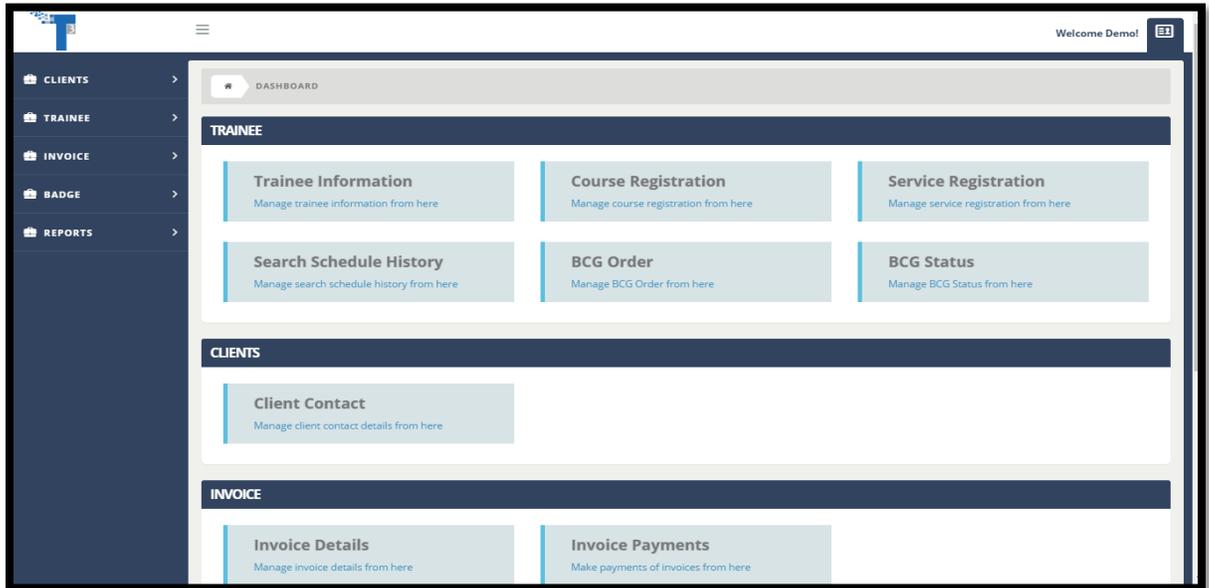
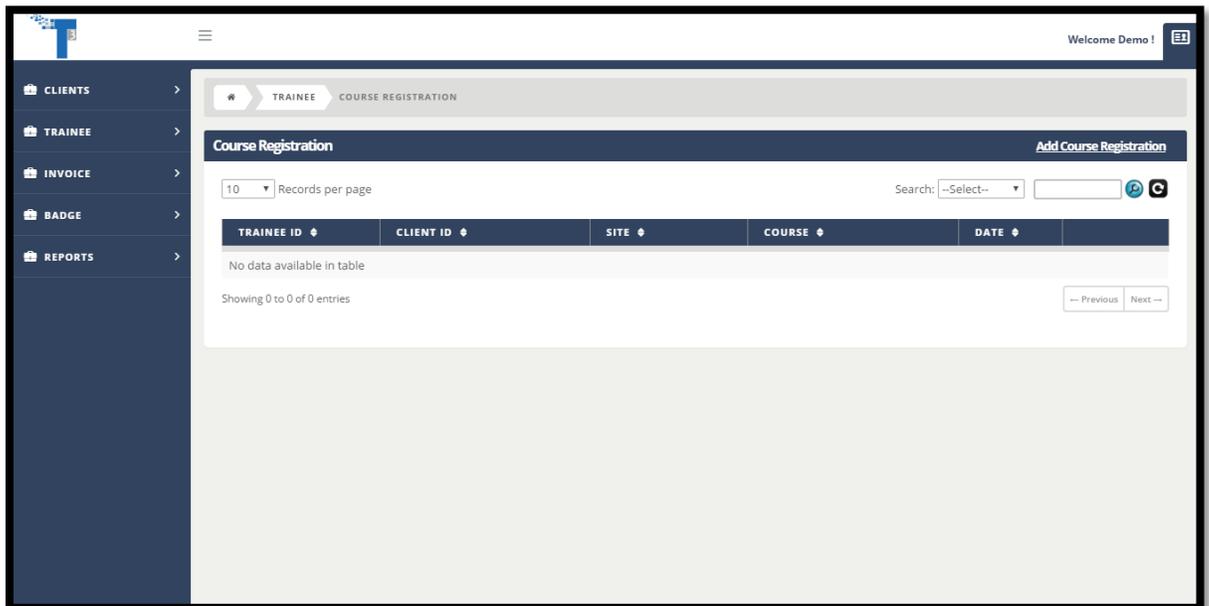


# How to Schedule a Trainee

1. Click on the **Course Registration** tab located in the dashboard underneath the **Trainee** section.



2. You will be directed to the **Course Registration** page, at this time you will register any courses that your trainee will need to complete. Click on the underlined **Add Course Registration** located the right hand side.



- You will be directed to the **Trainee Course Registration** page. Your first section is for **Courses**, select the training site at which your trainee will be taking the courses and the date of training.
- After selecting a *site*, a list of courses that are available for that date at that site will appear, if that client has access to those courses. Scroll down and select the course you need your trainee to take. After selecting the course or courses you need, then click the green **Next** button once you have all required fields field out.
 

*Note: If you don't see the course you're looking for, you can use the advanced filters to search for your wanted course, make sure to go through the pages offered to, to find your course.*

*Note: Also be aware, you can select courses from multiple pages at one time.*

**Trainee Course Registration**

Select Client \*  
Demo Client

**Courses** Trainee Course Requirements Summary

Select Site \*  
Demo Site

Date of Training \*  
4/26/2016

Advanced Filter  
All Search...

Categories  
All

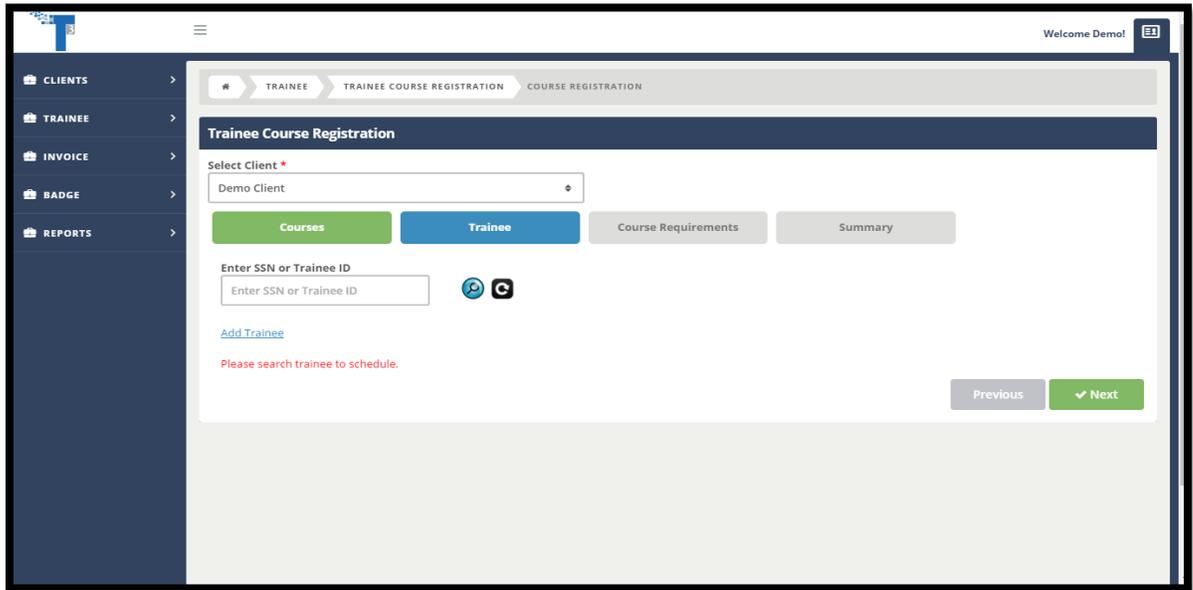
10 Records per page

SELECT	COURSE ID	COURSE CODE	COURSE	START DATE	BUSINESS RULES
<input type="checkbox"/>	100650	1Demo	Demo	4/21/2016	View
<input type="checkbox"/>	100651	02Demo	Demo 2	4/25/2016	View
<input type="checkbox"/>	100652	08BCG2_0	BCG2.0	4/26/2016	View
<input type="checkbox"/>	100653	085SV	SSV	4/26/2016	View
<input type="checkbox"/>	100654	08PREMP	PEV	4/26/2016	View

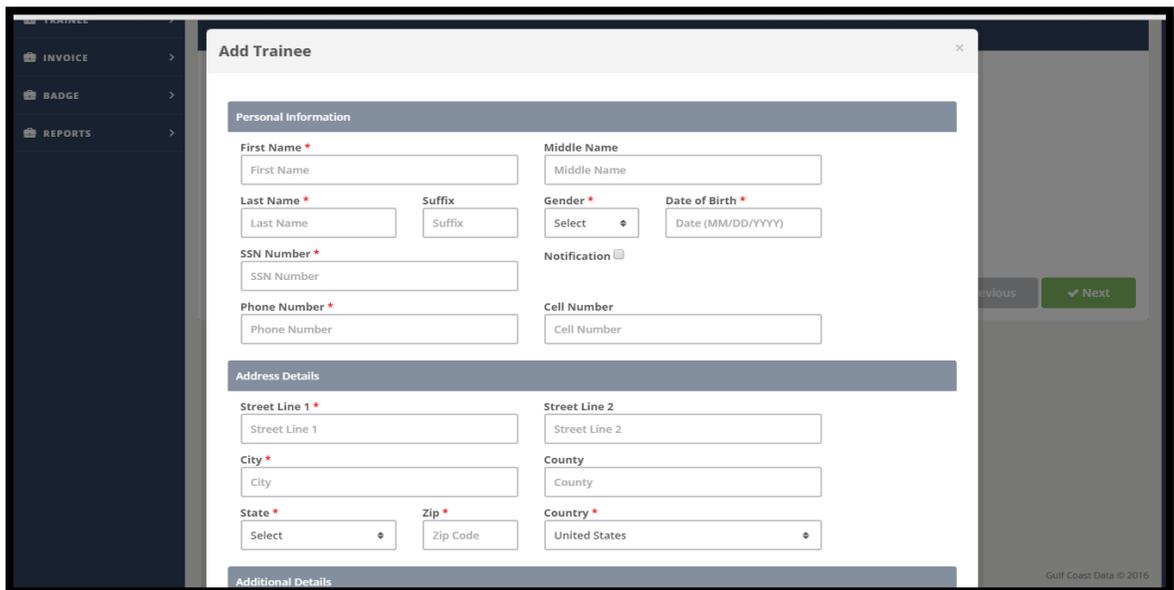
Showing 1 to 5 of 5 entries

Previous 1 Next

- Once you're on the section **Trainee**, you can either **Enter Social Security Number or Trainee ID** to find your Trainee or **Add Trainee**.



- If you need to add a Trainee that's not already in the system, click the **Add Trainee** button, and a pop up window will appear. Fill out all required fields and click the green **Add** button at the bottom of the screen. Your new trainee will appear on the **Trainee** section. Make sure to select the Trainee in the check box before continuing on.



7. Once you have added all trainees needed, press the green **Next** button on the right hand bottom.

The screenshot shows a web application interface for 'Course Registration'. On the left is a dark blue sidebar with menu items: USER MAINTENANCE, COURSE ADMIN, CLIENTS, TRAINEE, TAS, REPORTS, RECEIPT, STORE ADMIN, BADGE, and AUDIT LOG. The main content area has a breadcrumb trail: TRAINEE > COURSE REGISTRATION > REGISTRATION. Below this is a 'Course Registration' header. A 'Select Client' dropdown menu is set to 'Demo Client'. There are four buttons: 'Courses' (green), 'Trainee' (blue), 'Course Requirements' (grey), and 'Summary' (grey). Below the buttons is a text input field for 'Enter SSN or Trainee ID' containing '444444444'. There are two circular icons to the right of the input field. Below the input field is a link 'Add Trainee'. A table lists trainees with columns: SELECT, SSN, TRAINEE ID, and NAME. The first row has a checked checkbox, SSN '\*\*\*-\*\*-4444', TRAINEE ID '101009', and NAME 'Demo Testing'. At the bottom right are 'Previous' and 'Next' buttons.

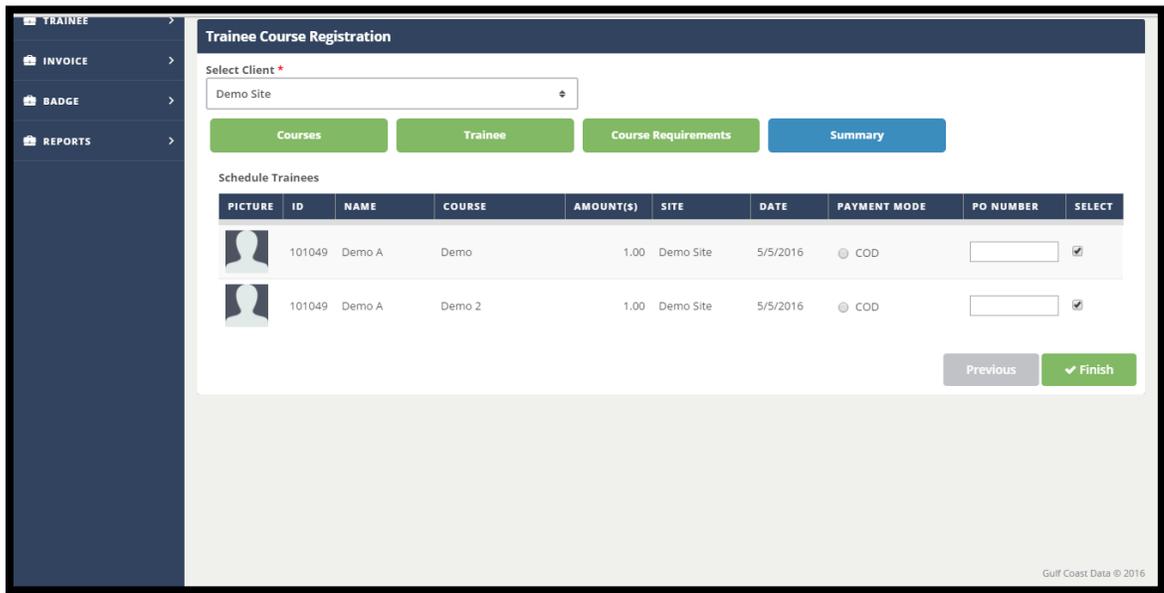
8. You will now be directed to the **Course Requirements** section. On this section you will need to review any course requirements to be sure Trainee is eligible to take that course. Afterwards, agree to the following Schedule Policy. Once you check off agree, click the green **Next** button on the bottom right hand corner.

The screenshot shows the 'Trainee Course Registration' section. The sidebar is the same as in the previous screenshot. The breadcrumb trail is: TRAINEE > COURSE REGISTRATION > REGISTRATION. The 'Course Requirements' button is now highlighted in blue. Below the buttons, there are two course entries. Each entry shows 'Course: Demo' and lists requirements: 'External Service Packages: N/A', 'End Point: N/A', 'Courses: N/A', and 'Other Items: N/A'. Below the course entries is a section titled 'SCHEDULE POLICY' with a scrollable text area containing the following text: 'By submitting this application, the undersigned company agrees to receive fax and/or email notification from Demo. Information captured in this application will not be shared with or sold to any other entity. This application may also be printed and mailed to Demo at 123 Test Drive East. Do you fulfill all the course requirements listed above and in the business rules?'. Below the text is a checkbox labeled 'I Agree'. At the bottom right are 'Previous' and 'Next' buttons. The footer text 'Gulf Coast Data © 2016' is visible at the bottom right.

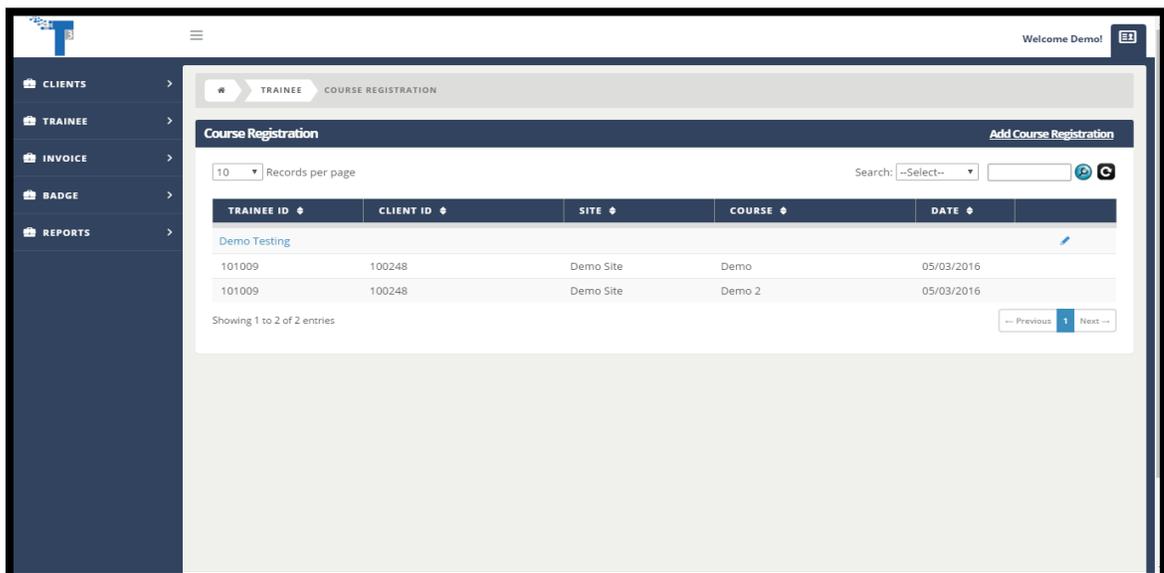
- Once you reach the **Summary** page, select your payment method. Then select the checkbox of the trainees you will like to finish scheduling. Once completed, you can click the green **Finish** button on the right bottom hand corner.

**Note:** Each client's payment method may be different. **Net 30** is for clients who pay in full 30 days after being charged. **COD** is for clients who make payments at the time of arrival. **Prepay** is for the clients who are paying before there trainee arrivals.

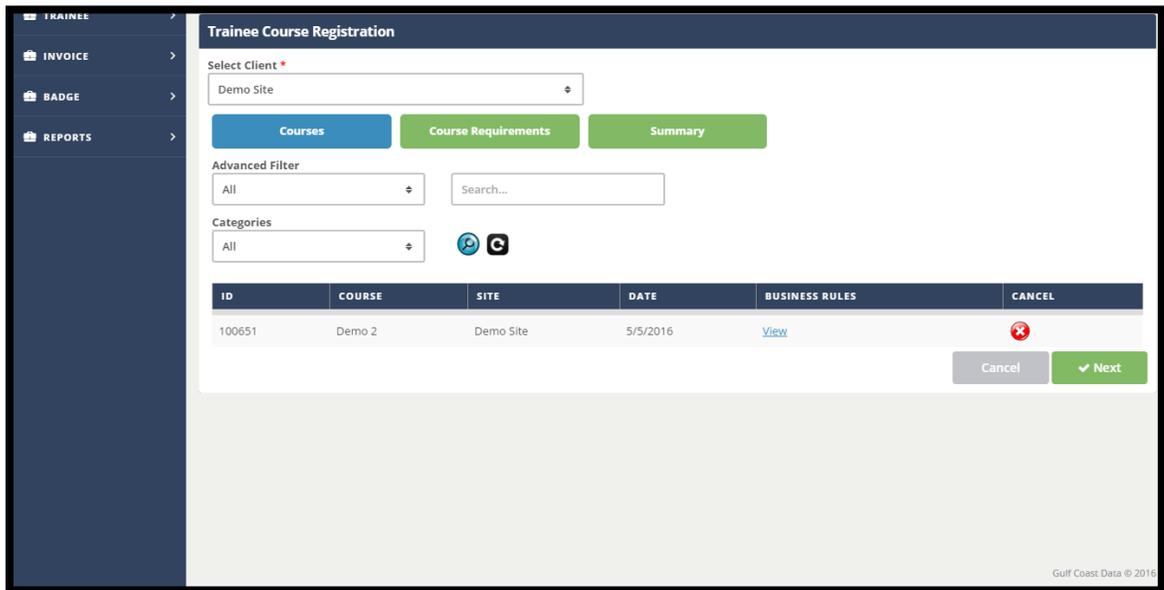
**Note:** **PO Number** is not mandatory, but you can add your PO Number if needed.



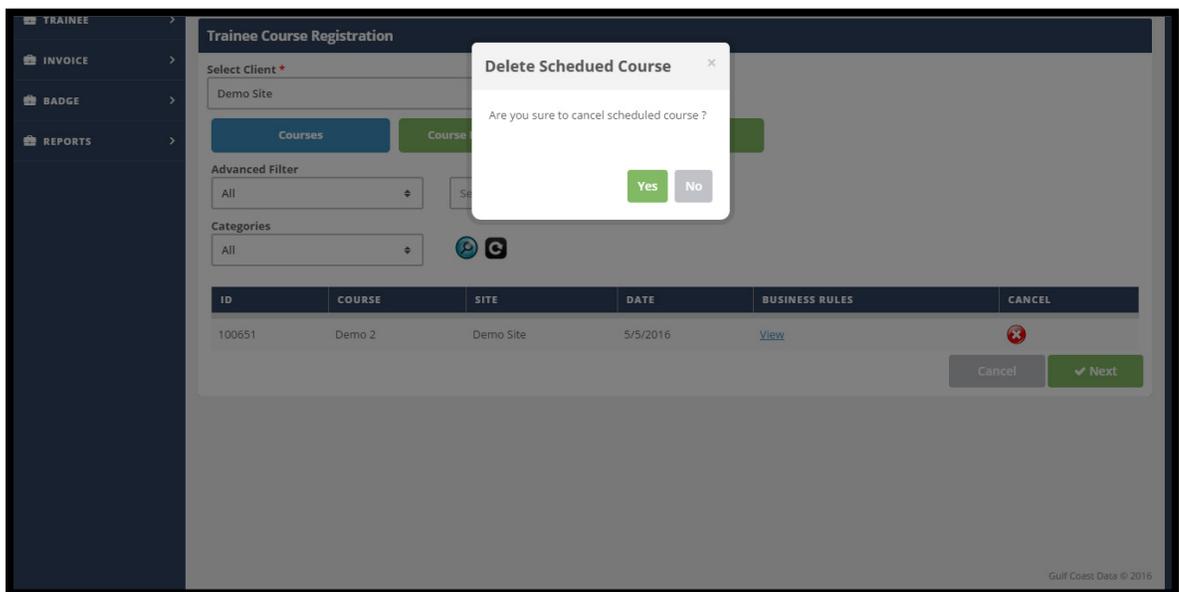
- You will be redirected back to the **Course Registration** page where you started. You can see which trainee or trainees you have scheduled for courses. If you see your trainees on the following page, they are scheduled successfully for their course.



11. If needed to edit a trainees schedule you can click the pen icon and edit your trainee schedule.



12. If you need to cancel the trainees scheduled course, click the red X button under cancel. A **Delete Scheduled Course** pop up box will appear click the green **Yes** button.



13. After canceling the course, the course will disappear. From here you are finished.