



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.



Figure 1 – Admin icon

3. Click the **Registrar** link.

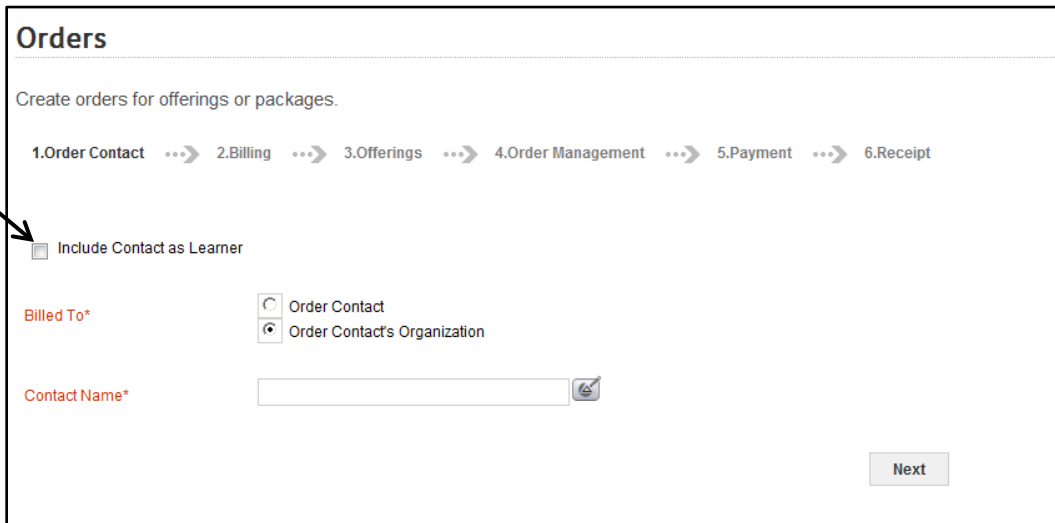
Registrar link



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



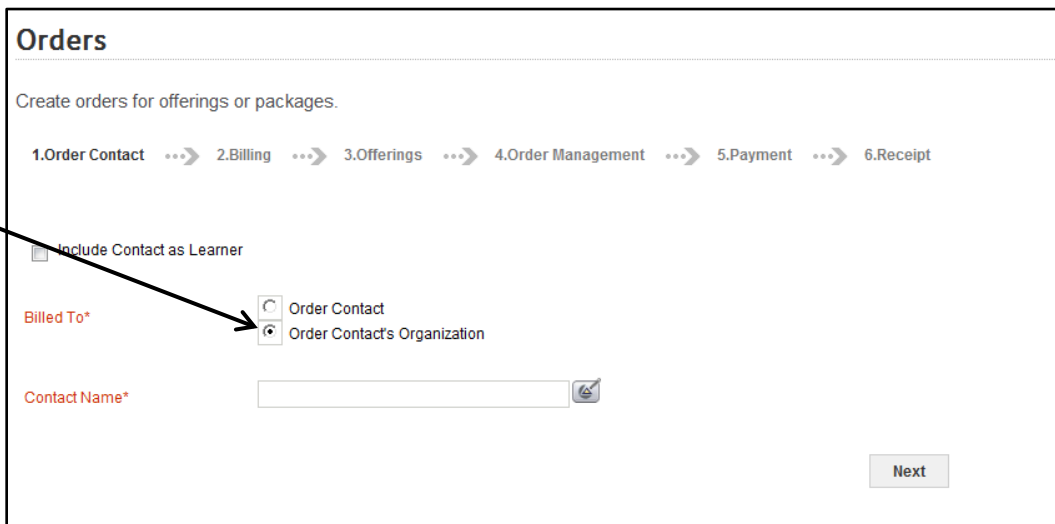
The screenshot shows the 'Orders' form with the following elements:

- Section: **Orders**
- Instruction: Create orders for offerings or packages.
- Progress bar: 1.Order Contact >>> 2.Billing >>> 3.Offerings >>> 4.Order Management >>> 5.Payment >>> 6.Receipt
- Checkbox: Include Contact as Learner
- Billed To* section:
 - Order Contact
 - Order Contact's Organization
- Contact Name* field with a search icon.
- Next button.

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



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 - Order Contact
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- Contact Name* field with a search icon.
- Next button.

Figure 4 – Order Contact's Organization radio button

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


Orders

Create orders for offerings or packages.

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

Include Contact as Learner

Billed To* Order Contact
 Order Contact's Organization

Contact Name* 

Next

**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.

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 ▾

Last Name field → Last Name

Username

Organization 🔍

Domain 🔍

Security Roles -Select One- ▾

First Name → **First Name field**

Person ID

Manager 🔍

Location 🔍

Person Type -Select One- ▾

Include All Suborganizations

Search

People

Close

Figure 6 – First Name and Last Name fields

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

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	nih
Last Name	manager	Person ID	
Username		Manager	
Organization		Location	
Domain		Person Type	-Select One-
Security Roles	-Select One-	Include All Suborganizations	<input type="checkbox"/>

People [Print](#) | [Export](#)

Showing 1 out of 1 results

Select	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	Manager	NIHMANAGER	Other	00165949	HNAM6		00037384

Select checkbox

Figure 7 – Select checkbox

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

Orders

Create orders for offerings or packages.

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

Include Contact as Learner

Billed To* Order Contact Order Contact's Organization

Contact Name*

Select Organization

Next button →

Figure 8 – Next button

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

Create Order

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

[Catalog Search Instructions](#)

[Advanced Search](#) | [Search Tips](#) | [Search Preferences](#)

In Search

Show exact matches only

Starting Location

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**

NIH LMS Local Learning Registrar (00085200,Version:FY15)
This half-day course will provide an introduction to the LMS and the permissions associated with Local Learning Registrars. During this course, hands-on exercises will be completed by learners in ...
Offered As: Instructor led Price: 430.00 USD
Start Date: 07/31/2015 End Date: 07/31/2015
Sessions: NIH Fri 12:30 - 4:30 Location: NIH Training Center
Language: English

NIH LMS Training Sample (00085235,Version:FY2015)
This course is designed to show Learning Administrators how to build and manage a catalog of courses in LMS.
Offered As: Instructor led Price: 0.00 USD
Start Date: 08/11/2015 End Date: 08/12/2015
Sessions: NIH Tue-Wed 8:30-4:30 Location: NIH Training Center
Language: English

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**

Page 1 2 3 4 5 ... Next ▾

Register

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

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

The screenshot shows the 'Create Order' page with a progress bar at the top: 1.Order Contact >>> 2.Billing >>> 3.Offerings >>> 4.Order Management >>> 5.Payment >>> 6.Receipt. Below the progress bar is a section titled 'Add Common Learners' with instructions: 'Add learners to all offerings in the page simultaneously. To add learners to each offering separately, click the 'Add Learners' link for an offering.' Below this is a link 'Expand All | Collapse All'. The main content area is for 'NIH LMS Training Sample (Instructor led, ID: 00085235, Seats: 25)'. It has links for 'Notes | Add Learners | Remove Offering'. A table below shows one row with columns: Learner, Status, Price, Training Units, and Actions. The row contains: 'No Learner Assigned', 'Confirmed', '0.00 USD', and 'Set Learner', 'Remove From Cart', 'Notes'. An arrow points to the 'Set Learner' link. Below the table is a section for 'Order Notes (0)'. At the bottom right, there is a summary: 'Order Total 0', 'Discount 0', 'Total 0'. At the bottom center, there are two buttons: 'Continue Shopping' and 'Place Order'.

Learner	Status	Price	Training Units	Actions
No Learner Assigned	Confirmed	0.00 USD		Set Learner Remove From Cart Notes

**Set
Learner
Link**

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.

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

Last Name field → Last Name

First Name field → First Name

Person ID

Manager

Location

Person Type -Select One-

Security Roles -Select One- Include All Suborganizations

Search button → Search

People





Close

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

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

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* First Name
Last Name Person ID
Username Manager 
Organization  Location 
Domain  Person Type
Security Roles Include All Suborganizations

People [Print](#) | [Export](#)

Showing 1 out of 1 results

Select	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	Sample Learner	NIHLEARNER2		00420402	HNAM6		NIHMANAGER

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.

Please read...

The following warnings are displayed for the selected offering (NIH LMS People Administrator). Are you sure you want to continue?

Learner Name	Warning
NIH Sample Learner	This offering requires manager approval.

[Remove learners from order](#)

**Yes,
Continue
Registration
button**

Figure 15 – Yes, Continue Registration button

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

The screenshot shows the 'Create Order' page with a progress bar at the top: 1.Order Contact >>> 2.Billing >>> 3.Offerings >>> 4.Order Management >>> 5.Payment >>> 6.Receipt. Below the progress bar is a section titled 'Add Common Learners' with instructions: 'Add learners to all offerings in the page simultaneously. To add learners to each offering separately, click the 'Add Learners' link for an offering.' To the right of this section are links for 'Expand All' and 'Collapse All'. Below that is a section for 'NIH LMS Training Sample (Instructor led, ID: 00085235, Seats: 25)' with links for 'Notes', 'Add Learners', and 'Remove Offering'. A table below this section has columns for 'Learner', 'Status', 'Price', 'Training Units', and 'Actions'. The table contains one row: 'NIH Sample Learner', 'Confirmed', '0.00 USD', and 'Remove From Cart Notes'. Below the table is a section for 'Order Notes (0)'. At the bottom right, the order summary shows 'Order Total 0', 'Discount 0', and 'Total 0'. At the bottom center are two buttons: 'Continue Shopping' and 'Place Order'. An arrow points from the text 'Place Order button' to the 'Place Order' button.

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

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 refer to the [LMS Support Page](#).