



AIMS

Registration Training Session
Exercise Book for Participants

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Revised March 2, 2009

AIMS Training Session – Exercise Book for Participants

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AIMS Training Session – Exercise Book for Participants

#	Functionality	NOTES
1	<p><u>Getting Started</u></p> <p>Launch Internet Explorer and type in: www.soccer.on.ca/AIMS Select first option in list of URL addresses.</p> <p>Type in User Name: pu Type in Password: pu</p> <p>In menu on left, •select “My Organizations” •select “Peterborough City”</p> <p>In new menu on left, •select “Registration” •select “Launch”</p> <p>Type in User Name: pu Type in Password: pu</p>	<p>Lower case only</p>
2	<p><u>Our Details</u></p> <ol style="list-style-type: none"> 1. Click on “Our Details” button 2. Participant #1 edits “Fax Number” 3. Click on “Save Details” button 4. Click on “Exit” button 5. Click on “Our Details” button 6. Participant #2 edits “Address 1” 7. Click on “Save Details” button 8. Click on “Exit” button 9. Click on “Our Details” button 10. Participant #3 edits “Postal Code” 11. Click on “Save Details” button 12. Click on “Exit” button 13. Click on “Our Details” button 14. Participant #4 edits “Office Phone Number” 15. Click on “Save Details” button 16. Click on “Exit” button 17. Click on “Our Details” button 18. Participant #5 edits “Building Name” which should be “Organization Name” 19. The “Organization Number” will be system generated. 20. Click on “Save Details” button 21. Click on “Exit” button 	<p>This exercise can only be performed by one participant at a time. The instructor will select the participant to perform steps 2, 6, 10, 14 and 18.</p> <p>Wait for instructions from the instructor.</p>

<p>3</p>	<p><u>Committees and Other Groups</u></p> <ol style="list-style-type: none"> 1. Click on "Committees & Other Groups" button 2. Click on "Show All Records" button 3. Scroll list of programs 4. Click on "Show All Records" button to remove check mark 5. Click on "Next" button and then "Previous" button 6. Type following name in "Name" field: <ul style="list-style-type: none"> • «COMMITTEE_1» 7. Set status as "Active" 8. Click on "Save" Button 9. Click on the "Name" heading of the middle column of list of committees to list the committees alphabetically from a to z or z to a. 10. Find the following committee by using the "Next" button under the list of committees. <ul style="list-style-type: none"> • «COMMITTEE_1» 11. Type following name in "Name" field: <ul style="list-style-type: none"> • «COMMITTEE_2» 12. Set status as "Pending" 13. Click on "Save" Button 14. Click on "Exit" Button 15. Click on "Committees & Other Groups" button 16. Click on the "Name" heading of the middle column of list of committees. 17. Find the following committee by using the "Next" button under the list of committees. <ul style="list-style-type: none"> • «COMMITTEE_2» 18. Click on the "Edit" button to the left of the following committee: <ul style="list-style-type: none"> • «COMMITTEE_2» 19. Change "status" to "Active" 20. Click on "Save" Button 21. Click in "Show All Records" box 22. Find the following committee: <ul style="list-style-type: none"> • «COMMITTEE_1» 23. Click on the "Edit" button to the left of the following committee: <ul style="list-style-type: none"> • «COMMITTEE_1» 24. In the "Status" drop-down menu, change "status" to "Delete" 25. Click on "Save" Button 26. Click on "Exit" Button 	
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<p>4</p>	<p><u>Program Registration</u></p> <ol style="list-style-type: none"> 1. Click on "Program Registration" button 2. Click on "Show All Records" button 3. Scroll list of programs 4. Click on "Show All Records" button to remove check mark 5. Click on "Next" button and then "Previous" button 6. Click on "Add New" button 7. Type the following name in "Program Name" field: <ul style="list-style-type: none"> •«PROGRAM» 8. Click on the arrow to right of "Type" dropdown menu and type the letter "P" which should bring up "Player" 9. Under "Season" menu, select "Outdoor 2009" 10. Under "Price", type any amount of your choice even "0" 11. Under "OSA Classification", select "Youth Recreational" 12. Under "Minimum Persons" and "Maximum Persons" fields, type any amount of your choice with the maximum number exceeding the minimum number 13. Under "Age Group" field, select: <ul style="list-style-type: none"> •«AGE_GROUP» 14. Click on the "available to web" box which will then show this program on the club's website. 15. Click on "Save" button 16. Click on "Exit" button 17. Click on "Program Registration" button 18. Click on "Program Name" heading to list programs alphabetically from a to z or z to a. 19. Click on the "Name" heading of the middle column of list of "Program Names" to list programs alphabetically. 20. Find the following program by using the "Next" button under the list of committees. <ul style="list-style-type: none"> •«PROGRAM» 21. Find your program and click on "Edit" button 22. Change the value (amount) in "Minimum Persons" field 23. Click on "Save" button 24. Click on the "Name" heading of the middle column of list of "Program Names" to list programs alphabetically. 25. Find the following program by using the "Next" button under the list of committees. <ul style="list-style-type: none"> •«PROGRAM» 26. Check to ensure that the new amount for "Minimum Persons" is correct 27. Click on "Exit" button 	<p>Later in March, the User will be able to create new seasons.</p>
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<p>5</p>	<p>Create/Edit Teams</p> <ol style="list-style-type: none"> 1. Click on "Create/Edit" button 2. Click on "Show All Records" button 3. Scroll list of teams 4. Click on "Show All Records" button to remove check mark 5. Click on "Next" button and then "Previous" button 6. Click on "Create New Team" button 7. Type the following name in "Name" field: <ul style="list-style-type: none"> • «TEAM_NAME_1» 8. Ignore "Team Type" as this field is being removed and in future, will be determined by the Competitions Manager 9. The status field will indicate "Pending" and you cannot change that field. 10. Type only the last five (5) characters of the following team number in the editable part of the "Team Number" field": <ul style="list-style-type: none"> • «TEAM_NUMBER_1» 11. Under "Classification", select "Youth Recreational" 12. Under "Age Group" field, select: <ul style="list-style-type: none"> • «AGE_GROUP» 13. Under "Gender" menu, select "Male" 14. Ignore "League" and "Division" fields. 15. Click on "Save" button 16. Click on "Show All Records" box 17. Click on the "Number" Headings to sort the list of teams. 18. Click on the "Number" Heading to reverse the sort. 19. Click on the "Status" Headings to sort the list of teams. 20. Click on the "Status" Heading to reverse the sort. 21. Click on the "Classification" Headings to sort the list of teams. 22. Click on the "Classification" Heading to reverse the sort. 23. Click on the "Age Group" Headings to sort the list of teams. 24. Click on the "Age Group" Heading to reverse the sort. 25. Click on the "Gender" Headings to sort the list of teams. 26. Click on the "Gender" Heading to reverse the sort. 27. Click on the "Name" Headings to sort the list of teams. 28. Click on the "Name" Heading to reverse the sort. 29. Scroll down the alphabetical list and locate the following team which you just registered: <ul style="list-style-type: none"> • «TEAM_NAME_1» 30. Click on the "Edit" button to the left of the new team that you just registered 31. In the "Status" field change status to "Active" 32. Click on the "Save" button 33. Click on "Create New Team" button 34. Type the following name in "Name" field: <ul style="list-style-type: none"> • «TEAM_NAME_2» 35. Ignore "Team Type" as this field is being removed and in future, will be determined by the Competitions Manager 36. The status field will indicate "Pending" and you cannot change that field. 37. Type only the last five (5) characters of the following team number in the editable part of the "Team Number" field": <ul style="list-style-type: none"> • «TEAM_NUMBER_2» 38. Under "Classification", select "Youth Recreational" 39. Under "Age Group" field, select: <ul style="list-style-type: none"> • «AGE_GROUP» 	<p>"Team Type" will be determined by the Competitions Manager.</p> <p>"League" and "Division" fields will be accessed through "Competitions" manager of AIMS.</p>
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	<p>40. Under "Gender" menu, select "Male" 41. Ignore "League" and "Division" fields. 42. Click on "Save" button 43. Click on "Show All Records" box 44. Click on "Name" Heading which lists teams alphabetically 45. Scroll down list and locate the following team which you just registered: <ul style="list-style-type: none"> • «TEAM_NAME_2» 46. Click on the "Edit" button to the left of the new team that you just registered 47. In the "Status" field change status to "Active" 48. Click on the "Save" button 49. Click on "Exit" button</p>	<p>Please ensure that you have performed steps 31 & 32 and steps 47 & 48. Failure to perform these steps will create problems later in this class.</p>
<p>6</p>	<p><u>Registrant Registration and Player Registration</u></p> <ol style="list-style-type: none"> 1. Click on "Registration of Individuals" button 2. Type the following in "Last Name" field <ul style="list-style-type: none"> • «LAST_NAME_1» 3. Click on "Search" button 4. Click on "Add New Registrant" button 5. Type the following information: <ul style="list-style-type: none"> • First Name: Tom • Year of Birth: «YEAR_OF_BIRTH_1»-10-10 • Address: 123 Broadway • City: Vaughan • Postal Code: L4L 9E4 6. Click on "Save Details" button 7. Click on "New" button 8. In the drop-down menu of the "OSA Classification" field, select "Youth Recreational" 9. In the drop-down menu of the "Season" field, select "Outdoor 2009" 10. Click on "Save and Proceed" button 11. When the Summary – Successful Registration dialogue box appears, click on "Save" button 12. The dialogue box "Player Registration Saved" appears and click on the "OK" button. 13. Click on "Start New Registration" button 14. Type the following in "Last Name" field <ul style="list-style-type: none"> • «LAST_NAME_2» 15. Click on "Search" button 16. Click on "Add New Registrant" button 17. Type the following information: <ul style="list-style-type: none"> • First Name: Bill • Year of Birth: «YEAR_OF_BIRTH_1»-10-10 • Address: 123 Broadway • City: Vaughan • Postal Code: L4L 9E4 18. Click on "Save Details" button 19. Click on "New" button 20. In the drop-down menu of the "OSA Classification" field, select "Youth Recreational" 21. In the drop-down menu of the "Season" field, select "Outdoor 2009" 22. Click on "Save and Proceed" button 23. When the Summary – Successful Registration dialogue 	<p>Upper case, lower case doesn't matter with postal code</p>

	<p>box appears, click on “Save” button</p> <p>24. The dialogue box “Player Registration Saved” appears and click on the “OK” button.</p> <p>25. Click on “Start New Registration” button</p> <p>26. Type the following in “Last Name” field <ul style="list-style-type: none"> • «LAST_NAME_3» </p> <p>27. Click on “Search” button</p> <p>28. Click on “Add New Registrant” button</p> <p>29. Type the following information: <ul style="list-style-type: none"> • First Name: Matt • Year of Birth: «YEAR_OF_BIRTH_1»-10-10 • Address: 123 Broadway • City: Vaughan • Postal Code: L4L 9E4 </p> <p>30. If player lives in USA, change default country from Canada to United States and enter 5-character Zip Code for Postal Code. The Postal Codes are required in order to “Validate Residency Requirements” of each team.</p> <p>31. Click on “Save Details” button</p> <p>32. Click on “New” button</p> <p>33. In the drop-down menu of the “OSA Classification” field, select “Youth Recreational”</p> <p>34. In the drop-down menu of the “Season” field, select “Outdoor 2009”</p> <p>35. Click on “Save and Proceed” button</p> <p>36. When the Summary – Successful Registration dialogue box appears, Click on “Save” button</p> <p>37. The dialogue box “Player Registration Saved” appears and click on the “OK” button.</p> <p>38. Click on “Start New Registration” button</p> <p>39. Type the following in “Last Name” field <ul style="list-style-type: none"> • «LAST_NAME_4» </p> <p>40. Click on “Search” button</p> <p>41. Click on “Add New Registrant” button</p> <p>42. Type the following information: <ul style="list-style-type: none"> • First Name: Brian • Year of Birth: «YEAR_OF_BIRTH_1»-10-10 • Address: 123 Broadway • City: Vaughan • Postal Code: L4L 9E4 </p> <p>43. Click on “Save Details” button</p> <p>44. Click on “New” button</p> <p>45. In the drop-down menu of the “OSA Classification” field, select “Youth Recreational”</p> <p>46. In the drop-down menu of the “Season” field, select “Outdoor 2009”</p> <p>47. Click on “Save and Proceed” button</p> <p>48. When the Summary – Successful Registration dialogue box appears, Click on “Save” button</p> <p>49. The dialogue box “Player Registration Saved” appears and click on the “OK” button.</p> <p>50. Click on “Exit” button</p>	
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7	<p><u>Register as Team Official</u></p> <ol style="list-style-type: none"> 1. Click on "Registration of Individuals" button 2. Type the following in "Last Name" field <ul style="list-style-type: none"> • «LAST_NAME_5» 3. Click on "Search" button 4. Click on "Add New Registrant" button 5. Type the following information: <ul style="list-style-type: none"> • First Name: Matt • Year of Birth: «YEAR_OF_BIRTH_2_»-10-10 • Address: 123 Broadway • City: Vaughan • Postal Code: L4l 9E4 6. Click on "Save Details" button 7. Click on "New Role" button 8. In the "Role" field menu at top of view, select "Team Official" which is the first listed role <ul style="list-style-type: none"> • NOTE: you can also select the role by clicking on the drop down menu arrow and typing the first 3 characters of the role name. for example, type: "Cla" and then "Tea" 9. Experiment by typing some other characters and then, return to "Team Official" by typing "Tea" 10. In the "Season" drop down menu, the field currently is not editable. It defaults to "Outdoor 2009" but, it will be editable in the future. 11. The "Effective From" and "Effective To" fields are not editable. 12. Ignore the "Status" field, "Program" field and the "Waiver Signed" box. 13. In the "Team" field menu drop down menu, select the following team by typing first 2-3 characters of the team name: <ul style="list-style-type: none"> • Opeongo Wild 14. In the "Role" field menu near the bottom of the view, select "Team Head Coach". You can also select by typing the first character of the role. 15. Click on the "Add" button 16. You will receive a message that "this team already has the maximum number of team officials. This is an example of an OSA rule being enforced by the system since this team has already been assigned a Team Head Coach and each team is limited to one Team Head Coach. 17. You will now select a different team in the "Team" field drop down menu by selecting the following team by typing first 2-3 characters of the team name: <ul style="list-style-type: none"> • «TEAM_NAME_1» 18. In the "Role" field menu near the bottom of the view, leave the role as: "Team Head Coach" 19. Click on the "Add" button to add that team 20. Click on the "Save" button to register the team official
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	<ol style="list-style-type: none"> 21. When the Summary – Successful Registration dialogue box appears, Click on “Save” button 22. The dialogue box “Registration Saved” appears and click on the “OK” button. 23. Click on “Exit” button in order to register another person as a Team Official. <ul style="list-style-type: none"> • NOTE: If you were going to register the same individual as a Team Official with another team within the same Club, you would click on the “New Role” button instead of the “Exit” button. But, in this case, click on the “Exit” button. 24. Click on “Registration” button 25. Type the following in “Last Name” field <ul style="list-style-type: none"> • «LAST_NAME_6» 26. Click on “Search” button 27. Click on “Add New Registrant” button 28. Type the following information: <ul style="list-style-type: none"> • First Name: Jim • Year of Birth: «YEAR_OF_BIRTH_2_»-10-10 • Address: 123 Broadway • City: Vaughan • Postal Code: L4l 9E4 29. Click on “Save Details” button 30. Click on “New Role” button 31. In the “Role” field menu near the bottom of the view, select “Team Official” which is the first listed role 32. Again, you can also select the role by clicking on the drop down menu arrow and typing the first 2-3 characters of the role name. for example, type: “Te” 33. In the “Season” drop down menu, select “Outdoor 2009” 34. In the “Team” field menu drop down menu, select the following team by typing first 2-3 characters of the team name: <ul style="list-style-type: none"> • «TEAM_NAME_2» 35. In the “Role” field menu, select any position 36. Click on the “Add” button to add that team 37. Click on the “Save” button to register the team official 38. When the Summary – Successful Registration dialogue box appears, Click on “Save” button 39. The dialogue box “Registration Saved” appears and click on the “OK” button. 40. Click on “Exit” button 	<p>When you click on the “Exit” button, ignore warning about the registration not being saved.</p>
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<p>8</p>	<p><u>Register as Administrator</u></p> <ol style="list-style-type: none"> 1. Click on "Registration" button 2. Type the following in "Last Name" field <ul style="list-style-type: none"> • «LAST_NAME_7_» 3. Click on "Search" button 4. Click on "Add New Registrant" button 5. Type the following information: <ul style="list-style-type: none"> • First Name: Tom • Year of Birth: «YEAR_OF_BIRTH_2_»-10-10 • Address: 123 Broadway • City: Vaughan • Postal Code: L4l 9E4 6. Click on "Save Details" button 7. Click on "New Role" button 8. In "Role" field menu at top of view, select "Administrator" which is the second listed role <ul style="list-style-type: none"> • NOTE: you can also select the role by clicking on the drop down menu arrow and typing the first 2-3 characters of the role name. for example, type: "Adm" 9. Experiment by typing some other characters and then, typing: "Administrator" 10. Type the following in "Position Title" field: <ul style="list-style-type: none"> • CEO 11. Ignore the "Program" field and the "Waiver Signed" box 12. In the drop-down menu to right of "Committee", type the first character of the following committee name and then selecting the following committee: <ul style="list-style-type: none"> • «COMMITTEE_1» 13. Click on "Add" button 14. The committee that you have chosen will appear under the Committee List. 15. Repeat the process and select the following committee in the drop-down list: <ul style="list-style-type: none"> • «COMMITTEE_2» 16. Click on "Add" button 17. Click in the box next to the following committee's name: <ul style="list-style-type: none"> • «COMMITTEE_1» 18. Click on "Delete" button 19. Click on "Save" button 20. Click "OK" button in the "Role Saved" message 21. At this point, you can register the same registrant to another administrative position or you can exit the registration function. 22. Click on "Exit" button 	<p>Ignore warning about registration not being saved</p>
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9	<p><u>Batch Player Registration</u></p> <ol style="list-style-type: none"> 1. Click on “Batch Player Registration” button. 2. Click on “Show All Records” box. 3. You can filter the number of players to include only those being considered for batch player registration by using the gender and birth year fields. 4. In the Gender drop-down menu, select “Male”. 5. In the Birth Year drop-down menu, select: <ul style="list-style-type: none"> • «YEAR_OF_BIRTH_1» • (NOTE: this is the same birth year as the players which you registered earlier in Player Registration above) • (NOTE: you could also filter the players based on the Program Registration and the previous year’s team) 6. From the reduced player list (based on the filter conditions), click in the box to the left of the following names: <ul style="list-style-type: none"> • Tom «LAST_NAME_1» • Bill «LAST_NAME_2» 7. The above two players are the players that you wish to register as part of this batch player registration. These are also players whom you registered earlier in the training session. 8. Select the Season, Classification and Team for the batch player registration: <ul style="list-style-type: none"> • Season: Outdoor 2009 • Classification: Youth Recreational • Team «TEAM_NAME_1» 9. Click on “Re-Register” button. 10. Click on the “OK” button of the “Selected Players Re-Registered” message. 11. Click on “Exit” button 	<p>Ignore warning about registration not being saved</p>
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<p>10</p>	<p><u>Allocate Players to Teams</u></p> <ol style="list-style-type: none"> 1. Click on “Allocate Players To Teams” button. 2. Using the following filter fields to narrow the group of players to be allocated to a team,; <ul style="list-style-type: none"> • Select “Outdoor 2009” in the “Season” field • Select “Player” in the “Role” field • Ignore the “Program” field • Select “Male” in the “Gender” field • Select “Active” in the “Status” field • Select “«YEAR_OF_BIRTH_1»” in the “Birth Year” field 3. Select the following “Team Name” to which these players will be assigned: <ul style="list-style-type: none"> • «TEAM_NAME_2» •NOTE: You can select the team by typing in the first three characters of the team’s name 4. If the Club has more than one team with the same team name, the following filters can identify the correct team: <ul style="list-style-type: none"> • Select “Male” in the “Gender” field • Select «YEAR_OF_BIRTH_1» in “Year of Birth” field 5. NOTE: by picking the above two filters (Gender and Year of Birth), it should reduce the number of teams available to include only teams of that gender and “years of birth” which are eligible to be assigned to that team. However, it is not currently doing that reduction. But, will do so in the future. 6. Click in the box to the left of each of the following two players whom you wish to assign to this team: <ul style="list-style-type: none"> • Matt «LAST_NAME_3» • Brian «LAST_NAME_4» 7. Click on the “Move” button (pointing to the right) to move the player to the team. 8. If you want to take a player off the team, click in the box to the left of the player’s name and then, on the “Move” button (pointing to the left). 9. Click on the “Validate Residency Requirement” button and if you receive a message that “Residency Validation Unsuccessful”, it means that the team does not have the required minimum of nine players resident in that District (based on each player’s postal code). Once you have registered all the players to this team and providing that at least nine players have a postal code for the District’s boundaries, the “Residency Validation” will be successful. 10. Although there is no “SAVE” button the allocation of these players to this team has been saved. 11. Click on the “Exit” button 	
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<p>11</p>	<p><u>Grading Players</u></p> <ol style="list-style-type: none"> 1. Click on "Grade Players" button. 2. Using the following filter fields to narrow the group of players to be allocated to a team,; <ul style="list-style-type: none"> • Select "Outdoor 2009" in the "Season" field • In the "Team" field, select "«TEAM_NAME_1»" by typing first character of the Team • Select "«YEAR_OF_BIRTH_1»" in the "Birth Year" field • Select "Male" in the "Gender" field 3. Click on the "Show Ungraded" box (immediately below gender). 4. Select the grade that you want to assign: "A" 5. Click in the box to the left of: «LAST_NAME_1» who is the player you wish to receive the "A" Grade. 6. Click on the "Move" button (pointing to the right) to assign the "A" Grade. The player will be moved to the right column and he will have an "A" grade. 7. Select the grade that you want to assign: "B" 8. Click in the box to the left of: «LAST_NAME_2» who is the player you wish to receive the "B" Grade. 9. Click on the "Move" button (pointing to the right) to assign the "B" Grade. The player will be moved to the right column and he will have a "B" grade. 10. Select the grade that you want to assign: "C" 11. Click in the box to the left of: «LAST_NAME_3» who is the player you wish to receive the "C" Grade. 12. Click on the "Move" button (pointing to the right) to assign the "C" Grade. The player will be moved to the right column and he will have a "C" grade. 13. Click in the box to the left of «LAST_NAME_2» who is player to which you assigned the "B" grade. 14. Click on the "Show Ungraded" box to remove the check mark in that box. 15. Click on the "Move" button (pointing to the left) to remove «LAST_NAME_2» from the list of graded players. 16. Select the grade that you want to assign: "D" 17. Click in the box to the left of «LAST_NAME_2» whom you removed the "B" grade and to whom you wish to now assign a "D" Grade. 18. Click on the "Move" button (pointing to the right) to assign the "D" Grade. The player will be moved to the right column and he will have a "D" grade. 19. Click on "Exit" button 	
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<p>12</p>	<p><u>Task List</u></p> <ol style="list-style-type: none"> 1. Click on “Task List” button . 2. Click on the “Show All Records” box. 3. In the “Type” drop down menu, select “Incomplete Registration” 4. Select a player by clicking in the “Go” box to the left of the player’s name. 5. Update the player’s record and if she/he has completed all requirements, change the “Player Status” to “Active”. <ul style="list-style-type: none"> • If the player still has not completed all requirements, leave the status as “Pending”. 6. Click on “Save” button. 7. Click on “Exit” button 8. If you have other updates, click on the “Task List” button. 	<p>The Task List is used to update a group of records which need to be updated. Usually these records have similar updates.</p> <p>Ignore warning about registration not being saved</p>
<p>13</p>	<p><u>Registration Management</u></p> <ol style="list-style-type: none"> 1. Click on “Registration Management” button. 2. Type in the following name in “Last Name” field: <ul style="list-style-type: none"> • «LAST_NAME_1» 3. Click on “Search” button. 4. Click on the “Select” button to the left of the name of the player whose record you wish to view or edit. 5. View the player’s record to obtain information about her/him. 6. Change the data in the player’s record (eg., click on any unchecked boxes for waiver, proof of age, parent/guardian signature, payment received, documents received) 7. Change the status to “Active’ if applicable. 8. Click on “Save and Proceed” button. 9. Click on “Return to Registration List” button. 10. When you have completed updating records, click on the” Exit” button. 	<p>Registration Management is used to update an individual record.</p>