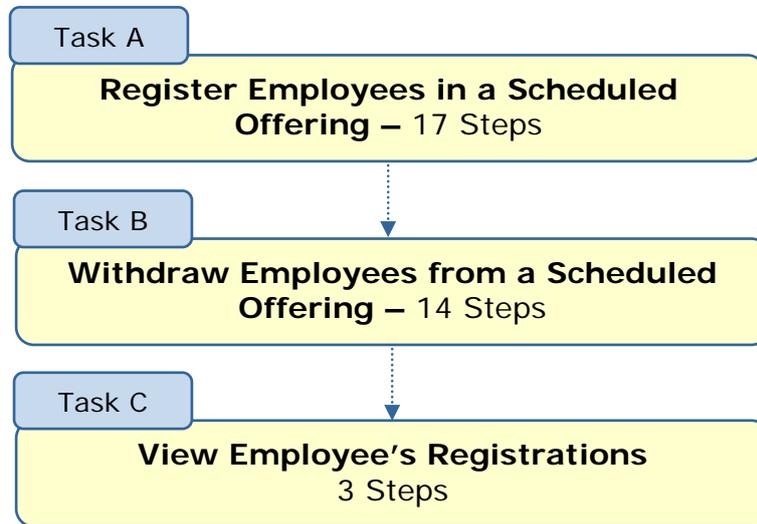


Job Aid: Registration (Supervisor)

Purpose

The purpose of this job aid is to guide supervisor users through the step-by-step process of managing the registration of employees into scheduled offerings within SuccessFactors Learning.

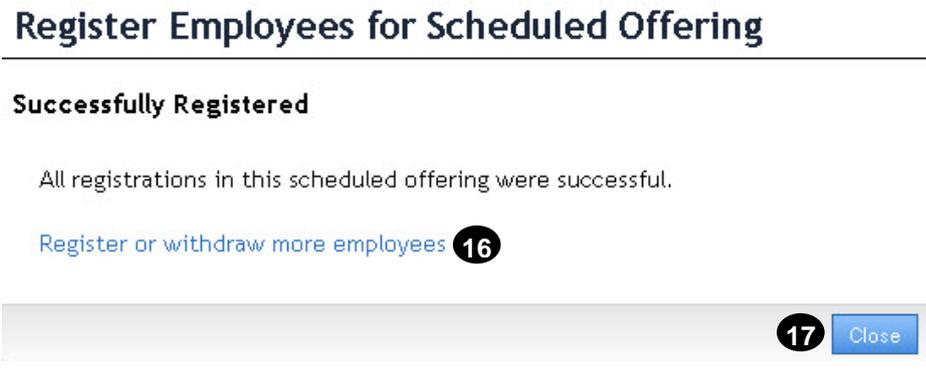


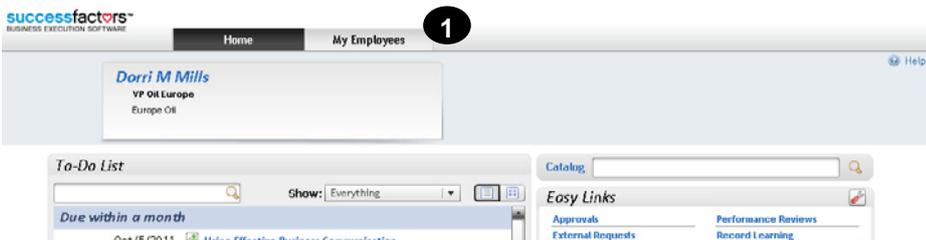
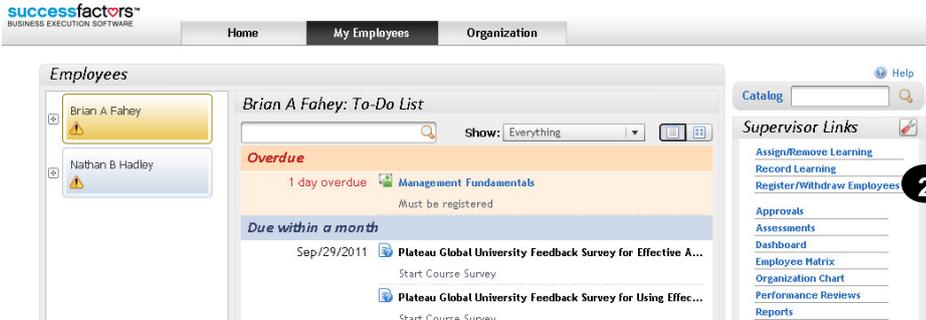
Task A. Register Employees in a Scheduled Offering

<p>1 From the Home page, click the My Employees tab.</p>	
<p>2 Click the Register/Withdraw Employees Supervisor Link.</p>	

<p>3 Click Register Employees. 4 Click Continue.</p>		<p>Register/Withdraw Employees</p> <p>Select the type of action you would like to take:</p> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>3</p>  <p>Register Employees Register Employees into a scheduled offering</p> </div> <div style="text-align: center;">  <p>Withdraw Employees Withdraw Employees from a scheduled offering.</p> </div> </div> <p style="text-align: right;">4 Continue Cancel</p>																
<p>5 Click the Scheduled Offering Add icon (+).</p>		<p>Register Employees for Scheduled Offering</p> <p>Enter Registration Details * Required</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p><input type="checkbox"/> Scheduled Offering 5 +</p> <p>No offering selected</p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p><input type="checkbox"/> Employees +</p> <p>No employees selected</p> </div> <p style="text-align: right;">Back Continue Cancel</p> <p><i>Note: Results will depend on catalog access.</i></p>																
<p>6 Enter keywords to search for the scheduled offering. 7 Click Search.</p>		<p>Scheduled Offerings</p> <p>Search for Scheduled Offering</p> <p>Keywords: <input type="text"/> 6</p> <p><input checked="" type="checkbox"/> Exact Phrase</p> <p style="text-align: right;">7 Search Cancel</p>																
<p>8 Click the Select link for the scheduled offering option into which to register your employee(s).</p>		<p>Select Offerings</p> <p>Search Results Keywords: Not Specified Exact Phrase: Yes</p> <p>Records per Page: 25 Page: 1 2 3 4 5 «Previous Next» (164 total records)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Start Date</th> <th>Description</th> <th>Facility & Location</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td>Jan/23/2013 08:00 AM America/New York</td> <td>Basics Electronics</td> <td>Regional Training Center</td> <td>8 Select</td> </tr> <tr> <td>Dec/21/2011 08:00 AM America/New York</td> <td>Basics Electronics</td> <td>Regional Training Center</td> <td>Select</td> </tr> <tr> <td>Jun/27/2012 08:00 AM America/New York</td> <td>Basics Electronics</td> <td>Regional Training Center</td> <td>Select</td> </tr> </tbody> </table> <p>Records per Page: 25 Page: 1 2 3 4 5 «Previous Next» (164 total records)</p> <p style="text-align: right;">Cancel</p>	Start Date	Description	Facility & Location	Select	Jan/23/2013 08:00 AM America/New York	Basics Electronics	Regional Training Center	8 Select	Dec/21/2011 08:00 AM America/New York	Basics Electronics	Regional Training Center	Select	Jun/27/2012 08:00 AM America/New York	Basics Electronics	Regional Training Center	Select
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Jun/27/2012 08:00 AM America/New York	Basics Electronics	Regional Training Center	Select															

<p>9 Click the Employees Add icon (+).</p>	<h3>Register Employees for Scheduled Offering</h3> <hr/> <p>Enter Registration Details * Required</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p><input type="checkbox"/> Scheduled Offering: Basic Electronics Change Offering</p> <p>Start Date/Time: Dec/21/2011 08:00 AM America/New York Description: Basics Electronics Facility & Location: Regional Training Center Associated Item: COURSE NRG-101 Price: 0.0 US Dollar(USD) Available Seats: 0 of 25 enrolled, 0 waitlisted</p> <p><input type="checkbox"/> Employees (+) 9</p> <p>No employees selected</p> </div> <p style="text-align: right;"> <input type="button" value="Back"/> <input type="button" value="Continue"/> <input type="button" value="Cancel"/> </p>																
<p>10 Click the checkbox next to the corresponding subordinate to register.</p> <p>11 Click Add.</p>	<div style="border: 1px solid #ccc; padding: 5px;"> <h3>My Team</h3> <p>Expand All Collapse All</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name</th> <th style="text-align: center;"><input type="checkbox"/> Select All</th> <th style="text-align: center;">Quick Select</th> </tr> </thead> <tbody> <tr> <td>Dorri M Mills</td> <td style="text-align: center;"><input checked="" type="checkbox"/> 10</td> <td style="text-align: center;">↓</td> </tr> <tr> <td> <input checked="" type="checkbox"/> Brian A Fahey</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">↓</td> </tr> <tr> <td> <input checked="" type="checkbox"/> Nathan B Hadley</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">↓</td> </tr> </tbody> </table> <p style="text-align: right;"> <input checked="" type="button" value="Add"/> 11 <input type="button" value="Cancel"/> </p> <p><i>Note: Click the Quick Select icon (↓) to simultaneously select all direct and/or indirect reports for the corresponding employee.</i></p> </div>	Name	<input type="checkbox"/> Select All	Quick Select	Dorri M Mills	<input checked="" type="checkbox"/> 10	↓	<input checked="" type="checkbox"/> Brian A Fahey	<input type="checkbox"/>	↓	<input checked="" type="checkbox"/> Nathan B Hadley	<input type="checkbox"/>	↓				
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<input checked="" type="checkbox"/> Nathan B Hadley	<input type="checkbox"/>	↓															
<p>12 Adjust the registration status for each employee, if necessary.</p> <p>13 Enter comments for each employee's registration, if necessary.</p> <p>14 Click Continue.</p>	<h3>Register Employees for Scheduled Offering</h3> <hr/> <p>Enter Registration Details * Required</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p><input type="checkbox"/> Scheduled Offering: Basic Electronics Change Offering</p> <p>Start Date/Time: Dec/21/2011 08:00 AM America/New York Description: Basics Electronics Facility & Location: Regional Training Center Associated Item: COURSE NRG-101 Price: 0.0 US Dollar(USD) Available Seats: 0 of 25 enrolled, 0 waitlisted</p> <p><input type="checkbox"/> Employees (+)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name</th> <th style="text-align: center;">* Registration Status 12</th> <th style="text-align: center;">Comments 13</th> <th style="text-align: center;">Remove</th> </tr> </thead> <tbody> <tr> <td>Fahey, Brian A</td> <td style="text-align: center;">ENROLL (Enrolled) ↓</td> <td style="text-align: center;"><input type="text"/></td> <td style="text-align: center;">✖</td> </tr> <tr> <td>Farley, Amanda M</td> <td style="text-align: center;">ENROLL (Enrolled) ↓</td> <td style="text-align: center;"><input type="text"/></td> <td style="text-align: center;">✖</td> </tr> <tr> <td>Favor, Christine N</td> <td style="text-align: center;">ENROLL (Enrolled) ↓</td> <td style="text-align: center;"><input type="text"/></td> <td style="text-align: center;">✖</td> </tr> </tbody> </table> <p style="text-align: right;"> <input type="button" value="Back"/> <input checked="" type="button" value="Continue"/> 14 <input type="button" value="Cancel"/> </p> </div>	Name	* Registration Status 12	Comments 13	Remove	Fahey, Brian A	ENROLL (Enrolled) ↓	<input type="text"/>	✖	Farley, Amanda M	ENROLL (Enrolled) ↓	<input type="text"/>	✖	Favor, Christine N	ENROLL (Enrolled) ↓	<input type="text"/>	✖
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Favor, Christine N	ENROLL (Enrolled) ↓	<input type="text"/>	✖														

<p>15 Confirm the registration details.</p> <p>15 Click Register Employees.</p>	
<p>Your selected employees are registered for the scheduled offering.</p> <p>16 Click Register or withdraw more employees to repeat the process.</p> <p>or</p> <p>17 Click Close.</p>	

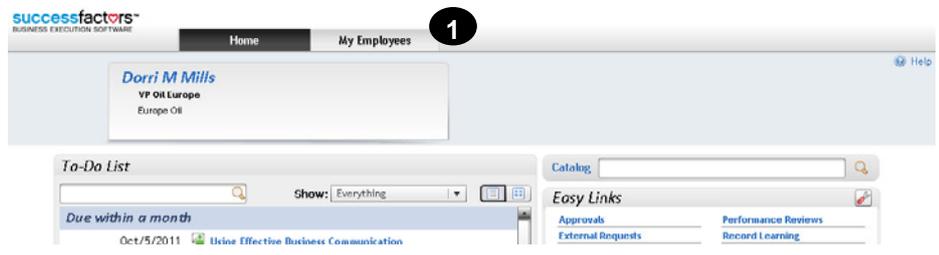
<p>Task B. Withdraw Employees from a Scheduled Offering</p>	
<p>1 From the Home page, click the My Employees tab.</p>	
<p>2 Click the Register/Withdraw Employees Supervisor Link.</p>	

<p>3 Click Withdraw Employees.</p> <p>4 Click Continue.</p>		<p>Register/Withdraw Employees</p> <p>Select the type of action you would like to take:</p> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">  <p>Register Employees Register Employees into a scheduled offering.</p> </div> <div style="text-align: center;">  <p>Withdraw Employees Withdraw Employees from a scheduled offering.</p> </div> </div> <p style="text-align: right;">4 Continue Cancel</p>																
<p>5 Click the Scheduled Offering Add icon (+).</p>		<p>Withdraw Employees from Scheduled Offering</p> <p>Enter Registration Details * Required</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p><input type="checkbox"/> Scheduled Offering + 5</p> <p>No offering selected</p> <p><input type="checkbox"/> Enrolled Employees</p> <p>Select an offering to view registered employees</p> </div> <p style="text-align: right;">Back Continue Cancel</p>																
<p>6 Enter keywords to search for the scheduled offering to withdraw the employee from.</p> <p>7 Click Search.</p>		<p>Scheduled Offerings</p> <p>Search for Scheduled Offering</p> <p>Keywords: <input type="text"/> 6</p> <p><input checked="" type="checkbox"/> Exact Phrase</p> <p style="text-align: right;">7 Search Cancel</p>																
<p>8 Click the Select link for the scheduled offering option to withdraw your employee(s) from.</p>		<p>Select Offerings</p> <p>Search Results Keywords: <i>Not Specified</i> Exact Phrase: <i>Yes</i></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Start Date</th> <th>Description</th> <th>Facility & Location</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td>Jan/23/2013 08:00 AM America/New York</td> <td>Basics Electronics</td> <td>Regional Training Center</td> <td>8 Select</td> </tr> <tr> <td>Dec/21/2011 08:00 AM America/New York</td> <td>Basics Electronics</td> <td>Regional Training Center</td> <td>Select</td> </tr> <tr> <td>Jun/27/2012 08:00 AM America/New York</td> <td>Basics Electronics</td> <td>Regional Training Center</td> <td>Select</td> </tr> </tbody> </table> <p style="text-align: right;">Cancel</p>	Start Date	Description	Facility & Location	Select	Jan/23/2013 08:00 AM America/New York	Basics Electronics	Regional Training Center	8 Select	Dec/21/2011 08:00 AM America/New York	Basics Electronics	Regional Training Center	Select	Jun/27/2012 08:00 AM America/New York	Basics Electronics	Regional Training Center	Select
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<p>9 Your employees who are currently registered are listed.</p> <p>9 Check the Withdraw checkbox next to each employee to withdraw from the scheduled offering.</p> <p>10 Click Continue.</p>	<h3>Withdraw Employees from Scheduled Offering</h3> <p>Enter Registration Details * Required</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p><input type="checkbox"/> Scheduled Offering: Basic Electronics Change Offering</p> <p>Start Date/Time: Oct/26/2011 08:00 AM America/New York Description: Basics Electronics Facility & Location: Regional Training Center Associated Item: COURSE NRG-101 Price: 0.0 US Dollar(USD)</p> <p><input type="checkbox"/> Enrolled Employees</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Name</th> <th style="width: 30%;">Registration Status</th> <th style="width: 10%;">Withdraw</th> </tr> </thead> <tbody> <tr> <td>Fahey, Brian A</td> <td></td> <td style="text-align: center;">9 <input type="checkbox"/></td> </tr> <tr> <td>Farley, Amanda M</td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Favior, Christine N</td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> </div> <p style="text-align: right;">10 Continue Cancel</p> <p><i>Note: A supervisor cannot withdraw the user if they were registered by an admin.</i> <i>Supervisors who withdraw a user from an offering will see a warning if this item is a prerequisite for another enrollment. Then the system will automatically withdraw the user from the dependent offering.</i></p>	Name	Registration Status	Withdraw	Fahey, Brian A		9 <input type="checkbox"/>	Farley, Amanda M		<input type="checkbox"/>	Favior, Christine N		<input type="checkbox"/>
Name	Registration Status	Withdraw											
Fahey, Brian A		9 <input type="checkbox"/>											
Farley, Amanda M		<input type="checkbox"/>											
Favior, Christine N		<input type="checkbox"/>											
<p>11 Select the email recipients by checking the corresponding Notify checkboxes. Remove the item from the employee's To-Do List by checking the corresponding checkbox.</p> <p>12 Click Withdraw Employees.</p>	<h3>Withdraw Employees from Scheduled Offering</h3> <p>Confirm Withdrawal Details</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Scheduled Offering: : Basic Electronics</p> <p>Associated Item: COURSE NRG-101 Start Date/Time: 2011-10-26 08:00:00.0 America/New_York Description: Basics Electronics Location: Regional Training Center Price:</p> <p>Employees to be Withdrawn</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Name</th> <th style="width: 40%;">Current Registration Status</th> </tr> </thead> <tbody> <tr> <td>Fahey, Brian A</td> <td>ENROLL(Enrolled)</td> </tr> <tr> <td>Farley, Amanda M</td> <td>ENROLL(Enrolled)</td> </tr> </tbody> </table> <p>11 Notify: <input type="checkbox"/> Users <input type="checkbox"/> Instructors <input type="checkbox"/> Supervisors <input type="checkbox"/> Others <input type="checkbox"/> Remove associated item from the To-Do List</p> </div> <p style="text-align: right;">12 Withdraw Employees Cancel</p>	Name	Current Registration Status	Fahey, Brian A	ENROLL(Enrolled)	Farley, Amanda M	ENROLL(Enrolled)						
Name	Current Registration Status												
Fahey, Brian A	ENROLL(Enrolled)												
Farley, Amanda M	ENROLL(Enrolled)												
<p>Your selected employees are successfully withdrawn from the scheduled offering.</p> <p>13 Click Register or withdraw more employees to repeat the process.</p> <p>or</p> <p>14 Click Close.</p>	<h3>Withdraw Employees from Scheduled Offering</h3> <p>Successfully Withdrawn</p> <p>All withdrawals in this scheduled offering were successful.</p> <p style="text-align: center;">Register or withdraw more employees 13</p> <div style="text-align: right;">14 Close</div>												

Task C. View Employee's Registrations

1 From the Home page, click the My Employees tab.



Use the employee tree to view the To-Do List of direct and indirect reports.

2 Click an employee card to load that user's To-Do List.

3 Customize the view by filtering the To-Do List by registrations only.

