

Job Aid: Canceling Learner Registration from the Roster

Core Concepts

When would I need to cancel a learner registration?

Instructors and Learning Administrators can cancel learners' registrations by changing their status. If a learner is registered for a class and can no longer attend the scheduled class, the registrar or instructor must cancel the registration from the class roster.

Does canceling a learner registration remove the learner from the roster?

No; however, cancelling a learner's registration does assign a registration status of "Cancelled."

What drop fees are charged when an order or a registration is canceled?

Administrators can drop entire orders or selected line items from an order. When this is done, the drop policies that have been established determine the drop charges.

Drop policies can be set for both internal and external learners, using the business rules:

- Drop Fees - Default
- Drop Fees - Time-based policy for Scheduled Classes
- Drop Fees - Time-based policy for Self-Paced Classes

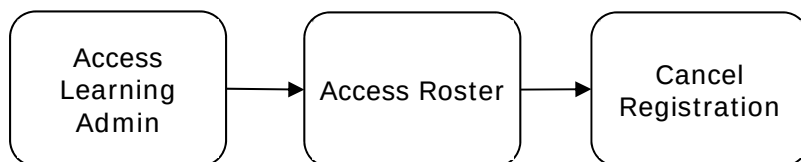
Drop policies can also be added at the delivery type or class level. This is accomplished by specifying the percent cancellation that will be charged for any cancellation occurring a specified number of days before the event starts.

Example:

Cancellation Occurs	Drop Fees
One week prior to event	25%
2 days prior to event	75%
Day of event	100%

Process

Process flow



ep	Action
1. Access Learning Admin	• Navigate to: App Menu > Admin > Instructor
2. Access Roster	• Click the My Schedule link on the left-hand navigation panel to search for the scheduled classes.

ep	Action
	- Enter your search criteria and click Search. - Click the title of the class to open the class details page. - Click the Roster tab to display a list of learners registered for a class.
3. Cancel Registration	- Note: You can cancel registrations that have a “Waitlisted,” “Offered,” or “Confirmed” registration status. - In the Registration Status column, click the status value link for the required learner. The Registration Status pop-up page displays. - Select the appropriate radio button for registration cancellation in the Update Status field. - Note: The type of cancellation you select is reflected in cancellation notifications, if configured. This will indicate to the recipient whether the cancellation was due to the learner being a no show or cancelled before the class started. - In the Reason field, you may enter a reason for changing the status of a learner. - Click the Save button. A message window displays regarding a class cancellation charge. The learner’s name will remain on the roster; however, his/her registration status will be “Cancelled.” A notification will be sent to the learner.

Additional Information

Can I search a class roster for learners?

Saba Cloud displays the following search filters when instructors and learning administrators search for learners in a class roster:

- First Name
- Last Name
- Person ID
- Registration date on or after
- Registration date on or before
- Order no
- Status
- Email
- Person Legal ID

You can use the fields individually or in combination with one another to search for learners in the roster.

To view the search filters in the class roster:

- **Click Admin > Instructor > Edit a class > Show filters**
- **Click Admin > Learning > Manage Classes > Search and edit a class > Roster > Show filters**

Can I select learners on the roster in bulk by registration status?

Saba Cloud provides instructors with an option to select multiple learners in a class roster based on their class registration status.

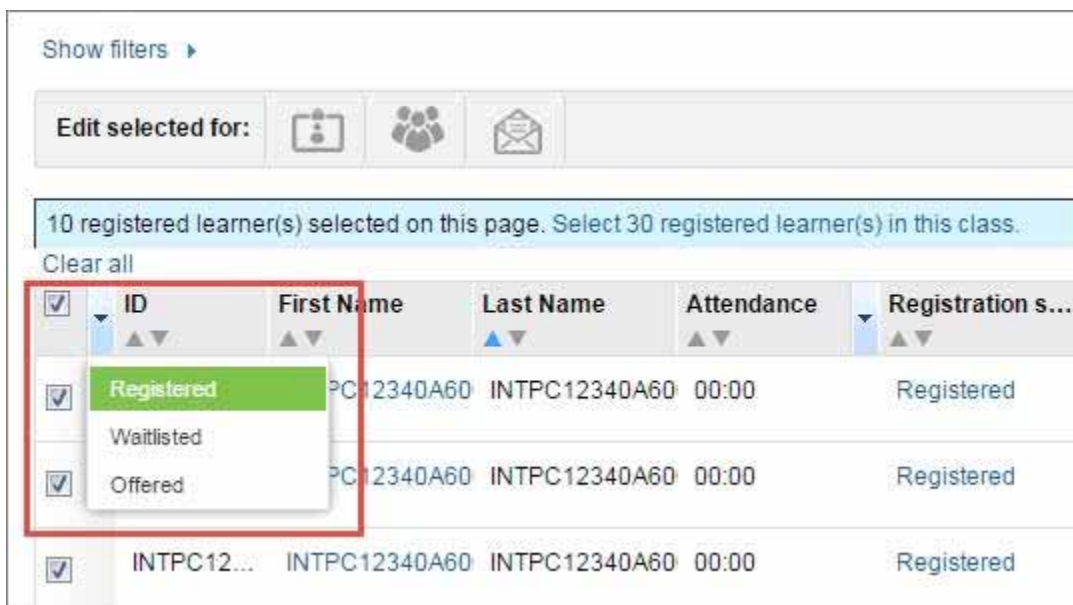
The bulk selection checkbox is enhanced to display a new dropdown list with the following class registration statuses:

- o Registered
- o Waitlist
- o Offered

Saba Cloud does not allow instructors to perform any action on learners in the *Cancelled* status. Therefore, the dropdown list on the bulk selection checkbox does not include the *Cancelled* status.

For Web-based (WBT) classes, the statuses Waitlisted and Offered are not applicable. Therefore, the status dropdown list is not displayed besides the bulk selection checkbox for WBT classes.

To select all learners on a page of a class roster irrespective of their status, instructors can still click the bulk selection checkbox.



The screenshot shows the Saba Cloud class roster interface. At the top, there is a "Show filters" link. Below it, a toolbar contains "Edit selected for:" and three icons: a person, a group of people, and an envelope. A blue banner states: "10 registered learner(s) selected on this page. Select 30 registered learner(s) in this class." Below the banner is a "Clear all" link. The main table has columns: ID, First Name, Last Name, Attendance, and Registration s... The "ID" column has a dropdown menu open, showing three options: "Registered" (highlighted in green), "Waitlisted", and "Offered". The table contains three rows of learner data, all with "Registered" status.

ID	First Name	Last Name	Attendance	Registration s...
PC12340A60	INTPC12340A60	INTPC12340A60	00:00	Registered
PC12340A60	INTPC12340A60	INTPC12340A60	00:00	Registered
INTPC12...	INTPC12340A60	INTPC12340A60	00:00	Registered

Notes:

- o When instructors select a status from the status dropdown list, all learners with that status on that page of the roster are selected. Multiple statuses cannot be selected simultaneously. If instructors select another status, then the previously selected status is overridden for a page. This bulk selection by status is applicable only for a page, and not for the entire list of learners in the class roster. Saba Cloud displays a message informing instructors of the selected number of learners on a page for that status, and whether they want to select all such learners for the entire class.
- o If learners on the roster span more than one page, then the status dropdown list is displayed on each page of the roster. If instructors select a status say "Registered" in the status dropdown list on one page and then select another status say "Waitlisted" in the status dropdown list on a subsequent page of the roster, then "Waitlisted" learners are selected on this page while the earlier selection of "Registered" learners is retained for the other page. However, if instructors select all learners in a particular status across pages by

clicking the link in the message, and then if they navigate to another page of the roster and select another status using the status dropdown list, then the learners in the new status are selected on that page only while retaining the selection of learners in the earlier status as well.

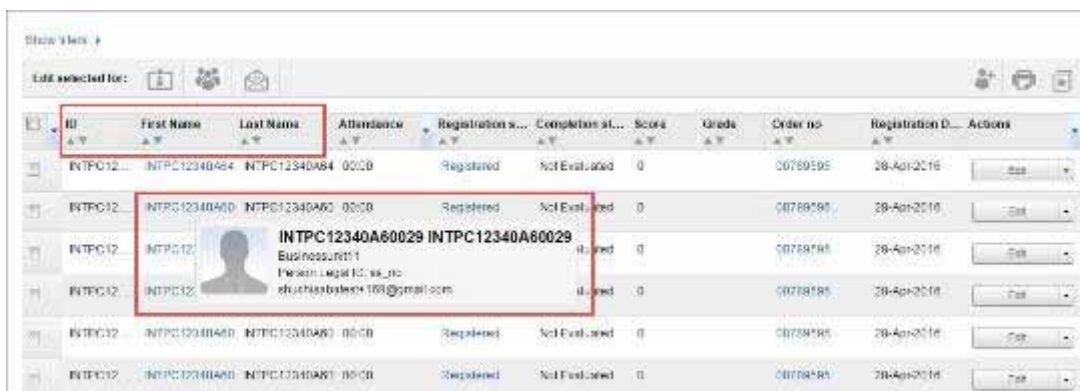
- o If search criteria are applied to filter learners in a class, then the status dropdown list works only on the filtered subset of learners, and not on the entire set of learners in the class.

To clear any selection, click the **Clear all** link at the top of the learner table.

Can I sort learners on the roster?

The ability to sort learners by different columns on the roster makes it easier for instructors and enhances the overall usability of the class roster.

- Provides the ability to sort learners on the class roster in ascending or descending order using any column, except the **Actions** column, as follows.
 - o The up and down arrow icons are always displayed if a column is sortable.
 - o Sorting learners by any column sorts the entire roster and not just the page where the sorting is performed.
 - o If learners span multiple pages on a roster, then each time they are sorted, the roster refreshes and returns the instructor to the first page.
 - o Any selections, bulk or otherwise, made before the sort are not retained.
 - o When any filter is applied in the roster and then sorting is performed, only the filtered records are sorted.
 - o While sorting by **Attendance** column, the sorting is performed by the selected session.
 - o By default, the learners are sorted by the learner last name in an ascending order.
- Splits the **Name** column into two columns, namely **First Name** and **Last Name** with their own sorting options. For locales where the learner's **Last Name** is followed by the **First Name**, the roster displays the Last Name column before the **First Name** column.
- Displays a separate **ID** column for the person ID.
- For substituting a learner, the learner's First Name is now displayed as a link and clicking that link opens the **Substitute Learner** window.
- The tooltip displaying "ss_no", "email" and person profile picture is now displayed when the instructor hovers the cursor over the learner's First Name link.



ID	First Name	Last Name	Attendance	Registration s...	Completion at...	Score	Grade	Order no	Registration D...	Actions
INTPC12...	INTPC12340A84	INTPC12340A84	00:00	Registered	Not Evaluated	0		00789595	28-Apr-2016	...
INTPC12...	INTPC12340A80	INTPC12340A80	00:00	Registered	Not Evaluated	0		00789595	28-Apr-2016	...
INTPC12...	INTPC12340A60029	INTPC12340A60029						00789595	28-Apr-2016	...
INTPC12...	INTPC12340A60029	INTPC12340A60029						00789595	28-Apr-2016	...
INTPC12...	INTPC12340A80	INTPC12340A80	00:00	Registered	Not Evaluated	0		00789595	28-Apr-2016	...
INTPC12...	INTPC12340A80	INTPC12340A80	00:00	Registered	Not Evaluated	0		00789595	28-Apr-2016	...

- The option to select columns now appear only by clicking the dropdown icon next to the **Actions** column.

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Edit selected for:

ID	First Name	Last Name	Attendance	Registration s...	Completion st...	Score	Grade	Order no	Registration D...	Actions
INTPC12...	INTPC12340A64	INTPC12340A64	00:00	Registered	Not Evaluated	0		00780095		☒ Edit ☒ First Name ☒ Last Name ☒ Attendance ☒ Registration status ☒ Completion status ☒ Score ☒ Grade ☒ Order no ☒ Registration Date ☒ Actions
INTPC12...	INTPC12340A60	INTPC12340A60	00:00	Registered	Not Evaluated	0		00780095		☒ Edit ☒ First Name ☒ Last Name ☒ Attendance ☒ Registration status ☒ Completion status ☒ Score ☒ Grade ☒ Order no ☒ Registration Date ☒ Actions
INTPC12...	INTPC12340A60	INTPC12340A60	00:00	Registered	Not Evaluated	0		00780095		☒ Edit ☒ First Name ☒ Last Name ☒ Attendance ☒ Registration status ☒ Completion status ☒ Score ☒ Grade ☒ Order no ☒ Registration Date ☒ Actions
INTPC12...	INTPC12340A60	INTPC12340A60	00:00	Registered	Not Evaluated	0		00780095		☒ Edit ☒ First Name ☒ Last Name ☒ Attendance ☒ Registration status ☒ Completion status ☒ Score ☒ Grade ☒ Order no ☒ Registration Date ☒ Actions
INTPC12...	INTPC12340A60	INTPC12340A60	00:00	Registered	Not Evaluated	0		00780095		☒ Edit ☒ First Name ☒ Last Name ☒ Attendance ☒ Registration status ☒ Completion status ☒ Score ☒ Grade ☒ Order no ☒ Registration Date ☒ Actions
INTPC12...	INTPC12340A60	INTPC12340A60	00:00	Registered	Not Evaluated	0		00780095		☒ Edit ☒ First Name ☒ Last Name ☒ Attendance ☒ Registration status ☒ Completion status ☒ Score ☒ Grade ☒ Order no ☒ Registration Date ☒ Actions
INTPC12...	INTPC12340A60	INTPC12340A60	00:00	Registered	Not Evaluated	0		00780095		☒ Edit ☒ First Name ☒ Last Name ☒ Attendance ☒ Registration status ☒ Completion status ☒ Score ☒ Grade ☒ Order no ☒ Registration Date ☒ Actions

References

- Saba Online Help
- http://sabacloud.com/support/index.php/Main_Page