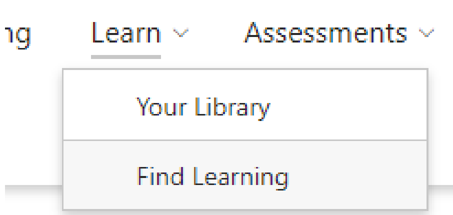
AgLearn Job Aid

December 9, 2022

How to Book Users into Seminar Events – Centrally Funded

This job aid outlines the steps for an AgLearn administrator/Training Officer to book or waitlist a user into a centrally funded seminar event. Login to AgLearn to begin these steps. www.AgLearn.usda.gov

<table>
<tr><th>Step</th><th>Activity</th><th>View</th></tr>
<tr><td>1.</td><td>Click the Learn tab and then Find Learning.</td><td>
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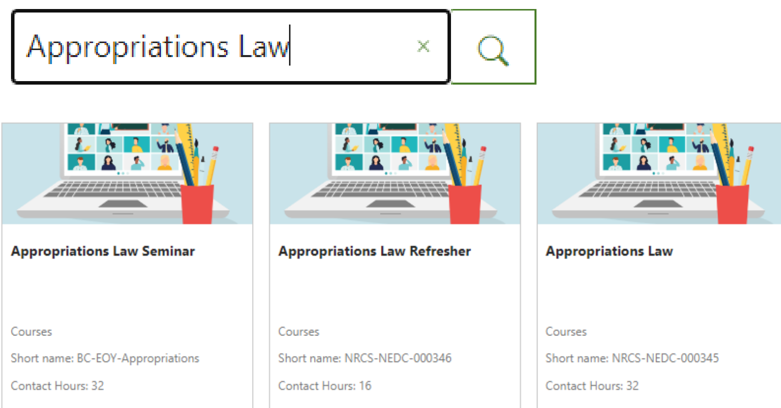
<tr><td>2.</td><td>Search for the Course name or Course short name.
Note: Verify the Course short name in the search result to distinguish between similarly titled courses.</td><td>
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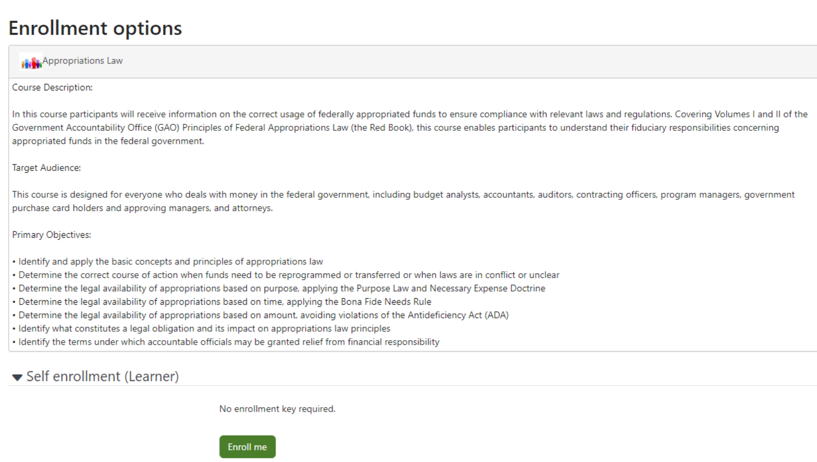
<tr><td>3.</td><td>Click on the Course block.</td><td>
</td></tr>
<tr><td>4.</td><td>The Course information page is displayed. The course title will appear at the top with a description, target audience and objectives. Be sure that the user you are booking is described in the target audience.</td><td>
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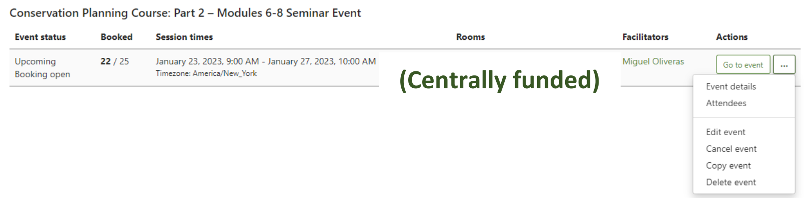
<td>5.</td>
<td>You have three options for how to get to the attendees tab. You can click on the breadcrumbs at the top of the page. This will not require you to enroll yourself in the course. You can click to enroll me and enroll yourself in the course. Or, if there are upcoming seminar events for that course, you can click on the three dots next to the event and click Attendees.

Note: The room name should end with (Centrally funded).</td>
<td>1. 

2. 

3. 
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<td>6.</td>
<td>If you use options 1 or 2, scroll down to the Course Activities section. Seminar events are listed here. Click to “View all events” to see the full list of upcoming seminar events.</td>
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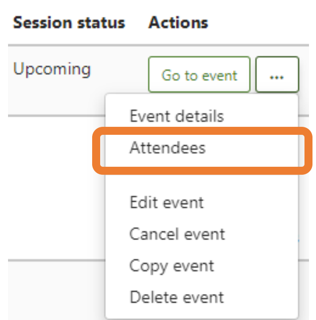
<td>7.</td>
<td>Click the three dots and then the “Attendees” link next to the seminar event you need.</td>
<td>
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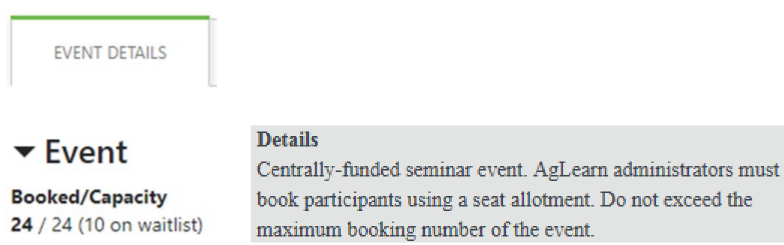
<td>8.</td>
<td>Note the “Details” field. This field describes the funding type of the seminar event.

Note: You can also verify the number of people booked in the event under the Event Details tab.</td>
<td>
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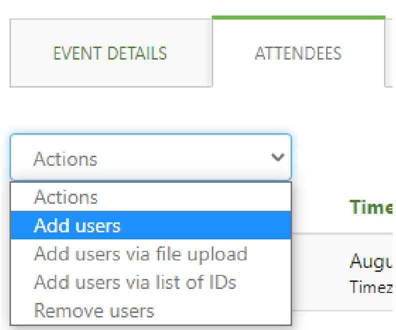
<td>9.</td>
<td>On the Attendees tab, change the Actions drop-down to “Add users.”</td>
<td>
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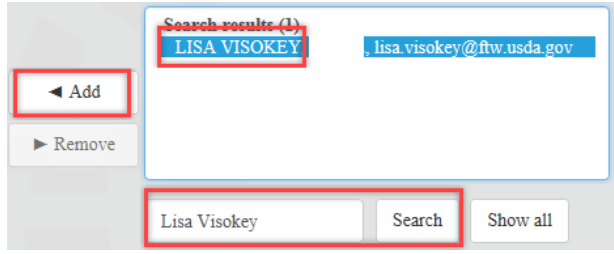
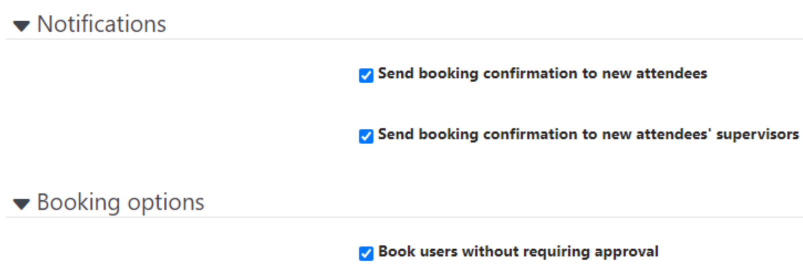
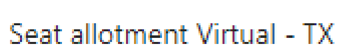
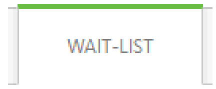
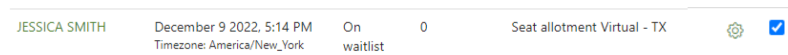
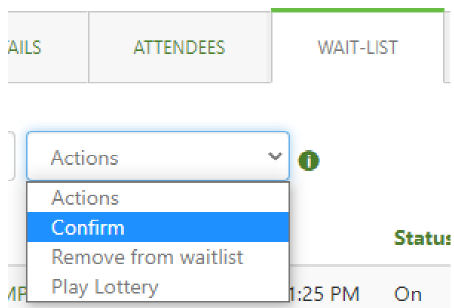
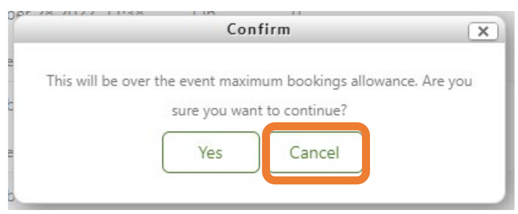
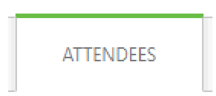
10.	On the right side, enter the employee's legal name in the search field and click search. Click on the name in the search results, then click Add.	
11.	Multiple users can be added on this screen. When all users have been added, click Continue. *Note: If some users will be waitlisted, book them in a separate process so the "Requests for session organizer" field (on the next screen) will be appropriate for all users being added in the process.*	
12.	Verify the users' names and email addresses.	
13.	Expand the "Booking options" section by clicking on the arrow.	
14.	Check the box to "Book users without requiring approval." *Not* checking this box means that supervisory approval will be required before the booking can be processed. We recommend unchecking the notifications boxes since you are waitlisting them in this first step.	
15.	Expand the "Sign-up fields" section by clicking on the arrow.	
16.	In the "Requests for session organizer" field, enter one of the following: 1. To use a centrally funded seat allotment, enter "Seat allotment - [Org abbreviation]". Example: "Seat allotment - TX" Or 2. To waitlist a user in case the seminar event has open seats when the booking period closes, enter "Waitlist - [Org abbreviation]". Example: "Waitlist - TX"	 If you would like to add "Virtual" or "In-person" to the sessions organizer note to help you track your allocations, you're welcome to do that. 

17.	Click Confirm.	
18.	The attendees will be listed on the Wait-list tab. Click the Wait-list tab.	
19.	To finalize a seat allotment booking, check the box under Select… for that user. *Note: Do not complete this step for Users with "Waitlist – XX" in the attendee's note as they are already on the waitlist as intended.*	
20.	Change the Actions drop-down to "Confirm."	
21.	Click "Cancel" if this error message pops up. If the class is full, the user will need to remain on the waitlist.	
22.	Click on the Attendees tab to verify the participant has been booked.	
23.	EDS will manage the waitlist: 1. EDS will move Attendees to the waitlist if seminar events become overbooked based on the date and time of bookings. 2. If a seminar event doesn't fill but there are waitlisted users, EDS will confirm attendance for waitlisted users after the booking period closes.	Only EDS should confirm users after the booking period closes. Only EDS should confirm users with a "Requests for session organizers" field that indicates "Waitlist." If EDS books one of your users from a waitlist status after the booking period closes, your org will not need to use a seat allocation for that booking.