## Assigning Your Inventory Seats

As soon as your inventory purchase is complete, you may begin assigning your purchased seats to your organization's Club staff of choice. To access your inventory and assign seats to people:

1. Hover your mouse on the Universal Profile in the top left corner of the portal and click on the name or picture to access the Universal Profile to gain access to the **My Account** information.



2. Click on My Account.

|       | Bio  | View Team 13 |
|-------|--|--------------|
| About | Wyatt Bevis<br>Boys & Girls Clubs of the Ocoee Region<br>ExecutiveLeadership | MY ACCOUNT   |

3. You arrive on your My Account Settings screen. Click on **My Orders** from the side menu.



4. From the My Orders screen, click the **View Inventory** button that appears on the top right.

## Spillett Leadership University – Assigning Inventory Seats

|           | My Account My Orders                 |                |        |                |       |                |
|-----------|--------------------------------------|----------------|--------|----------------|-------|----------------|
| Settings  | My Orders                            |                |        |                |       | View Inventory |
| My Orders | Transaction Date Clear<br>Start Date | End Date       | Search |                |       |                |
| M         | Transaction Date                     | Transaction ID |        | Payment Method | Total | Details        |

5. Your Training Inventory screen appears, showing all inventory purchases you have made. For each purchase, it displays what training title/session was purchased, quantity purchased, quantity assigned to learners, and quantity remaining for assignment. Click on the down arrow icon (Assign Users) to distribute unused seats to learners.

| Training Inventory                               |                    |          |      |           |                                 |
|--|--------------------|----------|------|-----------|---------------------------------|
|  |                    |          |      |           | Assign Users 🔞 View Enrollments |
| Training Inventory                               |                    |          |      |           |                                 |
| Title All Types V                                |                    |          |      |           |                                 |
|  |                    |          |      |           | (2 Results)                     |
| Title  | Date Purchased     | Quantity | Used | Available | Options                         |
| test) Learning Coach ILT Event (Starts4/2/2021)  | 3/10/2021 5:17 PM  | 5        | 4    |           | 1 🕑 🚳                           |
| (test) Learning Coach ILT Event (Starts4/2/2021) | 3/11/2021 10:12 PM | 5        | 0    |           | 5 🕑 🚱                           |
| « Back   |                    |          |      |           |                                 |

6. The Assign Training screen opens. **Check boxes** next to the names of people who should attend the training you purchased. You do not have to assign all seats at once. You may return to this screen at any time to continue assignment. In the upper right of the screen, it shows how many seats you have left to assign. Click the **Submit** button at the bottom left of the screen when all assignees are chosen.

| Assign Training - (test) Learning Coach IL                       | T Event   |  |   |
|--|---|--|---|
| Assign Training  |   |  |   |
| "Total Inventory Available" count includes Proxy Enrollment Requ | ests in progress but which may not immediately be reflected | in the Inventory Management home page count. |   |
| First Name Last Name Select OU Criteria 🗸                        | Search Onl  | y people from                                |   |
|  | your c  | assignment                                   | Total Inventory Available : 5<br>Inventory to be Assigned : 0 |
| ASSIGN TRAINING Due Date: Optional. Entering a Due Date/vill     | gger reminder emails for learners who have not completed    | the course.                                  |   |
| Name   | Assignment History  | Current Status                               | ou  |
| Anderson, Samuel   | 0   | None   | Boys & Girls Clubs of the Ocoee Region (Division)             |
| Aponte, Deborah  | 0   | None   | Boys & Girls Clubs of the Ocoee Region (Division)             |
| arden, carrie  | 0   | None   | Boys & Girls Clubs of the Ocoee Region (Division)             |
| C Armstrong, Johni   | 0   | None   | Boys & Girls Clubs of the Ocoee Region (Division)             |
| Arp, Riley   | 0   | None   | Boys & Girls Clubs of the Ocoee Region (Division)             |
| Avala. Amv   | 0   | None   | Boys & Girls Clubs of the Ocoee Region (Division)             |

7. You are returned to the main Training Inventory screen. **Be aware** that your new assignments take a few minutes to show up here (the system needs time to push those assignments to the people's transcripts.) If you return to the screen after five minutes, they should appear (if not, wait a little longer in case there is a delay.

| Training Inventory                               | Your assignme<br>few minutes | ents ta<br>to app | ke a<br>ear | (         | 🕖 Assign Users 🛞 Vi | ew Enrollments |
|--|------------------------------|-------------------|-------------|-----------|---------------------|----------------|
| Training Inventory                               |                              |                   |             |           |                     |                |
| Title All Types V Q Search                       |                              |                   |             |           |                     |                |
|  |                              |                   |             |           |                     | (2 Results)    |
| Title  | Date Purchased               | Quantity          | Used        | Available | Options             |                |
| (test) Learning Coach ILT Event (Starts4/2/2021) | 3/10/2021 5:17 PM            | 5                 | 4           | 1         | <b></b>             | 6              |
| test) Learning Coach ILT Event (Starts4/2/2021)  | 3/11/2021 10:12 PM           | 5                 | 0           | 5         | 0                   | 6              |
| « Back   |                              |                   |             |           | _                   |                |

- 8. When these inventory assignments are completed, the learners you chose will be registered for the session and will receive a confirmation email from SLU.
- 9. Click on the View Enrollments icon to view a list of all people who were assigned one of your inventory seats. Be aware that on this screen it shows every user who was EVER assigned one of your seats, even if they later withdrew from the session. If you click the Options icon for a learner who appears on this screen, you can see whether they are still registered for the session. Do not worry if the number of assigned learners on this screen appears to be more than you purchased. The system is keeping track of withdrawals, substitutions and reassignments and will not let more seats be assigned than are purchased.

| _ |   |                   |          |                   |                              |
|---|---|-------------------|----------|-------------------|------------------------------|
| ۷ | /iew Enrollment - (test) Learning Coach ILT Event |                   |          |                   |                              |
|   | Training Details                                  |                   |          |                   |                              |
|   | Search  |                   |          | Printable Version | « Previous 1-2 of 2 🗸 Next » |
|   | Assigned Users                                    |                   |          |                   |                              |
|   | EMPLOYEE NAME                                     | REGISTERED        | DUE DATE |                   | OPTIONS                      |
|   | Riley Arp   | 3/12/2021 9:01 PM |          |                   | <b>\$</b>                    |
|   | Heather Benefield                                 | 3/12/2021 9:01 PM |          |                   | \$                           |
|   | « Back  |                   |          |                   |                              |

## **Inventory Management FAQs**

| Question   | Answer  |
|--|---|
| If I assign one of my inventory seats<br>to someone who later withdraws<br>from the class, can I assign the seat<br>to someone else? | Yes. If an assigned learner withdraws from the session, the system credits that seat back to your inventory balance so it can be assigned to another learner. |

## Spillett Leadership University – Assigning Inventory Seats

| I assigned several inventory seats to<br>people from my club, but my<br>Training Inventory screen does not<br>reflect the assignment – my used<br>and available seat balances have not<br>changed. What is wrong? | Inventory screen. It processes the assignments and registrations<br>and then updates your inventory screen. Wait 5-10 minutes and<br>return to the screen and all should be well. If you return and it<br>still does not reflect the change, you may have forgotten to click<br>the Submit button in the bottom left of the screen to complete<br>the assignment. If you go back to the assignment screen and<br>those people's names still appear for assignment, then your<br>assignment was not completed. Try it again and be sure to click<br>the Submit button before leaving the screen. |
|---|---|
| I purchased 5 inventory seats for a session and assigned them, but the View Enrollment screen shows more than 5 people. How is that possible?   | The View Enrollment screen lists every learner who has <u>ever</u> been<br>assigned one of your inventory seats, even if they later withdrew.<br>If you do not recall reassigning a seat after someone withdrew, it<br>may have occurred via a substitution by an administrator. In<br>substitutions, the admin swaps one learner for another in the<br>session. Drill into details to see a user's current session status.   |