

## Job Aid: Registration Assistant Tool

### Purpose

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

In this Job Aid, you will learn how to:

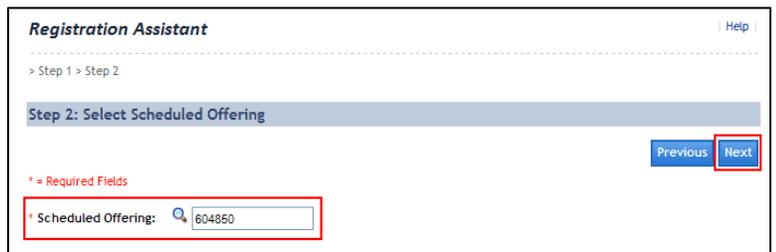
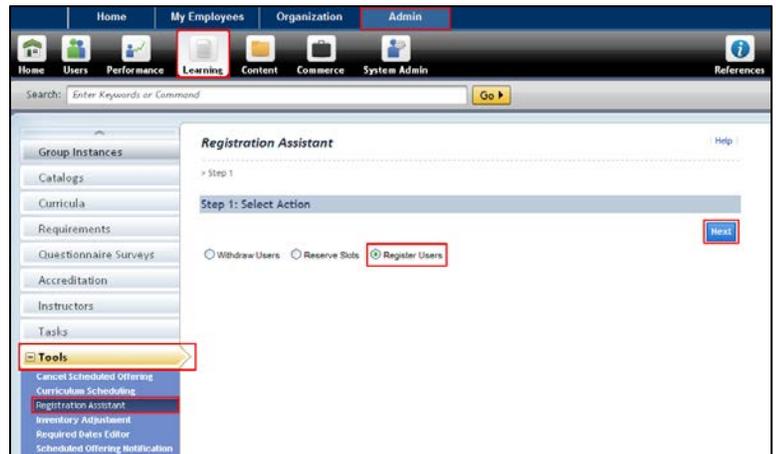
- Use Registration Assistant to Register Users in a Scheduled Offering
- Use Registration Assistant to Withdraw Users from a Scheduled Offering
- Use Registration Assistant to Add Slots to a Scheduled Offering

### Task A. Use Registration Assistant to Register Users in a Scheduled Offering

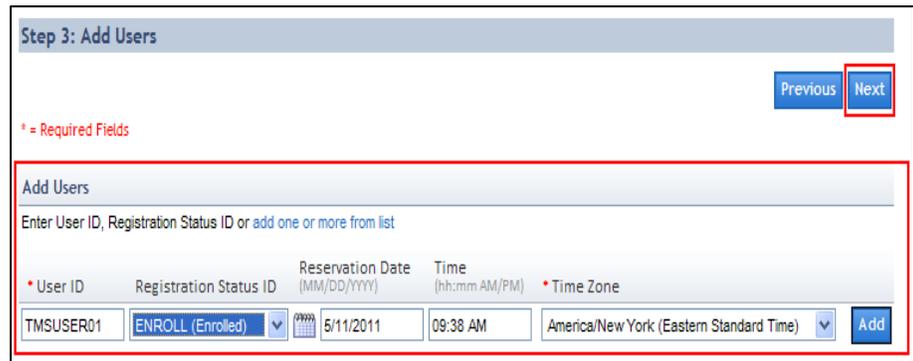
#### Talent Profile: Accessing

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

1. Navigate to **Learning > Tools > Registration Assistant**. *Step 1: Select Action* of the Registration Assistant displays.
2. Select the **Register Users** radio button.
3. Click **Next**. *Step 2: Select Scheduled Offering* of the Registration Assistant displays.
4. Enter the **Scheduled Offering ID** or click the **Search** icon to search for and select a scheduled offering.
5. Click **Next**. *Step 3: Add Users* of the Registration Assistant displays.



6. Enter the **User ID**.
7. Select the **Registration Status ID** from the drop-down menu.
8. Click **Add** or click the **add one or more from list** link to search and select users to add.
9. Click **Next**. *Step 4: Edit Assignment* of the Registration Assistant displays.



**Step 3: Add Users**

Previous Next

\* = Required Fields

Add Users

Enter User ID, Registration Status ID or add one or more from list

* User ID	Registration Status ID	Reservation Date (MM/DD/YYYY)	Time (hh:mm AM/PM)	* Time Zone
TMSUSER01	ENROLL (Enrolled)	5/11/2011	09:38 AM	America/New York (Eastern Standard Time)

Add

10. Enter any **Comments** as necessary.
11. Click **Next**. *Step 5: Edit Financial Data* of the Registration Assistant displays. Skip to Step 14 if no financial data is necessary.



**Registration Assistant** | Help

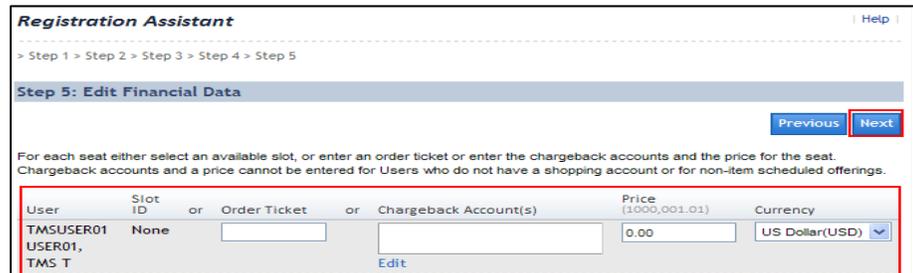
> Step 1 > Step 2 > Step 3 > Step 4

**Step 4: Edit Assignment**

Previous Next

User	Comments
TMSUSER01 USER01, TMS T	Example 1001

12. If applicable, select the **Slot ID** from the drop-down menu.
13. Click **Next**. *Step 6: Record Registration* of the Registration Assistant displays.



**Registration Assistant** | Help

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5

**Step 5: Edit Financial Data**

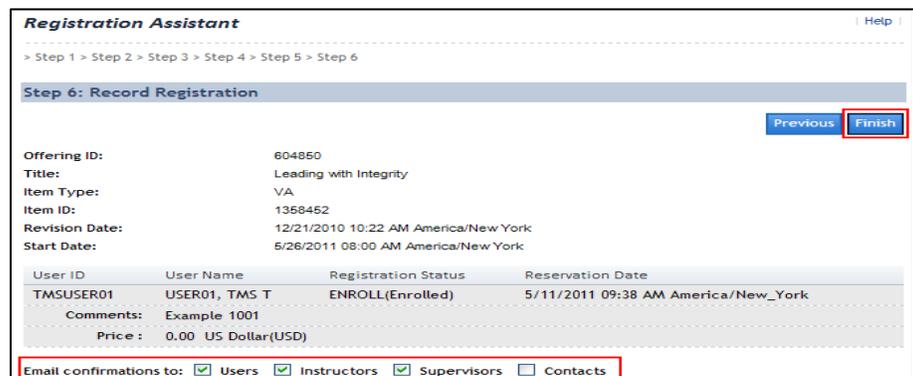
Previous Next

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.

User	Slot ID	or	Order Ticket	or	Chargeback Account(s)	Price (1000,001.01)	Currency
TMSUSER01 USER01, TMS T	None					0.00	US Dollar(USD)

Edit

14. Review the information.
15. Select **Email confirmations to preferences**.
16. Click **Finish**. A confirmation status notification displays.



**Registration Assistant** | Help

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6

**Step 6: Record Registration**

Previous Finish

Offering ID: 604850  
 Title: Leading with Integrity  
 Item Type: VA  
 Item ID: 1358452  
 Revision Date: 12/21/2010 10:22 AM America/New York  
 Start Date: 5/26/2011 08:00 AM America/New York

User ID	User Name	Registration Status	Reservation Date
TMSUSER01	USER01, TMS T	ENROLL(Enrolled)	5/11/2011 09:38 AM America/New_York

Comments: Example 1001  
 Price: 0.00 US Dollar(USD)

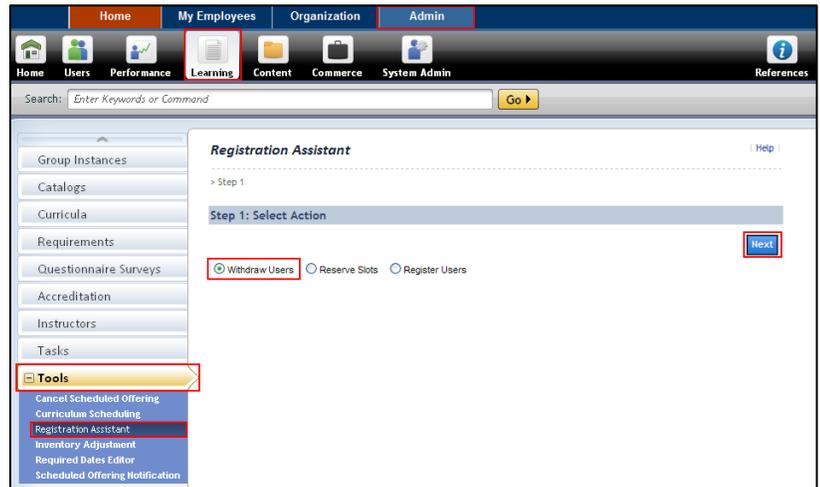
Email confirmations to:  Users  Instructors  Supervisors  Contacts

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

### Talent Profile: Accessing

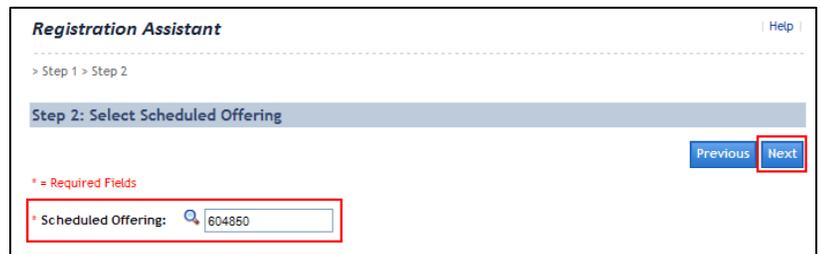
**Note:** Verify that the **Admin** tab is selected.

1. Navigate to **Learning > Tools > Registration Assistant**.
2. Select the **Withdraw Users** radio button.
3. Click **Next**. *Step 2: Select Scheduled Offering* of the Registration Assistant displays.



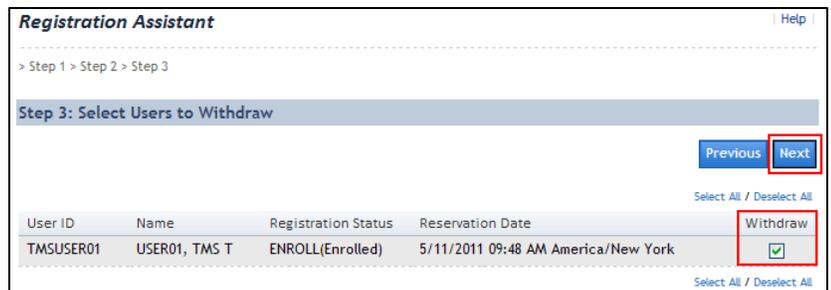
The screenshot shows the TMS interface with the 'Admin' tab selected. The 'Tools' menu is expanded, and 'Registration Assistant' is highlighted. The 'Withdraw Users' radio button is selected, and the 'Next' button is visible.

4. Enter the **Scheduled Offering ID** or click the **Search** icon to search for and select a scheduled offering.
5. Click **Next**. *Step 3: Select Users to Withdraw* of the Registration Assistant displays.



The screenshot shows the 'Step 2: Select Scheduled Offering' screen. The 'Scheduled Offering' field contains the ID '604850'. The 'Next' button is visible.

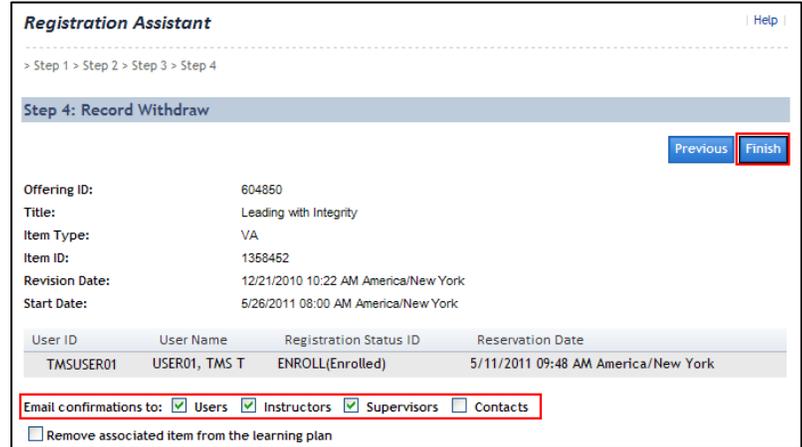
6. Click the **Withdraw** checkbox for the users you wish to withdraw from the scheduled offering.
7. Click **Next**. *Step 4: Record Withdraw* of the Registration Assistant displays.



The screenshot shows the 'Step 3: Select Users to Withdraw' screen. A table lists users, and the 'Withdraw' checkbox for the user 'TMSUSER01' is checked. The 'Next' button is visible.

User ID	Name	Registration Status	Reservation Date	Withdraw
TMSUSER01	USER01, TMS T	ENROLL(Enrolled)	5/11/2011 09:48 AM America/New York	<input checked="" type="checkbox"/>

8. Select **Email confirmations to:** preferences.
9. Click **Finish**. A confirmation status notification displays.



**Registration Assistant** | Help

> Step 1 > Step 2 > Step 3 > Step 4

**Step 4: Record Withdraw**

Previous **Finish**

Offering ID: 604850  
 Title: Leading with Integrity  
 Item Type: VA  
 Item ID: 1368452  
 Revision Date: 12/21/2010 10:22 AM America/New York  
 Start Date: 5/26/2011 08:00 AM America/New York

User ID	User Name	Registration Status ID	Reservation Date
TMSUSER01	USER01, TMS T	ENROLL(Enrolled)	5/11/2011 09:48 AM America/New York

Email confirmations to:  Users  Instructors  Supervisors  Contacts

Remove associated item from the learning plan

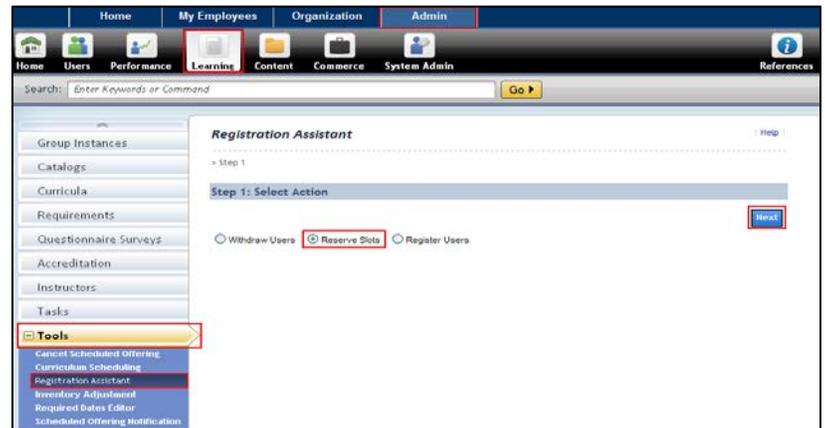


## Task C. Use Registration Assistant to Add Slots in a Scheduled Offering

### Talent Profile: Accessing

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

1. Navigate to **Learning > Tools > Registration Assistant**.  
*Step 1: Select Action* of the Registration Assistant displays.
2. Select the **Reserve Slots** radio button.
3. Click **Next**. *Step 2: Select Scheduled Offering* of the Registration Assistant displays.
4. Enter the **Scheduled Offering ID** or click the **Search** icon to search for and select a scheduled offering.
5. Click **Next**. *Step 3: Select Users to Withdraw* of the Registration Assistant displays.



Home My Employees Organization Admin

Home Users Performance **Learning** Content Commerce System Admin References

Search: Enter Keywords or Command

**Registration Assistant** | Help

> Step 1

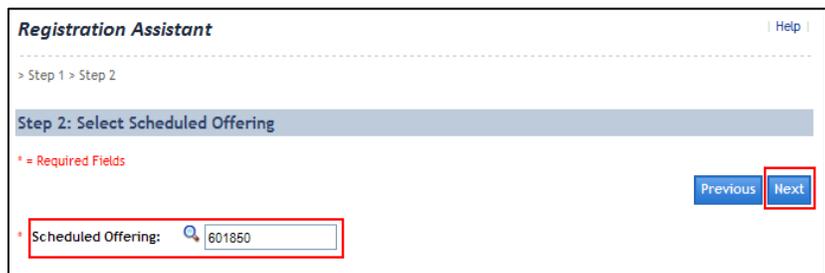
**Step 1: Select Action**

Withdraw Users  **Reserve Slots**  Register Users

**Next**

**Tools**

- Cancel Scheduled Offering
- Curriculum Scheduling
- Registration Assistant
- Inventory Adjustment
- Required Dates Editor
- Scheduled Offering Notification



**Registration Assistant** | Help

> Step 1 > Step 2

**Step 2: Select Scheduled Offering**

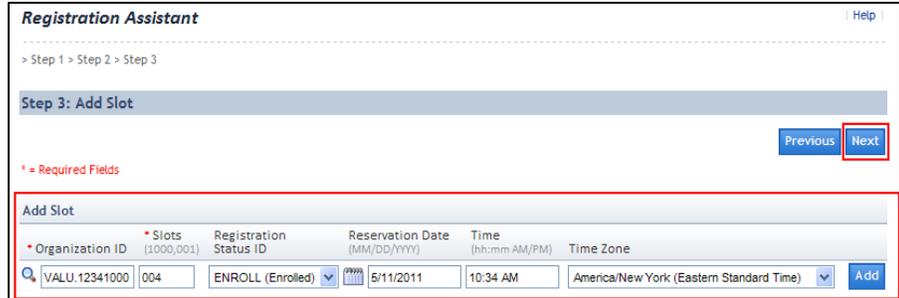
\* = Required Fields

\* Scheduled Offering:

Previous **Next**

## Talent Profile: Editing

1. Enter the **Organization ID** for whom the slots are being reserved or click the **Search** icon to search for and select an organization ID.
2. Enter the number of slots in the **Slots** field.
3. Select the **Registration Status ID** from drop-down menu.
4. Click **Add**.
5. Click **Next**. *Step 4: Edit Comments* of the Registration Assistant displays.
6. Enter any **Comments** as necessary.
7. Click **Next**. *Step 5: Edit Financial Data* of the Registration Assistant displays.
8. Skip to Step 12 if no financial data is necessary.
9. Click the **Edit** link to select and enter one or more chargeback accounts.
10. Complete the **Price** field.
11. Click **Next**. *Step 6: Record Registration* of the Registration Assistant displays.
12. Review the information.
13. Select **Email confirmations to:** preferences.
14. Click **Finish**. A confirmation status notification displays.



**Registration Assistant** | Help

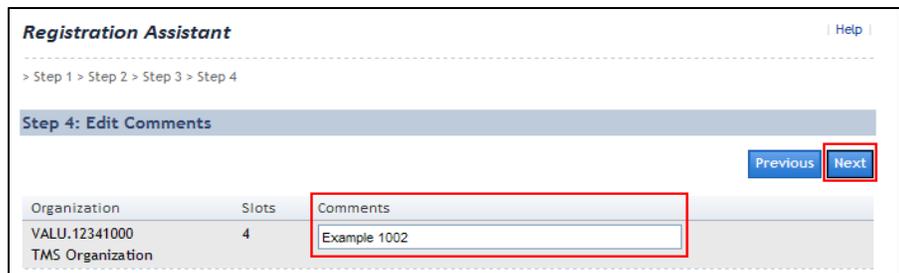
> Step 1 > Step 2 > Step 3

**Step 3: Add Slot** Previous Next

\* = Required Fields

Organization ID	Slots (1000,001)	Registration Status ID	Reservation Date (MM/DD/YYYY)	Time (hh:mm AM/PM)	Time Zone
VALU.12341000	004	ENROLL (Enrolled)	5/11/2011	10:34 AM	America/New York (Eastern Standard Time)

Add

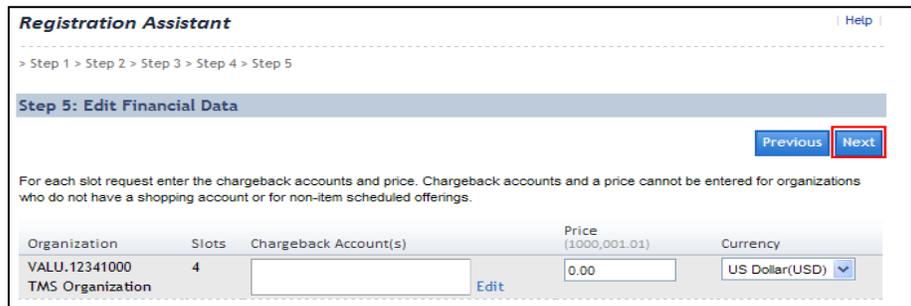


**Registration Assistant** | Help

> Step 1 > Step 2 > Step 3 > Step 4

**Step 4: Edit Comments** Previous Next

Organization	Slots	Comments
VALU.12341000	4	Example 1002
TMS Organization		



**Registration Assistant** | Help

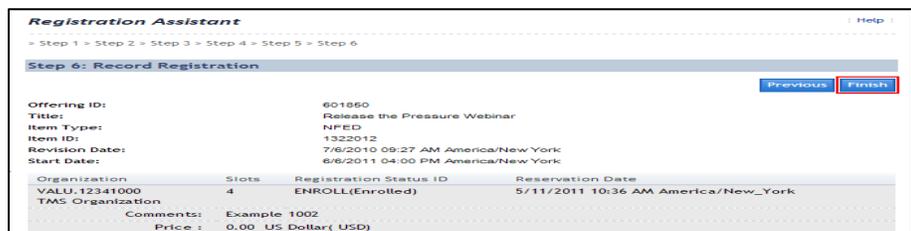
> Step 1 > Step 2 > Step 3 > Step 4 > Step 5

**Step 5: Edit Financial Data** Previous Next

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.

Organization	Slots	Chargeback Account(s)	Price (1000,001.01)	Currency
VALU.12341000	4		0.00	US Dollar(USD)
TMS Organization				

Edit



**Registration Assistant** | Help

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6

**Step 6: Record Registration** Previous Finish

Offering ID: 601860  
 Title: Release the Pressure Webinar  
 Item Type: NFEED  
 Item ID: 1322012  
 Revision Date: 7/6/2010 09:27 AM America/New York  
 Start Date: 6/6/2011 04:00 PM America/New York

Organization	Slots	Registration Status ID	Reservation Date
VALU.12341000	4	ENROLL(Enrolled)	5/11/2011 10:36 AM America/New York
TMS Organization			

Comments: Example 1002  
 Price: 0.00 US Dollar( USD)