Voucher Distribution Tool Walkthrough

The Voucher Distribution Tool (VDT) is designed to assist administrative users in distributing purchased vouchers to the appropriate teachers or assessment coordinators. This user guide walks you through the steps to: Log in to the Voucher Distribution Tool, add new customer(s) in order to distribute vouchers, and distribute or return vouchers.

Accessing the Voucher Distribution Tool:

To access the VDT, you must first log into the system.

1. Navigate to SkillConnec.org and enter your Username and Password fields and then click Login.
2. The campus homepage will display. Select Voucher and Teacher Tools from the left navigation.
3. Click the Voucher Distribution Tool link. This takes you into the VDT and the Voucher Summary page displays.

Adding a New Teacher/assessment coordinator

1. From the Voucher Summary page, click the Add New Teacher link located above or below the "Your customers" table.

> **Administrative Resources**
>
> Currently logged in as: ray.pageler@k2share.com
>
> Home | User Profile
>
> Customers listed below are eligible to receive distributions of vouchers from your pool. Use the links below to add new customers to receive distributions, or manage existing customers.
>
> Add Teacher

Your customers					
0 customers found					
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z					
Last Name ▲	First Name	Address	Phone	Email	Vouchers
0 customers found					

> Add Teacher

2. Enter information in the required fields which are denoted by a red asterisk.

Review and edit the user account information below. * **indicates a required field.**

Create new customer

First Name: *

Ray

Last Name: *

Test

Nickname:

School/Organization State:

TX - Texas

School/Organization:

Select School/Organization

School/Organization:

CISD

Address: *

1005 Univesrity Drive East

City, State, Zip: *

| College Station | TX - Texas | 77845 |

Phone Number:

Fax Number:

Email Address: The email can be used by account holder to log in to the system. *

raypageler@yahoo.com

Username: The username the account holder will use to log in to the system. *

raypageler@yahoo.com

Distributing customer: * The primary customer that will be distributing vouchers to this customer.

Pageler , Ray - ray.pageler@k2share.com

Submit

3. Ensure that the Distributing customer field displays the default value, which is your name and email address.
4. Click the Submit button located at the bottom of the page. The page will refresh and will then display a green check mark with a message indicating that the customer was successfully added.
5. Click the Voucher Summary link located under the Administrative Resources heading. The newly added customer now displays in the "Your customers" table.

Your customers

1 customer found

All   A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y   Z

Last Name ▲	First Name	Address	Phone	Email	Vouchers
Test	Ray	CISD 1005 Univesrity Drive East College Station 77845	n/a	raypageler@yahoo.com	view

1 customer found

Distributing Vouchers to Customers (Teachers):

1. From the Voucher Summary page, click the view link to the right of the appropriate customer in the "Your customers" table. The Customer Summary page will display.

Your customers					
1 customer found					
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z					
Last Name ▲	**First Name**	**Address**	**Phone**	**Email**	**Vouchers**
Test	Ray	CISD 1005 Univesrity Drive East College Station 77845	n/a	raypageler@yahoo.com	view
1 customer found					

2. In the "Distribute vouchers to" table, select the appropriate Course/Assessment from the "Course number" drop-down menu.
3. Enter the select number of vouchers into the "Number of vouchers to distribute TO this customer" field.
4. Select the "Start distribution with vouchers that will expire earliest" checkbox.

Distribute vouchers to Ray Test
Vouchers will be distributed from: Ray Pageler
Course number to distribute vouchers for:
Select the course to distribute vouchers for. Selecting all courses will allow you to distribute all your available vouchers without regard for their course.
All courses / 172 - Offset Press Operations and Binding and Finishing
Number of vouchers to distribute TO this customer: [1]
You may distribute up to 1 voucher for all courses.
Start distribution with vouchers that will expire earliest: ✔
Starting with vouchers that expire earliest will distribute your oldest vouchers first then work towards the newer vouchers. Uncheck this box to distribute starting with your newest vouchers first, then older vouchers.
Submit

5. Click the Submit button at the bottom of the "Distribute vouchers to" table. The Email Notification Preview and Handling page will display.
6. Select or deselect the checkboxes in the "Email notification handling" section based on your preferences.

Email notification handling
Send email to the recipient: ✔
Check this box to send the notification email to the recipient of the distributions. It is recommended that you do not uncheck this box unless you have not yet completed distributing vouchers to this customer, or if you will notify the customer yourself.
Send email to myself: ✔
Check this box to send the notification email to yourself. Uncheck this box if you do not wish to receive email notification of this distribution.
Submit

It is recommended that you leave the "Send email to the recipient" *checkbox selected unless you have not yet finished distributing vouchers to the customer, or if you plan to notify the customer yourself.*

7. Click the Submit button located at the bottom of the "Email notification handling" section. The Customer Summary page displays and a green check mark and message is shown at the top of the page indicating that the distribution was successfully saved.

Distribution Feedback
✔ Distribution was saved successfully.

8. Click the Voucher Summary link located below the Distribution Feedback message. The Voucher Summary page displays and the vouchers distributed to the customer are no longer displayed in the "Your vouchers" table.

Your vouchers

0 vouchers found

	Invoice	Course Number	Voucher	Expiration Date	Used By	Course Status	Course Expiration	Voucher Status ▲

0 vouchers found | Archive Students |

Returning Vouchers Previously Distributed:

1. From the Voucher Summary page, click the view link to the right of the appropriate customer in the "Your customers" table. The Customer Summary page displays.

Your customers

1 customer found

All   A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y   Z

Last Name ▲	First Name	Address	Phone	Email	Vouchers
Test	Ray	CISD 1005 Univesrity Drive East College Station 77845	n/a	raypageler@yahoo.com	view

1 customer found

2. Scroll down to the "Return vouchers from" table, which is located below the "Distribute vouchers to" table.
3. Select the appropriate Course/Assessment from the "Course number" drop-down menu.
4. Enter the appropriate number of vouchers into the "Number of vouchers to return FROM this customer" field.
5. Select the "Start return with vouchers that will expire earliest" checkbox.

Return vouchers from Ray Test

Vouchers will be returned to: Ray Pageler

Course number to return vouchers for:

Select the course to return vouchers for. Selecting all courses will allow you to return all of this customer's available vouchers without regard for their course.

| All courses |
| 172 - Offset Press Operations and Binding and Finishing |

Number of vouchers to return FROM this customer: | 1 |

You may return up to 1 voucher for all courses.

Start return with vouchers that will expire earliest: ☑

Starting with vouchers that expire earliest will return this customer's oldest vouchers first then work towards the newer vouchers. Uncheck this box to begin return starting with this customer's newest vouchers first, then older vouchers.

| Submit |

6. Click the Submit button located at the bottom of the "Return vouchers from" section. The Email Notification Preview and Handling page displays.
7. Select or deselect the checkboxes in the "Email notification handling" section based on your preferences.

Email notification handling

Send email to the recipient: ☑

Check this box to send the notification email to the recipient of the distributions. It is recommended that you do not uncheck this box unless you have not yet completed distributing vouchers to this customer, or if you will notify the customer yourself.

Send email to myself: ☑

Check this box to send the notification email to yourself. Uncheck this box if you do not wish to receive email notification of this distribution.

| Submit |

It is recommended that you leave the "Send email to the recipient" checkbox selected unless you have not yet finished distributing vouchers from the customer, or if you plan to notify the customer yourself.

8. Click the Submit button located at the bottom of the "Email notification handling" section. The Customer Summary page displays along with a green check mark and message which is shown at the top of the page indicating that the distribution was successfully saved.

9. Click the Voucher Summary link located below the Distribution Feedback message. The Voucher Summary page displays and the returned vouchers are now displayed in the "Your vouchers" table along with all previously existing vouchers.

	Invoice	Course Number	Voucher	Expiration Date	Used By	Course Status	Course Expiration	Voucher Status ▲
Your vouchers								
1 voucher found								
☐	2	172	YIQQ3FQ3	08/21/2014 4:10 PM		Not Started		Active
1 voucher found								Archive Students