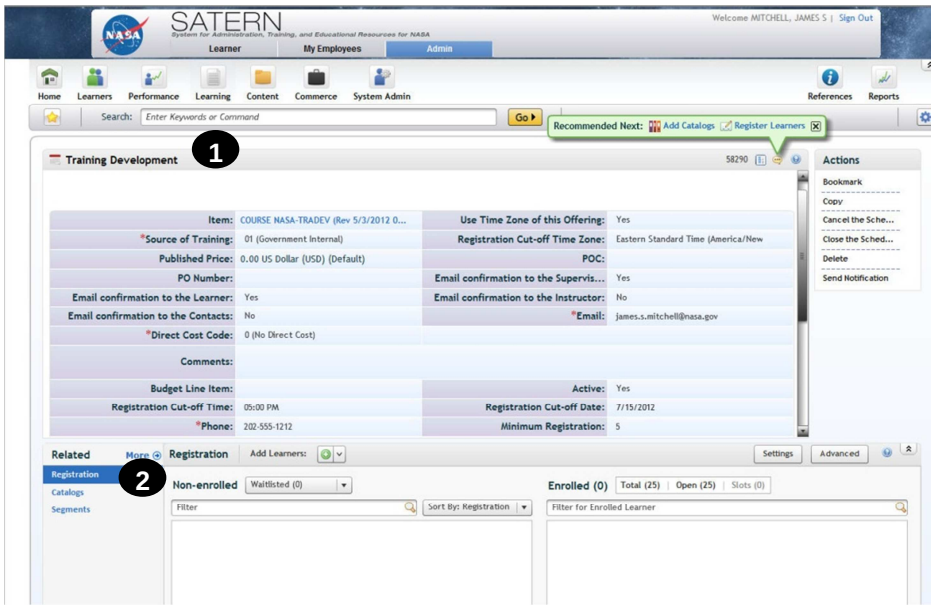
1. Open the scheduled offering record in edit mode.
2. Select the approval process from the drop-down menu.
3. Set the Approval Required option to **Yes**.
4. Click **Save**.



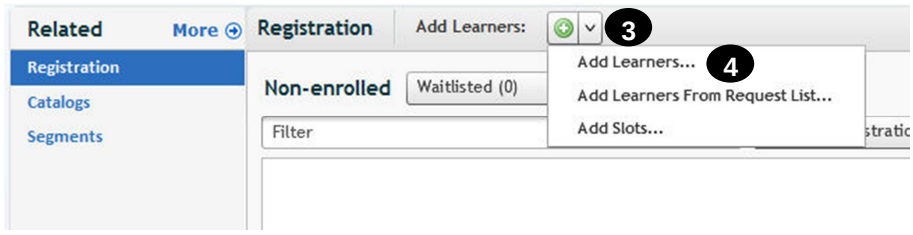
***Note**: Steps and Learners associated with approval processes are configured in the System Admin menu.*

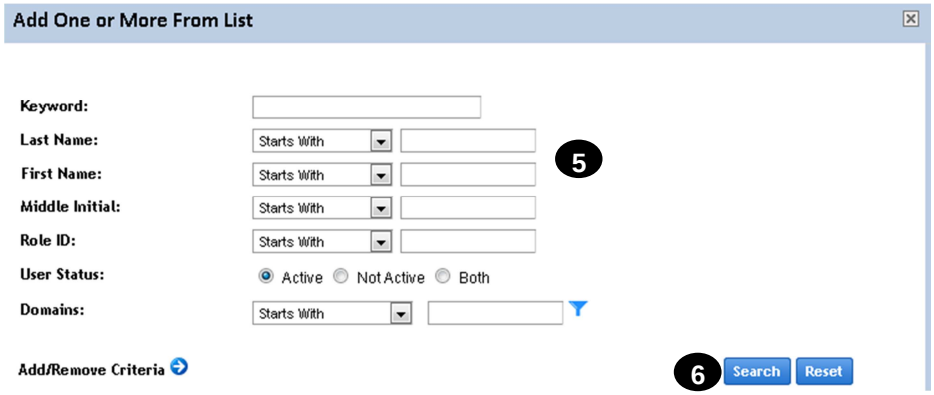
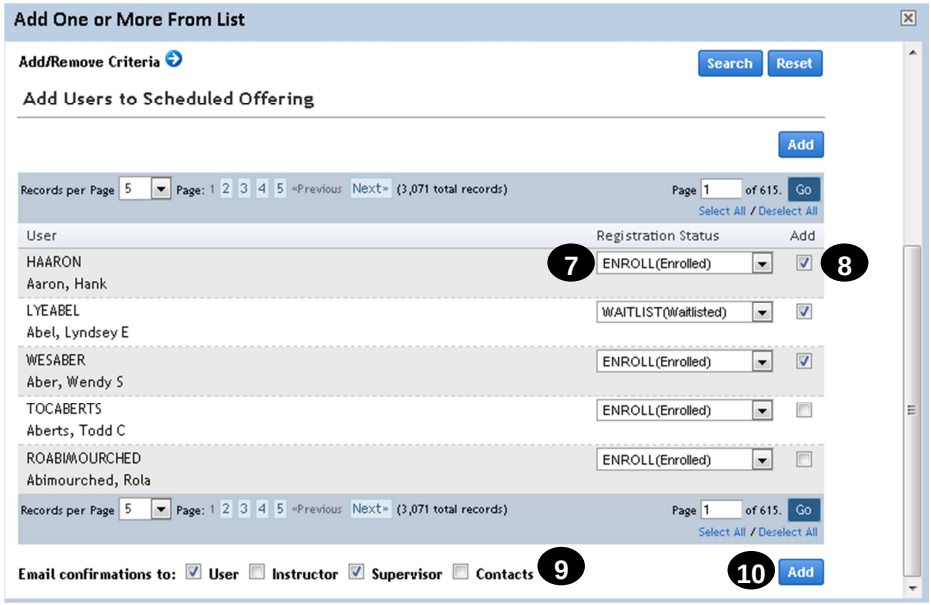
Task C. Register Learners in an Offering

1. Search for and select the scheduled offering.
2. Select the **Registration** tab from the Related area.



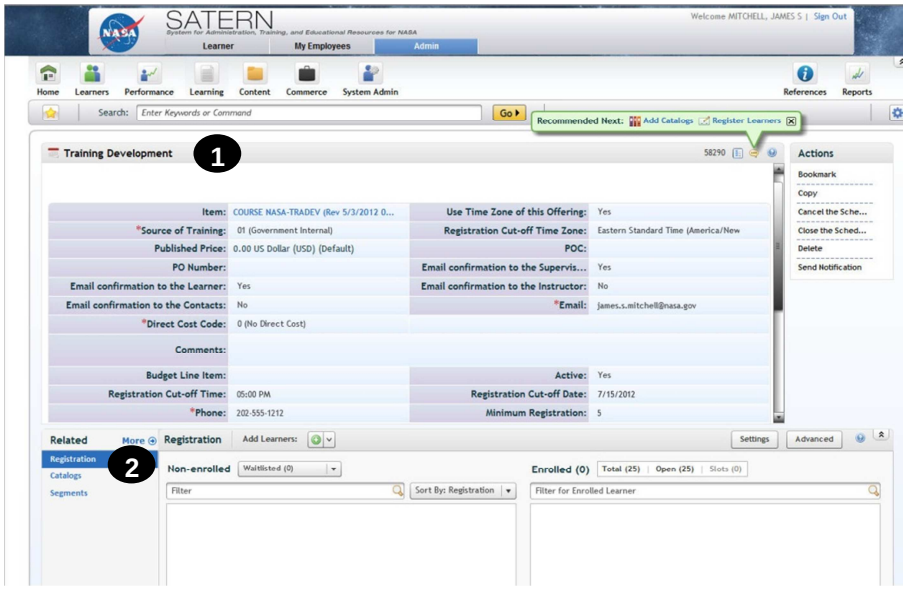
3. Click the **Add Learners** button ( ) to search for and select Learners to register.
4. Select **Add Learners** from the drop-down menu.



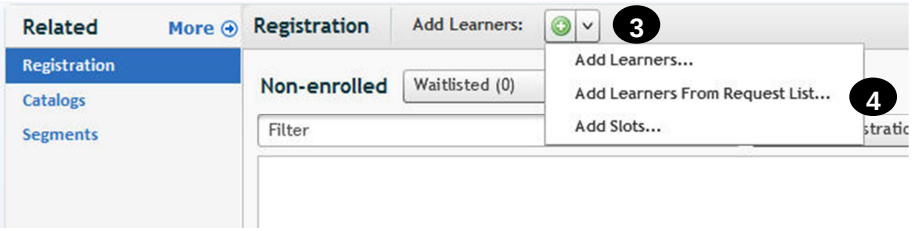
5	Enter criteria to search for Learners to register for the offering.	
6	Click **Search**.	
7	From the search results list, select the Learner registration status from the drop-down menu.	
8	Check the **Add** checkbox.	
9	Select notification preferences.	
10	Click **Add**.	

Task D. Register Learners in an Offering – from request list

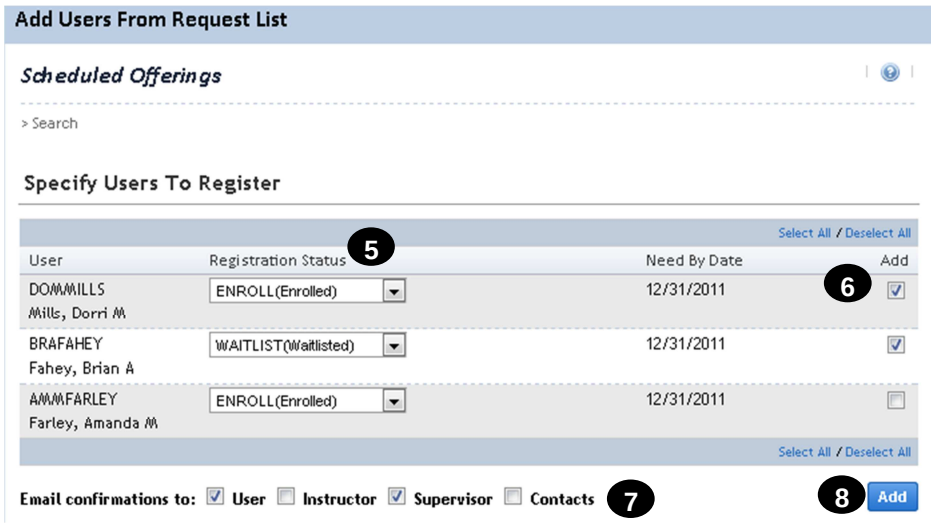
1. Search for and select the scheduled offering.
2. Select the **Registration** tab from the Related area.



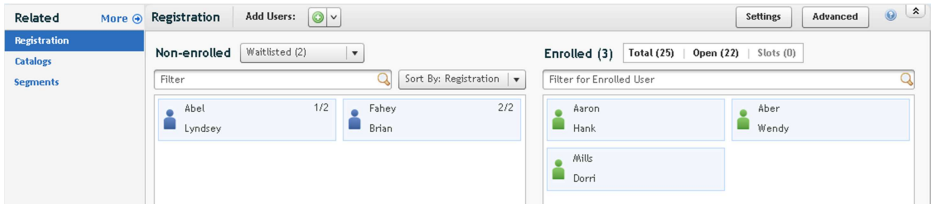
3. Click the **Add Learners** button ( ).
4. Select **Add Learners From Request List** from the drop-down menu.



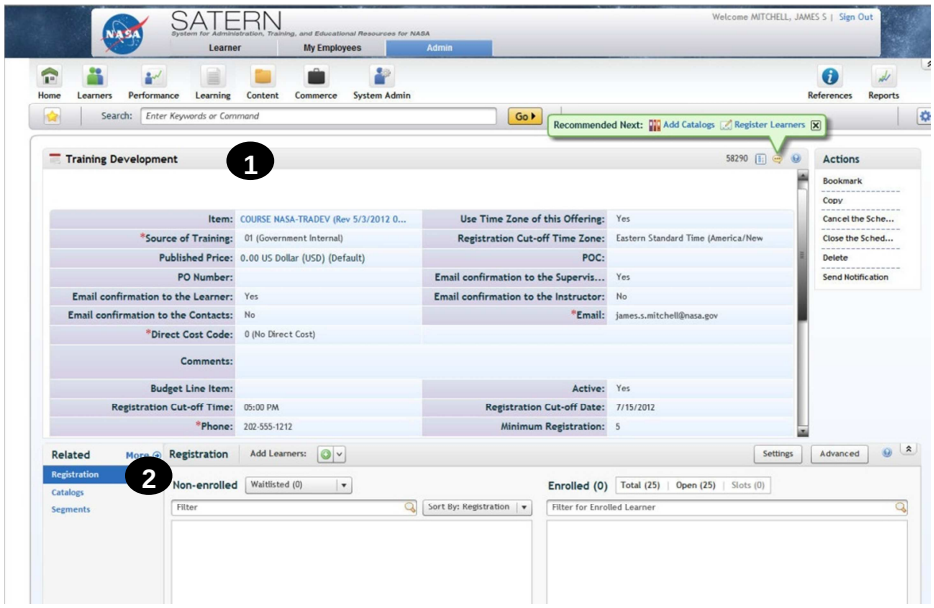
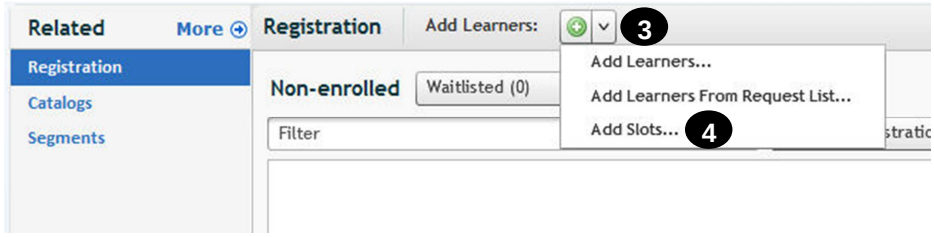
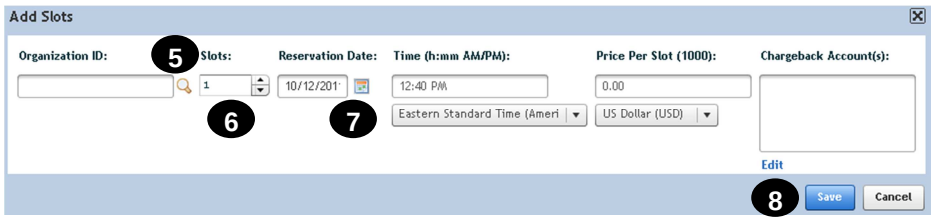
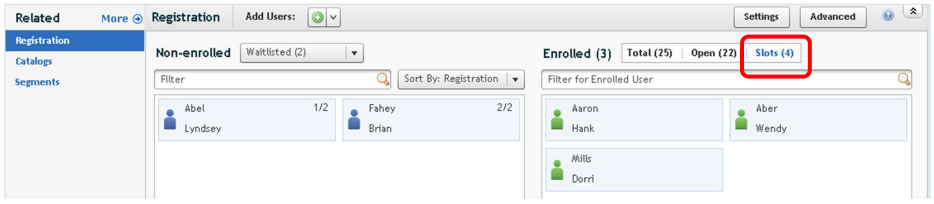
5. Select the Learner Registration Status.
6. Check the **Add** checkbox.
7. Check notification preferences.
8. Click **Add**.



The Learners who requested this schedule is now enrolled accordingly.

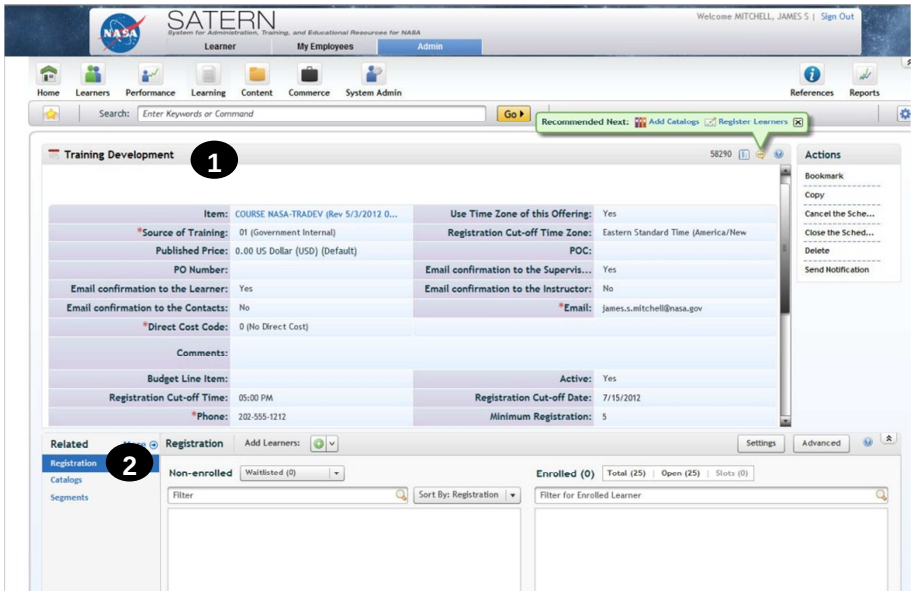


Task E. Add Slots to an Offering

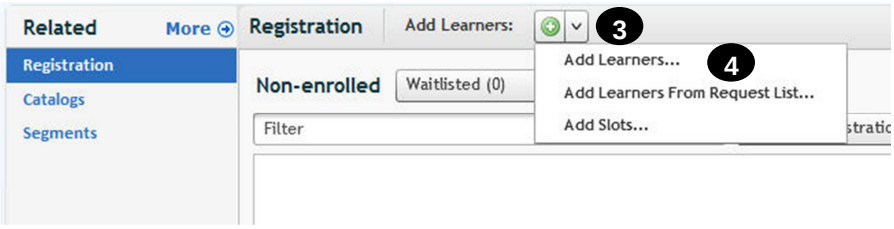
1	Search for and select the scheduled offering.	
2	Select the **Registration** tab from the Related area.	
3	Click the **Add Learners** button ( ).	
4	Select **Add Slots** from the drop-down menu.	
5	Click the **search icon** to search for and select the organization reserving slots.	
6	Enter a number of slot reservations.	
7	Select the reservation date.	
8	Click **Save**.	
	Slots have been reserved for this organization.	

Task F. Reserve Slots in an Offering

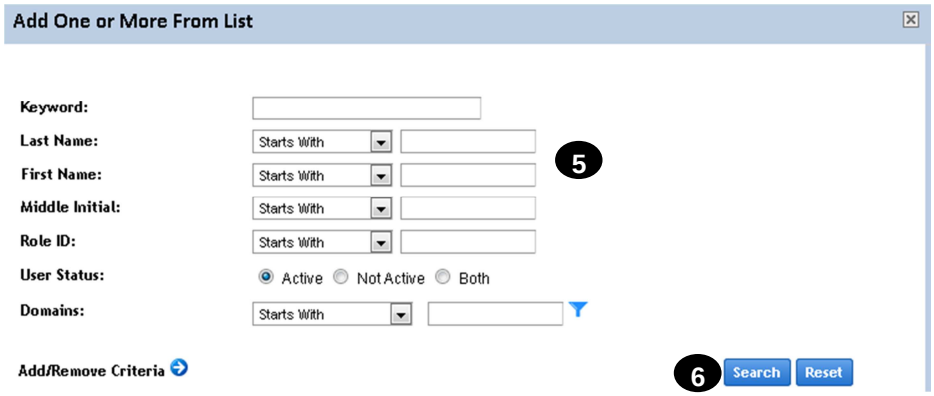
1. Search for and select the scheduled offering.
2. Select the **Registration** tab from the Related area.

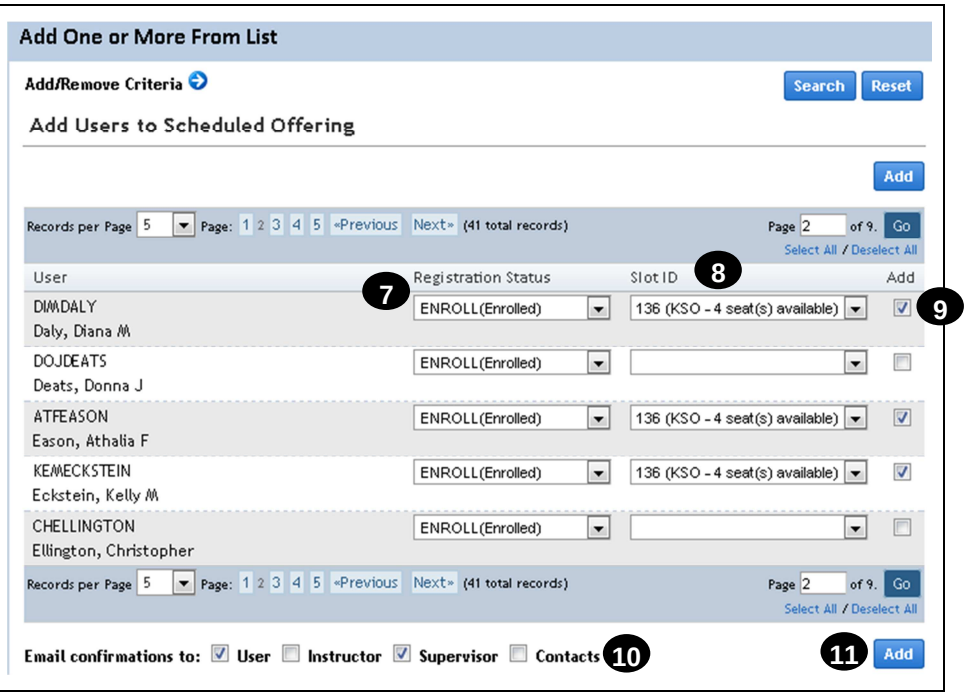


3. Click the **Add Learners** button ( ) to search for and select Learners to register.
4. Select **Add Learners** from the drop-down menu.

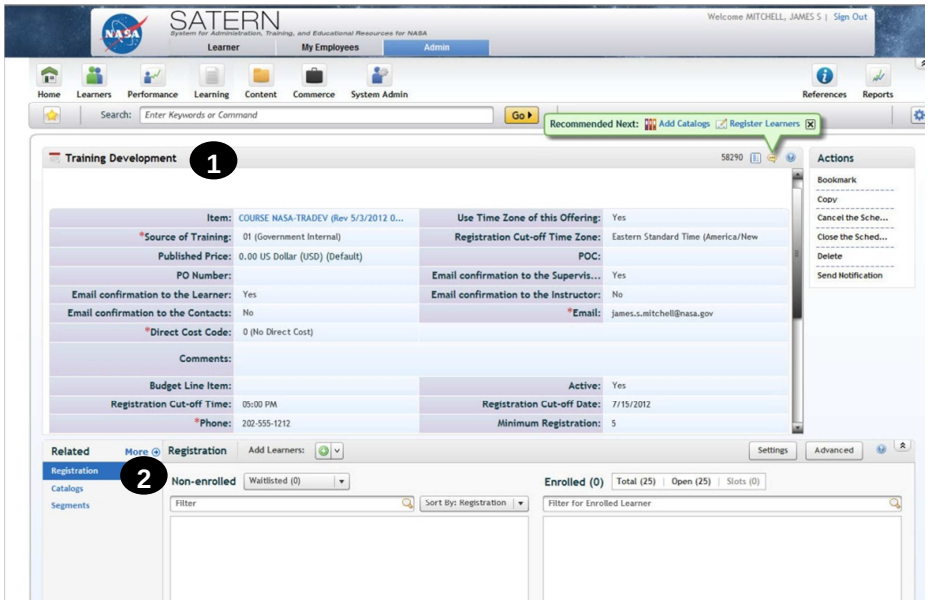


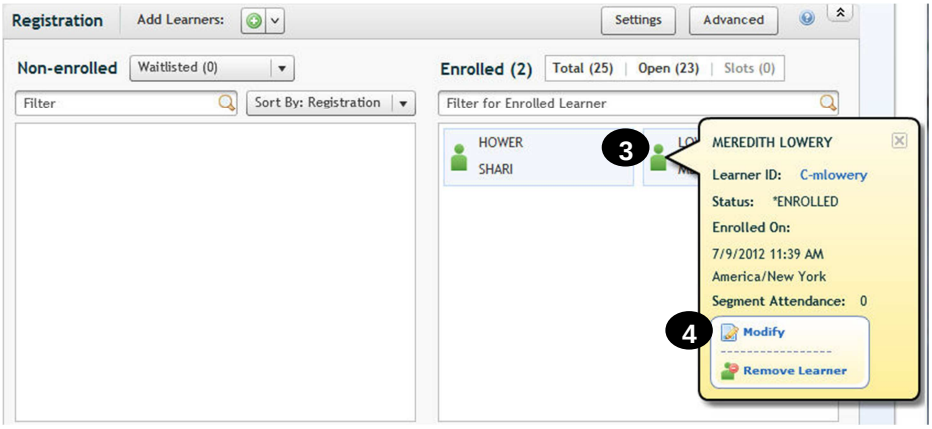
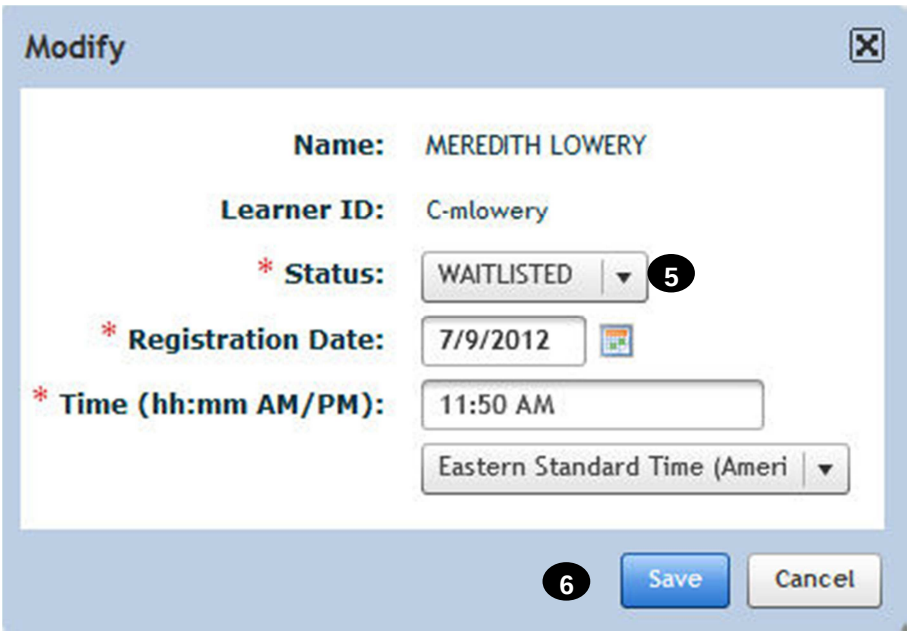
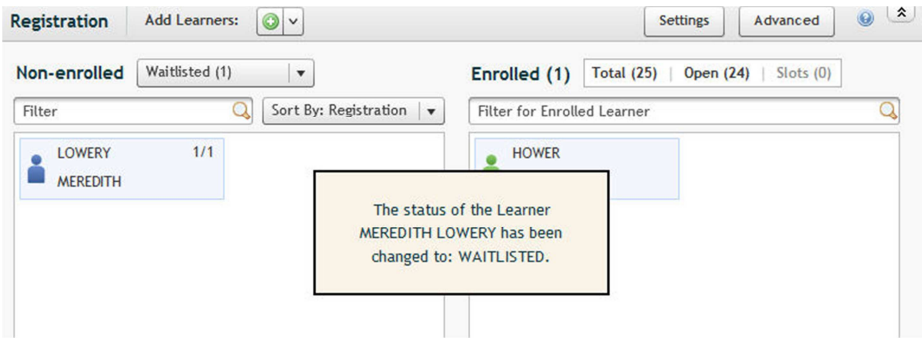
5. Enter criteria to search for Learners to register for the offering.
6. Click **Search**.



7	Select the Learner Registration Status.	
8	Select slot ID to use.	
9	Check the **Add** checkbox.	
10	Select notification preferences.	
11	Click **Add**.	

Task G. Change Registration Status of Learner

1	Search for and select the scheduled offering.	
2	Select the **Registration** tab from the Related area.	

3	Hover your mouse over the Learner for whom to change the registration status.	
4	Select **Modify**.	
5	Change the Learner Registration Status. Change any other registration data.	
6	Click **Save**. ***Note:*** *Admins who withdraw a Learner 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 Learner from the dependent offering.*	
	The Learner's registration status has been changed.