LEARNING MANAGEMENT SYSTEM (LMS)

Reports Quick Reference Guide
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Subscribing to a Report

This QRG provides instructions for subscribing to a report in the LMS. Report subscriptions in the LMS allow reports to be emailed at scheduled intervals to any valid email address. The reports delivered via email do not require LMS access to review.

Log into the LMS.

Click the Admin icon.

Click the Reports link in the left navigation menu.
Enter the name of the report in the Name field and click the **Search** button.

![Name field and Search button](image)

Click the **Actions** link for the report. The NIH Registrations Needing Approval report will be used for the purposes of demonstration.

![Actions link](image)
Click the **Subscribe** link in the Actions activity menu.

Figure 5 – Subscribe link on the Actions activity menu

Click the **New Report Subscription** link.

Figure 6 – New Report Subscription link
The Report Subscription page is displayed for the NIH Registrations Needing Approval report.

**Figure 7 – Report Subscription page**
Complete the following mandatory fields:

- Report Subscription Name – enter a meaningful name for the report
- Description – enter a brief description for the scheduled report
- To Email Address(es) – enter the full email address (e.g., firstname.lastname@nih.gov), multiple addresses should be separated by a semi-colon (;)
- Subject – this field will populate the Subject field of the email messages sent from the LMS
- Mail Text – this field will populate the Body of the email messages sent from the LMS; include contact information so that the recipients can opt-out of the report if they no longer want to receive it
- Report Format – select Adobe Format or MS Excel 97-2000
- Occurs – choose the occurrence based on the following information:
  - Daily Occurrence – this option delivers the report every set number of days. Entering a value of 1 would send the report daily; entering a value of 2 would send it every other day; entering a value of 3 would send it every third day.
  - Weekly Occurrence – this option delivers the report each week on the specified days. Click the checkbox to include the day in the delivery cycle.
  - Monthly Occurrence – this option delivers the report every set number of months on the set day number. Entering a value of 1 for the month and 15 for the day of the month would send the report on the 15th day of each month;
entering a value of 3 for the month and 28th for the day of the month would send the report on the 28th day of every third month (for a quarterly report).

- **Frequency** – use the default option of Once

- **Start Time** – the Start Time should be set to take place outside of core business hours (8:00AM – 5:00PM). This will improve the overall responsiveness LMS reporting for all users during normal business hours.

- **Start Date** – the Start Date is the date that the report subscription becomes active, not the date that the report will be sent. The subscription engine will then

   After all of the required fields have been, click the **Preview Report** button to see the report as it will appear. Verify that the report contains the correct data. If not, close the report and adjust the parameters that you entered.

   Click the **Save** button to activate the report subscription. The report will be sent to email recipients entered at the times designated.

   **If you experience trouble with this process, please refer to the LMS Support Page.**
Printing a Report

This QRG provides instructions for printing a report in the LMS.

After generating a report, click the **Print this report** icon.

![Figure 1 – Print this report icon](image)

Click the **Export** button on the Print to PDF message box.

![Figure 2 – Export button](image)
Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

Figure 3 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Exporting a Report to Excel

This QRG provides instructions for exporting a report to Microsoft Excel from the LMS.

After generating a report, click the **Export this report** icon.

![Figure 1 – Export this report icon](image)

Select **Microsoft Excel (97-2003) Data-Only** from the File Format dropdown list on the Export message box.

![Figure 2 – File format dropdown list](image)
Click the **Export** button on the Export message box.

![Export button](image)

Figure 3 – Export button

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into an Excel file. A notification will display at the top of the screen in the Microsoft Edge browser when the file has been created. Click the **Open file** link on the notification to open the file in Microsoft Excel.

![Open file link](image)

Figure 3 – Open file link

Row 1 of the spreadsheet will display the report header information. Row 2 will display the report column headings.

![Excel spreadsheet](image)

Figure 4 – Excel spreadsheet

If you experience trouble with this process, please refer to the **LMS Support Page**.
Running the Certification Dashboard by Learner Report

This QRG provides instructions for generating the Certification Dashboard by Learners report. The report creates a list of your certifications, their statuses and expiration dates, based on selected parameters.

Log into the LMS.

NOTE: For instructions about logging on, refer to the Log-On Instructions (TS02-L) QRG.

Click the Reports link in the left navigation menu.

Enter Certification Dashboard By Learner into the Name field and click the Search button.

Figure 1 – Reports link

Figure 2 – Name field and Search button
Click the **Actions** link.

![Actions link](image1)

---

Click the **Execute** link on the Actions activity menu.

![Execute link](image2)
Select a checkbox for each of the certification status types you wish to display.

By default, the Number of Days to Expire is populated with 30 days. This is the number of days in the future to report on expiring certifications. To view all of your certifications, regardless of the expiration date, clear to the field.

Click the **Generate Report** button.
Click the **Print this report** icon.

![Print this report icon](image)

**Figure 7 – Print this report button**

Click the **Export** button on the Print to PDF message box.

![Export button](image)

**Figure 8 – Export button**

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

**Figure 9 – Open file link**

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Running the Enrollment Dashboard for Manager Report

The Enrollment Dashboard for Manager Report will provide a comprehensive list of enrollments and completions for a one or all of your Direct Reports (Learners). The report can be filtered to show all or a selection of training activities.

Log into the LMS.
Select the **My Team** icon.

![My Team icon](image1.png)

**Figure 1 – My Team icon in the Menu Bar**

From the My Team page, select the **Reports** link in the left navigation menu.

![Reports link](image2.png)

**Figure 2 – Reports link in the left navigation menu**

In the Name field, type **Enrollment Dashboard for Manager** and select the **Search**.

![Reports Search Screen](image3.png)

**Figure 3 – Reports Search Screen**
Select the **Actions** link for the Enrollment Dashboard for Manager Report, then **Execute**.

![Figure 4 – Reports search screen with an arrow pointing to the Execute link](image)

To run the report for all of your Direct Reports in your supervisory chain, skip searching for a Learner Name. To run the report for a specific Direct Report, select the **Learner Name** pick icon.

![Figure 5 – The Enrollment Dashboard for Manager report parameters screen](image)
Enter the First Name and/or Last Name of the Learner in the appropriate fields and then select the **Search** button.

![Figure 6 – The Search Person, Internal screen](image)

Select the checkmark for the name of the Learner in the search results section.

![Figure 7 – The search results for the Search Person, Internal screen](image)
Insert a date range in the **Offering Start Date After** and **Offering Start Date Before** date range using MM/DD/YYYY format.

Additional parameters to consider for report filtering:

- Scheduled Offerings = Instructor-led training
- Self-Paced Offerings = Online training
- Physical Offerings = *not used in NIH*
- Cancelled/Late Cancelled/Dropped Enrollments
- Confirmed Enrollments
- Back Ordered Enrollments = *not used in NIH*
- Delivered/Shipped Enrollments = enrollments that have been completed
- Enrollments Pending Approval
- Show Graph = will display a graph that shows all direct reports training statuses include Cancelled, Delivered, Pending Approval, and Confirmed
- Show summary = will display a graph that shows all direct reports training statuses include Cancelled, Delivered, Pending Approval, and Confirmed

![Report Parameters - Enrollment Dashboard for Manager report parameters screen](image-url)
Select the **Generate Report** button to continue.

To print the report or save as a *.PDF document, click the **Print this report** icon.

![Figure 9 – The report output screen for the Enrollment Dashboard for Manager Report](image)

Select the **Export** button on the Print to PDF message box.

![Figure 10 – Export button](image)

Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Select the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Figure 11 – Open file link](image)

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Running the HHS Accounts: Deactivated/To-Be-Deactivated Report

This report provides a list of learner accounts that will be deactivated by a specific date or a list of learner accounts that have already been deactivated. One practical application of this report is to set up a weekly subscription to the report, having the report return what LMS accounts will be deactivated during the following week. The learner account email addresses are provided on the report.

Log into the LMS.

Click the Admin icon.

Click the Reports link in the left navigation menu.

Figure 1 – Admin icon

Figure 2 – Reports link
Enter HHS Accounts in the Name field and click the Search button.

![Figure 3 – Name field and Search button](image)

Click the **Actions** link for the HHS Accounts: Deactivated/To-Be-Deactivated Report.

![Figure 4 – Actions link](image)
Click the **Execute** link on the Actions activity menu.

By default, the Report Type pull-down menu is populated as Deactivated. For Learner accounts pending deactivation, select the **To Be Deactivated** option.
You must populate either the Organization ID or Domain fields. In this example, the Organization ID field will be used – enter the Organization ID in the organization ID field. You can use a percent symbol (%) as a wildcard field to capture all the sub-Organizations.

![Report Parameters - HHS Accounts: Deactivated/To-Be-Deactivated Report](image)

**Figure 7 – Organization ID field**

To filter the results for a specific Person Type, click the **Person Type** pull-down menu. Filtering based on the Person Type is not required.

![Report Parameters - HHS Accounts: Deactivated/To-Be-Deactivated Report](image)

**Figure 8 – Person Type pull-down menu**
The Number of Days field is only required for the To Be Deactivated version of the report. Enter a value between 1 and 120 (1 day to 120 days in the future). For the Deactivated version of the report, leave this field blank.

![Figure 9 – Number of Days field](image)

Click the **Generate Report button**.

![Figure 10 – Generate Report button](image)
To print the report, click the **Print this report** icon.

Click the **Export** button on the Print to PDF message box.
Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Figure 13 – Open file link](image)

Print the file from Adobe Reader/Acrobat.

**If you experience trouble with this process, please refer to the LMS Support Page.**
Running the HHS All Approvers by Org Report

This QRG provides instructions for generating the HHS All Approvers by Org Report. This report creates a list of all Learners and their Approvers – the Learner’s Managers, Alternate Managers, and Additional Approver for Orders for a specified Organization and sub-Organizations. This report is important for verifying the approval chains for organizations.

Log into the LMS.

Click the **Admin** icon.

![Admin icon](image)

Figure 1 – Admin icon

Click the **Reports** link in the left navigation menu.

![Reports link](image)

Figure 2 – Reports link
Enter “HHS All” in the Name field and click Search.

Click the Actions link for the HHS All Approvers by Org Report.
Click the **Execute** link on the Actions activity menu.

![Figure 5 – Execute link on the Actions activity menu](image)

Enter the Organization ID in the Organization ID field. You can use a percent symbol (%) as a wildcard field to capture all of the sub-O rganizations.

![Figure 6 – Org Name field](image)
Click the **Generate Report** link.

![Figure 7 – Generate Report button](image)

To print the report, click the **Print this report** icon.

![Figure 8 – Print this report button](image)
Click the Export button on the Print to PDF message box.

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the Open file link on the notification to open the pdf file in Adobe Reader/Acrobat.

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the LMS Support Page.
Running the HHS Certification/Curriculum Compliance/Exception Report

This report delivers data on Learners in an Organization (or its Sub-Orgs) to determine whether the Learner has completed a specific certification or curriculum during a specified date range. The results can be further refined using the Employee EOD Date, Certification/Curriculum Domain, and Person Type.

Log into the LMS.

Click the **Admin** icon.

![Admin icon](image1)

Click the **Reports** link in the left navigation menu.

![Reports link](image2)
Select **HHS Custom Reports** from the Category pull-down menu and click the **Search** button.

![Figure 3 – Category pull-down menu and Search button](image)

Click the **Actions** link for the HHS Certification/Curriculum Compliance/Exception Report.

![Figure 4 – Actions link](image)

Click the **Execute** link on the Actions activity menu.
For a Certification, click the **Certification Title** pick icon.

**Figure 5 – Execute link on the Actions activity menu**

**Figure 6 – Certification Title pick icon**
Use the Name, Update On >=, Target Completion Duration <=, Past Credit Duration <=, and/or Audience Type/Subtype fields and the **Search** button to search for the Certification.

![Select Certifications](image)

Figure 7 – Name, Update On >=, Target Completion Duration <=, Past Credit Duration <=, and Audience Type/Subtype fields and the Search button

Click the **Select** checkbox to select the Certification.

![Select Certifications](image)

Figure 8 – Select checkmark
For a Curriculum, click the **Curriculum Title** pick icon.

![Curriculum Title pick icon](image)

**Figure 9 – Curriculum Title pick icon**

Use the Name, Update On >=, Discontinued From >=, Updated On >=, and/or Target Completion Duration <= fields and the **Search** button to search for the Curriculum.

![Select Curricula](image)

**Figure 10 – Name, Update On >=, Discontinued From >=, Updated On >=, and Target Completion Duration <= fields and the Search button**

Click the **Select** checkbox to select the Curriculum.
Enter the From Date and To Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the **From Date** and **To Date** pick icons to select the date.
Enter the Organization ID in the Organization ID field. You can use a percent symbol (%) as a wildcard field to capture all of the sub-Organiizations.

To run a Compliance report, select Compliance from the Report Type pull-down menu. Select Exception from the Report Type pull-down menu to run an Exception report.

**NOTE:** A Compliance report will show Learners who completed the Certification/Curriculum within the specified date range. An Exception report will show Learners who did not complete the Certification/Curriculum within the specified date range.
Click the **Generate Report** button.

![Generate Report button](image1)

**Figure 15 – Generate Report button**

**NOTE**: The total Completion/Exception percentage appears at the bottom of the last page of the report. Depending on the number of records in the report, it may be necessary to click the **Go to Last Page** icon.

To print the report, click the **Print this report** icon.

![Print this report icon](image2)

**Figure 16 – Print this report button**
Click the Export button on the Print to PDF message box.

![Figure 17 – Export button](image)

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the Open file link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Figure 18 – Open file link](image)

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the LMS Support Page.
Running the HHS Course Catalog Report

This QRG provides instructions for generating the HHS Course Catalog Report. This report allows a LMS Administrator to create a Course Catalog by Domain, Course Title, Category, Delivery Type (Instructor-led, Web-based, or All), Competency, and/or Job.

This report is especially useful to create the current list of the free SkillSoft online courses that are available in the LMS. This can be done by selecting the HHS Common Domain and select the Delivery Type of Web-Based.

Log on to the LMS.

Click on Admin icon.

Click the Reports link in the left navigation menu.
Enter HHS Course Catalog in the Name field and click the **Search** button.

![Figure 3 – Name field and Search button](image)

Click the **Actions** link for the HHS Course Catalog Report.

![Figure 4 – Actions link](image)
Click the **Execute** link on the Actions activity menu.

![Figure 5 – Execute link on the Actions activity menu](image)

Click the **Domain** pick icon.

![Figure 6 – Domain pick icon](image)
Enter the Domain name in the Name field and click the **Search** button. You can also simply click the **Search** button to see all Domains.

Click the **Select** checkbox.
Using the Delivery Type pull-down menu, select either **All**, **Instruct-Led**, or **Web-Based**.

![Figure 9 – Delivery Type pull-down menu](image)

Click the **Generate Report** button.

![Figure 10 – Generate Report button](image)
To print the report, click the **Print this report** icon.

![Figure 11 – Print this report button](image)

Click the **Export** button on the Print to PDF message box.

![Figure 12 – Export button](image)
Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

Figure 13 – Open file link

Print the file from Adobe Reader/Acrobat.

**If you experience trouble with this process, please refer to the LMS Support Page.**
Running the HHS Course Compliance/Exception Report by Organization

This report delivers data on Learners in an Organization (or its Sub-Orgs) to determine whether or not the Learner completed a specific course during a specified date range. This report returns only the last, most recent completion for a Learner (in the event the Learner completed the course more than once in that timeframe). The results can be further refined using the Employee EOD Date, Course Domain, and Person Type.

Log into the LMS.

Click the Admin icon.

Click the Reports link in the left navigation menu.
Select **HHS Custom Reports** from the Category pull-down menu and click the **Search** button.

Click the **Actions** link for HHS Course Compliance/Exception Report by Organization.
Click the **Execute** link on the Actions activity menu.

Figure 5 – Execute link on the Actions activity menu

Click the **Course Title** pick icon and then select the course title name into the appropriate title field.

Figure 6 – Course Title pick icon
Use the Title, Course ID, Domain, and/or Audience Type/Subtype fields and the Search button to search for the course.

Click the Select checkbox to select the course.
Enter the From Date and To Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the From Date and To Date pick icons to select the date.

Figure 9 – From Date and To Date pick icons
Enter the Organization ID in the Organization ID field. Alternately, you can use the **Organization ID** pick icon to select the Organization ID.

Use the **Name** field and the **Search** button to search for an Organization ID.
Click the Select checkbox to select the Organization.

Figure 12 – Select checkbox
By default, the Include Child Organizations checkbox is selected. To only view results for a single Organization ID, remove the checkbox.

Select the Person Status pull-down menu and select Active Accounts Only, All Accounts, or Deactivated Accounts only.

<table>
<thead>
<tr>
<th>Person Status</th>
<th>Select One:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Active Accounts Only</td>
</tr>
<tr>
<td></td>
<td>All Accounts</td>
</tr>
<tr>
<td></td>
<td>Deactivated Accounts Only</td>
</tr>
</tbody>
</table>
To run a Compliance report, select Compliance from the Report Type pull-down menu. Select Exception from the Report Type pull-down menu to run an Exception report. Select All to view both Compliance and Exception information in the same report.

**NOTE:** A Compliance report will show Learners who completed the Course within the specified date range. An Exception report will show Learners who did not complete the Course within the specified date range.

Select the **Generate Report** button.
To print the report, click the **Print this report** icon.

![Print this report icon](image1)

**Figure 17 – Print this report icon**

Click the **Export** button on the Print to PDF message box.

![Export button](image2)

**Figure 18 – Export button**
Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the Open file link on the notification to open the pdf file in Adobe Reader/Acrobat.

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the LMS Support Page.
Running the HHS Course Enrollment Details Report

The Course Enrollment Details report enables administrators to identify by course, all learner enrollment and completion details for a given date range. Log into the LMS.

Click the **Admin** icon.

![Admin icon](image1.png)

**Figure 1 – Admin icon**

Click the **Reports** link in the left navigation menu.

![Reports link](image2.png)

**Figure 2 – Reports link**
Enter HHS Course Enrollment Details in the Name field and click the **Search** button.

**Figure 3 – Name field and Search button**

Click the **Actions** link.

**Figure 4 – Actions link**
Click the **Execute** link on the Actions activity menu.

![Execute link on the Actions activity menu](image)

**Figure 5 – Execute link on the Actions activity menu**

Click the **Course Title** pick icon.

![Course Title pick icon](image)

**Figure 6 – Course Title pick icon**
You can search for a course using the Title, Course ID, or Domain fields. Click the **Search** button to continue.

Click the **Select** checkmark for the course.

---

**Figure 7** – Title, Course ID, and Domain fields and Search button

**Figure 8** – Select checkbox
Specify the date range for the report using the Starting Enrollment Date and Ending Enrollment Date fields. You can manually enter a date in MM/DD/YYYY format or use the **Starting Enrollment Date** and **Ending Enrollment Date** pick icons.

The Person Type, Organization ID and Enrollment Status parameters are optional for the report. You can choose specific values to narrow the focus of the report or skip selecting a value to include all Person Types, Organization IDs and Enrollment Statuses.

Click the **Generate Report** button to create the report.
Click the **Print this report** icon.

![Print this report icon](image)

**Figure 11 – Print this report button**

Click the **Export** button on the Print to PDF message box.

![Export button](image)

**Figure 12 – Export button**
Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

Print the file from Adobe Reader/Acrobat.

**If you experience trouble with this process, please refer to the [LMS Support Page](#) for help or assistance.**
Running the HHS Course Enrollment Details by Audience Type Report

The Course Enrollment Details by Audience Type report enables Learning Administrators to identify all Learner enrollment details for a given date range including the course, Organization, and Audience Type/Sub-Type. This report provides the option to return course enrollments by Organization grouped by all of the Learner’s Audience Type/Sub-Types, or just for a specific Audience Type/Sub-Type.

Log into the LMS.

Click the Admin icon.

![Admin icon](image1)

Click the Reports link in the left navigation menu.

![Reports link](image2)
Enter HHS Course Enrollment Details by Audience Type in the Name field and click the **Search** button.

![Name field and Search button](image1)

**Figure 3 – Name field and Search button**

Click the **Actions** link.

![Actions link](image2)

**Figure 4 – Actions link**
Click the **Execute** link on the Actions activity menu.

![Execute link on the Actions activity menu](image)

**Figure 5 – Execute link on the Actions activity menu**

Click the **Course Title** pick icon.

![Course Title pick icon](image)

**Figure 6 – Course Title pick icon**
You can search for a course using the Title, Course ID, or Domain fields. Click the **Search** button to continue.

**Title field**

**Course ID field**

**Domain field**

**Search button**

Figure 7 – Title, Course ID, and Domain fields and Search button

Click the **Select** checkmark for the course.

**Select checkbox**

Figure 8 – Select checkbox
To use Course Equivalents in the report, select the **Course Equivalents checkbox** (this is optional).

Specify the date range for the report using the Starting Enrollment Date and Ending Enrollment Date fields. You can manually enter a date in MM/DD/YYYY format or use the **Starting Enrollment Date** and **Ending Enrollment Date** pick icons.
Select the **Audience Type/Sub-Type** pick icon.

![Figure 11 – Audience Type/Sub-Type pick icon](image1)

From the **Audience Type/Sub Type** pull-down menu, select Audience Sub Type.

![Figure 12 – Audience Type/SubType pull-down menu](image2)
Enter the name of an Audience SubType in the **Name** field and select the **Search** button. You can use the percent symbol (%) to perform a wildcard search. To return all completions for all of NIH, enter NIH – all in the Audience Type/Sub-Type field.

Select the checkbox for the name of the Audience SubType to use it in the report.
To include Exemptions on the report, select the **Exempt Audience Type** pick icon (this step is optional).

![Exempt Audience Type pick icon](image)

Figure 15 – Exempt Audience Type/Sub-Type pick icon

From the **Audience Type/SubType** pull-down menu, select Audience SubType.

![Audience Type/SubType pull-down menu](image)

Figure 16 – Audience Type/SubType pull-down menu
Enter the name of an Exempt Audience SubType in the **Name** field and select the **Search** button. You can use the percent symbol (%) to perform a wildcard search.

Select the checkbox for the name of the Audience SubType to use it in the report.
The Person Type, Organization ID and Enrollment Status parameters are optional for the report. You can choose specific values to narrow the focus of the report or skip selecting a value to include all Person Types, Organization IDs and Enrollment Statuses.

Enter a percent symbol (%) as a wildcard in the Organization ID field to capture all the sub organizations.

Click the **Generate Report** button to create the report.

![Figure 19 – Person Type and Enrollment Status pull-down menus, Organization ID text field, and Generate Report button](image)

Click the **Print this report** icon.

![Figure 20 – Print this report button](image)
Click the **Export** button on the Print to PDF message box.

![Figure 21 – Export button](image)

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Figure 22 – Open file link](image)

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the LMS Support Page for help or assistance.
Running the HHS Enrollment Snapshot Report

This report delivers the roster details for offerings of a given Owner, Course or Domain in a specified date range – the date range cannot exceed one (1) year.

Log into the LMS.

Click the Admin icon.

Click the Reports link in the left navigation menu.
Enter HHS Enrollment Snapshot in the Name field and click the **Search** button.

Click the **Actions** link for the HHS Enrollment Snapshot Report.
Click the **Execute** link on the Actions activity menu.

![Figure 5 – Execute link on the Actions activity menu](image)

In addition to the mandatory From Date and To Date fields, you must populate the Offering Owner, Customer Service Representative, Course ID, or Domain fields. Use the respective pick icons to select the Offering Owner, Course ID, or Domain. In this example, Domain will be used – click the **Domain** pick icon.

![Figure 6 – Offering Owner, Customer Service Representative, Course ID, and Domain pick icons](image)
Click the **Search** button.

![Figure 7 – Search button](image)

Click the **Select** checkbox to select the Domain.

![Figure 8 – Select checkbox](image)
Enter the From Date and To Date in the appropriate fields in MM/DD/DD/YYYY format. Alternately, you can use the From Date and To Date pick icons to select the date.

NOTE: The date range cannot exceed one (1) year.
By default, the Offering Status field is populated with Open-Normal. Click the **Offering Status** pull-down menu to select another value.

![Offering Status Pull-Down Menu](image)

Figure 10 – Offering Status Pull-Down Menu
Click the **Generate Report** icon.

![Generate Report button](image1)

**Figure 11 – Generate Report button**

To print the report, click the **Print this report** icon.

![Print this report icon](image2)

**Figure 12 – Print this report icon**
Click the **Export** button on the Print to PDF message box.

![Export button](image)

Figure 13 – Export button

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

Figure 14 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Running the HHS Mandatory Training by Audience Type Report

This report delivers data based on audience for NIH staff to determine whether or not they completed a specific mandatory course during a specified date range.

The report can also be configured to show NIH staff that are exempt (i.e. staff are not required to take the training) from the mandatory training initiative. This report returns only the last, most recent completions (in the event the course was completed multiple times in that timeframe).

Log into the LMS.

Select the Admin icon.

Select the Reports link in the left navigation menu.
Enter HHS Mandatory in the Name field and select the **Search** button.

Select the **Actions** link for the HHS Mandatory Training by Audience Type Report.
Select the **Execute** link on the Actions activity menu.

![Figure 5 – Execute link on the Actions activity menu](image)

Select the **Course Title** pick icon.

![Figure 6 – Course Title pick icon](image)
Use the Title, Course ID, Domain, and/or Audience Type/Subtype fields and the **Search** button to search for the course.

Select the checkbox for the name of the Course to use it in the report.
To use Course Equivalents in the report, select the **Course Equivalents** checkbox.

Enter the From Date and To Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the **From Date** and **To Date** pick icons to select the dates.
Add your Organization ID to the Organization ID field. You can use a percent symbol (%) to search for all sub-O rganizations.

Select the Mandatory Audience Type pick icon.

Figure 11 – Organization ID field

Figure 12 – Mandatory Audience Type pick icon
From the **Audience Type/SubType** pull-down menu, select Audience SubType.

![Figure 13 – Audience Type/SubType pull-down menu](image)

Enter the name of a Mandatory Audience SubType in the **Name** field and select the **Search** button. You can use the percent symbol (%) to perform a wildcard search.

![Figure 14 – Name field and Search button](image)
Select the checkbox for the name of the Audience SubType to use it in the report.

To include Exemptions on the report, select the **Exempt Audience Type** pick icon (this step is optional).
From the **Audience Type/SubType** pull-down menu, select Audience SubType.

![Audience Type/SubType pull-down menu](image1.png)

**Figure 17 – Audience Type/SubType pull-down menu**

Enter the name of an Exempt Audience SubType in the **Name** field and select the **Search** button. You can use the percent symbol (%) to perform a wildcard search.

![Name field and Search button](image2.png)

**Figure 18 – Name field and Search button**
Select the checkbox for the name of the Audience SubType to use it in the report.

![Figure 19 – Select checkbox](image)

From the Person Status pull-down menu, select **All Accounts**.

![Figure 20 – Person Status pull-down menu](image)
Select the **Generate Report** button.

![Figure 21 – Generate Report button](image)

To print the report, click the **Print this report** icon.

![Figure 22 – Print this report button](image)
Click the **Export** button on the Print to PDF message box.

![Export button](image)

**Figure 23 – Export button**

Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

**Figure 24 – Open file link**

Print or save the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Running the HHS Training Completion Detail Report

This report delivers training completion information for a specific course in an Organization (or its sub-Orgs) for a specified date range. This report will display all completions for a Learner that occurred during that time period. The results can be further refined using the employee EOD Dates, Person Type, and Person Status.

Log on to the LMS.

Click on Admin icon.

Click the Reports link in the left navigation menu.
Enter HHS Training Completion Detail in the Name field and click the **Search** button.

Click the **Actions** link.

---

**Figure 3** – Name field and Search button

**Figure 4** – Actions link
Click the **Execute** link on the Actions activity menu.

![Figure 5 – Execute link on the Actions activity menu](image)

Click the **Course Title** pick icon and then select the course title name into the appropriate title field.

![Figure 6 – Course Title pick icon](image)
Use the Title, Course ID, Domain, and/or Audience Type/Subtype fields and the **Search** button to search for the course.

![Select Course](image)

**Figure 7** – Name, Course ID, Domain, and Audience Type/Subtype fields and Search button

Click the **Select** checkbox to select the course.

![Select Course](image)

**Figure 8** – Select checkbox
Enter the Completion Start Date and Completion End Date in the appropriate fields in MM/DD/ YYYY format. Alternately, you can use the **Completion Start Date** and **Completion End Date** pick icons to select the date.

![Figure 9 – Completion Start Date and Completion End Date pick icons](image)

Enter the Organization ID in the Organization ID field. You can use a percent symbol (%) as a wildcard field to capture all of the sub-Organsations.

![Figure 10 – Organization ID field](image)
Click the **Generate Report** button.

![Figure 11 – Generate Report button](image)

To print the report, click the **Print this report** icon.

![Figure 12 – Print this report icon](image)
Click the **Export** button on the Print to PDF message box.

![Figure 13 – Export button](image)

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Figure 14 – Open file link](image)

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](https://hr.nih.gov).
Running the HHS Training Completion Details – Wildcard Report

This report delivers data for training completions on Learners in an Organization (or its sub-Orgs) based upon a partial Course Title during a specified date range. The partial Course Title must be at least 8 alphanumeric characters. The report data can be further refined using the Employee EOD Dates, Person Type, and Person Status.

Log into the LMS.

Click the Admin icon.

Click the Reports link in the left navigation menu.
Enter %wildcard in the Name field and click the Search button.

Click the Actions link for the HHS Training Completion Details – Wildcard report.
Click the **Execute** link on the Actions activity menu.

Enter at least eight (8) alphanumeric characters in the Course Title field. These characters can be found anywhere in the course titles for the completions to include in the report.
Enter the Completion Start Date and Completion End Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the **Completion Start Date** and **Completion End Date** pick icons to select the date.

Enter the Organization ID in the Organization ID field. You can use a percent symbol (%) as a wildcard field to capture all of the sub-Organizations.

---

**Figure 6 – Completion Start Date and Completion End Date pick icons**

**Figure 8 – Organization ID field**
By default, the Person Status field is populated with Full Time. Click the Person Status pull-down menu to select another value.

![Person Status pull-down menu](image)

**Figure 9 – Person Status pull-down menu**

Click the Generate Report button.

![Generate Report button](image)

**Figure 10 – Generate Report button**
To print the report, click the Print this report icon.

Figure 11 – Print this report button

Click the Export button on the Print to PDF message box.

Figure 12 – Export button
Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Figure 13 – Open file link](Open file link)

Print the file from Adobe Reader/Acrobat.

**If you experience trouble with this process, please refer to the LMS Support Page.**
Running the HHS Training Completions by Offering Domain Report

This report delivers Learner completion details for offerings for a specified date range not to exceed 365 days.

Log into the LMS.

Click the Admin icon.

![Admin icon]

Click the Reports link in the left navigation menu.

![Reports link]
Enter HHS Training Completions by Offering Domain in the Name field and click the **Search** button.

![Figure 3 – Name field and Search button](image)

Click the **Actions** link for the HHS Training Completions Report.

![Figure 4 – Actions link](image)
Click the **Execute** link on the Actions activity menu.
By default, the date range is automatically populated with the last 6 months. Enter the From Date and To Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the From Date and To Date pick icons to select the date.

**NOTE**: The date range cannot exceed 365 days.
Click the **Offering Domain** pick icon.

**Figure 7 – Offering Domain pick icon**

Click the **Search** button.

**Figure 8 – Search button**
Click the Select checkbox to select a Domain.

Optional parameters are the Include Sub Domains and Include HHS Common Domain. Click on the Include Sub Domains checkbox if you would like to include all of the completions of the sub domains of the offering domain that was selected. Click on Include HHS Common Domain if you would like to include all of the SkillSoft online training completions.
Enter the Org ID using the **Organization ID** pick icon. The **Include Child Organizations** checkbox allows for the capture all of the sub-Orgs.

![Figure 10 – Organization ID field](image-url)
Select an option from the **Delivery Type** pull-down menu.

Click the **Generate Report** button.
To print the report, click the **Print this report** icon.

![Figure 13 – Print this report icon](image13.png)

Click the **Export** button on the Print to PDF message box.

![Figure 14 – Export button](image14.png)
Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Running the HHS Training Completions by Org Report

This report delivers Learner completion details for offerings for a specified date range not to exceed 365 days. This report includes external items (either entered manually or by a feed), and specific Fields of Study credits (i.e. NIH Supervisory CLPs, for example).

Log into the LMS.

Click the Admin icon.

Click the Reports link in the left navigation menu.
Enter HHS Training Completions by Org in the Name field and click the **Search** button.

Click the **Actions** link for the HHS Training Completions by Org Report.
Click the **Execute** link on the Actions activity menu.

By default, the date range is automatically populated with the last year. Enter the From Date and To Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the From Date and To Date pick icons to select the date. **NOTE**: The date range cannot exceed 365 days.
Click the **Organizational ID** pick icon.

![Org ID pick icon](image1)

**Figure 7 – Org ID pick icon**

Enter the desired Organization ID **Name** and click the **Search** button.

![Search button](image2)

**Figure 8 – Search button**
Click the Select checkbox to select a Domain.

Optional parameters are Field of Study and Audience Type. If no Field of Study parameter is entered, the Credits column on the report will show an aggregate total of all the credits from all of the Fields of Study that are assigned to that item. (In some cases there are more than one).

The Include Completed Learning Items without FOS checkbox is checked by default to include all items that do not include Field of Study credits as well as those that may be selected.

Click the Generate Report button.
To print the report, click the **Print this report** icon.

![Print this report icon](image)

**Figure 11 – Print this report icon**

Click the **Export** button on the Print to PDF message box.

![Export button](image)

**Figure 12 – Export button**

Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

**Figure 13 – Open file link**

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Running the NIH All Approvers by AAO Report

This QRG provides instructions for generating the NIH All Approvers by AAO Report. This report creates a list of all Learners and their Approvers – the Learner’s Managers, Alternate Managers, and Additional Approver for Orders (AAO) for a specified AAO. This report is important for verifying the approval chains for a specific AAO.

Log on to the LMS.

Click on Admin icon.

Click the Reports link in the left navigation menu.
Enter NIH All Approvers by AAO in the Name field and click the **Search** button.

Click the **Actions** link for the NIH All Approvers by AAO Report.
Click the **Execute** link on the Actions activity menu.

![Figure 5 – Execute link on the Actions activity menu](image-url)

Click the **Additional Approver On Order (AAO) pick icon.**

![Figure 6 – Additional Approver On Order (AAO) pick icon](image-url)
Enter the last name an AAO in the Last Name field and click the Search button.

Click the Select checkbox to select the AAO.
Click the **Generate Report** button.

![Figure 9 – Generate Report button](image)

To print the report, click the **Print this report** icon.

![Figure 10 – Print this report icon](image)
Click the **Export** button on the Print to PDF message box.

![Export button](image)

**Figure 11 – Export button**

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

**Figure 12 – Open file link**

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Running the NIH CLP Transcript Completions Report

This QRG will guide approvers through the task of running the NIH CLP Transcript Completions report. This report allows Learners or Administrators to generate a report showing all transcript items that contain a specific Field of Study for a specific date range. The report can be run either for a specific Learner or Org Code.

Log into the LMS.

Click the Admin icon.

Click the Reports link in the left navigation menu.
Enter NIH CLP in the Name field and click the **Search** button.

![Figure 3 – Name field and Search button](image)

Click the **Actions** link.

![Figure 4 – Actions link](image)
Click the **Execute** link on the Actions activity menu.

![Figure 5 – Execute link on the Actions activity menu](image)

Click the **Field of Study Name** pick icon and then search for the Field of Study that is desired.

![Figure 6 – Field of Study pick icon](image)
Enter the name of a Field of Study in the Name field and click the Search button. You can also just click the Search button to view all Fields of Study.

Click the Select checkbox for a specific Field of Study to add it to the report.
The CLPs From Date and CLPs To Date fields will be populated with the last calendar year date range by default. You can use the CLPs From Date and CLPs To Date fields to change the date range, manually entering a date in MM/DD/YYYY format, or you can use the CLPs From Date and CLPs To Date pick icons to select a date range.

**NOTE**: The date range for the report cannot exceed 3 years.

The Supervisory Code pull-down is an optional parameter for the report, you can choose a specific value to narrow the focus of the report or skip selecting a value to include all Supervisory Codes.

Organization ID and Person Name are optional parameters for this report.

Enter an Org Code in the Org Code field. You can enter a full Org Code (e.g., AB1234) or you can search for multiple Org Codes using the percent symbol (%) as a wildcard (e.g., AB%).

The Person Name field is an optional parameter for the report, you can choose a specific value to narrow the focus of the report to a single Learner or skip selecting a value to include all Learners within the specified Org Code.
Click the **Generate Report** button.

![Generate Report button](image10)

*Figure 10 – Generate Report button*

Click the **Print this report** icon.

![Print this report icon](image11)

*Figure 11 – Print this report button*
Click the **Export** button on the Print to PDF message box.

![Figure 12 – Export button](image)

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Figure 13 – Open file link](image)

Print the file from Adobe Reader/Acrobat.

If **you experience trouble with this process**, please refer to the [LMS Support Page](#).
Running the NIH CLP Transcript Completions Report for Learner

This QRG will guide approvers through the task of running the NIH CLP Transcript Completions Report for Learner. This report allows Learners to generate a report showing all transcript items that contain a Field of Study for a specific date range. The report can be run either for the Learner themselves.

Log into the LMS.

Click the Reports link in the left navigation menu.

Enter NIH CLP in the Name field and click the Search button.
Click the **Actions** link.

![Figure 3 – Actions link](image)

Click the **Execute** link on the Actions activity menu.

![Figure 4 – Execute link on the Actions activity menu](image)
The report parameters screen appears. The CLPs From Date and CLPs To Date fields will be populated with the last three calendar years date range by default. You can use the CLPs From Date and CLPs To Date fields to change the date range, manually entering a date in MM/DD/YYYY format, or you can use the CLPs From Date and CLPs To Date pick icons to select a date range.

**NOTE:** The date range for the report cannot exceed 3 years.

![Figure 5 – CLPs From Date and CLPs To Date pick icons](image)

Click the **Generate Report** button.

![Figure 6 – Generate Report button](image)
Click the **Print this report** icon.

![Figure 7 – Print this report button](image)

Click the **Export** button on the Print to PDF message box.

![Figure 8 – Export button](image)
Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

Figur 9 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Running the NIH Missing NED Servicing AOs by Org Report

This QRG provides instructions for generating the NIH Missing NED Servicing AOs by Org Report. This report creates a list of all NIH staff who are missing the Servicing AO in the NIH Enterprise Directory (NED) for a specified Organization and sub-Organizations. This report is important for ensuring that the AAO in the LMS is correct for organizations that have “opted-in” to the NED Servicing AO→LMS AAO data feed process.

Log into the LMS.

Click the Admin icon.

Click the Reports link in the left navigation menu.
Enter “NIH Missing” in the **Name** field and click **Search**.

![Diagram of Name field and Search button](image)

**Figure 3 – Name field and Search button**

Click the **Actions** link for the HHS All Approvers by Org Report.

![Diagram of Actions link](image)

**Figure 4 – Actions link**
Click the **Execute** link on the Actions activity menu.

![Execute link on the Actions activity menu](image1)

**Figure 5 – Execute link on the Actions activity menu**

Enter the Organization ID in the Organization ID field. You can use a percent symbol (%) as a wildcard field to capture all of the sub-Organizations.

![Org Name field](image2)

**Figure 6 – Org Name field**
Click the **Generate Report** link.

![Generate Report button](image1)

**Figure 7 – Generate Report button**

To print the report, click the **Print this report** icon.

![Print this report icon](image2)

**Figure 8 – Print this report icon**

Click the **Export** button on the Print to PDF message box.

![Export button](image3)

**Figure 9 – Export button**
Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the Open file link on the notification to open the pdf file in Adobe Reader/Acrobat.

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the LMS Support Page.
Running the NIH Order Approvals by Org/Approver Report

This QRG provides instructions for generating the NIH Order Approvals by Org/Approver Report. This report lists all fully approved NIHTC orders (not cancelled or dropped) by Org or Approver. These are order approvals made by a Manager, Alternate Manager, Alternate Approver for Orders (AAO), or an LMS Administrator during a specified date range (not to exceed 365 days). This report can create a list of approved training that an approver can submit to their Budget Officer.

Log into the LMS.

Click the Admin icon.

Click the Reports link from the left navigation menu.
Enter NIH Order Approvals by Org/Approver in the Name field and click the **Search** button.

**Figure 3 – Name field and Search button**

Click the **Actions** link for the NIH Order Approvals by Org/Approver Report.

**Figure 4 – Actions link**
Click the **Execute** link on the Actions activity menu.

![Execute link on the Actions activity menu](image)

Figure 5 – Execute link on the Actions activity menu

The default date range for the report is the last one (1) day. If you want to change the date range, enter the From Order Approval Date and To Order Approval Date in the appropriate fields in MM/DDD/YYYY format. Alternately, you can use the **From Order Approval Date** and **To Order Approval Date** pick icons to select the date.

![Report Parameters - NIH Order Approvals by Org/Approver](image)

Figure 6 – From Order Approval Date and To Order Approval Date pick icons
Click the **Generate Report** button.

![Figure 7 – Generate Report button](image)

To print the report, click the **Print this report** icon.

![Figure 8 – Print this report icon](image)
Click the **Export** button on the Print to PDF message box.

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](https://hr.nih.gov).
Running the NIH Order Reconciliation Report

This QRG provides instructions for generating the NIH Order Reconciliation Report. This report is needed to reconcile the NIHTC training orders in the LMS with the NIH Business System (NBS) financial transaction data. The results can be further refined using the Organization, Document Number, or a specific CAN. This report can be used to determine what orders are still in Pending Approval state for a specific Org Code.

Log on to the LMS.

Click the **Admin** icon.

![Admin icon](image)

Click the **Reports** link in the left navigation menu.

![Reports link](image)
Enter NIH Order Reconciliation in the Name field and click the **Search** button.

Click the **Actions** link for the NIH Order Reconciliation Report.
Click the **Execute** link from the Actions activity menu.

Enter the From Order Creation Date and To Order Creation Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the **From Order Creation Date** and **To Order Creation Date** pick icons to select the date.

NOTE: The date range in the From Order Creation Date and To Order Creation Date fields cannot exceed one (1) year.
Click the **Generate Report** button.

![Figure 7 – Generate Report button](image)

To print the report, click the **Print this report** icon.

![Figure 8 – Print this report icon](image)
Click the **Export** button on the Print to PDF message box.

![Export button](image)

Figure 9 – Export button

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

Figure 10 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Running the NIH Registrations Needing Approval Report

This section will guide approvers through the task of running the NIH Registrations Needing Approval report. This report allows you to easily view key information, such as the CAN, for any orders pending your approval. All registrations pending approval are listed in this report, regardless of whether or not your approval point has been reached in the approval chain.

The report also allows you to view another approver’s pending approvals, so you can take action on behalf of someone who would normally be unable to make the approval themselves.

When one of your team members is added to an order needing approval, you will receive an email notification from the LMS stating that there is a registration pending your approval.

Log on to the LMS.

Select the My Team icon.

Select the Reports link on the bottom left of the page.
Enter NIH Registrations in the Name field and select the **Search** button.

![Figure 3 – Name field and Search button](image)

In the Reports table, select the **Actions** link for the NIH Registrations Needing Approval report.

![Figure 4 – Actions link](image)
Select the **Execute** from the Actions activity menu.

![Figure 5 – Execute link on the Actions activity menu](image)

To generate the list of your own pending approvals, select the **Generate Report** button.

![Figure 6 – Generate Report button](image)
To generate the list of another approver’s pending approvals, select the **Do NOT generate my pending approvals list** checkmark and then select the **Approver Name** pick icon.

Enter the first and last name of the other approver in the **First Name** and **Last Name** fields and select the **Search** button.
Select the checkbox for the name of the other approver.

Figure 9 – Select checkbox

Select the Generate Report button.

Figure 10 – Generate Report button
Review the information included in the report to determine accuracy, paying attention to the CAN to ensure the proper obligation of funds. Any orders without a CAN will display as N/A.

**NOTE:** Refer to LMS QRG [TS73-S: Review/Add CAN on an order—Manager or Alternate Manager](https://example.com) or [TS74-A: Review/Add CAN on an order-AAO](https://example.com) to modify a CAN if necessary.

To continue the process and approve the order, refer to the following LMS QRGs, depending on your role in the approval chain:

- **TS75-S: Approve Orders—Manager**
- **TS76-S: Approve Orders—Alternate Manager**
- **TS71-A: Approving Orders—AAO**

To print the report, select the **Print this report** icon.

![Print this report icon](https://example.com)

*Figure 11 – Print this report icon*
Select the Export button on the Print to PDF message box.

![Export button](image)

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Select the Open file link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

Print the file from Adobe Reader/Acrobat.

**If you experience trouble with this process, please refer to the LMS Support Page.**
Running the NIH Roster Report

This report enables administrators to identify all Learners enrolled in a specific offering, including email addresses, by registration status, and print a class sign-in sheet.

Log into the LMS.

Click on **Admin** icon.

![Admin icon](image)

Click the **Reports** link in the left navigation menu.

![Reports link](image)
Enter NIH Roster in the Name field and click the **Search** button.

![Figure 3 – Name field and Search button](image)

Click the **Actions** link for the NIH Roster Report.

![Figure 4 – Actions link](image)
Click the **Execute** link on the Actions activity menu.

![Execute link on the Actions activity menu](image)

**Figure 5 – Execute link on the Actions activity menu**

Click the **Offering Number** pick icon.

![Offering Number pick icon](image)

**Figure 6 – Offering Number pick icon**

Note: When the **Only Waitlisted** parameter is set to “Yes”, the report will return approved and pending approval waitlisted enrollments only.
To search for the offering, you can use the Title, ID, Domain, Audience Type/Subtype, Start Date >=, End Date <=, Course ID, and Language fields, and/or the Delivery pull-down menu. Once you have entered the search criteria, click the Search button.

You can also enter the Start Date and End Date in the appropriate fields in MM/DDD/YYYY format. Alternately, you can use the Start Date >= and End Date <= pick icons to select the date.
Click the **Select** checkmark to select the offering.

![Figure 9 – Select checkmark](image)

Click the **Generate Report** button.

![Figure 10 – Generate Report button](image)
To print the report, click the **Print this report** icon.

![Print this report icon](image)

**Figure 11 – Print this report button**

Click the **Export** button on the Print to PDF message box.

![Export button](image)

**Figure 12 – Export button**
Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

Figure 13 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).
Running the NIH Transcript Report

The NIH Transcript report will provide a comprehensive list of all completions recorded in the HHS Learning Portal (LMS) for a specified date range. The completions displayed in the report are limited to the Learner who has logged into the LMS.

Log into the LMS.

**NOTE:** For instructions about logging on, refer to the Log-On Instructions (TS02-L) QRG.

From the LMS Home Page, select the **Reports** link in the left navigation menu.

Enter NIH Transcript in the **Name** field and select the **Search** button.

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**Figure 1 – Reports link in the left navigation menu**

**Figure 2 – Name field and Search button**
Select the **Actions** link for the NIH Transcript report. Select **Execute**.

![Actions link for the NIH Transcript report](image)

**Figure 3 – Actions link for the NIH Transcript report**

Enter the **Completion Date After** and **Completion Date Before** in the appropriate fields in MM/DD/YYYY format. Alternate, you can use the Completion Date After and Completion Date Before pick icons to select the dates.

Select the **Generate Report** button to continue.

![Generate Report button](image)

**Figure 4 – Generate Report button**

To print the report or save as a *.PDF document, click the **Print this report** icon.

![Print this report icon](image)

**Figure 5 – Print this report button**
Select the **Export** button on the Print to PDF message box.

![Export button](image)

Figure 6 – Export button

Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Select the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

![Open file link](image)

Figure 7 – Open file link

If you experience trouble with this process, please refer to the [LMS Support Page](#).