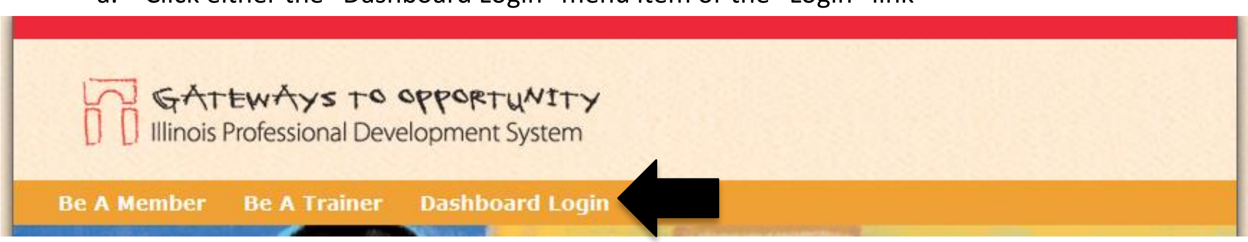
Guide to Using the Gateways Registry Authorized Entity Portal

Contents

Access the Authorized Entity Portal

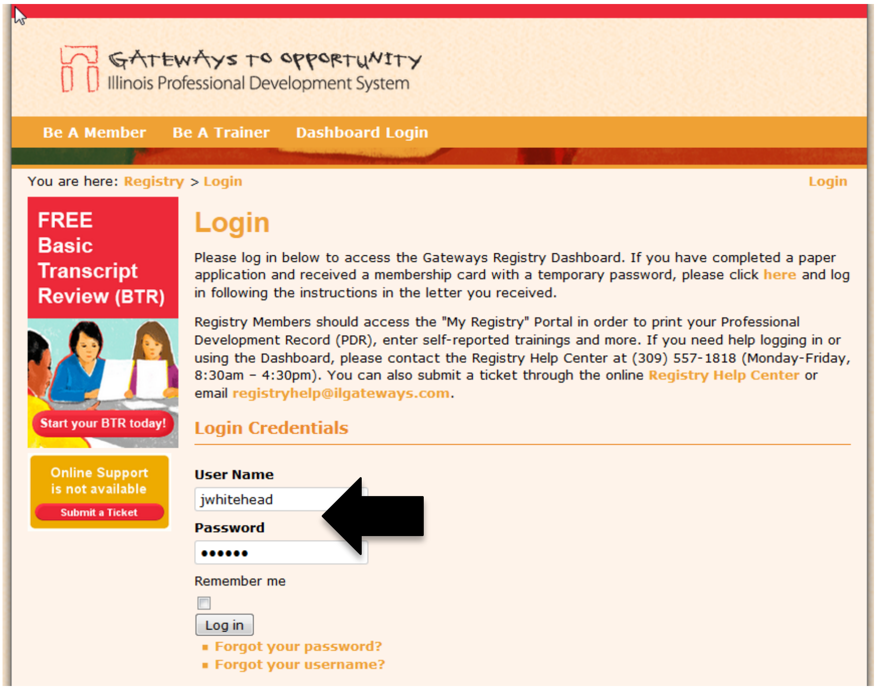
1. Visit the Registry website at http://registry.ilgateways.com/

2. Log in to the Registry Dashboard
   a. Click either the "Dashboard Login" menu item or the "Login" link



OR

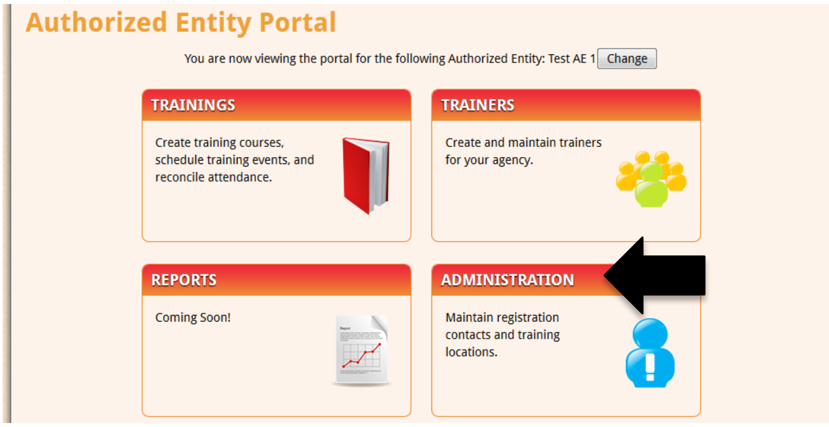
b. Enter your username and password



3. Click into the Authorized Entity Portal

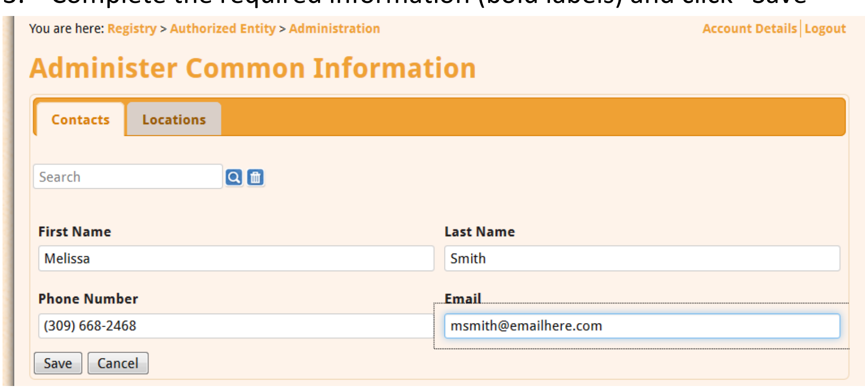
Set Up Registration Contact(s)

1. Enter the Administration section



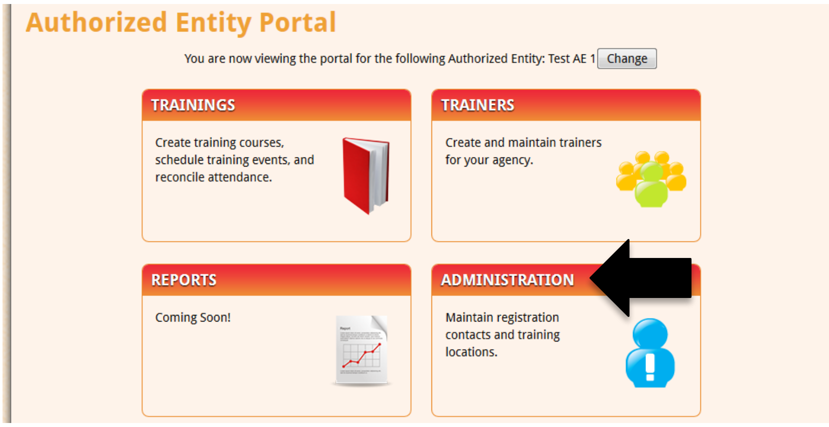
2. Click the button to add a new Registration Contact

3. Complete the required information (bold labels) and click "Save"

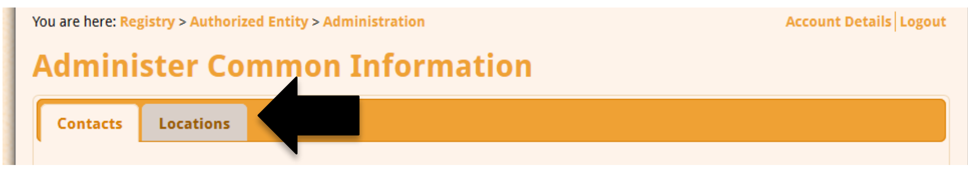


Set Up Training Locations

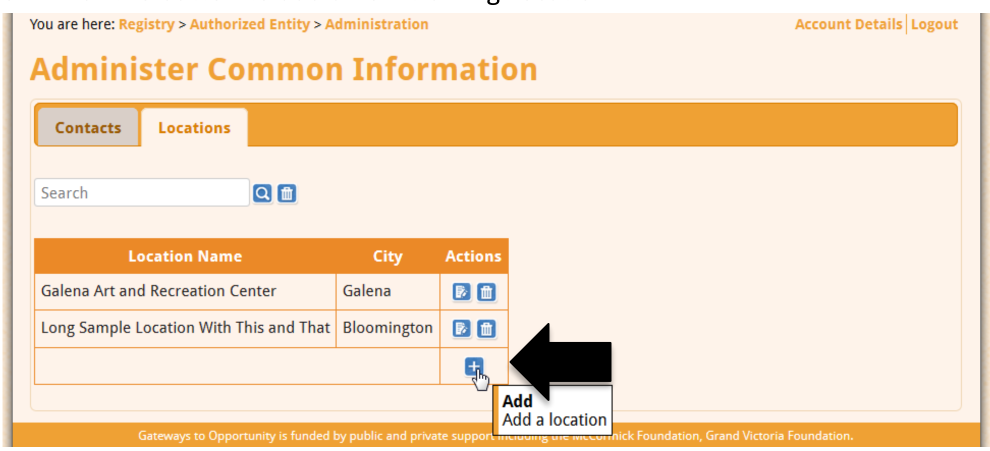
1. Enter the Administration section



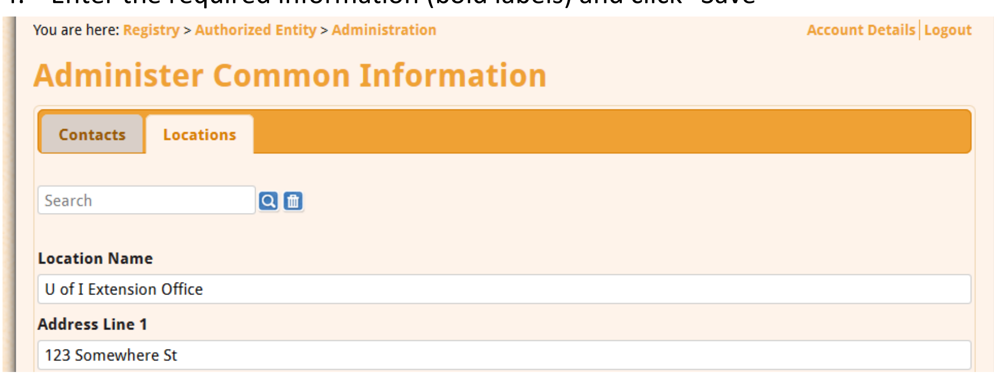
2. Click the Locations tab



3. Click the button to add a new training Location

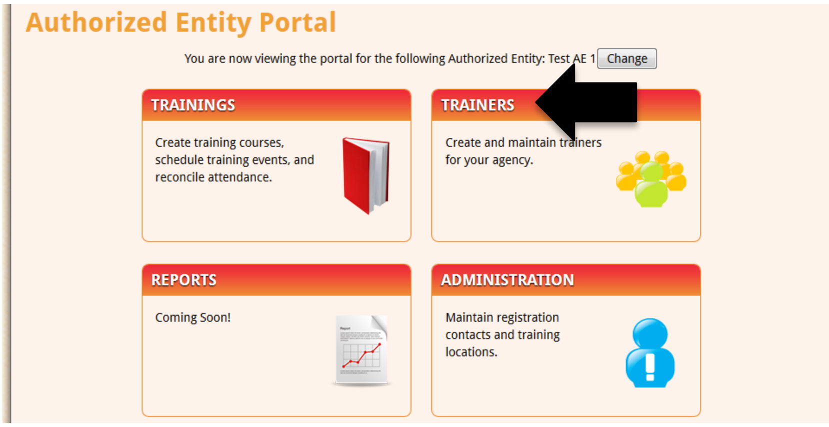


4. Enter the required information (bold labels) and click “Save”

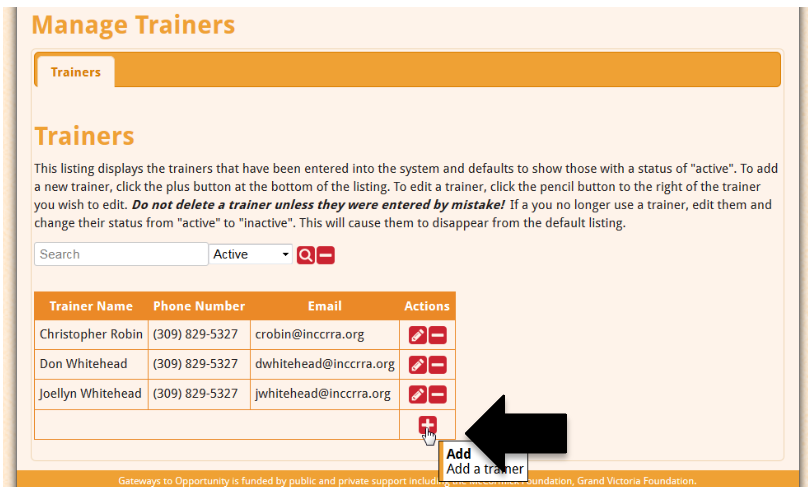


Set Up Trainers

1. Enter the Trainers section

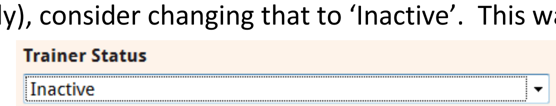


2. Click the button to add a new Trainer



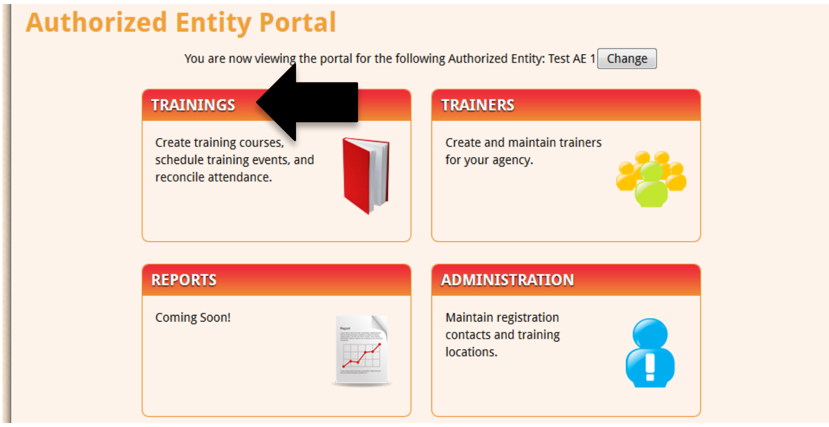
3. Enter the required information (bold labels) and click "Save"

Note: The "Trainer Status" field defaults to 'Active'. If you will no longer use a trainer (or will not use them regularly), consider changing that to 'Inactive'. This way they will not show up in the listing by default.



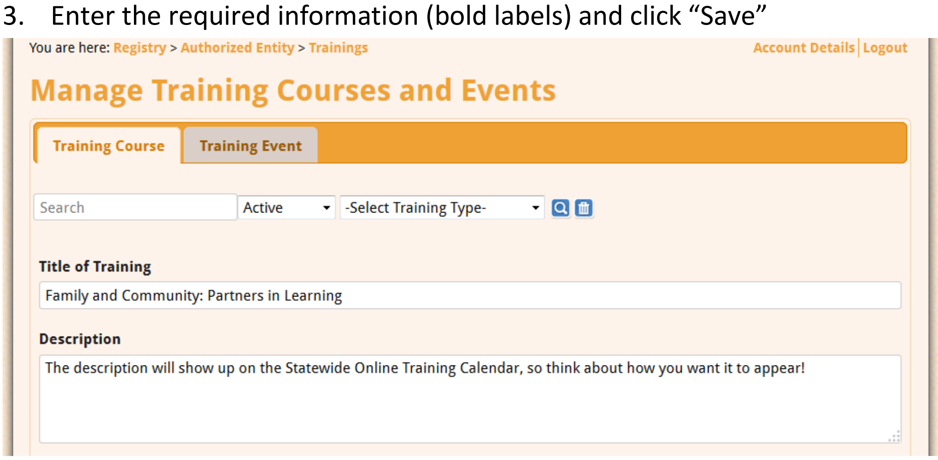
Set Up Training Courses

1. Enter the Trainings section

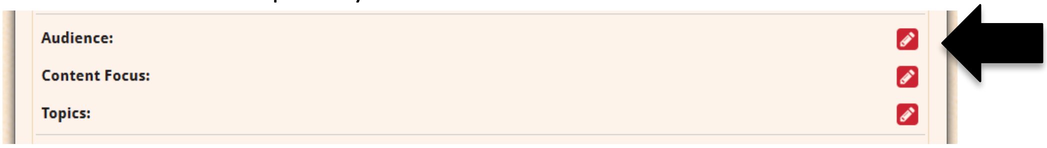


2. Click the button to add a new Training Course

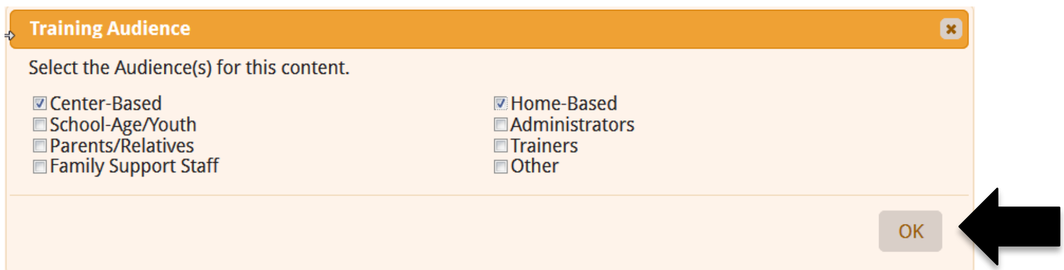
3. Enter the required information (bold labels) and click "Save"



Note: Some fields, such as “Audience” require you to click a button to bring up the option set for that field. Select the options you wish and then click “OK”.



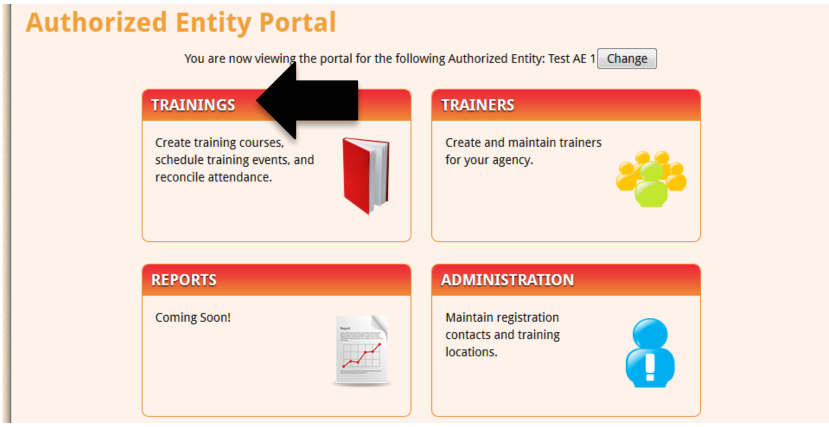
THEN



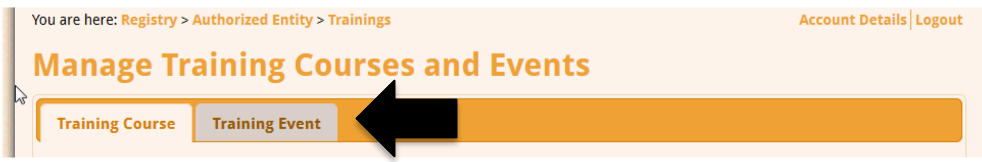
Note About CDA Content Areas: As the CDA (Child Development Associate credential) Content Areas apply only to trainings related to early childhood, it is possible that your training will not fall into any of the CDA Content Areas. In order to bypass the system requirement to enter CDA Content Areas, please check the box that reads “CDA Content Areas Not Applicable”. Doing so will allow you leave the “0.00” defaults in the CDA Content Areas boxes.

Set Up Training Events

1. Enter the Trainings section

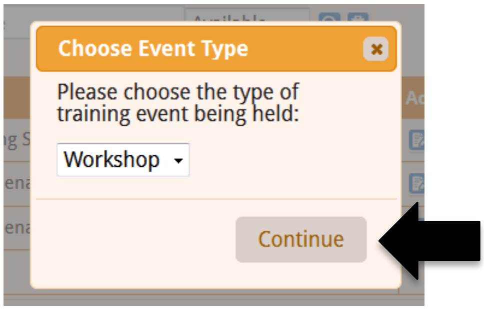


2. Click the Training Event tab

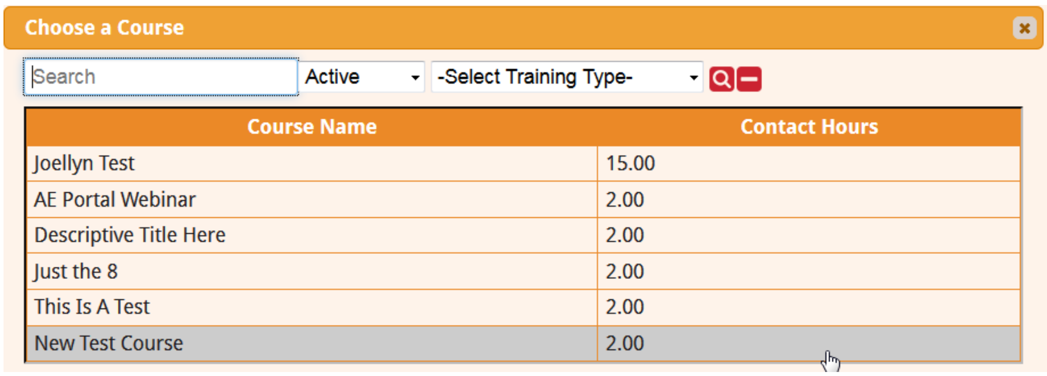


3. Click the button to add a new Training Event

4. Select whether the event is a Workshop (single date), Series (multiple dates), or Self-Paced. Then click “Continue”



5. Click on the Training Course that this event will be built upon

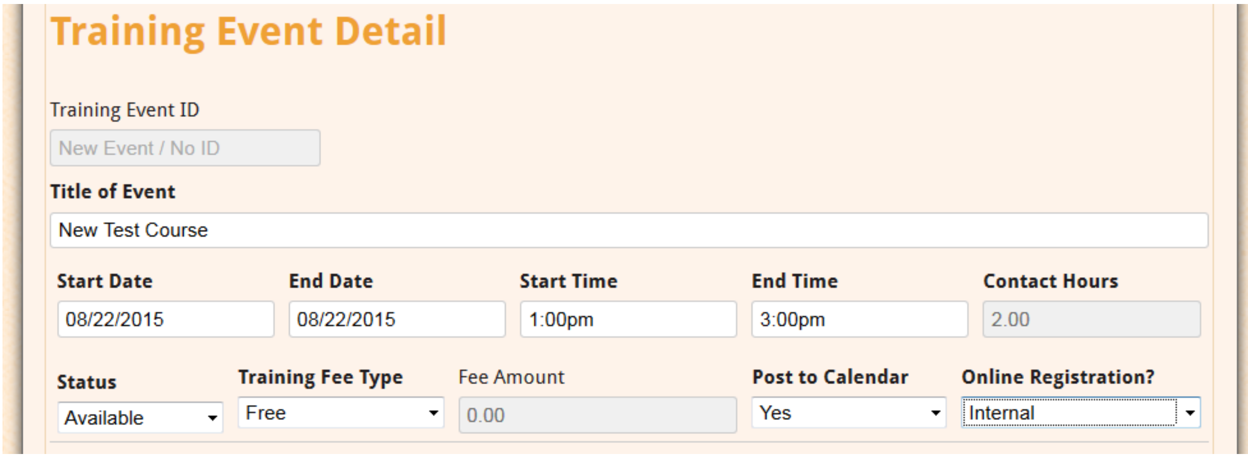


Course Name	Contact Hours
Joellyn Test	15.00
AE Portal Webinar	2.00
Descriptive Title Here	2.00
Just the 8	2.00
This Is A Test	2.00
New Test Course	2.00

6. Enter the required information (bold labels) and click “Save”. This top section gathers information about the date, time, and training fees. The ***Post to Calendar*** drop-down allows to you choose whether you wish to have this training shown on the Statewide Online Training Calendar. The ***Online Registration*** field allows you to specify whether you wish to enable online registration for this training, and if so, do you prefer the Internal or External option.

Internal Registration – This allows an individual to register for the training via the Statewide Online Training Calendar. The benefit is that their information (Registry Member ID and Name) will appear on the Roster for the training event. It is only available for free trainings at this time.

External Registration – This allows you to provide a registration link that you would us to send people to if they want to register online. It could be a registration system you use or simply the page on your website that has information about how to register for your trainings. The downside is that their information does not automatically appear on the Roster for the training event – it will be up to you to enter that information.



Top section of the Training Event Detail screen

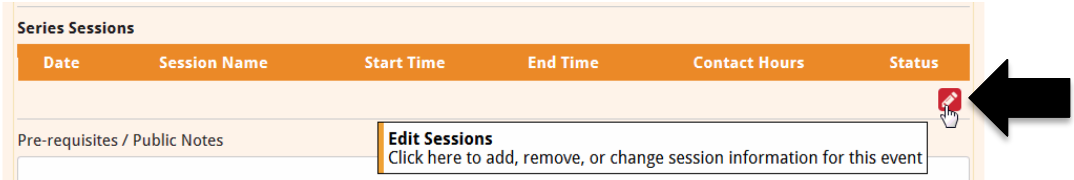
The bottom section of the screen allows you to specify the training location, trainer(s), and details about registration. If you choose to use the ***External Online Registration*** option, you must provide a ***Registration Hyperlink***. If you choose to use the ***Internal Online Registration*** option, you must provide the ***Maximum Capacity***. ***Pre-requisites / Public Notes*** allow you to enter text that provides additional information, which will be shown on the Statewide Online Training Calendar.

Notes:

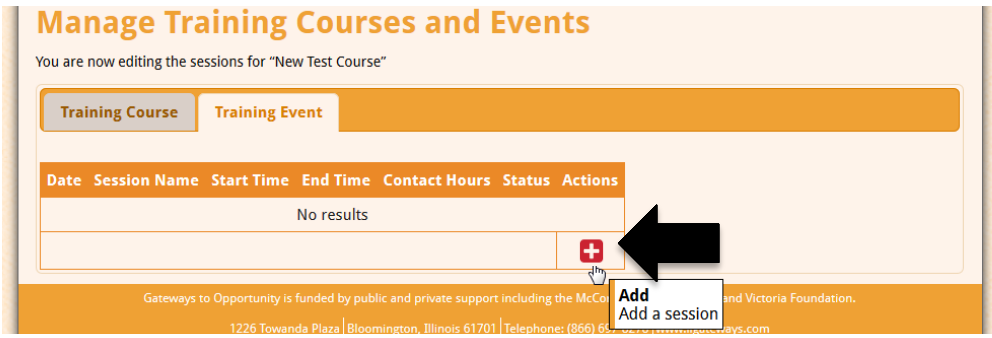
- The "Title of Event" field will be populated by default with the "Title of Training" from the Course. You can change this on the event if you wish and it will apply just to that event.
- If a training event will be held on just one day (a single session workshop), the End Date should be the same as the Start Date.
- If the training event is a series and held on multiple dates:
    - The Start Date should be the date of the first session.
    - The End Date should be the date of the last session.
    - The Start Time should be the start time of the first session.
    - The End Time should be the end time of the last session.
- If the training event is self-paced, the date and time fields do not necessarily make sense in context, but are required fields.
    - Choose a Start/End Date as you wish. You could set it to be a 5-year period, or maybe just a 1-year period. The number of people you expect will complete the training and end up on the roster may help you decide. For example, if you expect you'll have 200 people per year attend the training, you may want to create a new event on a yearly basis instead of leaving it open for 5 years (so you don't have to deal with a roster that has 1,000 people on it!)
    - Choose the Start/End Time as you wish.
- The Location and Trainer(s) fields require that you click the edit button and choose the appropriate options. (These are based on what is set up in the Administration and Trainers sections, respectively.)

Set Up Series Sessions

1. See the “Series Sessions” grid on the Training Event detail screen and click the button to add, edit, or remove sessions from the event

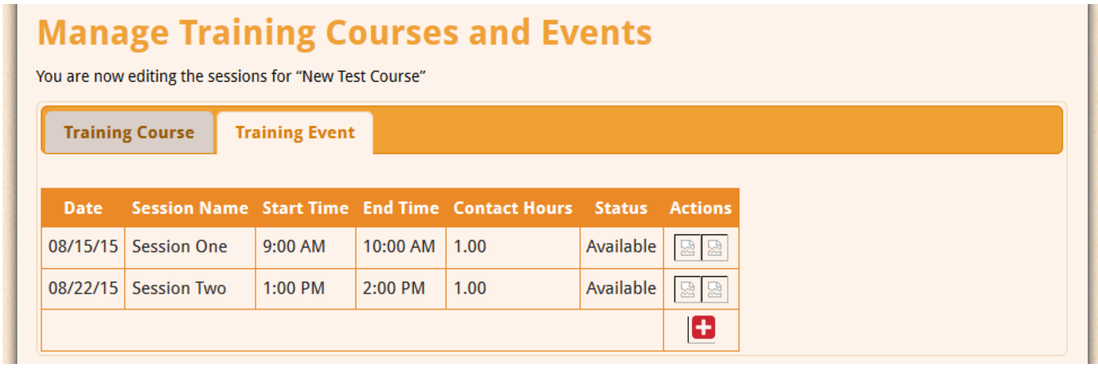


2. Click the button to add a session

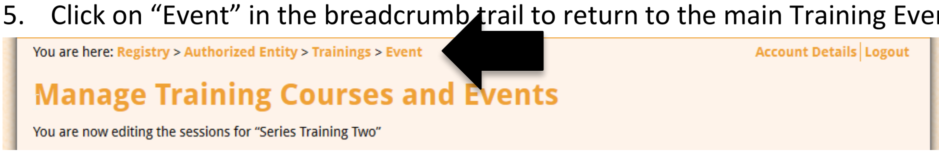


3. Enter the required information (bold labels) and click “Save”

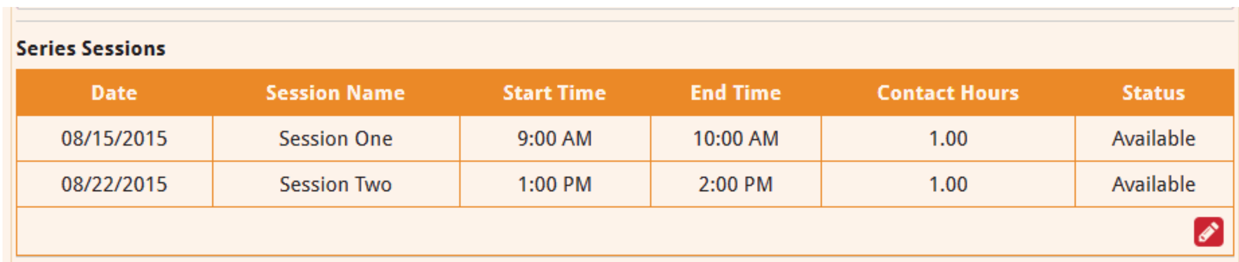
4. Repeat steps 2 and 3 until you have added all of the sessions for the event



5. Click on "Event" in the breadcrumb trail to return to the main Training Event detail screen

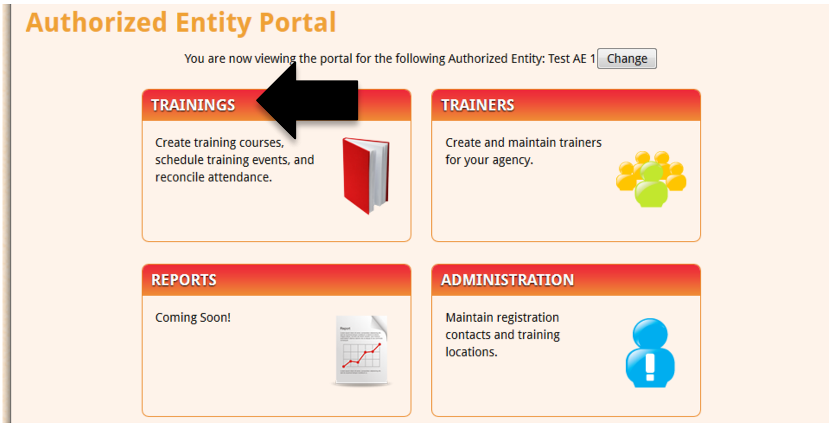


6. You should now see your session listed on the main Training Event detail screen

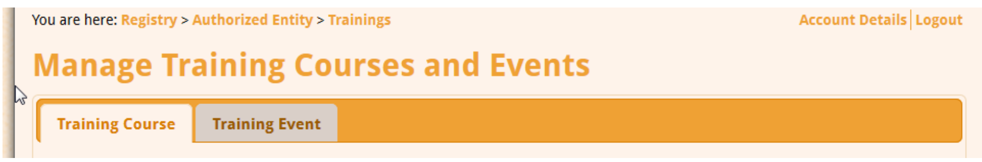


Using the Roster

1. Enter the Trainings section



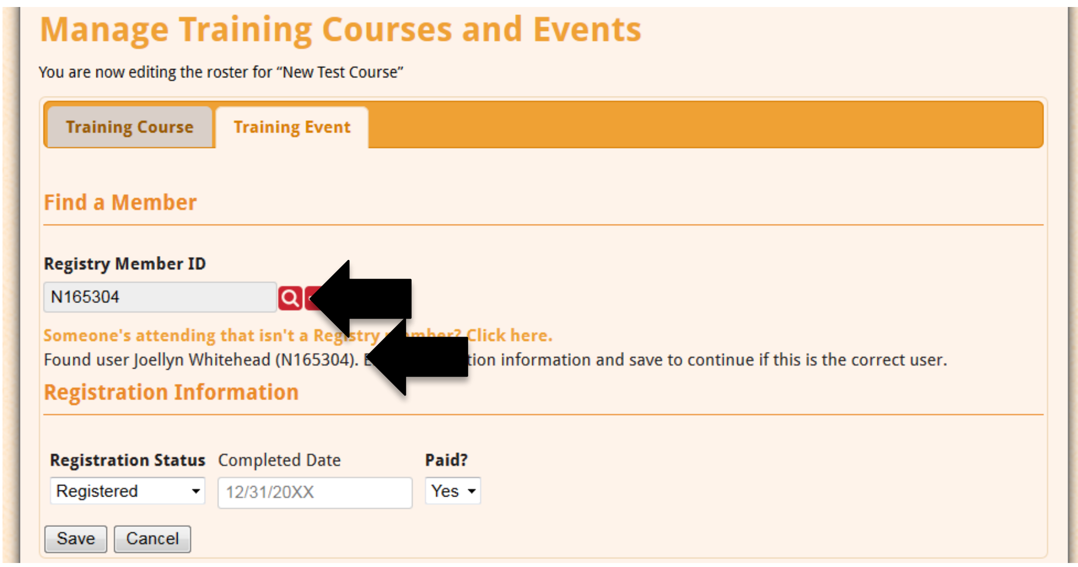
2. Click the Training Event tab



3. Click the Roster link for a Training Event

4. Click the button to add a new participant

5. Enter the individual's Registry Member ID and click the button to search for them. After confirming the correct name appears, click "Save".



6. To "reconcile" attendance, check the boxes next to the names of the people that attended the training. Select "Mark Completed" from the drop-down and click "Submit".

Notes:

- You can also use the drop-down to batch mark people as "No Show" if you decide to use the Roster to register people before the training.

- The batch function is only available for Workshop and Series training events. For Self-Paced events, you must go into each record individually and change the "Registration Status" field to 'Completed' and enter the "Completed Date" (as it will vary from person to person).
- To register and/or reconcile an individual that is not a Registry Member, on the registration screen you can click where it indicates and then enter the person's name: