Quick Reference Guide (QRG)

NIH National Institutes of Health
Office of Management

LEARNING MANAGEMENT SYSTEM (LMS)
REGISTER A LEARNER FOR AN OFFERING

This QRG will guide a Local Learning Registrar through the task of registering a Learner for a course in the LMS by creating an order.

1. Log on to the LMS.

2. Click the **Admin** icon.

Admin icon

Figure 1 – Admin icon
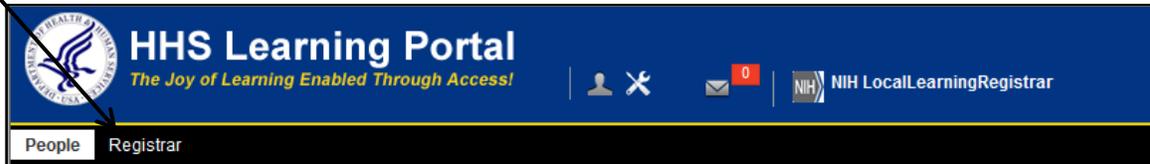
3. Click the **Registrar** link.

Registrar link

Figure 2 – Registrar link

4. Deselect the **Include Contact as Learner** checkbox (if the contact is being registered for the offering, leave it checked).

Include Contact as Learner checkbox

Figure 3 – Include Contact as Learner checkbox

5. Make sure the **Order Contact's Organization** radio button is selected in the Billed To section.

Order Contact's Organization radio button

Figure 4 – Order Contact's Organization radio button

6. Click the **Pick Contact Name** pick icon.

Figure 5 – Pick Contact Name pick icon

7. In the popup window, enter your first and last name then click the **Search** button.

Last Name field

First Name field

Search Person, Internal

Supervisors: you can easily display all of **your staff** by entering your **login ID** into the **"Manager"** field, clicking the **Magnifying Glass** graphic, and then clicking the **"Search"** button.

Population*	Internal ▾	First Name	
Last Name		Person ID	
Username		Manager	
Organization		Location	
Domain		Person Type	-Select One- ▾
Security Roles	-Select One- ▾	Include All Suborganizations	☐

Search

People

Close

Figure 6 – First Name and Last Name fields

8. Click the **Select** checkbox to the left of your name.

Select checkbox

Figure 7 – Select checkbox

9. You should be returned to the Orders screen with your LMS Username populating the Contact Name field. Click the **Next** button to continue.

Next button

Figure 8 – Next button

10. Enter search criteria for the course in the Search field and then click the **Search** button.

Search field

Search button

Figure 9 – Search field and Search button

11. Click the **Select** checkbox to the left of the course title.

Select checkbox

Figure 10 – Select checkbox for a course in the search results

12. Scroll to the bottom of the page and click the **Register** button.

Register button

Figure 11 – Register button at the bottom of the page in the search results

13. Click the **Set Learner** link in the Actions column.

Figure 12 – Set Learner link on the Create Order page for a sample course

14. Enter the search criteria for the person being registered and then click on the **Search** button.

Last Name field

First Name field

Search button

Figure 13 – First Name and Last Name fields and Search button

15. Click the Select checkbox to the left of the Learner's name.

Select checkbox

Figure 14 – Select checkmark for a specific Learner

16. Courses requiring a manager's approval will display a warning message advising that manager approval is required. Click the **Yes, Continue Registration** button to continue, if applicable.

Figure 15 – Yes, Continue Registration button

17. Click the **Place Order** button.

Create Order

1.Order Contact ···❯ 2.Billing ···❯ 3.Offerings ···❯ **4.Order Management** ···❯ 5.Payment ···❯ 6.Receipt

Add Common Learners

Add learners to all offerings in the page simultaneously. To add learners to each offering separately, click the 'Add Learners' link for an offering.

Expand All | Collapse All

▼ NIH LMS Training Sample (Instructor led, ID: 00085235, Seats: 25)

Notes | Add Learners | Remove Offering

Learner	Status	Price	Training Units	Actions
NIH Sample Learner	Confirmed	0.00 USD		Remove From Cart Notes

▶ Order Notes (0)

Place Order button

Order Total 0
Discount 0
Total 0

Continue Shopping   Place Order

Figure 16 – Place Order button

NOTE: If manager approval is required for the course, the Status for the individual Learners will display as Pending Approval instead of Confirmed.

18. You should see a Registration Confirmation receipt with specific information regarding the completed order.

Registration Confirmation

1.Order Contact ⋯〉 2.Billing ⋯〉 3.Offerings ⋯〉 4.Order Management ⋯〉 5.Payment ⋯〉 6.Receipt

Printer-Friendly Version

NIH LocalLearningRegistrar
06/26/2015 at 9:35 AM

0 USD

Order Contact	**NIH Manager**
Billed To	**HNAM6**
Order Status	**Confirmed**
Order Number	**02492020**

Order Items (1 Purchasable Items)

NIH LMS Training Sample (Instructor led, ID: 00085235, Seats: 25)

Learner	Status	Price
NIH Sample Learner	Confirmed	0.00 USD

Order Total	**0**
Discount	**0**
Total	**0**

Figure 17 – Registration Confirmation receipt sample

If you experience trouble with this process, please submit a helpdesk ticket at: http://intrahr.od.nih.gov/helpdeskform.htm