HHS Learning Portal

Local Learning Registrar

NIHTraining Center

NIH Training Center
Rockledge One, Suite 4000
6705 Rockledge Drive
Bethesda, MD 20817

HHS LEARNING PORTAL

LOCAL LEARNING REGISTRAR

Version 6.0

National Institutes of Health Training Center

National Institutes of Health Training Center, Rockville 20817

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6.0	07/22/2019	Tom Holscher	07/22/2019	Updated URLs in document

Please submit any questions or suggestions for changes to
https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx

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LOCAL LEARNING REGISTRAR

INTRODUCTION

HHS Learning Portal/LMS: These terms are used interchangeably and refer to the same system. The Learning Management System (LMS) is a Department-wide system for managing, accessing, and tracking training. As a Department-wide system, the overall LMS is managed at the HHS level – hence the name HHS Learning Portal. The following are some concepts and terms you should understand before beginning to perform administrative tasks in the LMS.

LEARNER PROFILE

The Learner Profile contains information about the learner such as employee status, start date, name, and organization. The profile does not contain personally identifiable information such as the employee's social security number or date of birth.

The Learner Profile receives data from the following sources on a nightly basis:

- NIH Enterprise Directory (NED)
- Capital HR
- Commissioned Corp Personnel Database
- Integrated Time and Attendance System (ITAS)

Anyone given an NIH Enterprise Directory (NED) account and has been included in the NIH Active Directory will automatically be given an LMS account. Due to the nightly updates, all data changed in the learner profile will be overwritten, with the following exceptions:

Email - Accurate email addresses in the LMS will ensure learners receive notifications generated by the LMS. If the email address is incorrect, then an LMS People Administrator (formerly known as a Human Capital Administrator) can manually update it.

Manager (Non-FTE staff only): This field is currently populated with the Learner's ITAS Approving Official. Having the correct Manager (a.k.a. supervisor) listed will allow supervisors to view their direct reports and access training and development information about them.

If the Approving Official in ITAS is not the Learner's training approver, then a Local Learning Registrar may set up an Alternate Manager for the Learner.

DOMAINS

Domains (a.k.a. Security Domains) in the LMS are used to segment users into hierarchical groups of people who should all have the same basic security permissions. The HHS Learning Portal is comprised of many domains; some of which are strictly dedicated to NIH, its staff and learning resources. (See Appendix C for a graphic depiction.)

These domains allow for the partitioning of the following components that may be managed by various administrator security roles:

Component	***Example…***
Business rules	NIH Proxies receive email notifications seven days prior to the expiration of their Proxy status.
Notifications	NIH email notifications include NIH-specific information and logos.
Locations, facilities, and rooms	NIH resources are only available to NIH administrators in the LMS.
User accounts	Only NIH administrators may access and modify the accounts of NIH staff.

NIH has its own domain to ensure that all NIH employees and contractors have access to NIH-specific training resources. Having an NIH domain also prevents users in other domains (other agencies within HHS) from viewing and accessing NIH-specific training resources.

LMS users are unable to see information in domains that are at a higher or equal level in the hierarchy. Their permissions trickle down, which means they can see items in their own domain and sub-domains only.

The following are all sub-domains of the NIH domain:

- NIH Training Center (NIHTC)
- Clinical Center (CC)
- Center for Information Technology (CIT)
- Office of Research Services (ORS)
- National Institutes of Allergy and Infectious Diseases (NIAID)
- NIH Common

For a graphic representation of the HHS Learning Portal domain structure please refer to Appendix C of this document.

SECURITY ROLES

Security Roles further define the permissions of individual users in a domain. Most of the security roles in the LMS are 'tied' to the domain (e.g., a user assigned the Learning Administrator security role in the NIH domain has permission to manage NIH courses, as well as everything in NIH sub-domains).

Every user in the LMS has the Learner security role. If you are designated as the Manager in someone's Learner Profile, you will automatically have the role of Manager/Supervisor as well.

Domain-Specific Security Roles include:

- Learning Administration
- Content Administration
- System Administration
- People Administration

Only the Learning Registrar (a.k.a. Local Learning Registrar or LLA) Security Role is defined by Organization/SAC code instead of the domain. This restricts the LLA to performing actions associated with Learners within a specific organization/SAC and its sub-organizations only.

LOCAL LEARNING REGISTRAR ROLE

The LMS Local Learning Registrar role is a combination of the People Administration and Registrar's Desk roles found within the LMS. The Local Learning Registrar is similar in function to the Super User role in the NIHITS system.

With Local Learning Registrar privileges you can do the following within the Organization code/ Sub-codes to which your permissions are assigned:

- View account profiles for Learners
- Reactivate deactivated LMS accounts
- Register Learners for all training in the LMS catalog
- Manage course enrollments
- Manage learner transcripts
- Approve NIH Training Center courses and obligate funds
- Generate various reports

This user manual will provide step-by-step instructions for the major functions used by Local Learning Registrars.

LMS TERMS AND DEFINITIONS

Audience Types - Audience Types are used to group learners in the system. Similarly, Audience Sub-Types allow for the further grouping of learners within an Audience Type.

These groups can then be used to control access to learning offerings in the LMS:

- by associating audience types and subtypes at the course level;
- attaching audience types with seat percentages at the delivery type level; and,
- specifying seat numbers for audience subtypes at the offering level.

Certification – A predefined set of courses that have been grouped together, with a deadline for completion. Credentials earned by completing the certification may expire on a predetermined date.

Closing a Competency Gap – A competency gap can be closed by increasing the calculated gap number to zero or higher. Closing the gap can be accomplished by completing or updating a learner self-assessment, or a manager/supervisor assessment, usually after relevant training has been completed or additional experience has been gained.

Competency – A competency is a skill, knowledge, or behavior that can be measured, calculated, acquired, specified, or tested. Examples of competencies include “Java Programming”, “Written Communications”, “Product Knowledge”, and “People Skills”.

Assigned competencies “required” and assessed competencies are “held.”

Competency Gap – This is a measure of the learner’s current competency proficiency minus his/her required competency proficiency level. This value indicates how much training, development, and learning is needed in order to make measurable increases to performance.

Course – A course is organized training with planned objectives for learners to complete. Courses may be offered using a variety of delivery types and may have multiple offerings.

Curriculum – A predefined set of courses that have been grouped together. A learner must complete all courses to complete the curriculum.

Delivery Type – A delivery type is the method through which the course content will be presented to learners. Some examples of delivery types are: Online Training, Traditional Classroom, Books, Video, and Webcast.

Descriptors – Behavioral descriptors are descriptions associated with competency proficiency levels. They are intended to help establish an anchor that raters and viewers can use when assessing the proficiency level of a learner.

Enrollment – An offering that a learner is registered for, but has not yet completed.

Facility – A facility is the actual building at a specific location. An example would be Building 31, which is part of the NIH Main Campus location.

Job Families – A job family is a collection of related jobs.

Job Roles – Roles identify specific skills required to perform a job. Roles can be shared across multiple jobs. Role definitions may include:

- Competencies — competencies required to perform the role (including criticality of the competency and minimum required proficiency)
- Certifications — certifications required to perform the role.
- Curricula — curricula required to perform the role.
- Attachments — additional information about the job role.

Jobs – In the LMS, jobs are listed according to the OPM job series number. A job can be a collection of roles. It can inherits the competencies, certifications, curricula and attachments of the associated roles. Job definitions may include:

- Roles — define the functional responsibilities for the job.
- Next career steps — other jobs that represent likely promotion paths for people who hold the job.
- Attachments — additional information about the job function.

Learning Plan – Learning plans allow learners to keep track of learning offerings and other tasks needed for general development. Every LMS learner has a single learning plan. Learners can set or view the progress of each item in their learning plan. In addition, users with certain privileges (like managers) can also view progress on the learning plan items.

Location – A location is either a geographic location, such as Bethesda, or the name that serves as an identifier, such as NIH Main Campus.

Multi-Rater Assessment (MRA) – A multi-rater assessment (MRA) is a method by which a learner's competencies are assessed by supervisors, peers, subordinates, and customers.

Offering – An offering is the specific date and time a course will be presented to learners. In most cases, offerings are limited to specific dates, times, locations, facilities, and rooms. The exception would be self-paced courses, such as online training, where the offering is available to the learner at any time. Offerings are often referred to as classes.

Order – An order is created when an administrator signs another person up for an offering.

Prescriptive Rule – Prescriptive rules are used to dynamically assign goals or learning (offerings, courses, certifications, curricula, etc.) to people as a group. Prescriptive rules are defined to assign the prescribed goals/learning.

Proficiency Level – Proficiency levels represent the scale on which a competency is measured. Examples of the proficiency levels used at NIH include "Fundamental Awareness", "Novice", "Intermediate", "Advanced", and "Expert".

Ratee – The employee whose competencies are being rated.

Rater – An individual who is completing a competency assessment of someone else.

Registration – A registration is created when a learner signs up for an offering.

Room – A room is a designated space, such as a conference room, classroom, or auditorium, found within a specific facility. An example would be Conference Room A in Building 31.

Security Role – A security role is a set of privileges assigned to a user. A user can be a learner, a manager, an alternate manager, a registrar, an instructor, or an administrator. The permissions granted to a user through a security role apply to the specified domain.

Session Template – A session template is a general format used to show the learner when a course is being offered. Session templates should contain the day and time the offering will be held. Examples of session templates are:

- Mon 9 – 11
- Mon - Wed 9 – 5
- Mon, Wed, Fri 1 – 4:30

Surveys – A survey is a questionnaire that a respondent uses to evaluate a service or provide general feedback.

Transcript – a record or history of training taken by a learner

LEARNER PROFILE

The Learner Profile contains detailed information about each learner. This information is populated through nightly data feeds from the following NIH HR Systems:

- Employees = Capital HR (CapHR)
- Contractors = NIH Employee Directory (NED)
- Commissioned Corps Officers = Office of Public Health Service (OPHS)

When viewing the Learner Profile, all of the fields appear editable. Changes in many of these fields will be overwritten by the HR database feeds. Only a few fields can be edited by Local Learning Registrars without being affected by the data feeds. They are:

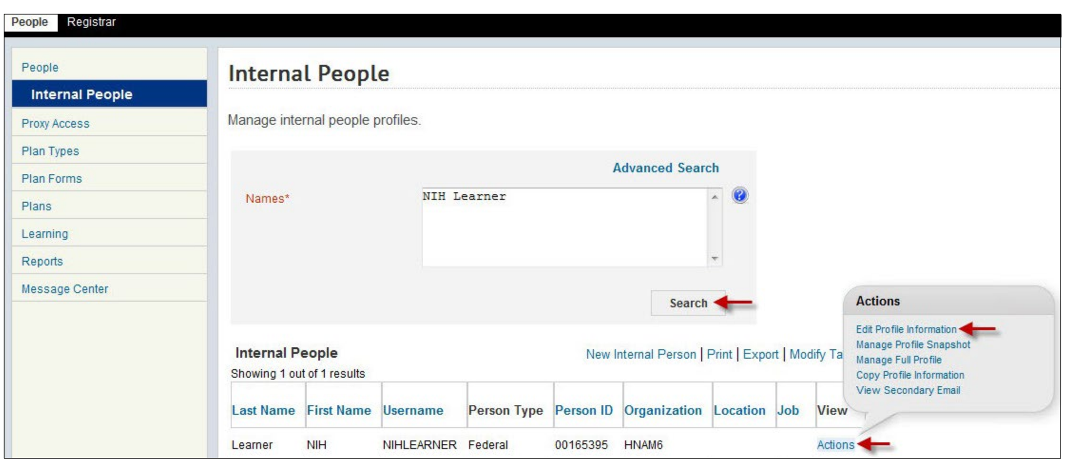
- Email address
- Managers (Non-FTE staff only)
- Alternate managers

Changes to all other fields should be made in the HR database. Contact your organization's Administrative Officer to make these changes. Changes made in the HR database will be sent to the LMS through the data feed.

VIEW AND EDIT LEARNER PROFILE

1. Select the **Admin** icon.

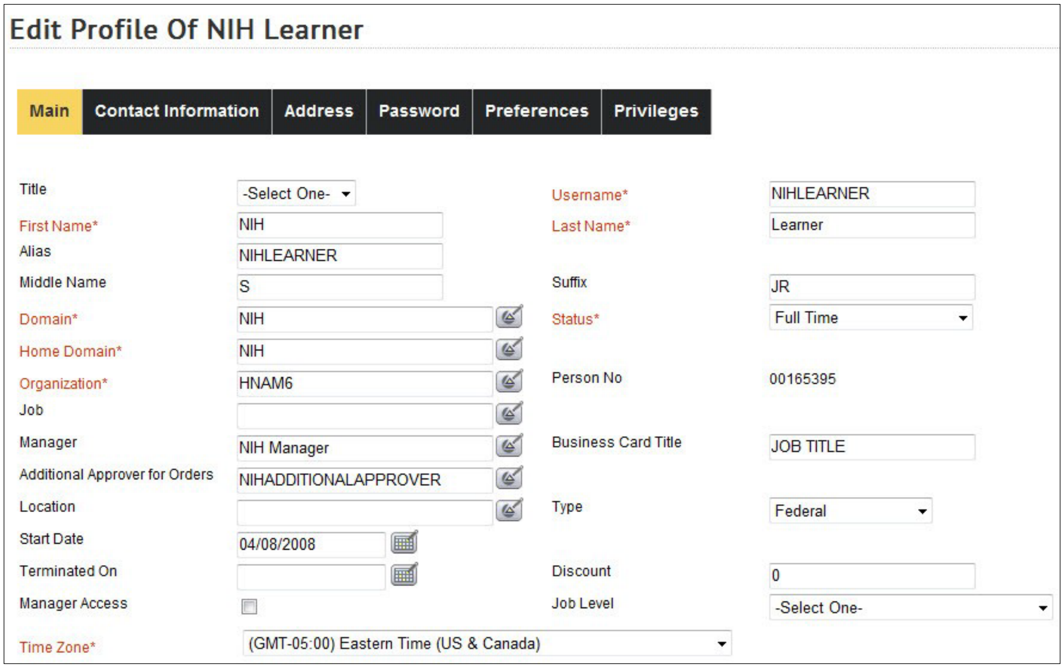
2. Enter the learner's name in the Name(s) search field and click **Search**. **NOTE:** To view acceptable formats for searching, click the **Help** icon to the right of the Name(s) search field.
3. Click the **Actions** link in the View column.
4. Select the **Edit Profile Information** link in the Actions popup bubble.



NOTE: If you do not find the account you are looking for, try using the Advanced Search. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

IMPORTANT! The majority of HR Information in the Learner Profile is populated by automated data feeds from the Capital HR, NED, and/or Commission Corp databases. If any of the information is incorrect, it must be corrected in the source system and not the LMS.

5. The learner's profile will be displayed.



CORRECT A LEARNER'S EMAIL

A learner's email address must be correct in order for them to receive emails generated by the LMS (e.g., registration confirmation, cancelation notifications, etc.)

Follow the steps below to change a learner's email.

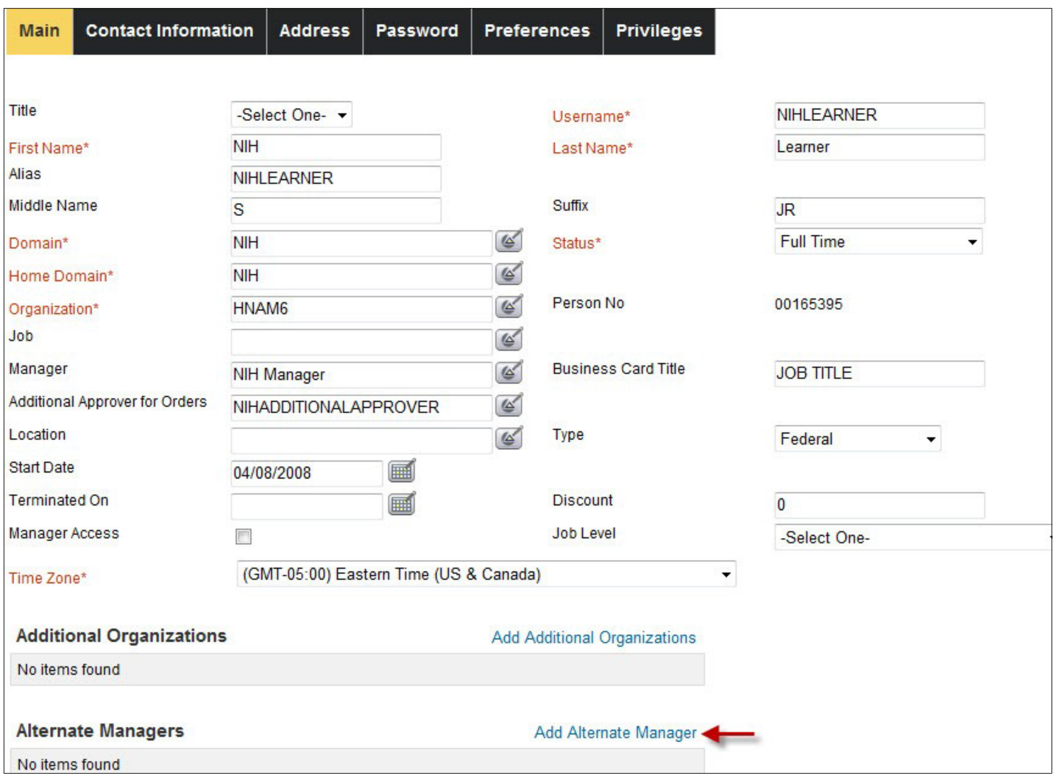
1. While viewing the Edit Profile screen, enter the new address in the E-Mail field and click **Save** at the bottom of the screen.

ADD AN ALTERNATE MANAGER

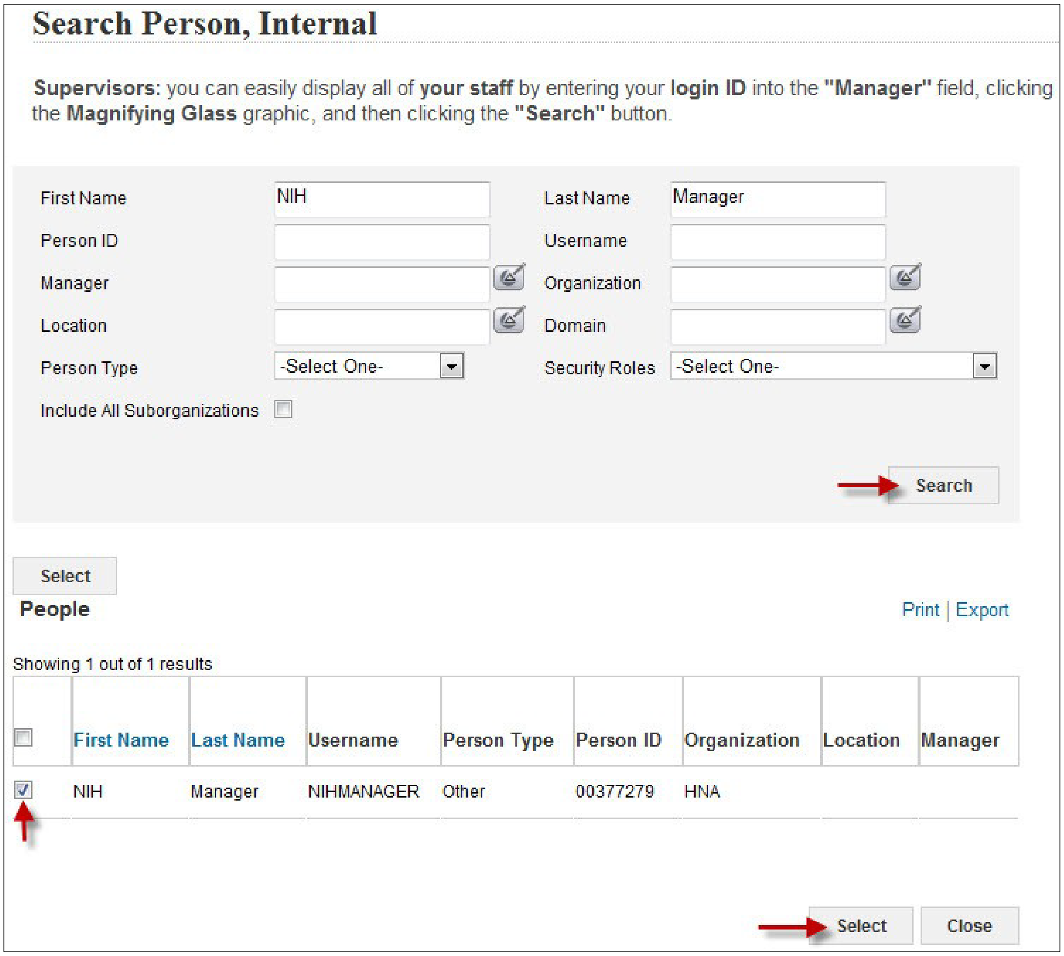
There are situations where a learner requires someone other than, or in addition to, the person specified in the Manager field to perform managerial tasks such as approvals. In these situations, an LLAR can add one or more people to the Alternate Manager section of the learner's profile.

Follow the steps below to add an Alternate Manager.

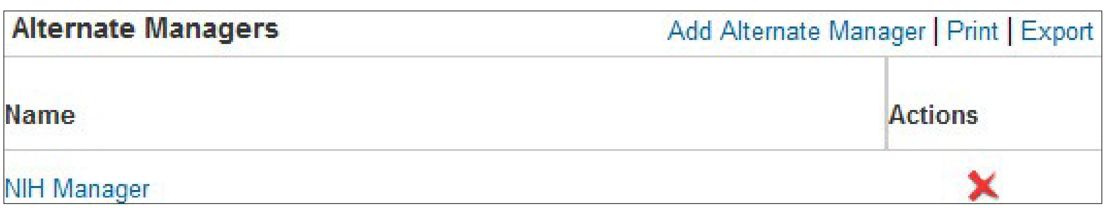
1. While viewing the Edit Profile screen, click the **Add Alternate Manager link**.



3. Enter the search criteria for the Alternate Manager then click **Search**.
4. Click the **checkbox** to the left of the first name of the Alternate Manager.
5. Click the **Select button**.



6. The name of the Alternate Manager will now be listed in the learner's profile.



NOTE: You can add as many Alternate Managers as needed. Alternate Managers will receive the same LMS notifications and privileges as managers.

REACTIVATING A DEACTIVATED ACCOUNT

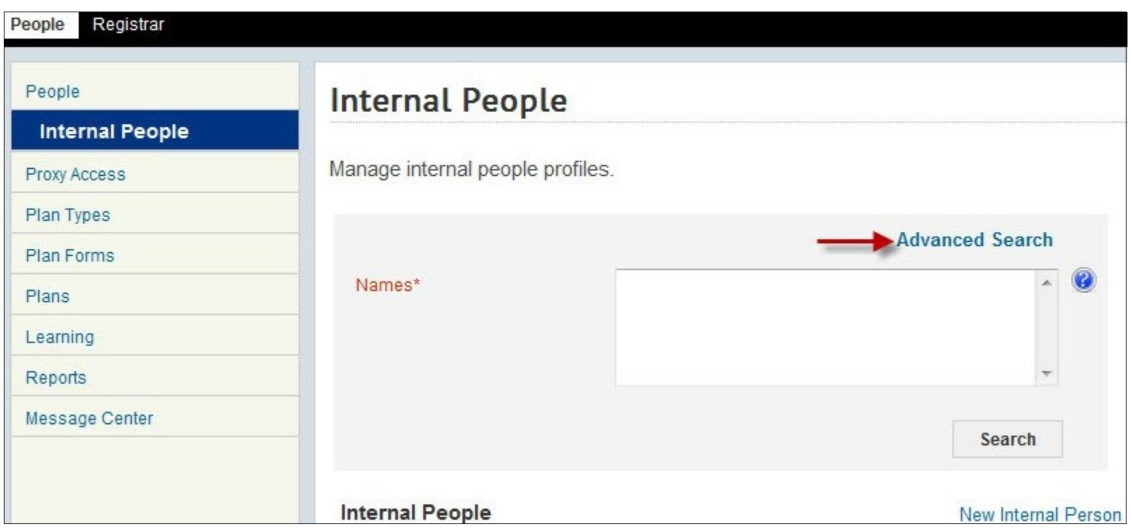
LMS accounts that are deactivated cannot be found using the simple search. Here are some key things to remember with deactivated accounts:

- Accounts are deactivated every 365 days of account inactivity by the account holder.
- Local Learning Registrars can reactivate an account at any time and use the account as needed. (E.g. Registrations, transcript additions, etc.)
- Accounts that are reactivated are not available for use by the learner until the next calendar day.
- Starting the day after the account has been reactivated; learners have six grace days to logon. A successful logon will reset the 365 day cycle giving the learner another year before deactivation occurs again. If the account is not accessed within 6 days, the account will be deactivated again.

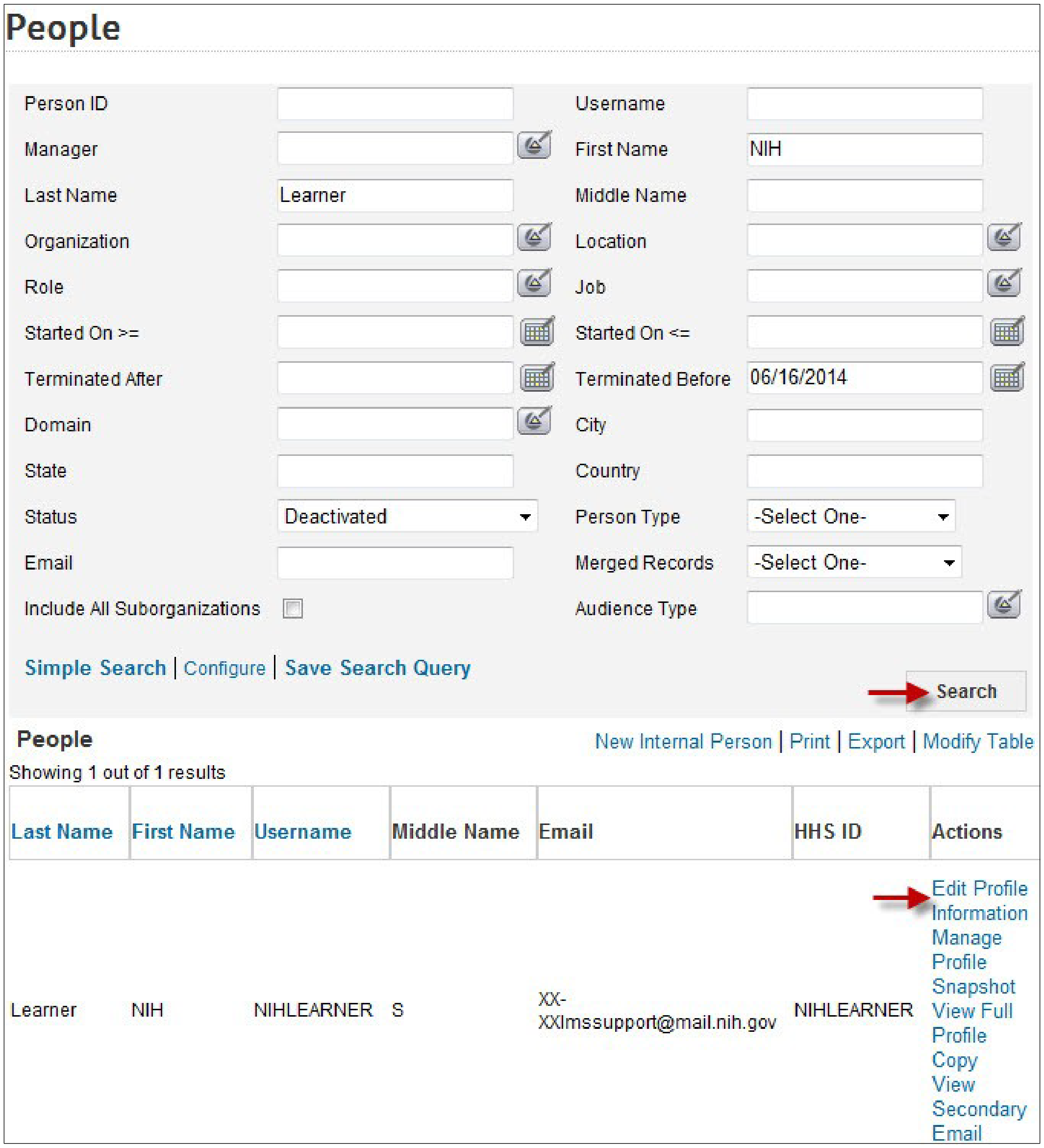
Follow the instructions below to reactivate a deactivated account.

1. Select the **Admin** icon.

2. Click **Advanced Search**. (Deactivated accounts may only be found using advanced search.)



3. Enter the **First Name** and **Last Name** of the user with the deactivated account.
4. Enter today’s date in the **Terminated Before** field.
5. Select Deactivated in the **Status** field.
6. Click **Search**.
7. Click the **Edit Profile Information** link.



People

Person ID		Username	
Manager		First Name	NIH
Last Name	Learner	Middle Name	
Organization		Location	
Role		Job	
Started On >=		Started On <=	
Terminated After		Terminated Before	06/16/2014
Domain		City	
State		Country	
Status	Deactivated	Person Type	-Select One-
Email		Merged Records	-Select One-
Include All Suborganizations		Audience Type	

Simple Search | Configure | Save Search Query

Search

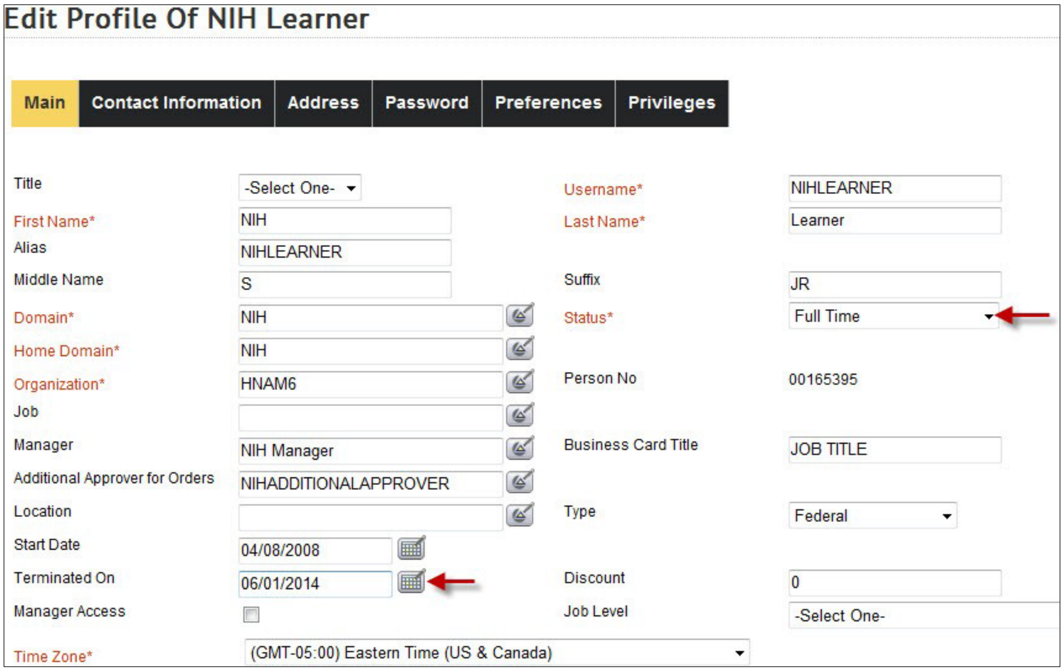
People

New Internal Person | Print | Export | Modify Table

Showing 1 out of 1 results

Last Name	First Name	Username	Middle Name	Email	HHS ID	Actions
Learner	NIH	NIHLEARNER	S	XX-XXlmssupport@mail.nih.gov	NIHLEARNER	Edit Profile Information Manage Profile Snapshot View Full Profile Copy View Secondary Email

8. Change the **Status** from Deactivated to “Full Time”.
9. Delete the date in the **Terminated On** field.
10. Scroll to the bottom of the screen and click **Save**.



11. The account is now reactivated in the LMS. You can verify that the account is active by searching for the account using the simple search. If the account can be found using the simple search, it is reactivated successfully. The learner has 6 days starting the next calendar day to logon and reset the 365 day deactivation schedule for the account. Failure to do so will result in the account being deactivated again.

    IMPORTANT! There are no notifications associated with the reactivation of an account. Local Learning Registrars should notify the learner immediately so they can login within the next 6 days.

CREATING ORDERS

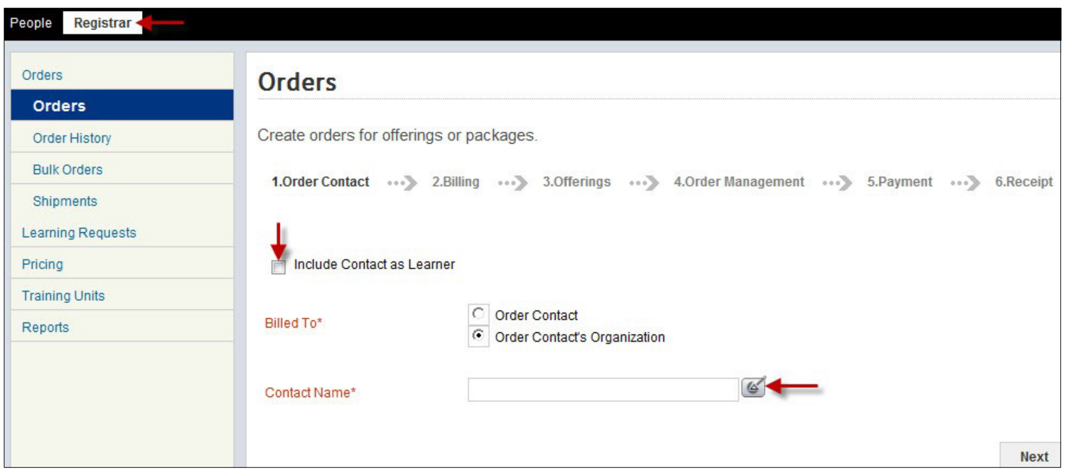
Local Learning Registrars have the ability to create orders which register learners for course offerings found in the LMS catalog.

Follow the instructions below to register a learner for a course offering.

CREATE AN ORDER FOR A LEARNER

1. Click the **Admin** icon.

2. Click **Registrar** from the menu bar.
3. Uncheck the "Include Contact as Learner" **checkbox**. If the contact is being registered for the offering, leave it checked and proceed to step 7.
4. Click the **Pick** icon to search for the contact name.

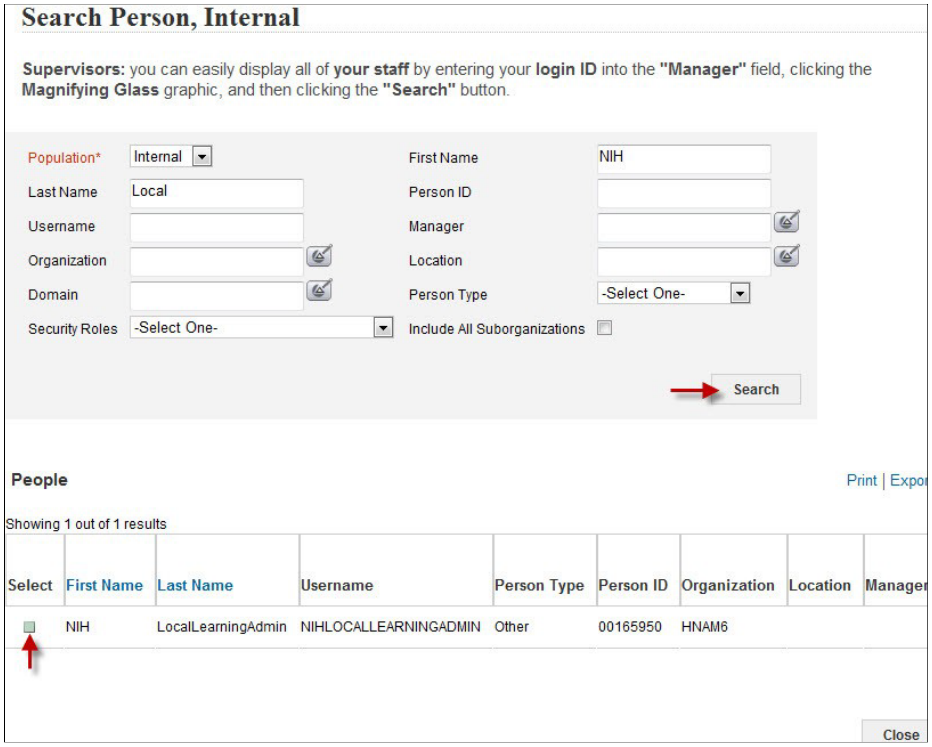


NOTE: It is recommended that the person placing the order is listed as the contact.

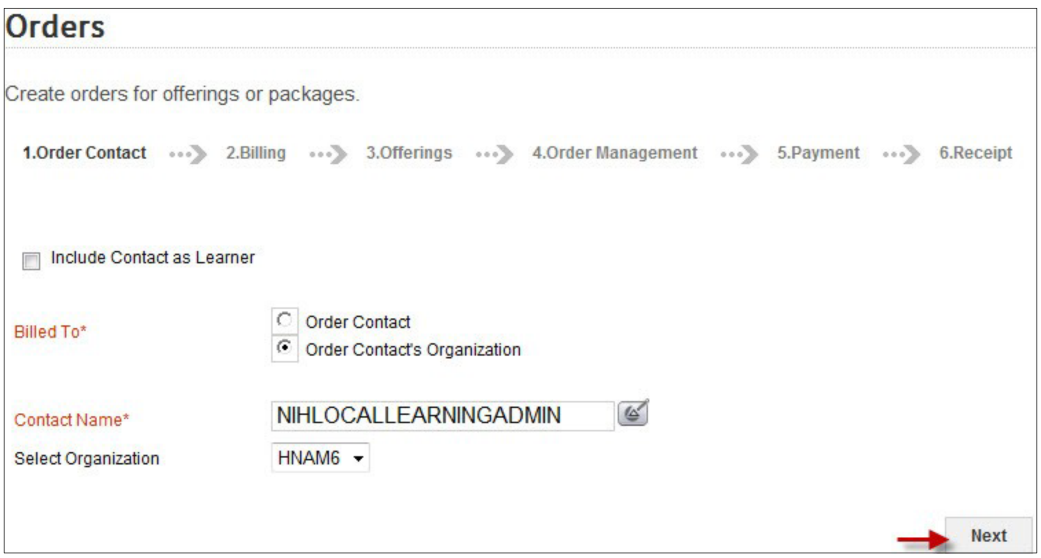
5. Enter the contact's first and last name in the corresponding search fields then click
Search. You may use additional search fields to help locate the contact.

NOTE: It is recommended that the person placing the order is identified as the contact for the order.

6. Click the **checkbox** to the left of the contact's first name.



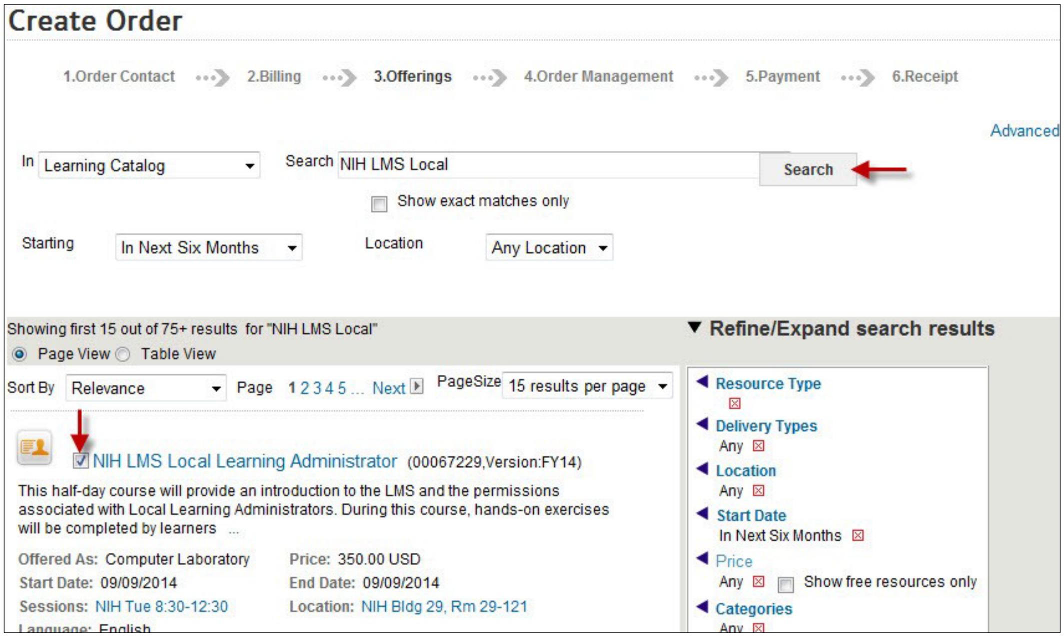
7. Click **Next**.



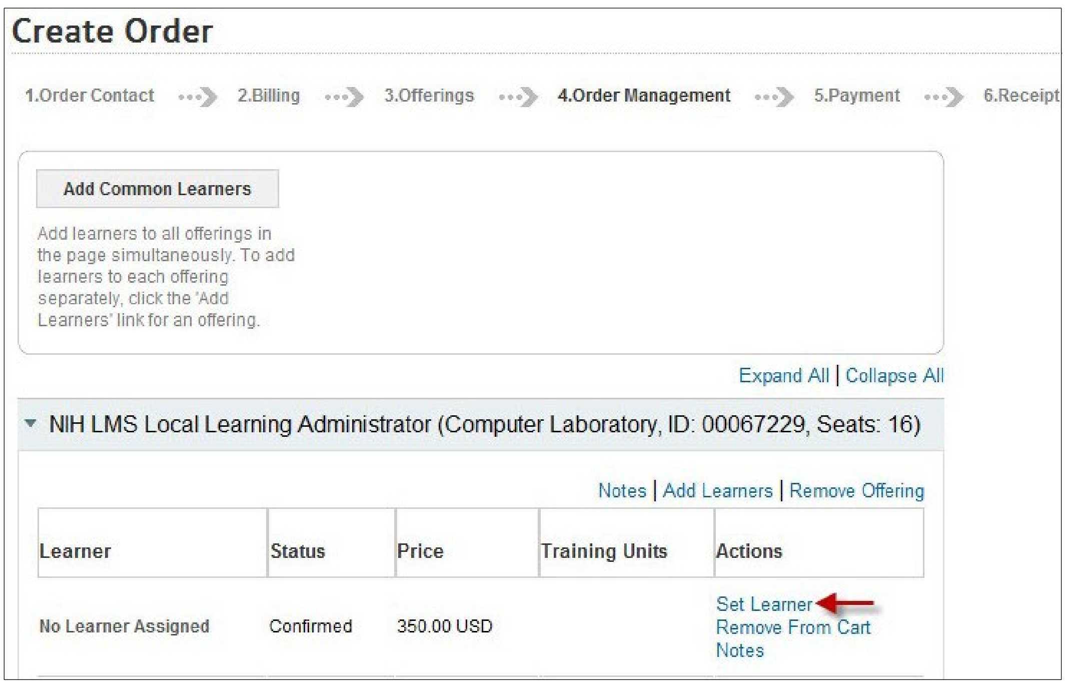
8. Enter the title of the course into the Search field then click **Search**.

   NOTE: Many NIH courses are prefixed with NIH in the title. You may also try using the **Advanced Search** or **Browse by Category** options to help locate a course.

9. Scroll to the bottom of the screen and click **Register**.

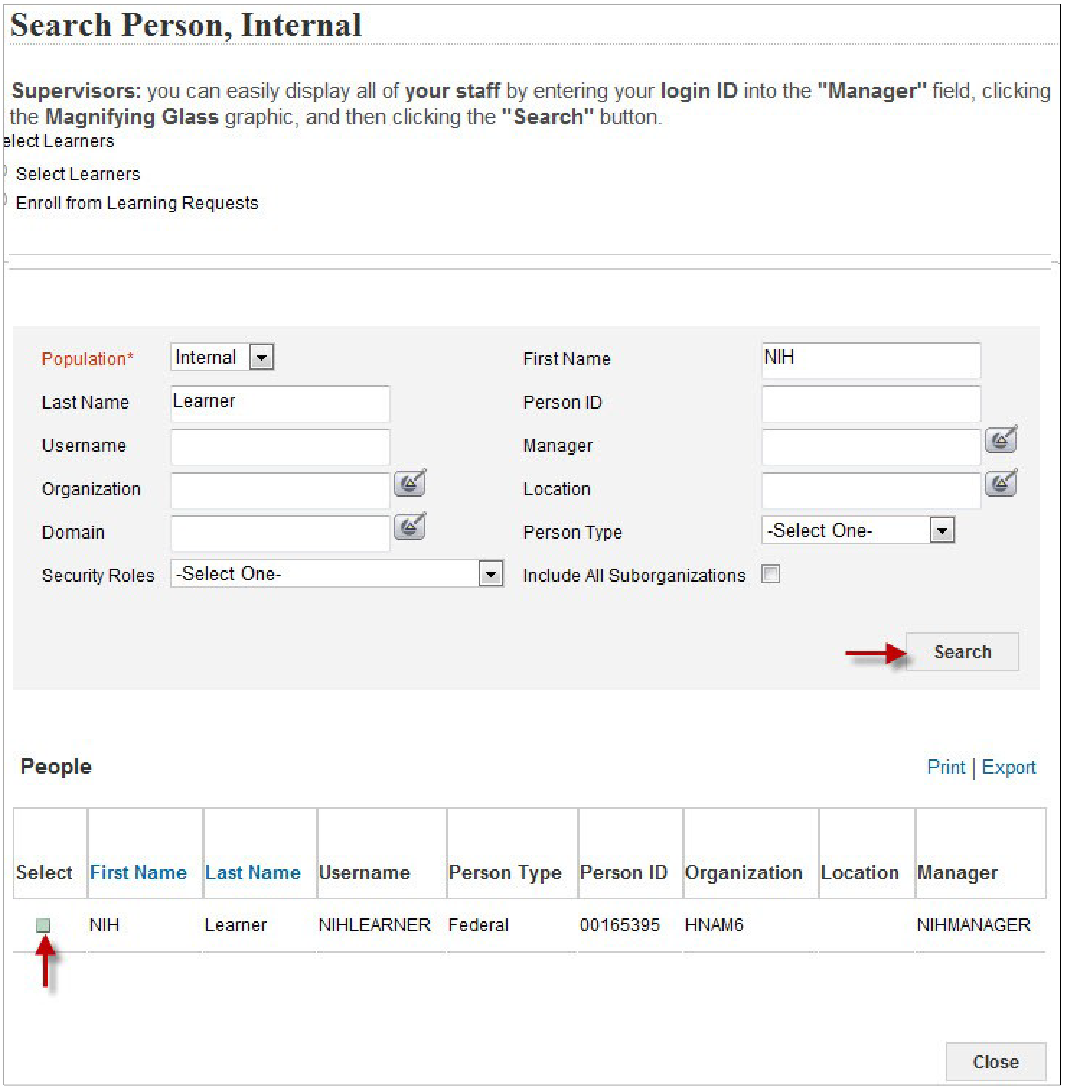


10. Click **Set Learner** in the Actions column to search for the learner you want to register.

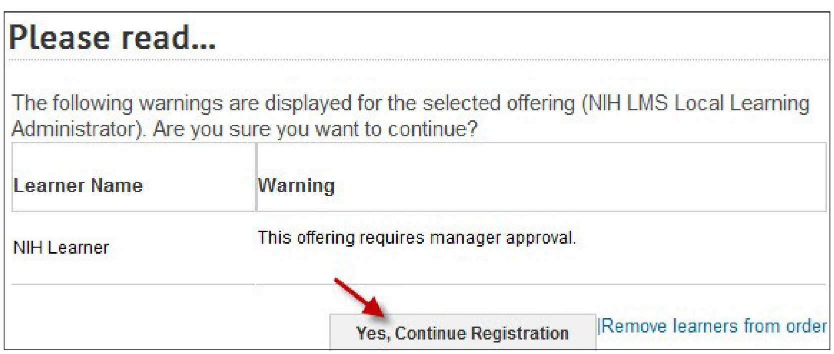


NOTE: If the Set Learner option is not there, it is the result of not unchecking the checkbox in step 2.

11. Enter the name (or other known criteria) in the search fields and click **Search**.
12. Click the **checkbox** to the left of the learner's name.

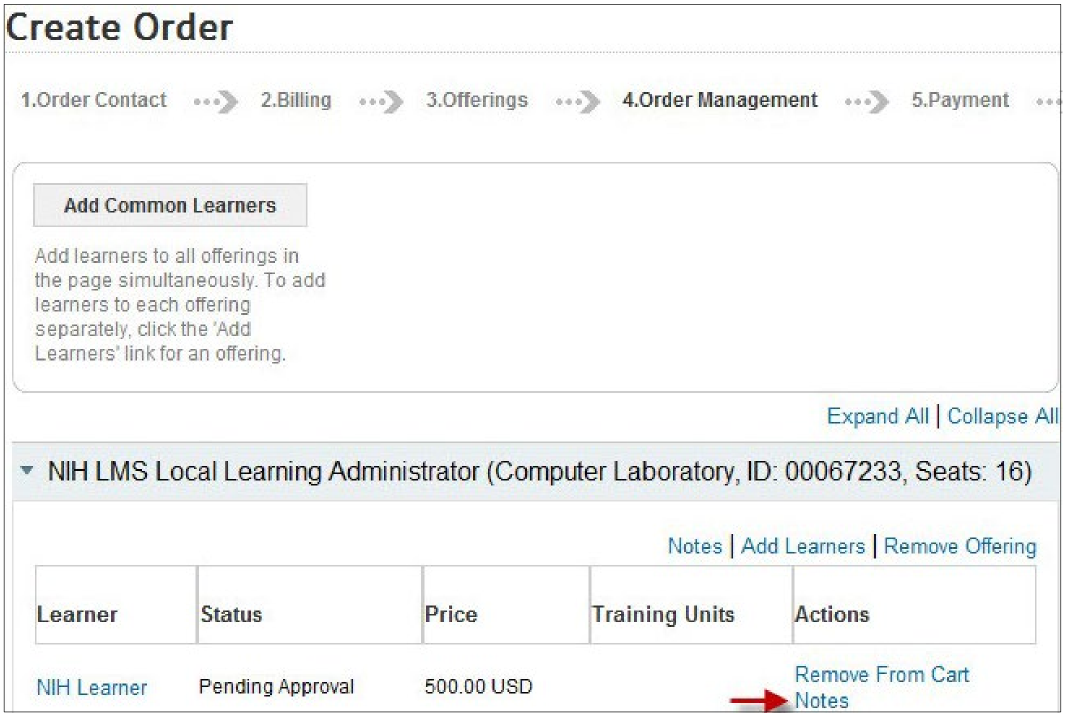


13. If the course requires approval, a warning will be displayed as shown below:
14. Click **Yes, Continue Registration** to continue.

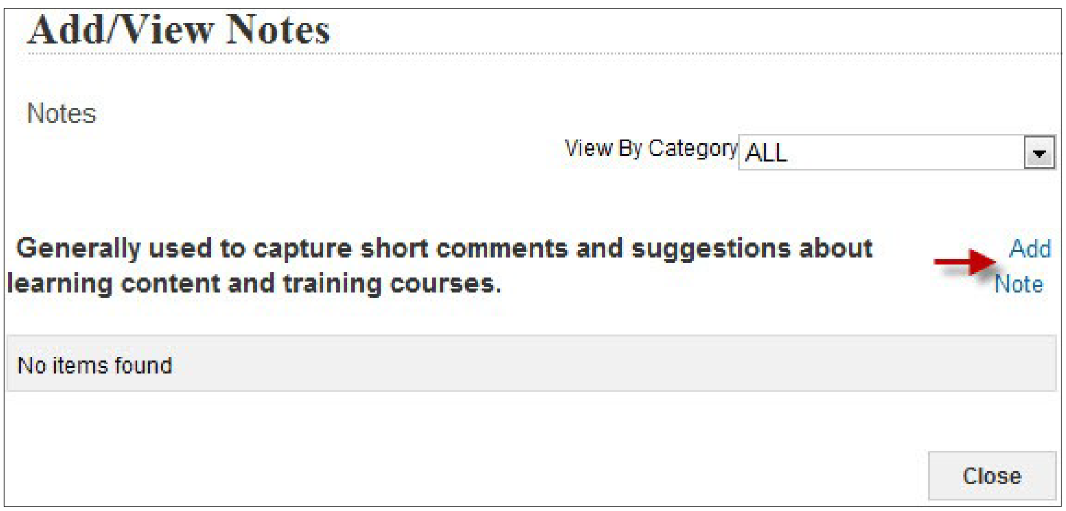


IMPORTANT: For courses that have tuition, the payroll CAN from the learner's account profile will be used. To change the default CAN, do the following:

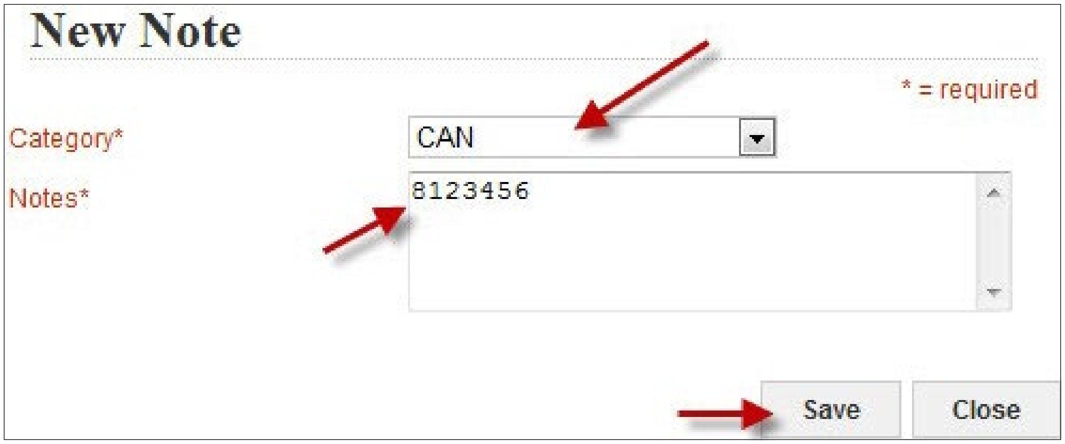
15. Click the **Notes** link in the Actions column.



16. Click **Add Note**.



17. Select CAN from the **Category drop-down menu**.
18. Enter the 8-digit CAN that will be charged for this course in the **Notes field**.
19. Click **Save**.



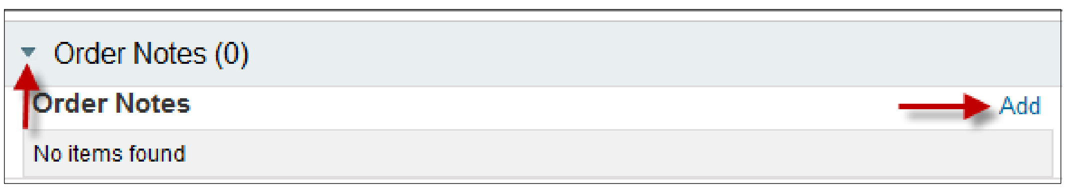
20. The CAN entered here will take precedence over the CAN used from the profile.

    NOTE: If the CAN was entered incorrectly or needs to be changed, repeat steps 15– 19 to make the correction.

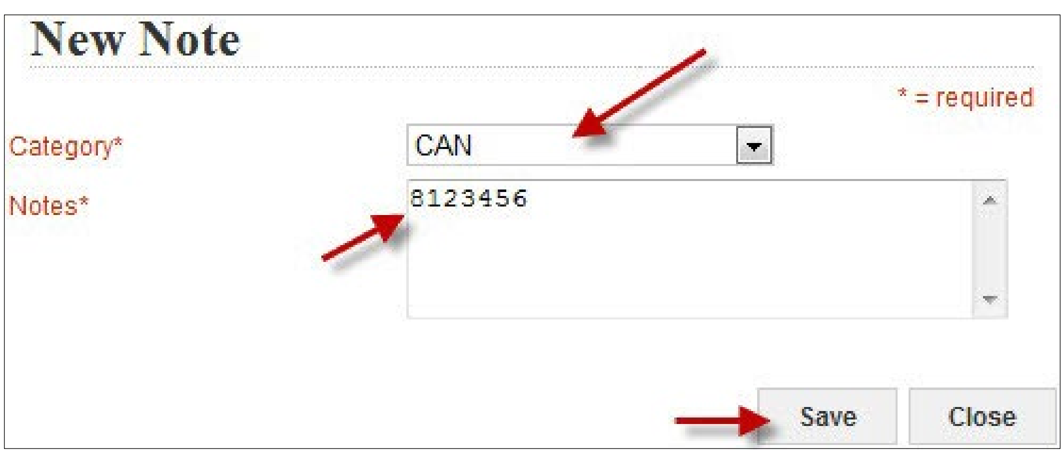
ADDING ONE CAN FOR ALL LEARNERS

If an order has multiple learners, a single CAN may be entered for all of them by adding it in the Order Notes section. The CAN that is entered will not affect manual CANs that are entered for learners. To add a CAN for all learners, do the following:

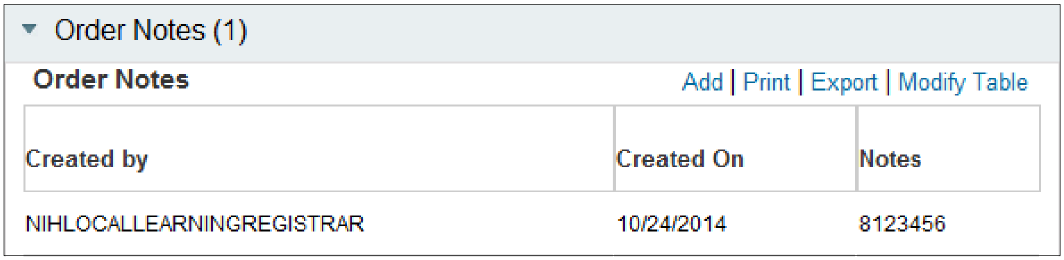
1. Click the arrow at the left of the **Order Notes** section label.
2. When the section expands, click the **Add link**.



3. Select CAN from the **Category drop-down menu**.
4. Enter the 8-digit CAN that will be charged for this course in the **Notes field**.
5. Click **Save**.



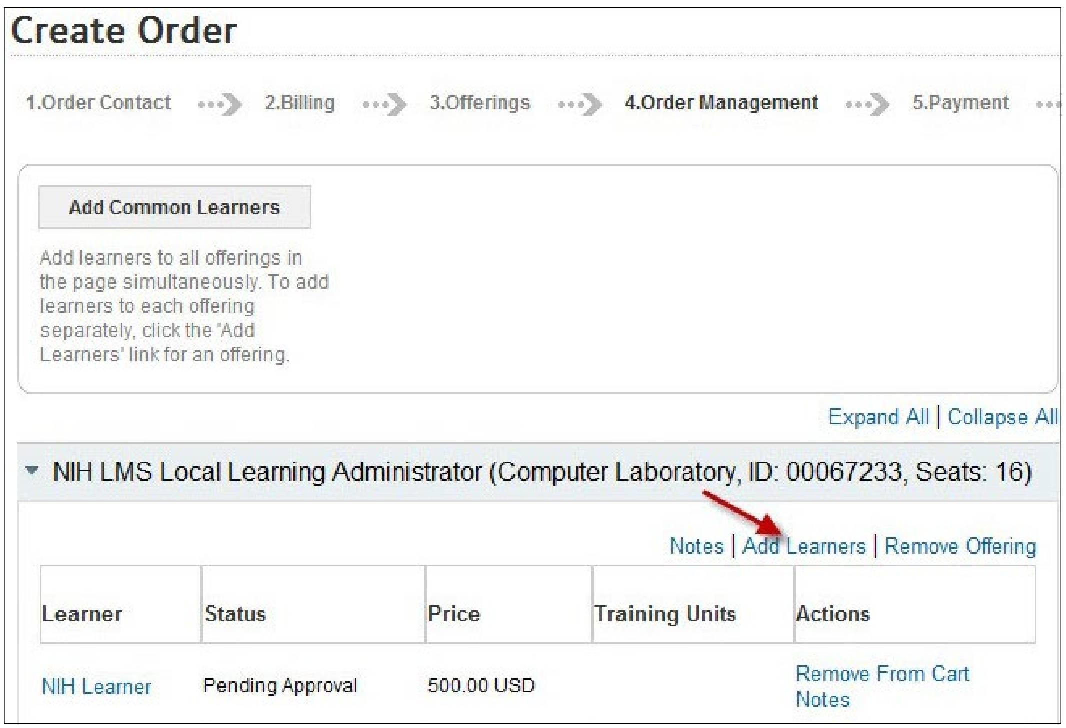
6. The CAN will be displayed in the Order Notes section. This CAN will be applied to all learners on the order that do not have a CAN manually entered.



NOTE: If the CAN was entered incorrectly or needs to be changed, repeat steps 2 - 5 to make the correction.

ADDING ADDITIONAL LEARNERS (OPTIONAL)

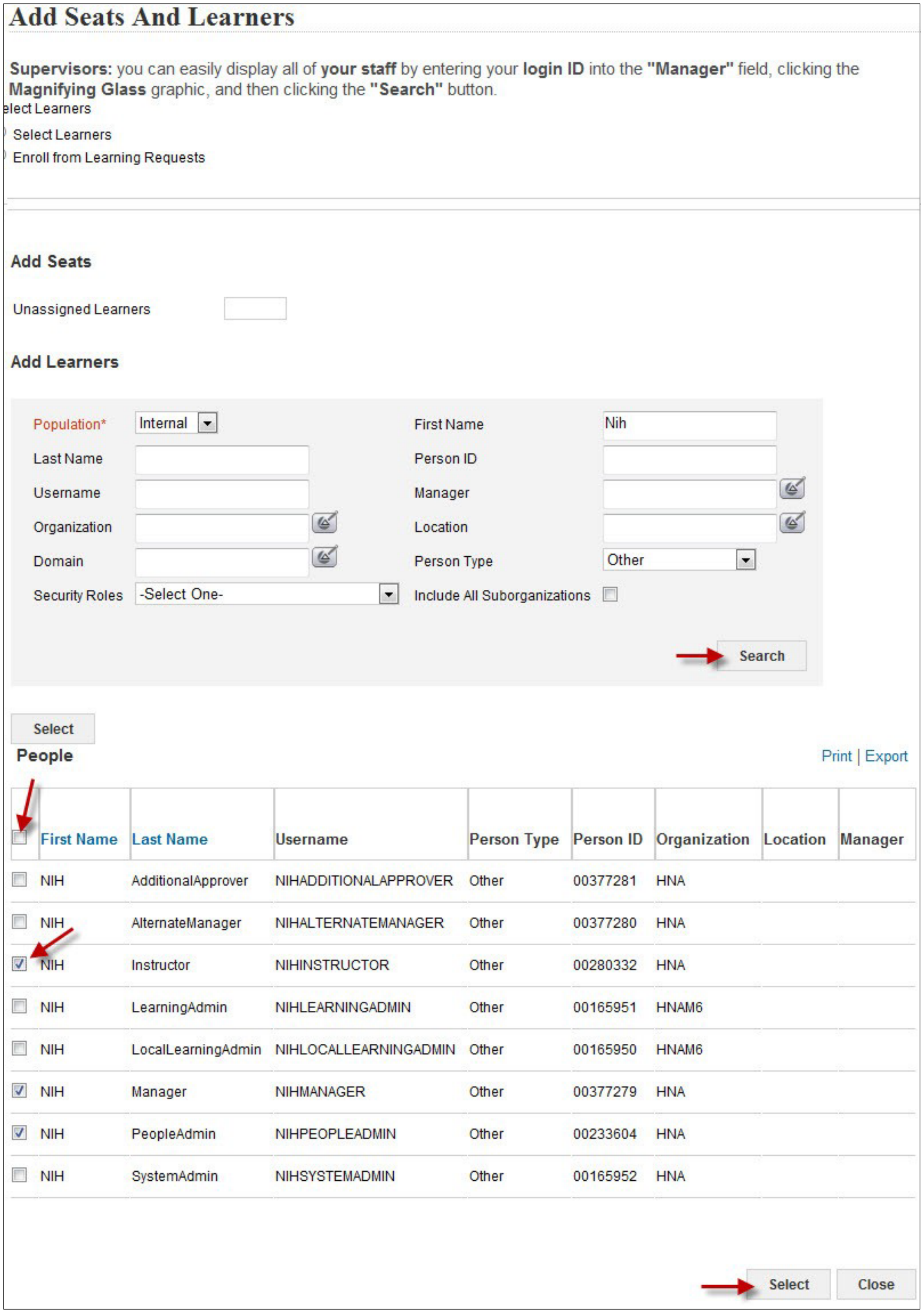
1. While viewing the Create Order screen, click the **Add Learners link** in the Actions column.



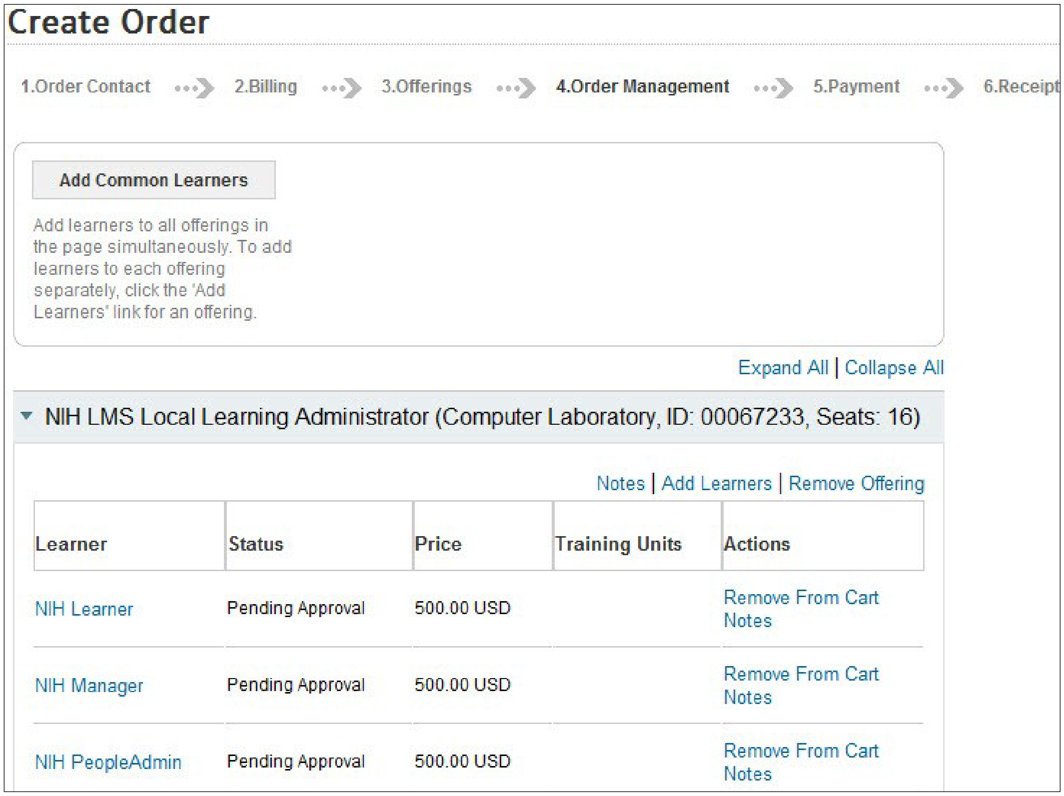
2. Enter search criteria for additional learners then click **Search**.
3. Click the checkboxes to the left of the corresponding learners you wish to register.

   NOTE: You may select multiple learners by clicking multiple checkboxes or you may select all the learners being viewed by selecting the checkbox in the column header.

4. Click **Select**.

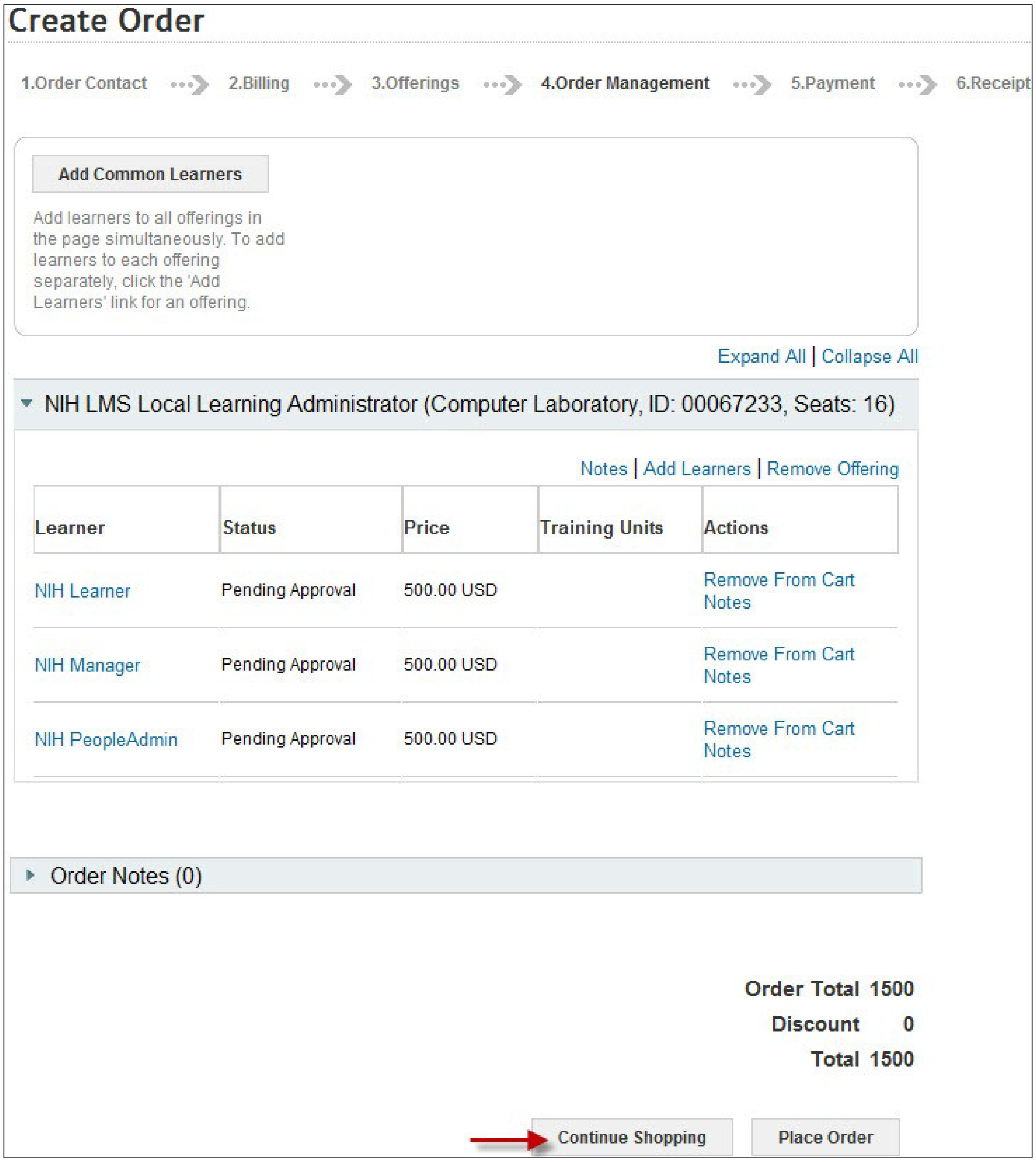


5. All of the learners selected will now be added to the order.


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 Local Learning Administrator (Computer Laboratory, ID: 00067233, Seats: 16)
Notes | Add Learners | Remove Offering
Learner
Status
Price
Training Units
Actions
NIH Learner
Pending Approval
500.00 USD
Remove From Cart
Notes
NIH Manager
Pending Approval
500.00 USD
Remove From Cart
Notes
NIH PeopleAdmin
Pending Approval
500.00 USD
Remove From Cart
Notes

ADDING ADDITIONAL COURSES TO THE ORDER (OPTIONAL)

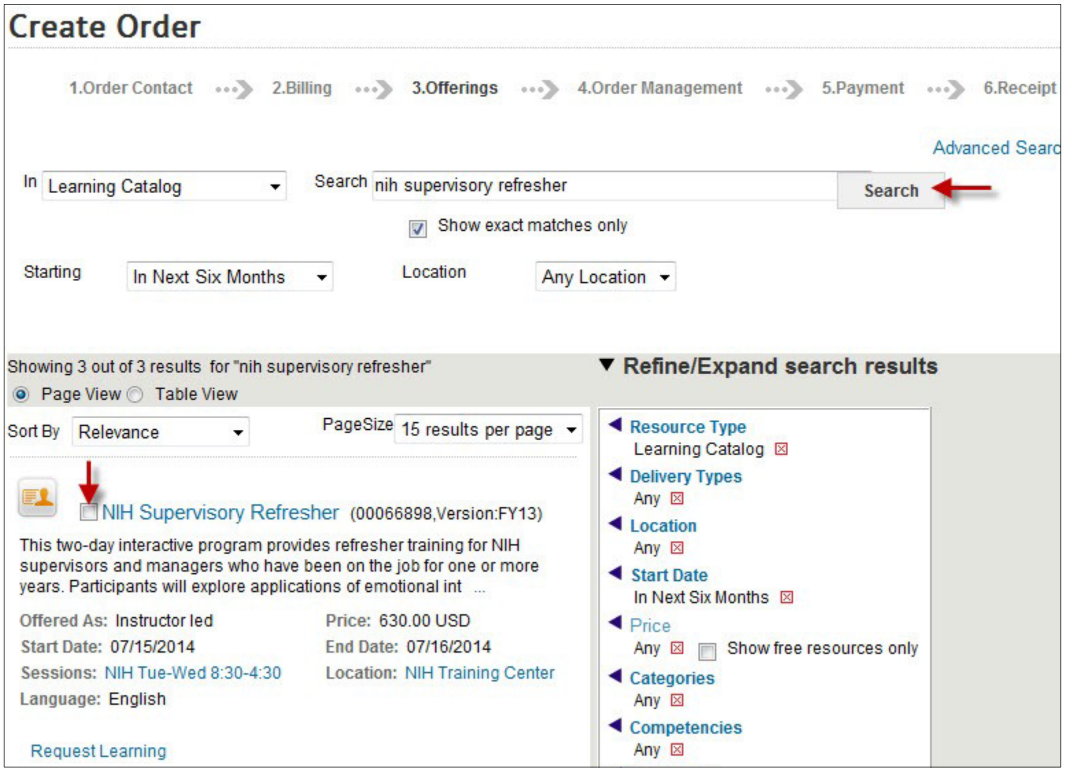
1. While viewing the Create Order screen, click the **Continue Shopping** button.



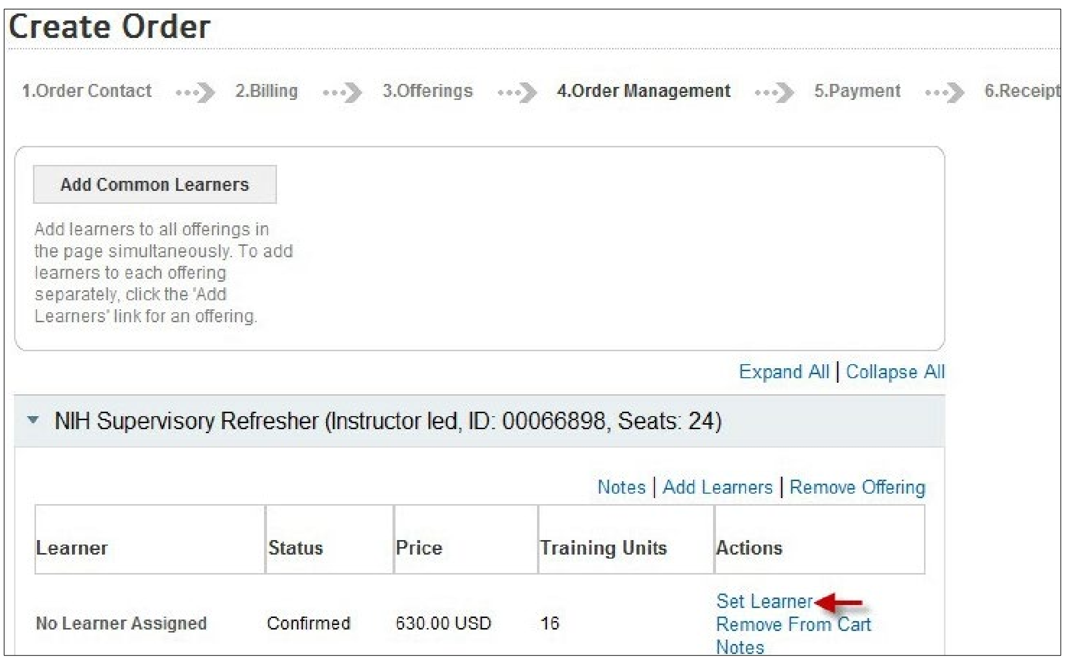
2. Enter the title of the course into the search field then click **Search Learning Catalog**.

   NOTE: Many NIH courses are prefixed with NIH in the title. You may also try using the **Advanced Search** or **Browse by Category** options to help locate a course.

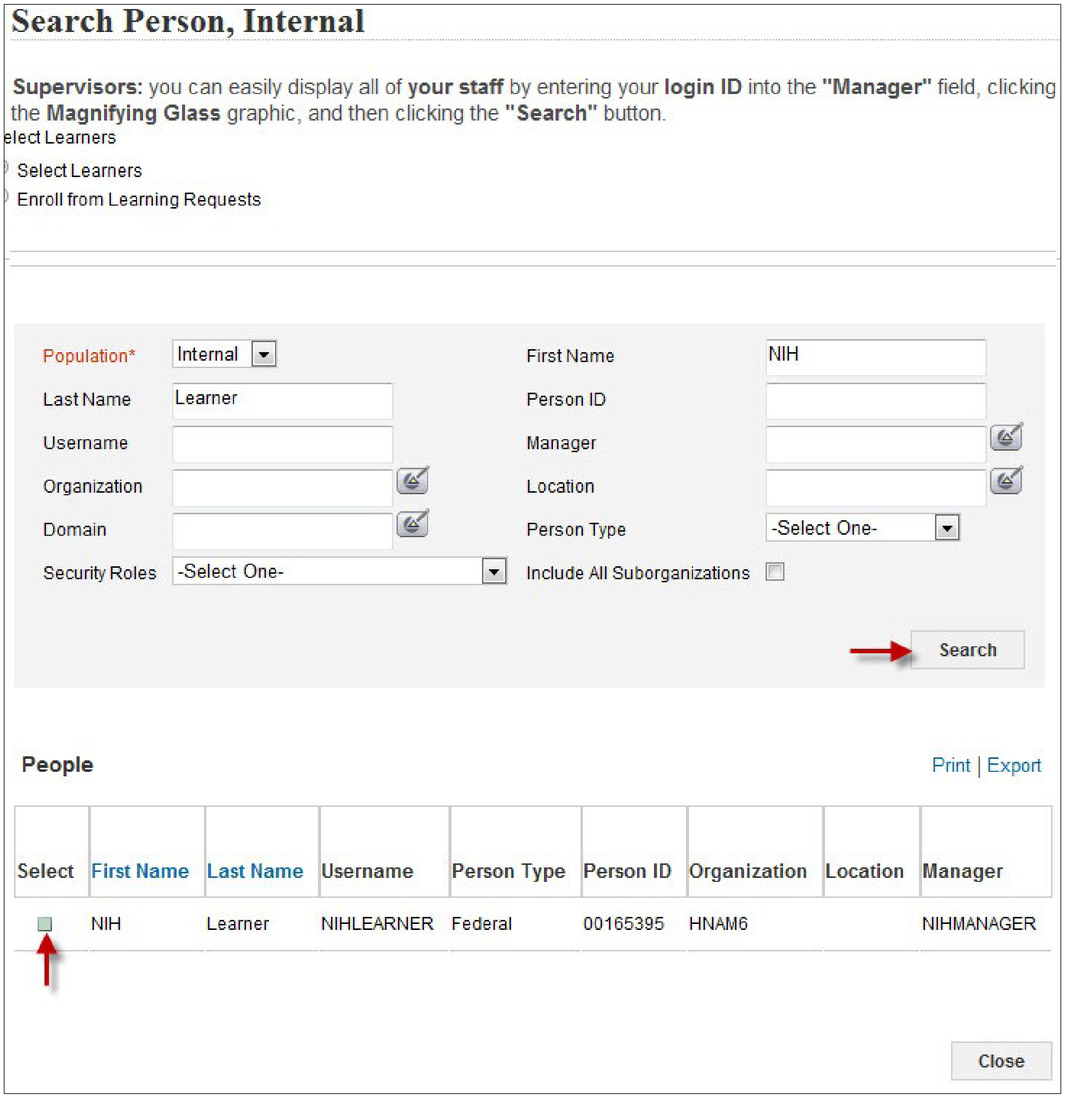
3. Click **Register** to the right of the correct offering in the Add column.



4. Click **Set Learner** in the Actions column to search for the learner you want to register.



5. Enter the name (or other known criteria) in the search fields and click **Search**.
6. Click the **checkbox** to the left of the learner's name.

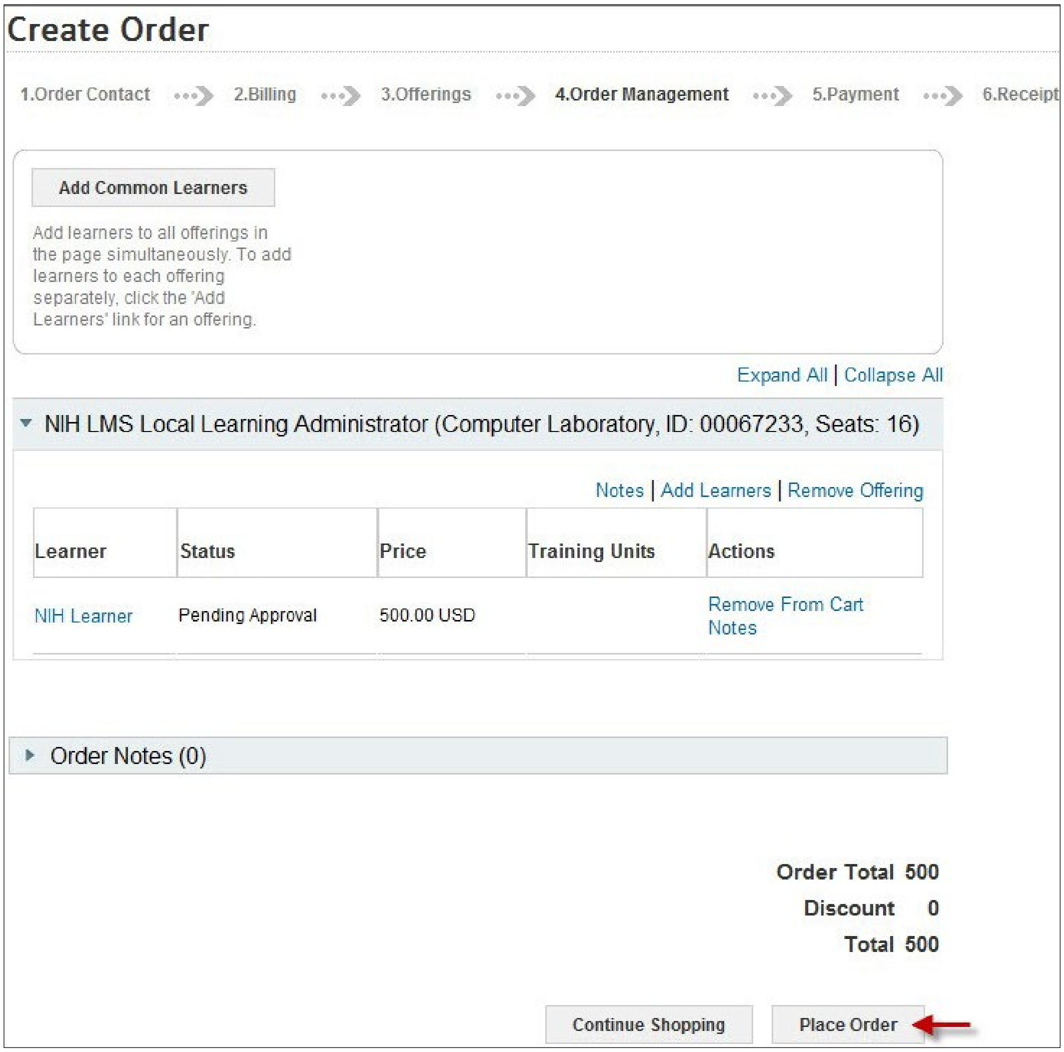


7. The learner will now be added to the order for the course that was selected.

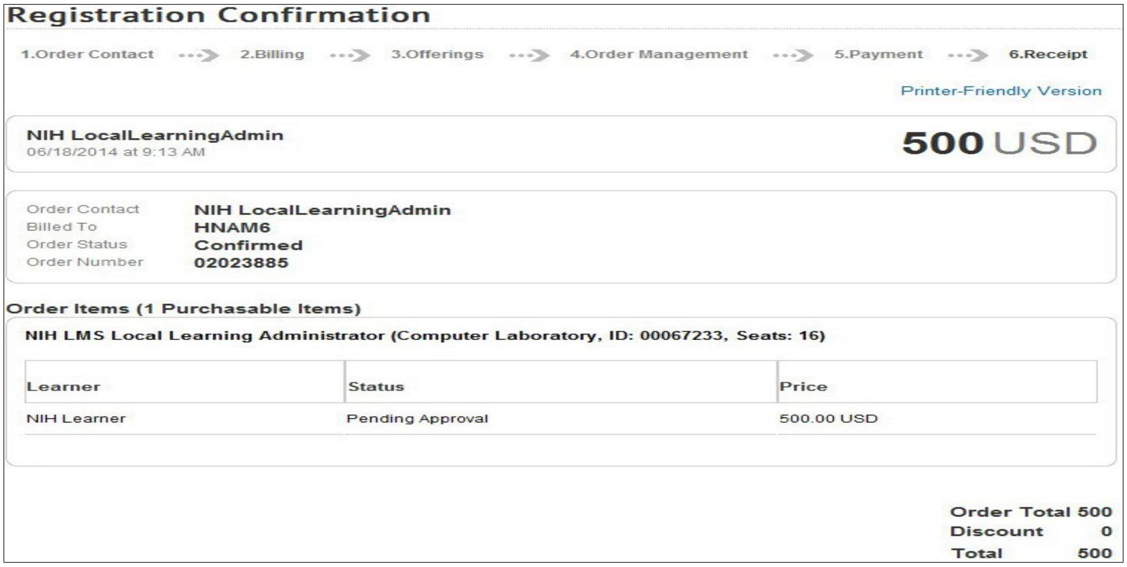
PLACING THE ORDER

When all of the learners and courses have been added, you may place the order by doing the following:

1. Click **Place Order**.



2. A Registration Confirmation screen with the details of the order will be displayed. The learner will immediately be notified as well as any managers for courses requiring manager approval.



SEARCH FOR AND VIEW AN EXISTING ORDER

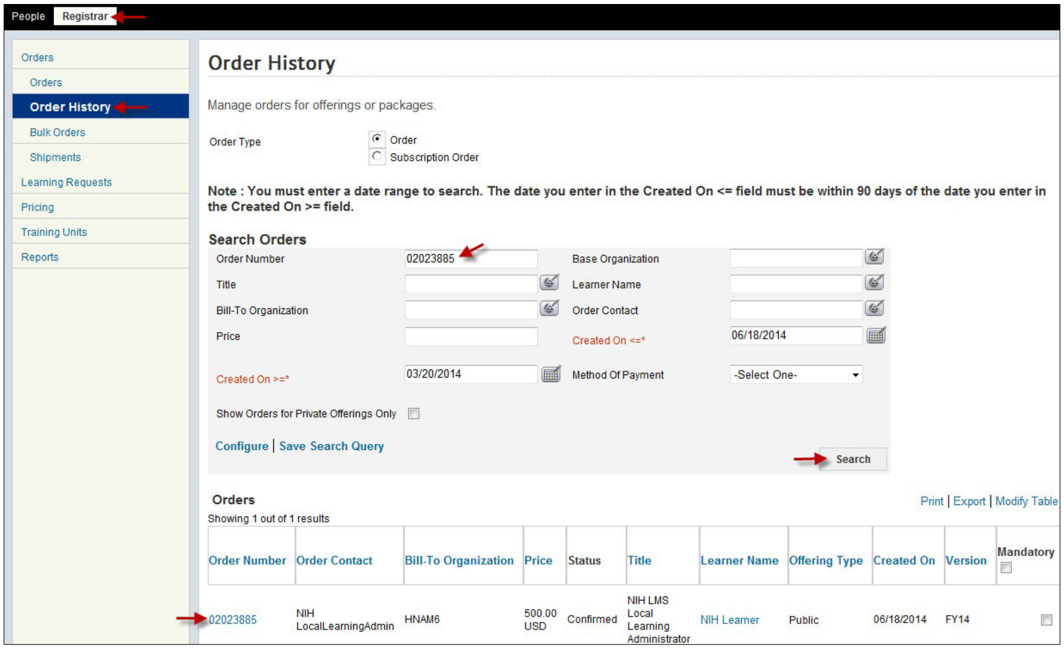
Local Learning Registrars can search for and view orders that were created for learners in their organization.

1. Click the **Admin Icon**.

2. Click **Registrar** from menu bar.
3. Click **Order History** in the left menu.
4. Enter search criteria in the appropriate fields and click **Search**.

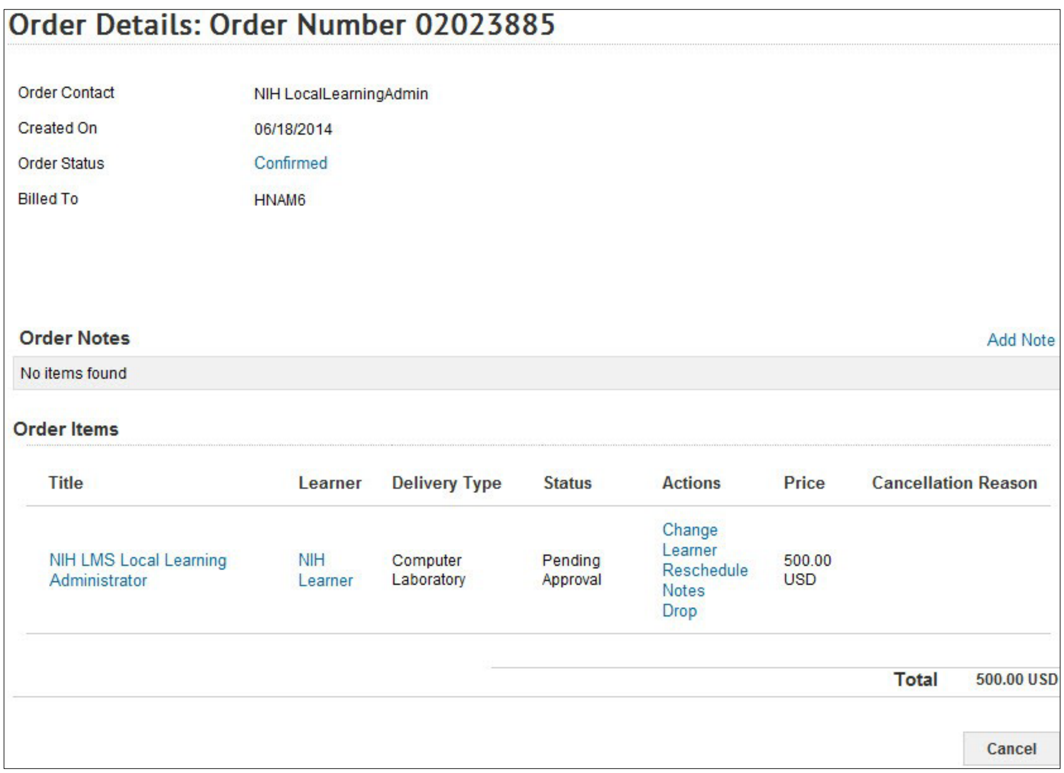
NOTE: Using the Order Number is the most accurate way to find an existing order. The Order Number may be found in confirmation and approval notifications sent by the LMS. If you do not have this email, use other search criteria to find the order.

5. Click on the **Order Number** link.



6. From the Order Details page, you may view more details by doing the following:

- Click the **Title** link to get more information about the course.
- Click the **Learner's Name** link to view details about the learner.



MODIFYING AN ORDER

Local Learning Registrars have the ability to modify orders for learners in their organization. Options for order modifications are as follows:

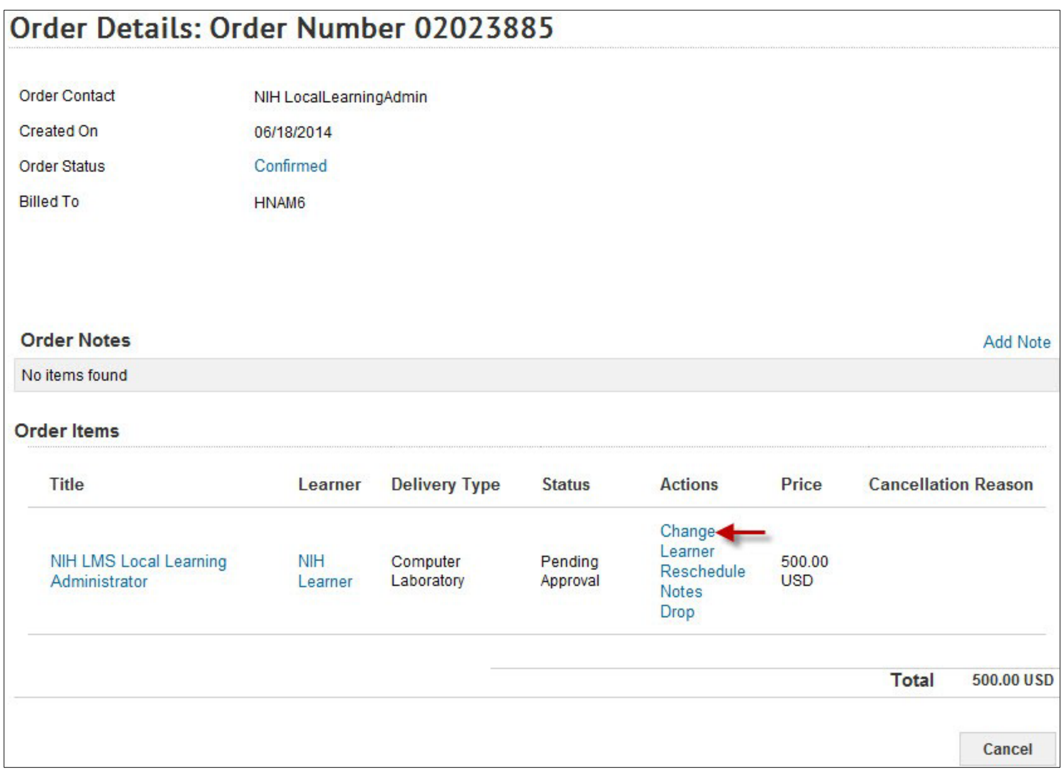
- **Change Learner** – This will substitute one learner for another.
- **Reschedule** – The option will move the learner from the current offering to another offering for the same course.
- **Notes** – This option adds general notes to the learner's order. This area can also be used to update the CAN being used to pay for NIH Training Center courses.
- **Drop** – This option will cancel a learner's registration.

Follow the instructions below search for and modify an existing LMS order.

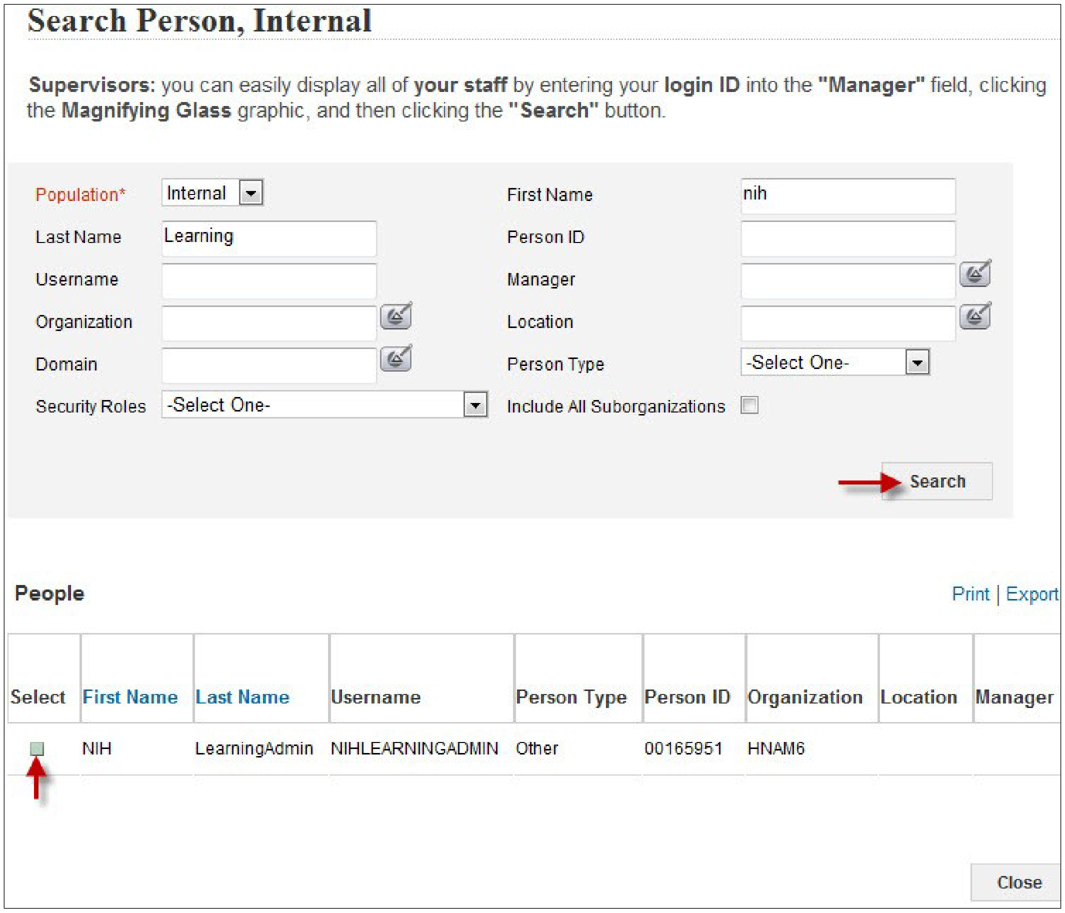
CHANGE A LEARNER ON AN ORDER

You may substitute a learner for another on an order by using the Change Learner action. Changing the learner will not trigger any notifications for the old learner and therefore the Local Learning Registrar should send a notification to them.

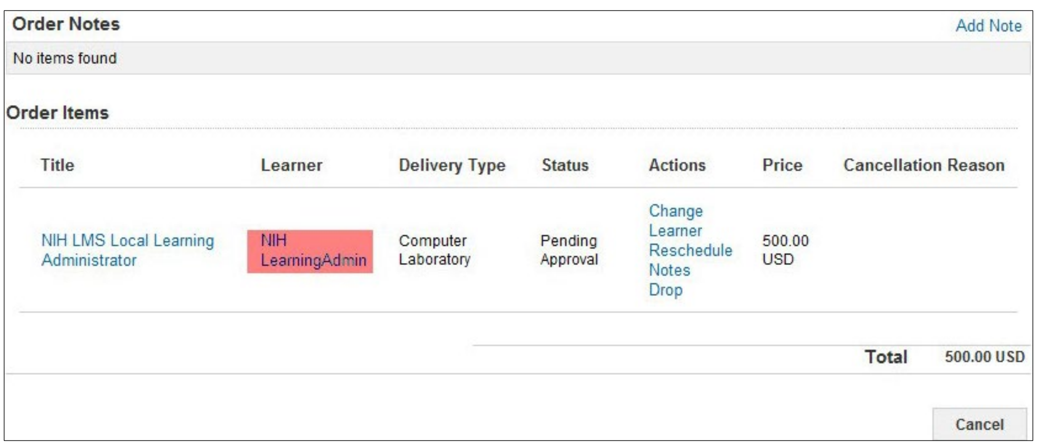
1. While viewing an order, click the **Change Learner link** in the Actions column.



2. Enter search criteria for the new learner then click **Search**.
3. Click the **checkbox** located to the left of the new learner's first name.



4. The new learner will now be located on the order in the Order Items section of the Order Details screen.



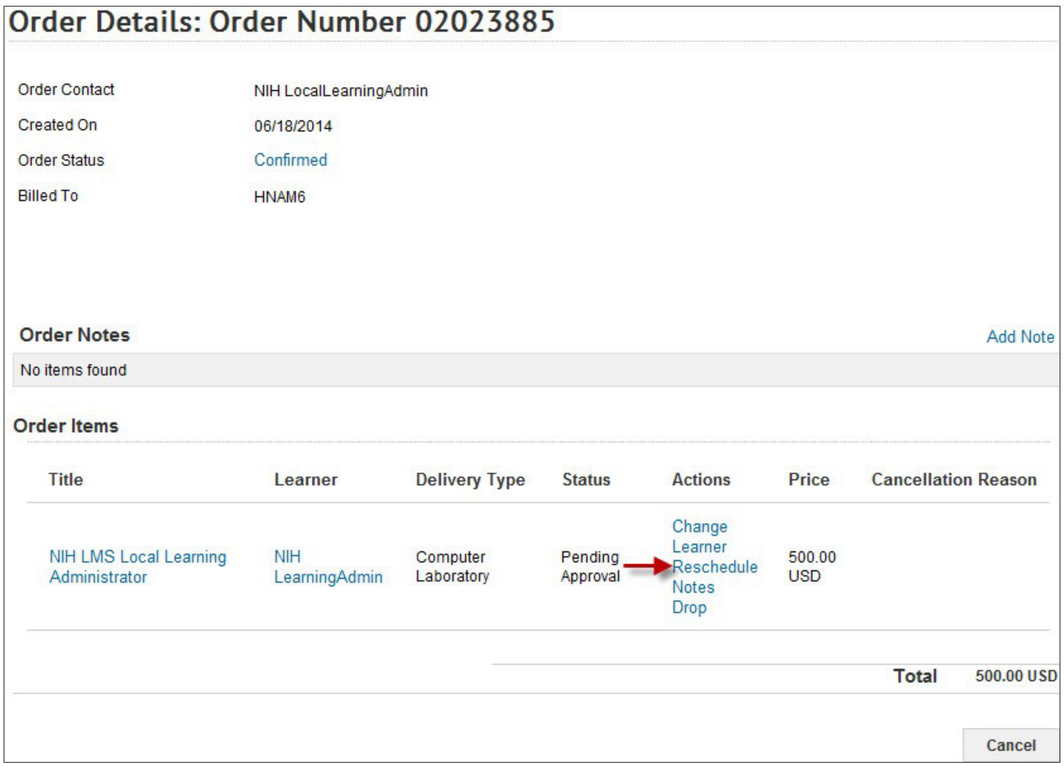
NOTE: If manager approval is required for the offering, the registration will have a pending approval status and the approval chain cycle will be started.

RESCHEDULE A LEARNER FROM ONE OFFERING TO ANOTHER

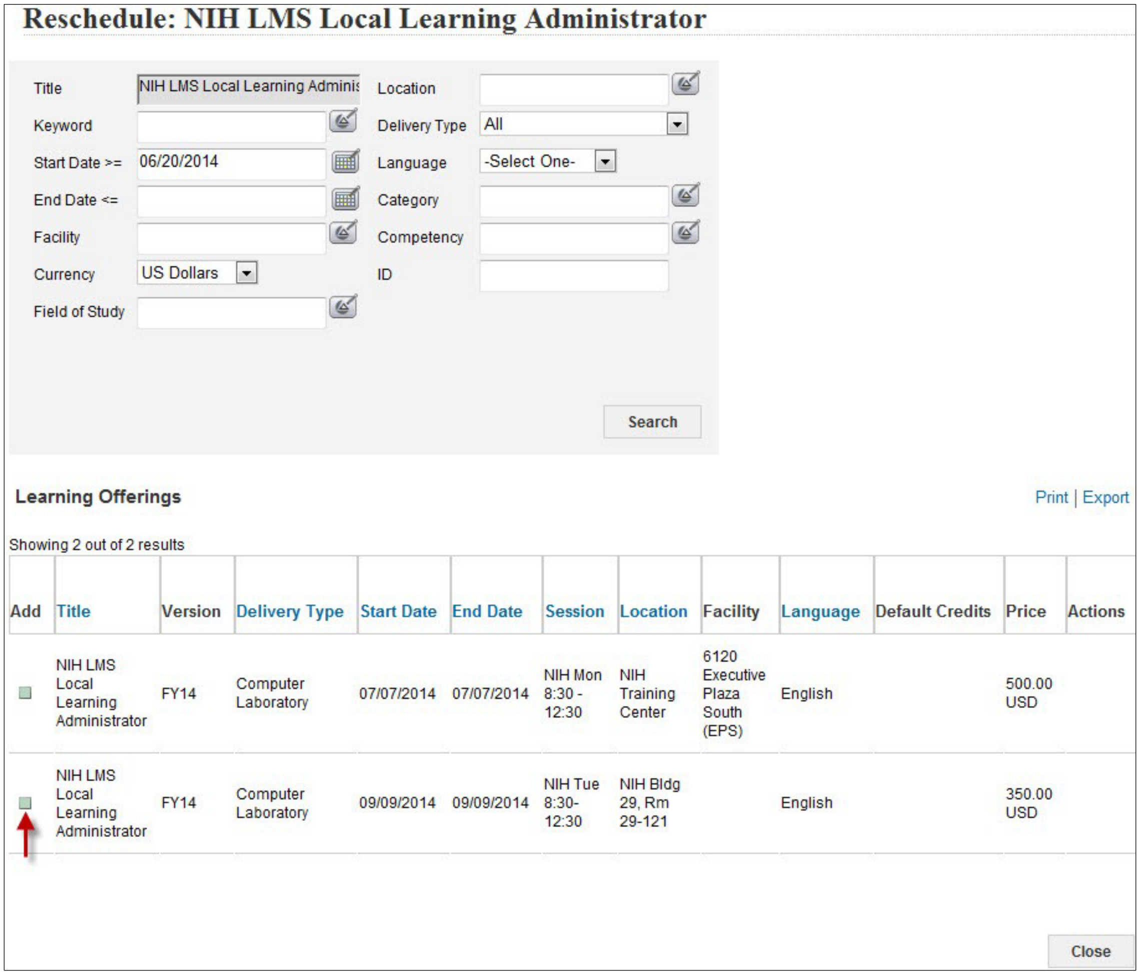
Local Learning Registrars can reschedule a learner from one offering to another offering as long as there are no rescheduling restrictions put in place by the course owner.

IMPORTANT! NIH Training Center courses may have rescheduling restrictions on their courses preventing Local Learning Registrars from using the reschedule function. Contact the course owner for details on how to complete the reschedule function.

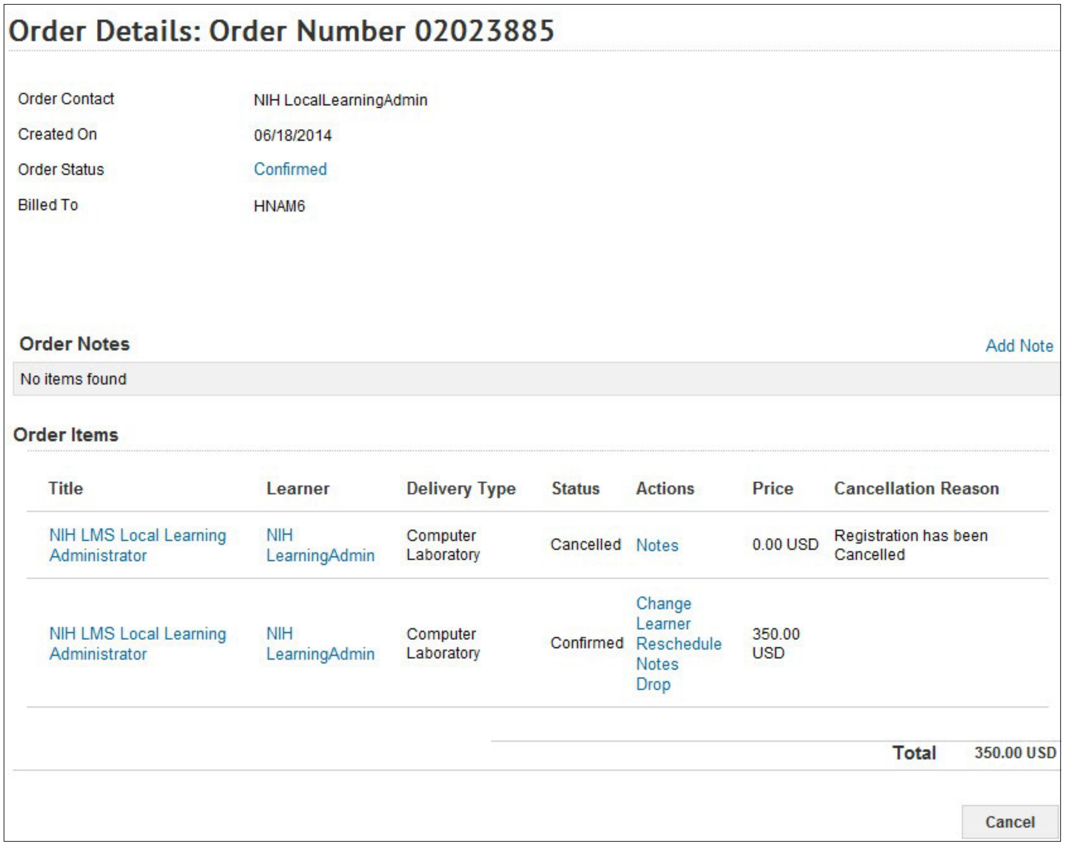
1. While viewing the Order Details screen, click the **Reschedule link** in the Actions column.



2. Click the **checkbox** associated with the offering the learner will be rescheduled to.



3. The learner is now rescheduled to the new offering.



NOTE: The LMS will send the learner (managers and approvers when appropriate) a cancellation notification for the old offering followed by a registration notification for the new offering.

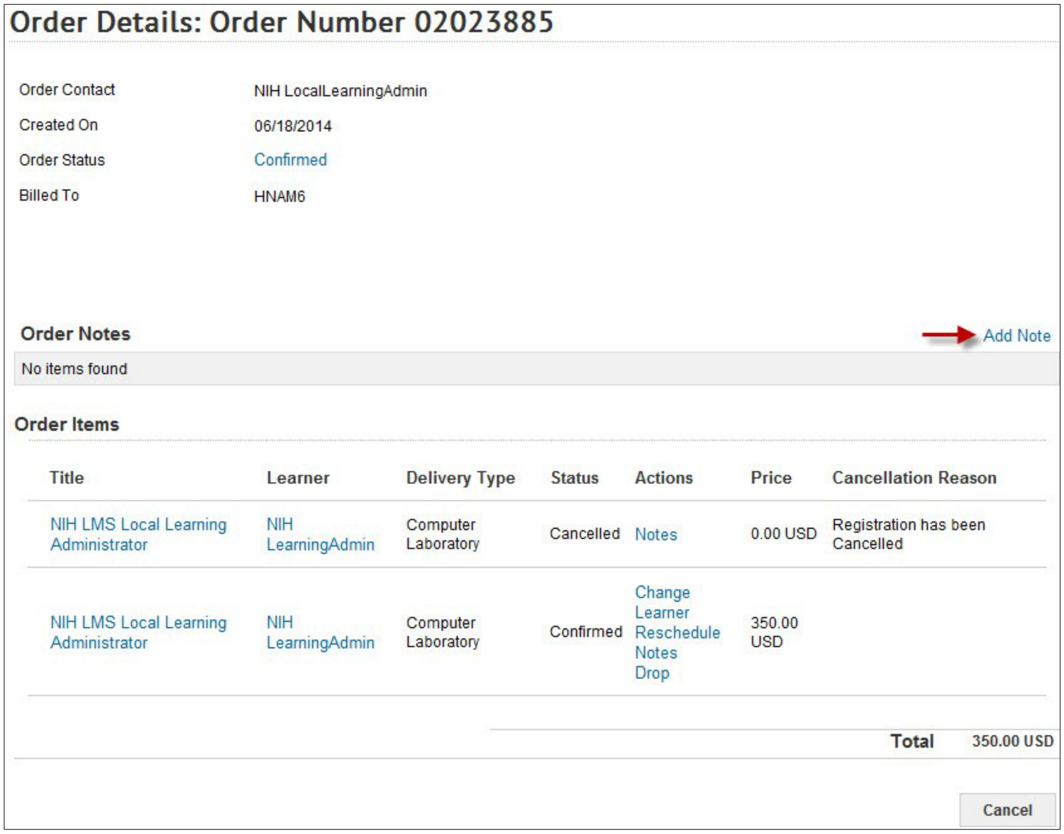
It is recommended that learners and Local Learning Registrars contact the NIH Training Center to reschedule courses that it offers.

ADD A CAN TO AN ORDER FOR ALL LEARNERS

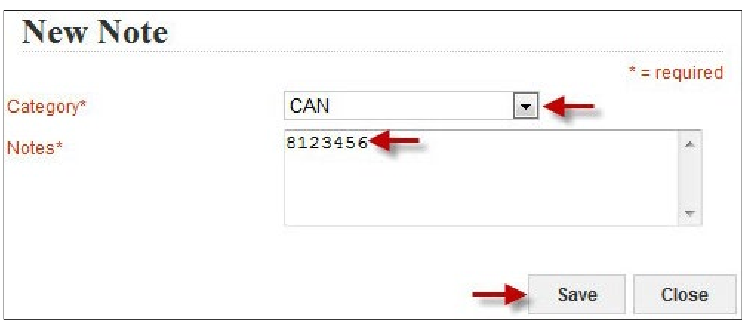
The CAN in a learner's profile is entered by the CAN Auto-fill process automatically after the order is approved by the AAO. If a different CAN is to be used, the AAO should enter the CAN as a note by following the instructions below. The CAN entered as a note will override the CAN Auto-fill process.

All notes are viewable by administrators and learners that are on the order. Follow the instructions below to a CAN to an order for all learners.

1. While viewing an order, click the **Add Note link** in the Order Notes section of the Order Details screen.



2. Select CAN from the **Category pull-down menu**.
3. Enter the 8-digit CAN that will be charged for this course in the **Notes field**.
4. Click **Save**.



NOTE: Other notes can be entered under different categories as needed.

5. The CAN will be displayed in the Order Notes section of the Order Details screen.

NOTE: If the CAN was entered incorrectly or needs to be changed, repeat steps 1 - 4 to make the correction.

IMPORTANT! The CAN will apply to all learners on the order. If a specific CAN for one or more learners is to be designated, please refer to the Specifying a CAN by Individual Learner section of this manual.

Order Details: Order Number 02023885

Order Contact	NIH LocalLearningAdmin
Created On	06/18/2014
Order Status	Confirmed
Billed To	HNAM6

Order Notes Add Note | Print | Export | Modify Table

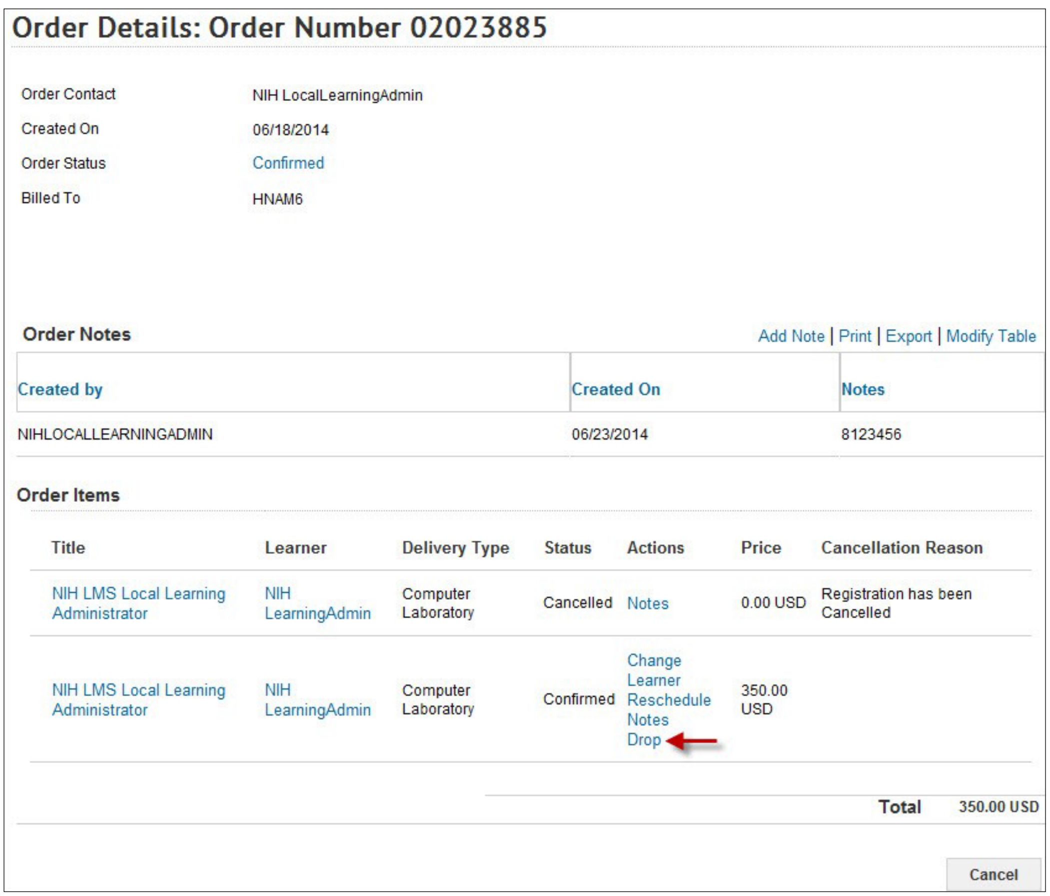
Created by	Created On	Notes
NIHLOCALLEARNINGADMIN	06/23/2014	8123456

CANCEL A LEARNER'S REGISTRATION

Local Learning Registrars can cancel a registration for a learner as long as the course owner has not placed any cancellation restrictions on the offering.

Follow the instructions below to cancel an offering.

1. While viewing the Order Details Screen, click the **Drop link** in the Actions column.



Order Details: Order Number 02023885

Order Contact	NIH LocalLearningAdmin
Created On	06/18/2014
Order Status	Confirmed
Billed To	HNAM6

Order Notes Add Note | Print | Export | Modify Table

Created by	Created On	Notes
NIHLOCALLEARNINGADMIN	06/23/2014	8123456

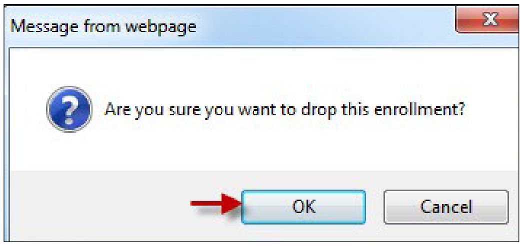
Order Items

Title	Learner	Delivery Type	Status	Actions	Price	Cancellation Reason
NIH LMS Local Learning Administrator	NIH LearningAdmin	Computer Laboratory	Cancelled	Notes	0.00 USD	Registration has been Cancelled
NIH LMS Local Learning Administrator	NIH LearningAdmin	Computer Laboratory	Confirmed	Change Learner Reschedule Notes Drop	350.00 USD	

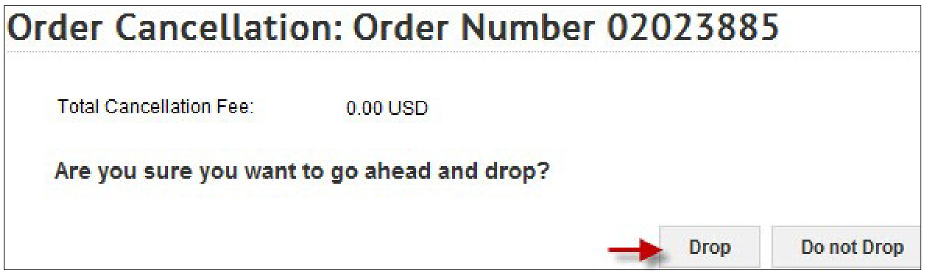
Total 350.00 USD

Cancel

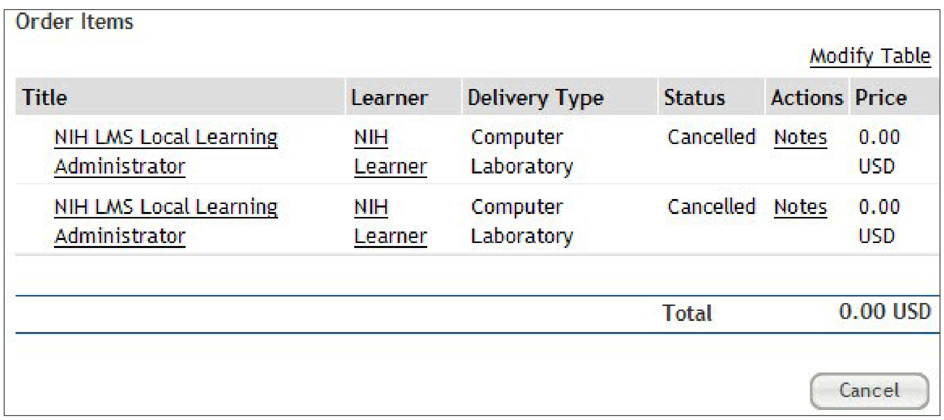
2. Click the **OK** button on the confirmation popup window.



3. If the offering has a cancellation fee, you'll get the screen below. Keep in mind, your organization will be responsible for any fees listed on this screen. If there is no cancellation fee for the offering, you will continue to step 5.
4. Click the **Drop** button to continue with the order cancellation.



5. The learner's registration will now be cancelled and the LMS will send a notification to the learner. (Managers and approvers will also be notified for offerings that require approval.)



Title	Learner	Delivery Type	Status	Actions	Price
NIH LMS Local Learning Administrator	NIH Learner	Computer Laboratory	Cancelled	Notes	0.00 USD
NIH LMS Local Learning Administrator	NIH Learner	Computer Laboratory	Cancelled	Notes	0.00 USD
			Total		0.00 USD

LEARNER ENROLLMENTS

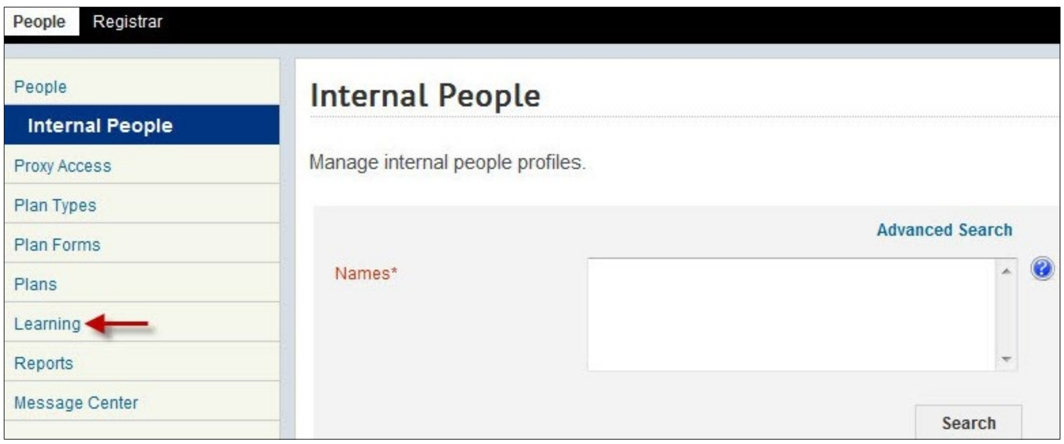
An Enrollment of an offering is the equivalent of a class registration. This means that a learner is scheduled to attend or is currently attending the designated course offering, but has not yet successfully completed it. As a Local Learning Registrar, you may view or drop enrollments for learners within your IC.

Follow the instructions below to view a learner's enrollments.

VIEW CURRENT LEARNING

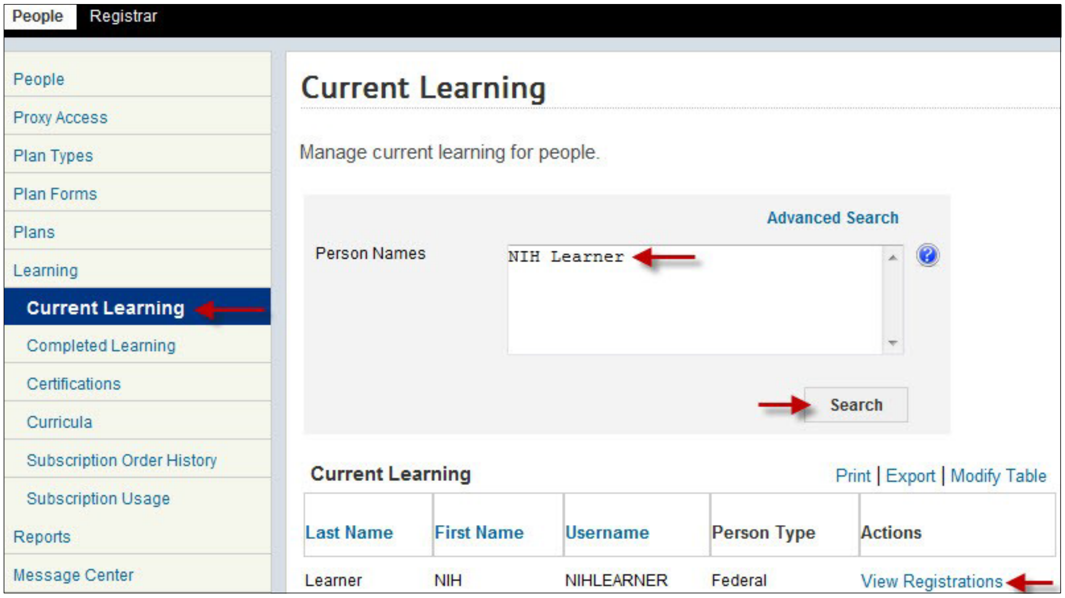
1. Click the **Admin Icon**.

2. Click **People** in the menu bar. (Default)
3. Click **Learning** in the left menu.

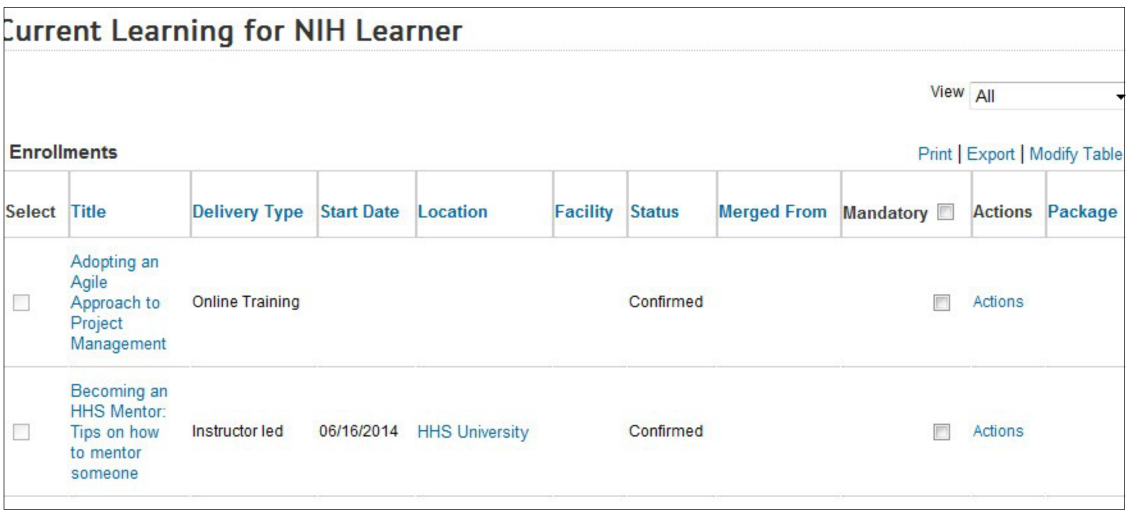


4. Click **Current Learning** in the left menu.
5. Enter the learner's name in the Name(s) search field and click **Search**. **NOTE**: If you do not find the account you are looking for, try using the Advanced Search. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

6. Click the **View Registrations link** in the View Enrollments column.



7. The current learning of the learner will be displayed.



LIMIT THE TYPE OF ENROLLMENTS DISPLAYED (OPTIONAL)

To limit the type of enrollments displayed, click the **View** pull-down menu and select one of the following:

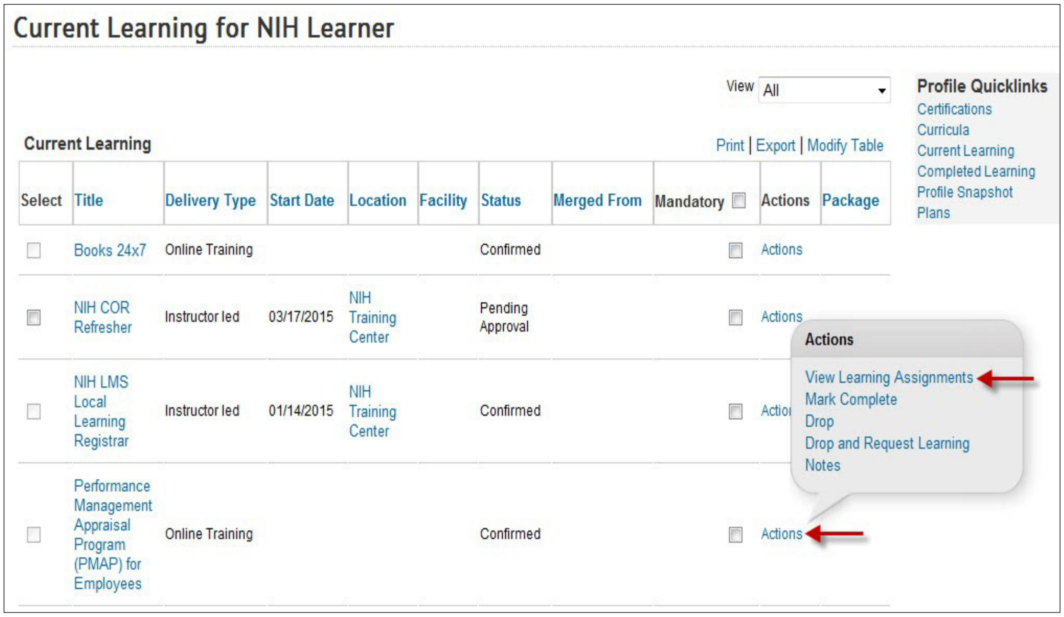
- **All**: Default view. This option displays all enrollments regardless of status.
- **Pending Approval**: This option displays all enrollments currently awaiting approval by one or more approvers in the learner's training approval chain.
- **Approved**: This option displays all enrollments for which all approvers have approved the enrollment and the learner has a "Confirmed" enrollment status. This enrollment remains on the Enrollments page until training is conducted and the learner is marked complete by a Learning Administrator. (Online courses will be marked complete by the LMS automatically.)
- **Unscheduled**: This option displays all enrollments for courses without a specific date and time.

CURRENT LEARNING ACTIONS – WIEW LEARNING ASSIGNMENTS

The View Learning Assignments Action is designed to give administrators access to the additional tasks that are required for completing an offering or results from online training courses.

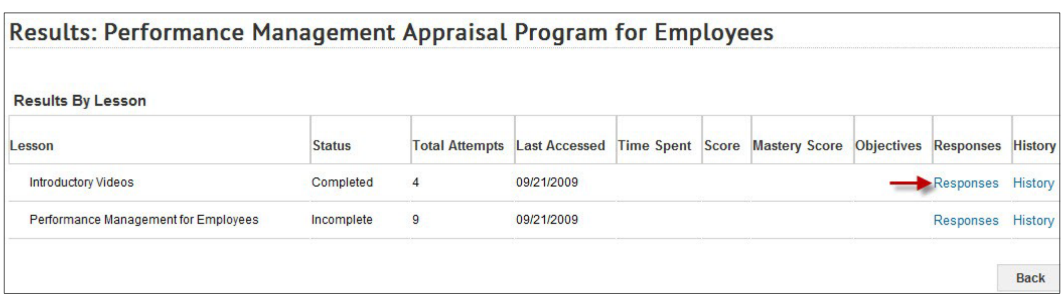
Follow the instructions below to view the learning assignments of a course.

1. Click the **Actions link** in the Actions column. (For online courses)
2. Click **View Learning Assignments** in the Actions popup bubble.



3. You will now see all of the learning assignments and their completion statuses for the offering. (For online courses)
4. Click **Actions** in the Actions column. (For online courses)
5. Click **View Results by Lesson**. (For online courses)

6. Click the **Responses** link. (For online courses)



1. You will be able to view the learner's answers to the questions in the course as shown below: (This functionality is based on how the course was programmed.)

Responses For Attempt 1

Responses

Print | Export | Modify Table

Question ID	Question Text	Type	Response	Result	Time Spent	Date/Time
Question_1_418_1365097197018	The LMS allows…	Multiple Choice	F	Correct	00:00:04	2013-04-04T13:38:14
Question_2_997_1365097197018	Which browser …	Multiple Choice	B,D	Correct	00:00:13	2013-04-04T13:38:21
Question_3_1019_1365097197018	Which browser …	Multiple Choice	A	Correct	00:00:11	2013-04-04T13:38:42
Question_4_1033_1365097197018	Identify the p…	Multiple Choice	B	Correct	00:00:08	2013-04-04T13:39:01
Question_5_1046_1365097197018	Which of the f…	Multiple Choice	A,C	Correct	00:00:12	2013-04-04T13:39:13
Question_6_472_1365097197018	The training h…	True-False	True	Correct	00:00:01	2013-04-04T13:39:29
Question_7_500_1365097197034	The LMS will a…	True-False	True	Correct	00:00:01	2013-04-04T13:39:34
Question_8_1058_1365097197034	Check the item…	Multiple Choice	A,B,C,D	Correct	00:00:04	2013-04-04T13:39:38
Question_9_1072_1365097197034	What types of …	Multiple Choice	D	Correct	00:00:02	2013-04-04T13:39:45
Question_10_1084_1365097197034	Which of the f…	Multiple Choice	D	Correct	00:00:01	2013-04-04T13:39:51

Back

7. In step 5, selecting the **History** link will show the following screen:

Attempts for Introductory Videos

Lesson Data

Status	Completed
Score	N/A
Passing Score	N/A
Maximum Score	N/A

Attempts

Print | Export | Modify Table

Attempt	Status	Score	Date/Time Completed	Time Spent	Responses
Attempt 4	Completed		09/21/2009 9:09 AM	00:00:00	Responses
Attempt 3	Completed		09/21/2009 9:04 AM	00:00:00	Responses
Attempt 2	Not Attempted		09/21/2009 8:53 AM	00:00:00	Responses
Attempt 1	Completed		09/21/2009 8:36 AM	00:00:00	Responses

Back

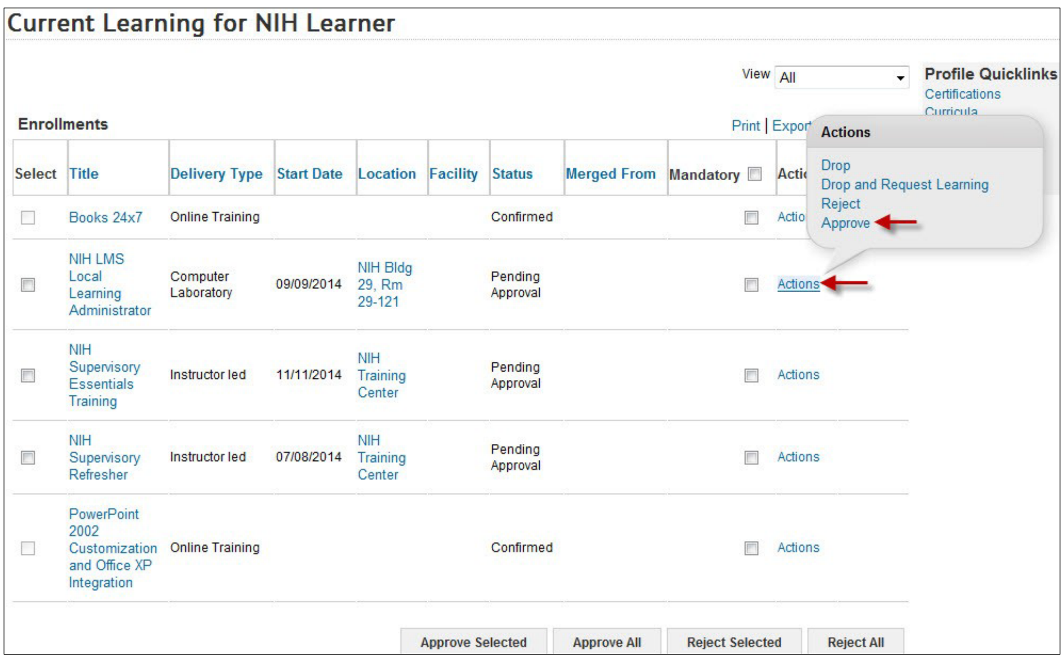
NOTE: From this screen, you will be able to see the current completion status, score information, the dates the content was attempted by the learner, and how long the learner accessed the content on each attempt. Clicking the **Responses link** will take you to the screen shown in step 6.

APPROVE/REJECT A LEARNER'S ENROLLMENT (ON BEHALF OF THE MANAGER)

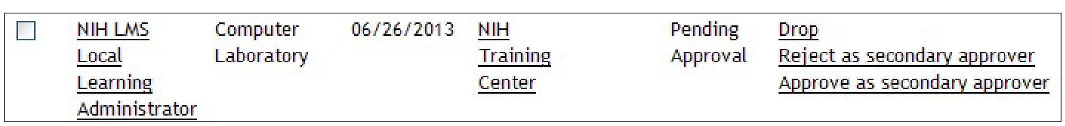
As a Local Learning Registrar, you may approve or reject a learner's registration on behalf of their manager as long as you have the authority from your organization to do so.

Follow the instructions below to approve or reject a learner's registration.

1. While viewing the enrollments for a learner, click the **Reject** or **Approve** link in the Actions column associated with the course you wish to approve or reject. This approval will be on behalf of the manager.



2. If the **Approve** link is selected, the Actions bubble will change to display Approve/Reject as secondary approver. (Shown below)



3. If the **Reject** link is selected, the enrollment is removed and the registration is cancelled for the learner.

NOTE: Each action, reject or approve, will trigger a notification to the learner (and AAO for approvals) informing them of the action that was taken.

IMPORTANT!: If the course enrollment already displays Approve/Reject as secondary approver in the actions column, the manager/alternate manager has already approved the enrollment and it is now ready for the Additional Approver for Orders (AAO) to approve. You should not click Approve/Reject as secondary approver unless you are the AAO or have been given the authority to do so.

Enrollments for learners without a manager identified in their LMS profile are sent directly to the AAO for approval. Approve/ Reject as secondary approver will be the only options for learners in this situation.

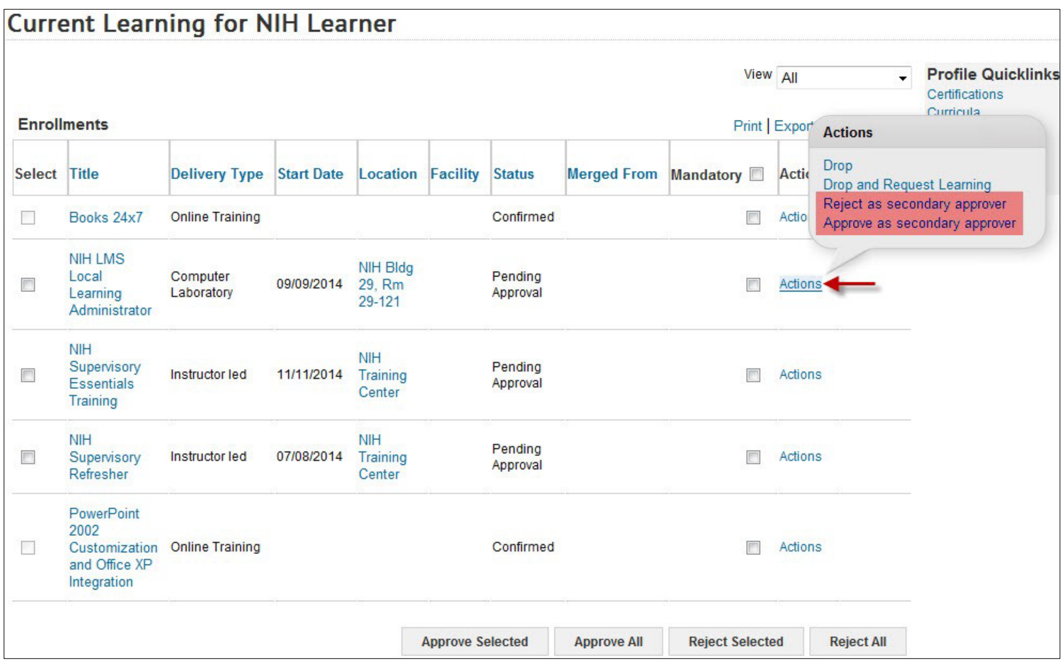
Follow the instructions below to approve or reject a learner's registration on behalf of the Additional Approver for Orders.

APPROVE/REJECT A LEARNER'S ENROLLMENT (ON BEHALF OF THE SECONDARY APPROVER)

As a Local Learning Registrar, you may approve or reject a learner's registration on behalf of their Additional Approver for Orders (AAO) as long as you have the authority from your organization to do so.

1. While viewing a learner's enrollments, click the **Reject as secondary approver** or

   Approve as secondary approver link in the Actions column.



2. If the **Reject as secondary approver** link is clicked, the course will be removed and the learner's registration cancelled.

NOTE: Each action, reject or approve, will trigger a notification to the learner informing them of the action that was taken.

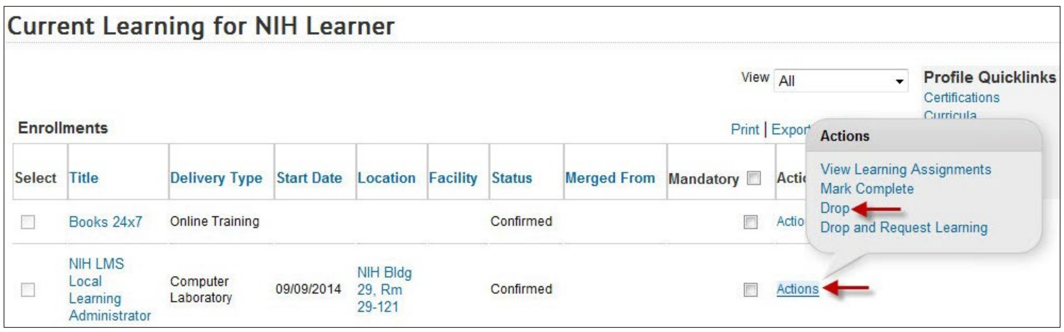
DROP/CANCEL A COURSE

As a Local Learning Registrar, you may drop an enrollment on behalf of a learner. Dropping an enrollment will do the following:

- Cancel the learner's registration and remove from their enrollments
- Notify the learner, managers/alternate managers, and AAOs as appropriate
- Cancel the obligation of funds for NIHTC courses if the registration was

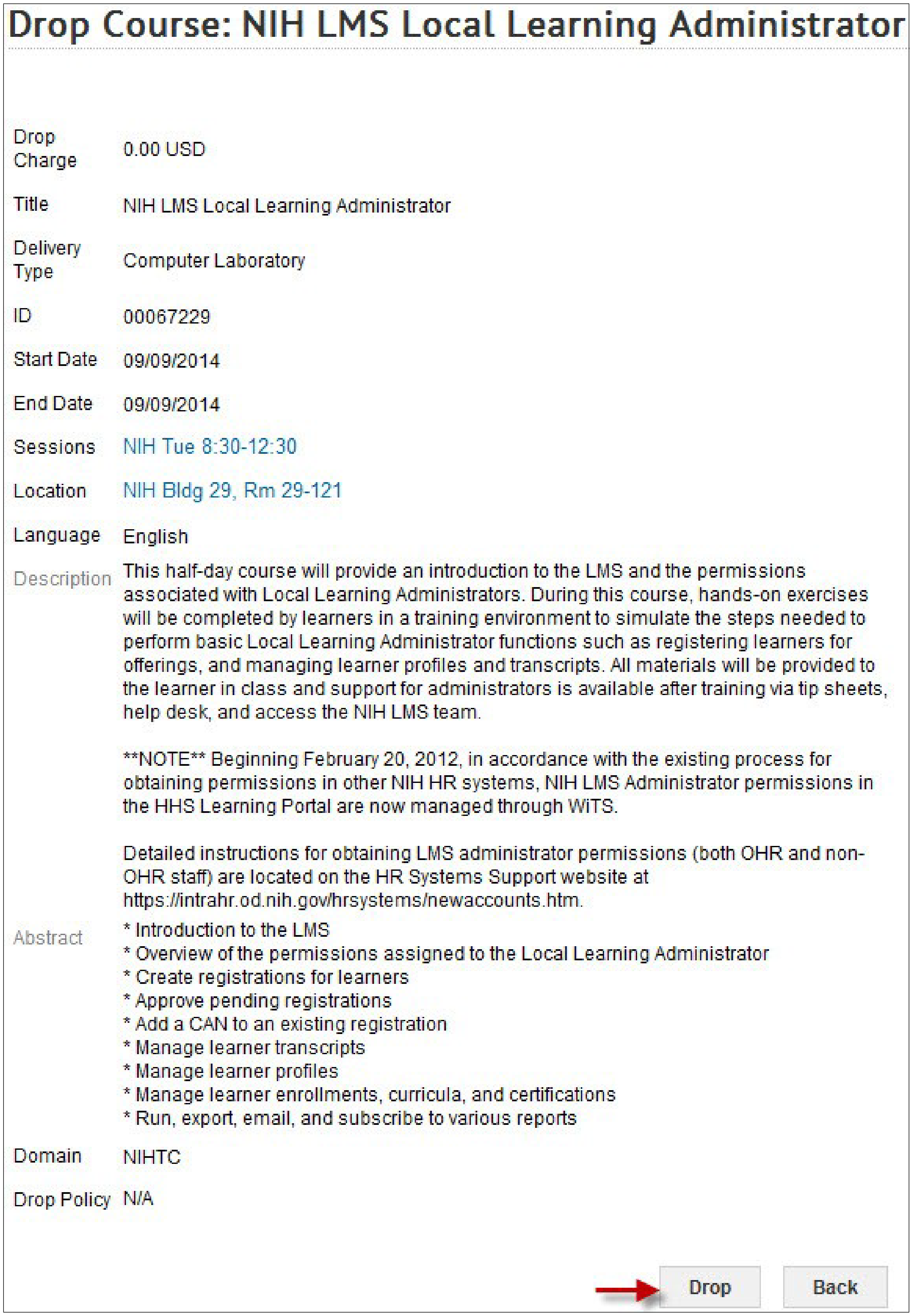
approved Follow the instructions below to drop/cancel a learner's course.

1. Click the **Actions** link in the Actions column.
2. Click the **Drop** link in the Actions popup bubble.



NOTE: Dropping the Books 24X7 enrollment will prevent the learner from accessing Books 24/7 content in the LMS.

3. Scroll to the bottom of the Drop Offering screen and click the **Drop** button.



Drop Course: NIH LMS Local Learning Administrator

Drop Charge	0.00 USD
Title	NIH LMS Local Learning Administrator
Delivery Type	Computer Laboratory
ID	00067229
Start Date	09/09/2014
End Date	09/09/2014
Sessions	NIH Tue 8:30-12:30
Location	NIH Bldg 29, Rm 29-121
Language	English
Description	This half-day course will provide an introduction to the LMS and the permissions associated with Local Learning Administrators. During this course, hands-on exercises will be completed by learners in a training environment to simulate the steps needed to perform basic Local Learning Administrator functions such as registering learners for offerings, and managing learner profiles and transcripts. All materials will be provided to the learner in class and support for administrators is available after training via tip sheets, help desk, and access the NIH LMS team. **NOTE** Beginning February 20, 2012, in accordance with the existing process for obtaining permissions in other NIH HR systems, NIH LMS Administrator permissions in the HHS Learning Portal are now managed through WiTS. Detailed instructions for obtaining LMS administrator permissions (both OHR and non-OHR staff) are located on the HR Systems Support website at https://intrahr.od.nih.gov/hrsystems/newaccounts.htm.
Abstract	* Introduction to the LMS * Overview of the permissions assigned to the Local Learning Administrator * Create registrations for learners * Approve pending registrations * Add a CAN to an existing registration * Manage learner transcripts * Manage learner profiles * Manage learner enrollments, curricula, and certifications * Run, export, email, and subscribe to various reports
Domain	NIHTC
Drop Policy	N/A

Drop Back

4. The enrollment will be dropped and all appropriate notifications sent.

MARK AN ENROLLMENT COMPLETE

IMPORTANT! Local Learning Registrars should **not** mark any course complete from the enrollments area. While Local Learning Registrars have the technical ability to mark an enrollment complete, this should not be done for the following reasons:

- Enrollments are currently being taken or are scheduled in the future and have not yet occurred.
- Online courses are automatically marked complete and at that time they are removed from the enrollments area and become transcript items.
- Instructor-led training should be marked complete by a Learning Administrator that has access to a roster or other information to justify marking the learner complete.

If you feel an enrollment has not been marked complete in a timely manner, please contact the course owner or HRSS Helpdesk to receive assistance.

A learner's transcript is a record of their completed training. Transcripts may contain records for training delivered by NIH, the Department of Health and Human Services (HHS), in addition to training completed outside of HHS (e.g. a college course, conference, etc.). Since the LMS is a department-wide system, transcripts will go with an employee if he/she moves to another agency within HHS.

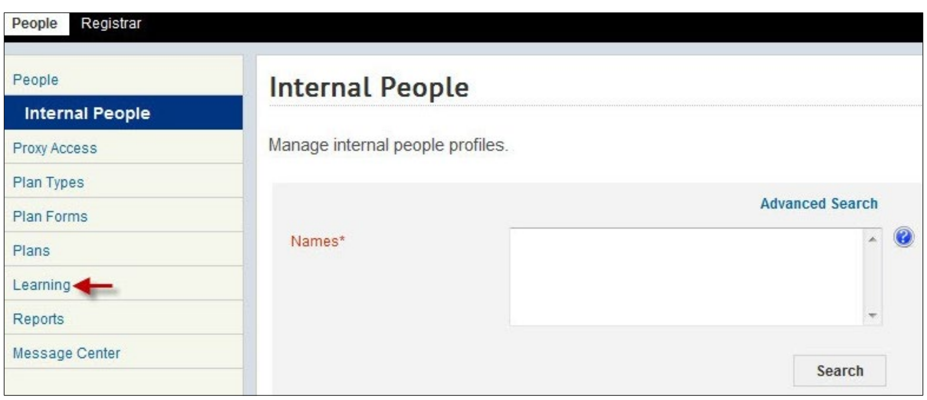
NOTE: All historic training has not yet been migrated into the LMS from existing systems. As a result, some records may not appear on a Learner's LMS transcript but can be manually added by a Local Learning Registrar.

Follow the instructions below to view a learner's transcript.

VIEW A LEARNER TRANSCRIPT

1. Click the **Admin Icon**.

2. Click **Learning** in the left menu.



3. Click **Completed Learning** in the left menu.

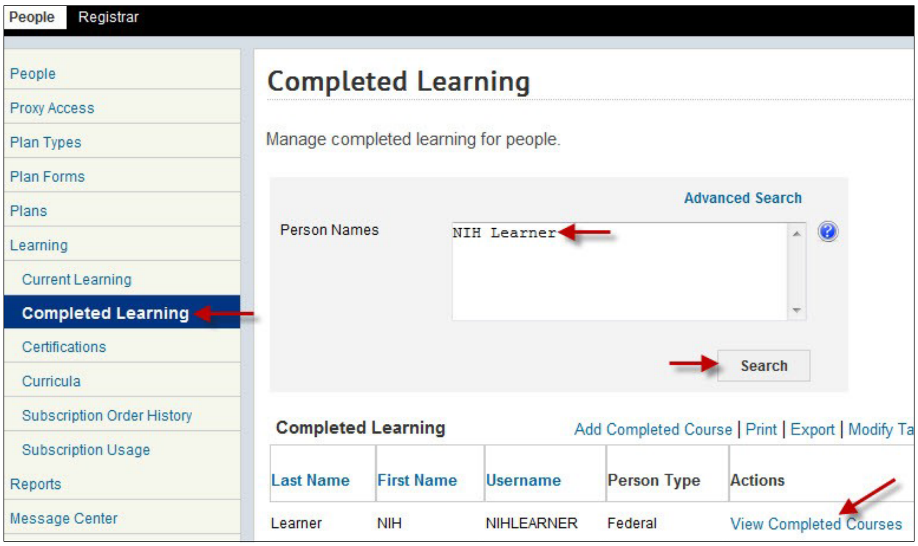
4. Enter the learner’s name in the Name(s) search field and click

   Search. **NOTE:** See instructions for searching listed to the right of

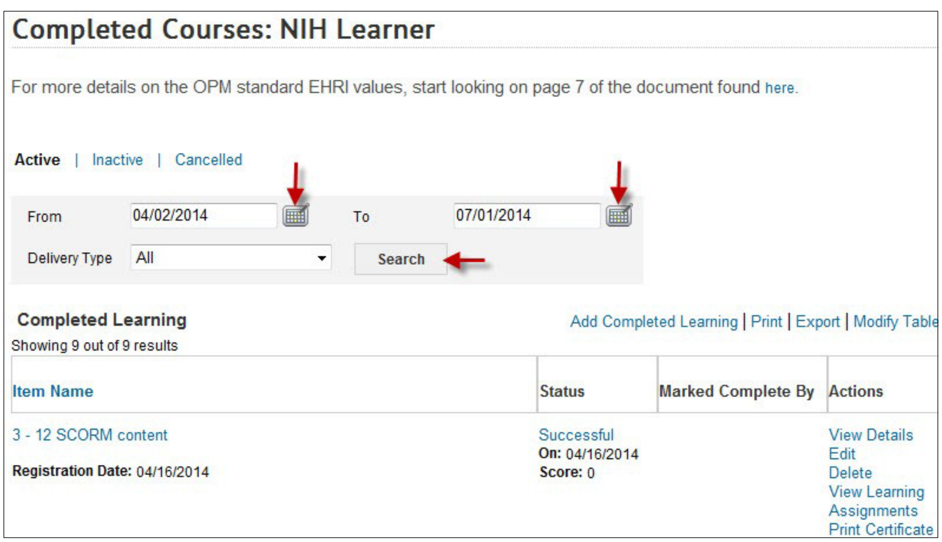
   the search box.

   If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Select the **View Completed Courses** link in the Actions column.



Note: The LMS shows the last 90 days of training by default. To view completed courses outside of that date range, change the date range values and then click **Search**.

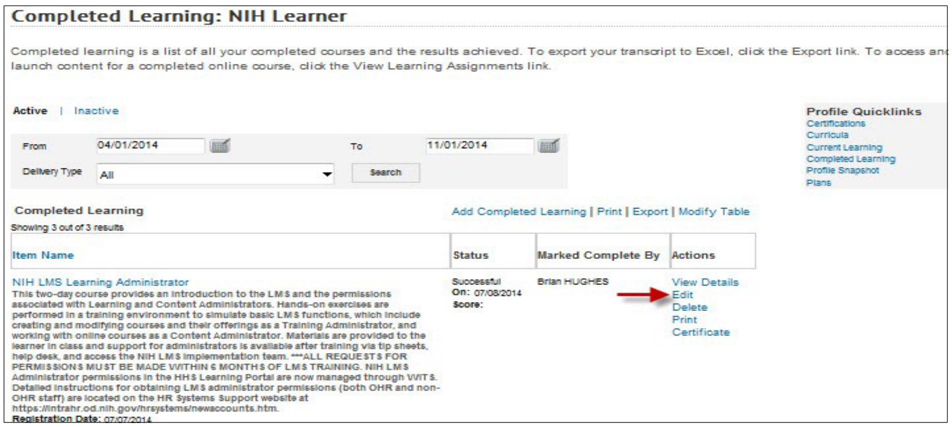


EDIT TRANSCRIPT ITEM DETAILS

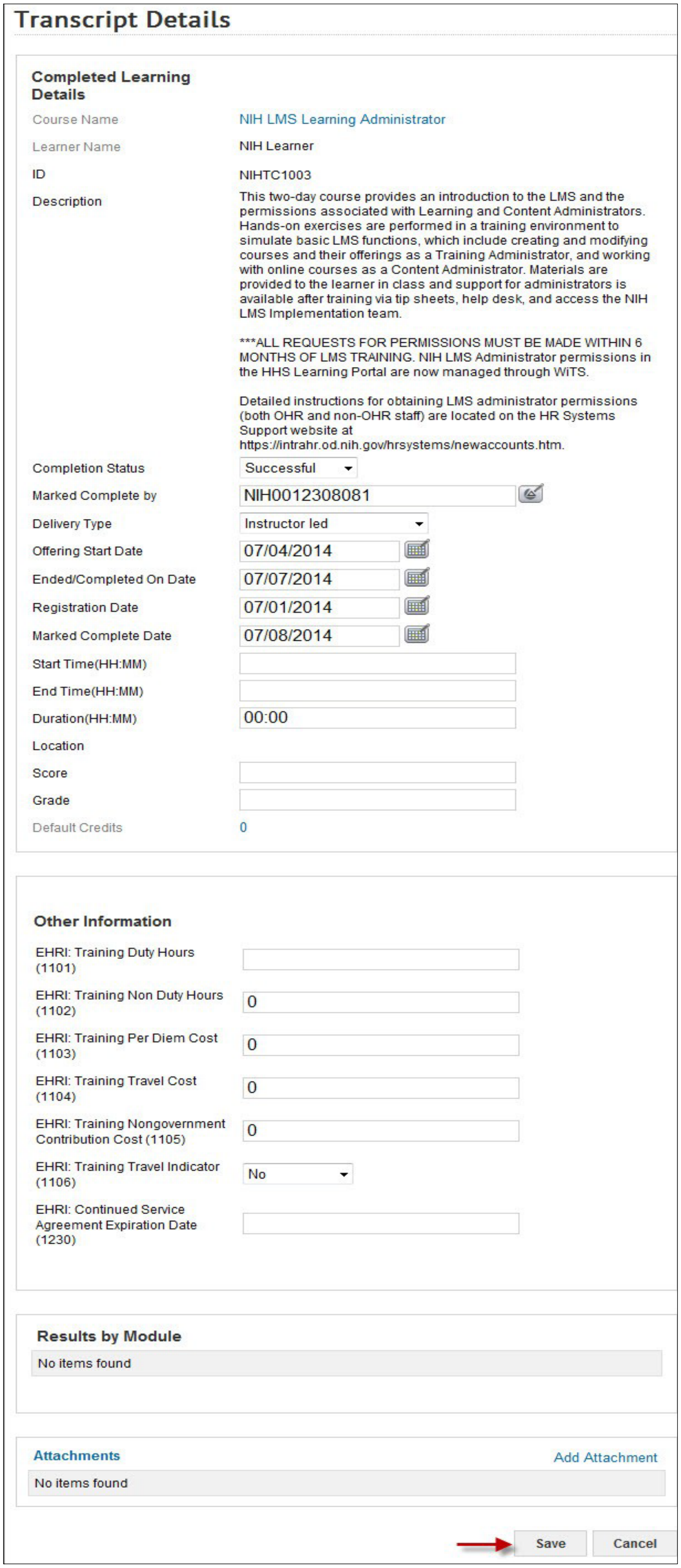
IMPORTANT! Edits to a learner's completed courses should only be performed when you take possession of the credentials that warrant the changes. These credentials should be kept on file in a secure location designated by your organization's management team.

Follow the instructions below to edit a completed course item.

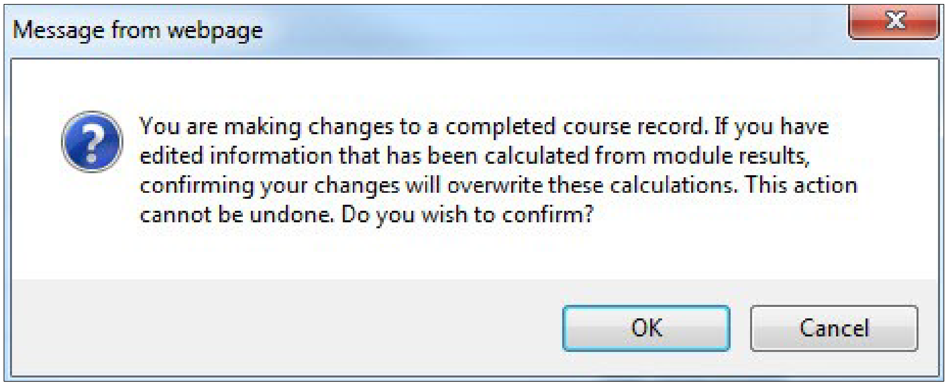
1. While viewing the Completed Courses screen, click the **Edit link** from the *Actions* column.



2. Make all necessary changes then click the **Save button** at the bottom of the screen.



3. Click **OK** in the confirmation popup window.

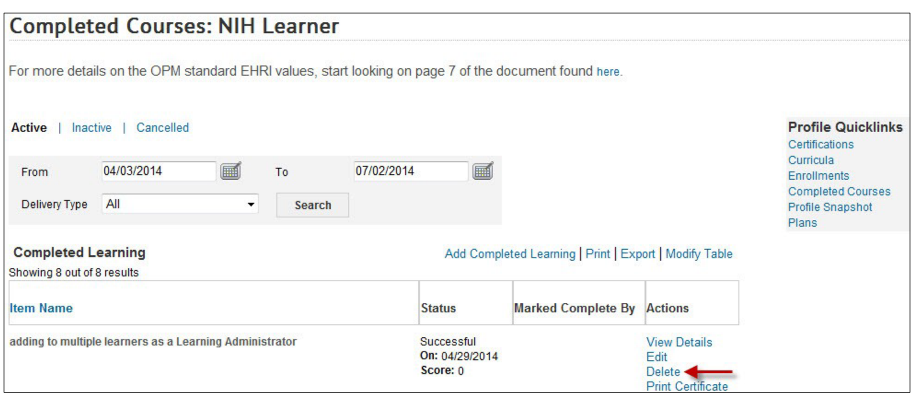


4. Click the **Cancel** button to return to the Completed Courses screen.

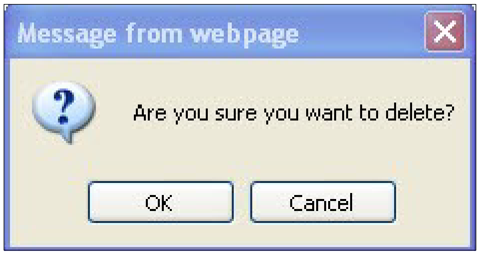
DELETE A TRANSCRIPT ITEM

IMPORTANT! Once a completed course item is deleted, the action cannot be undone. A new completed course item would need to be added if one was deleted unintentionally.

1. Click the **Delete link** from the Actions column.



2. Click the OK button in the confirmation popup window.



3. The transcript item will now be added to the Inactive tab. To see all the items that have previously been deleted, click the Inactive tab.

IMPORTANT! Only transcript items on the Active tab will be factored into completion reports.

ADD LEARNING TO A TRANSCRIPT

Local Learning Registrars may add training to a learner's transcript. The types of learning that are frequently added manually are:

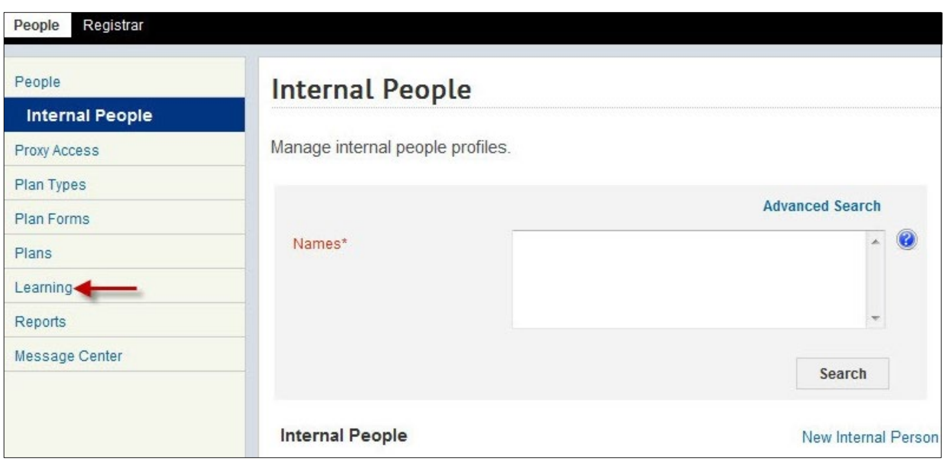
- External training that was completed outside of NIH/HHS
- NIH/HHS training that is not in the LMS catalog
- LMS catalog courses that could not be added by a learning administrator during the time completions were being marked.

Follow the instructions below to manually add learning to a learner's transcript.

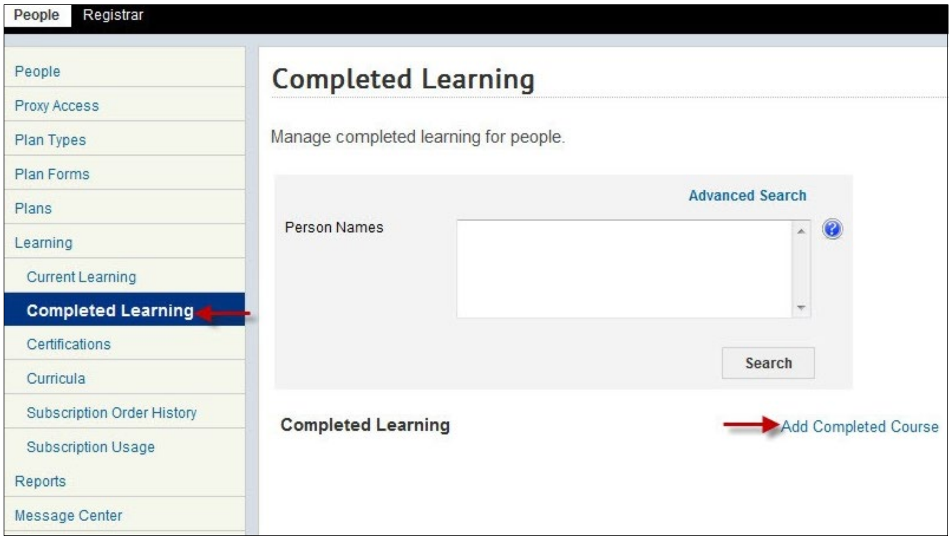
IMPORTANT! The guidelines for verifying completed training may vary by IC, office, division, etc. Please be sure to check with your organization to determine the process for verifying the completion of training prior to manually entering it onto a learner's LMS transcript.

1. Click the **Admin Icon**.

2. Click **Learning** in the left menu.



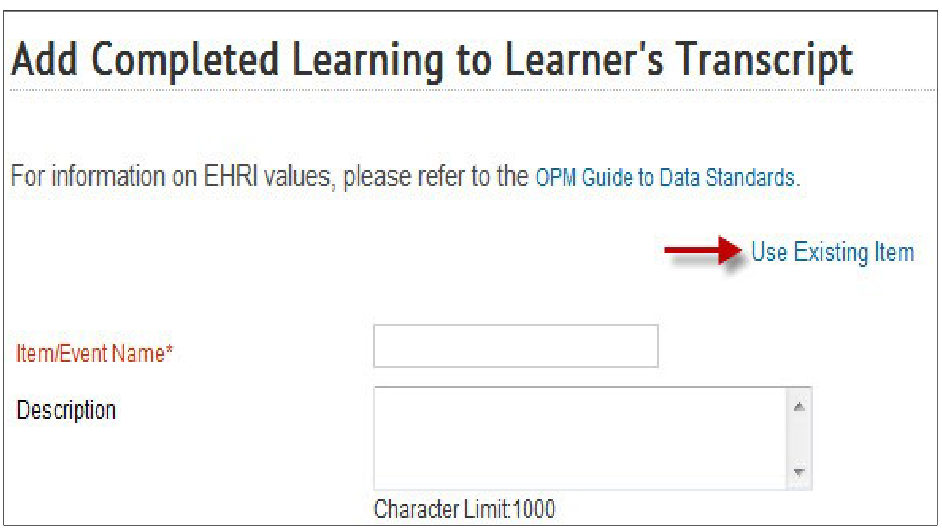
3. Click **Completed Learning** in the left menu.
4. Click the **Add Completed Course** link.



USE AN EXISTING ITEM

IMPORTANT! The course you are attempting to add may already be on a learner's transcript. For reporting accuracy, it is best to use the course on a learner's transcript rather than create a new transcript item. Creating a duplicate course will force administrators to run multiple reports when attempting to show how many people have taken a specific course.

5. Click **Use Existing Item**.

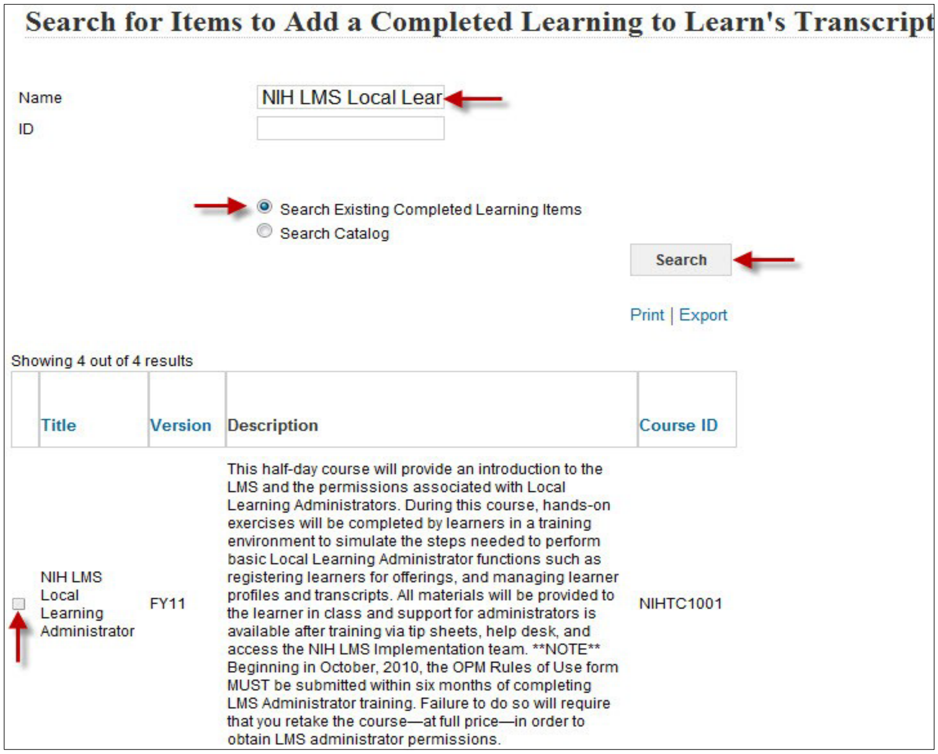


6. Enter search criteria in the Name and/or ID fields.
   a. Name – The actual name of the course. The wildcard (%) can also be used in this field.
   b. ID – The unique course number associated with the course.
7. Select your search method:
   a. Search Existing Completed Course Items – Use this option if the course

being added is external to NIH such as one from a college or university.

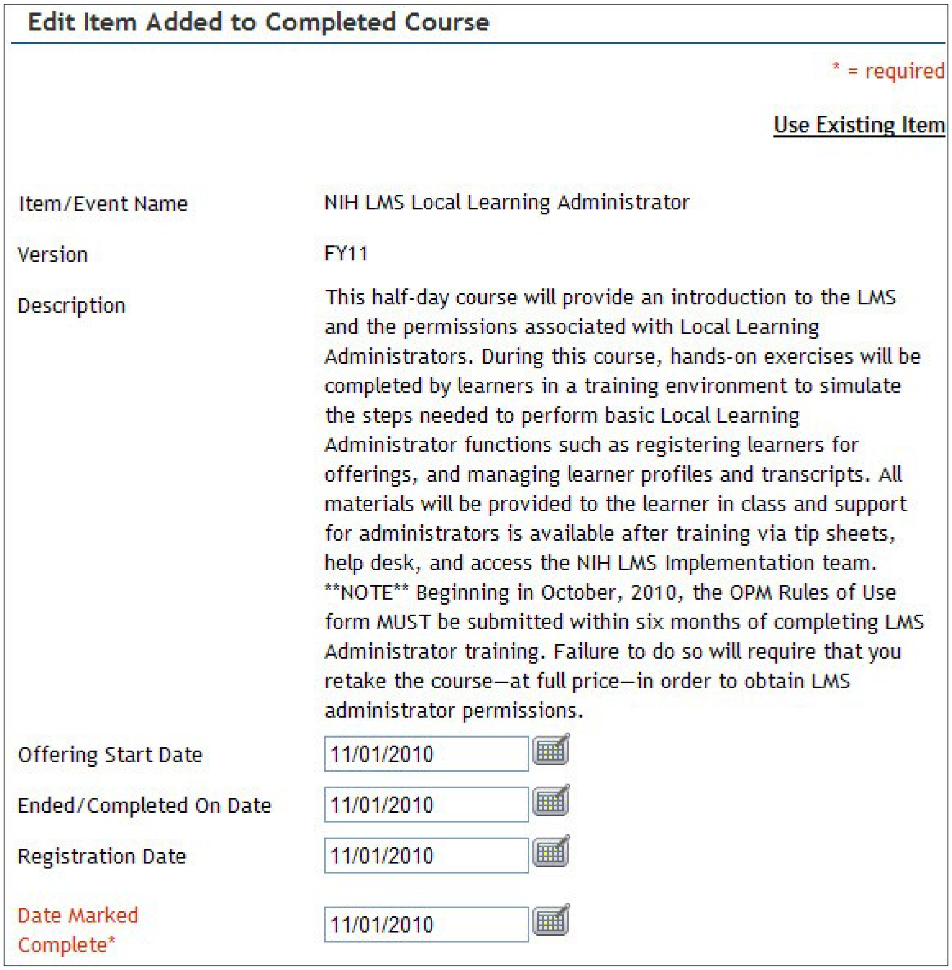
   b. Search Catalog – Use this option if the course is available in the LMS catalog.

8. Click **Search**.
9. Click the **checkbox** to the left of the course title.



NOTE: If the training being added is not in the LMS catalog or already added to someone else's transcript, it cannot be found in the LMS as an existing item. The data entry form should be completed and saved as a new transcript item.

10. Enter additional data such as dates of completion, location, time, and score.
11. **Marked Complete By** – This will always be the administrator that is adding the transcript item.



Edit Item Added to Completed Course

* = required

Use Existing Item

Item/Event Name	NIH LMS Local Learning Administrator
Version	FY11
Description	This half-day course will provide an introduction to the LMS and the permissions associated with Local Learning Administrators. During this course, hands-on exercises will be completed by learners in a training environment to simulate the steps needed to perform basic Local Learning Administrator functions such as registering learners for offerings, and managing learner profiles and transcripts. All materials will be provided to the learner in class and support for administrators is available after training via tip sheets, help desk, and access the NIH LMS Implementation team. **NOTE** Beginning in October, 2010, the OPM Rules of Use form MUST be submitted within six months of completing LMS Administrator training. Failure to do so will require that you retake the course—at full price—in order to obtain LMS administrator permissions.
Offering Start Date	11/01/2010
Ended/Completed On Date	11/01/2010
Registration Date	11/01/2010
Date Marked Complete*	11/01/2010

IMPORTANT! All EHRI values included at the bottom of this page should be validated. If any of the values are incorrect, the transcript item should be cancelled and the values corrected in the LMS course catalog by an LMS Learning Administrator. (See Appendix B for explanations of data fields required for EHRI reporting.)

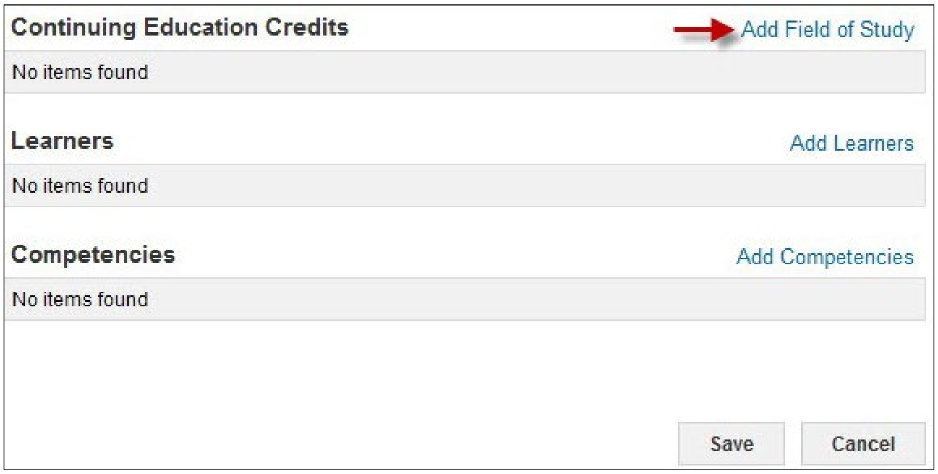
If the transcript item is from an external source, the EHRI data values cannot be changed by an administrator. The administrator should not use this transcript item.

NOTE: The **Ended/Completed On Date** field must be populated even though it is not designated as “required”. This is the date that appears on a Learner’s Certificate of Completion from the LMS.

ADDING CLPS TO A TRANSCRIPT ITEM

A course may be associated with a field of study that assigns CEUs/CLPs once completed. Follow the instructions below to add a field of study and its accompanying CEUs/CLPs to the transcript item.

1. In the Continuing Education Credits section, click the **Add Field of Study link**.



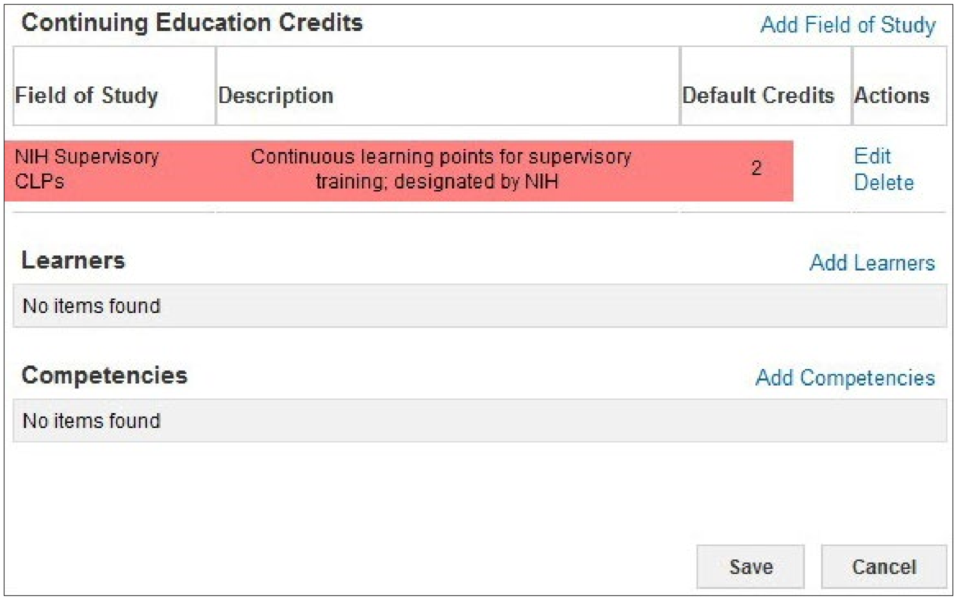
2. Click the **pick icon** for Field of Study.

3. Type NIH in the **Name field.**
4. Click **Search**.
5. Select the **checkbox** associated with the Field of Study being assigned to the course.

6. Enter the number of **Default Credits**.
7. Click **Save**.

   NOTE: It is possible to specify the number of credits being assigned based on a person's Job Role by clicking the Add Job Role link and indicating how many credits are earned by people who have that job role.

8. The Field Of Study will now be part of the transcript item.

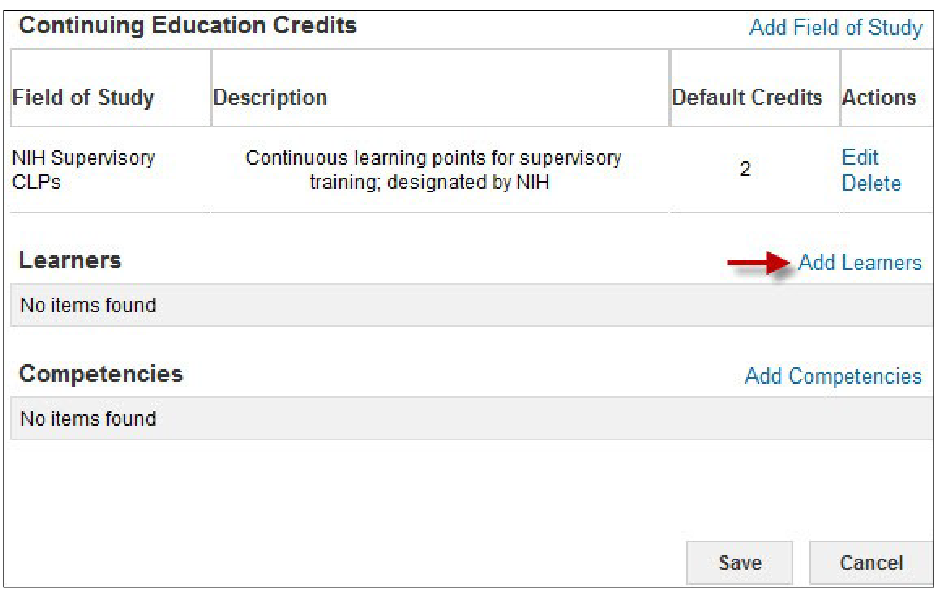


NOTE: You may edit or delete the Field of Study by clicking on the appropriate links in the Actions column.

ADDING LEARNERS TO THE TRANSCRIPT ITEM

At least one learner needs to be added as a recipient of this transcript item. The learners added in this section will have the transcript item display in their completed courses area. Follow the instructions below to add a learner.

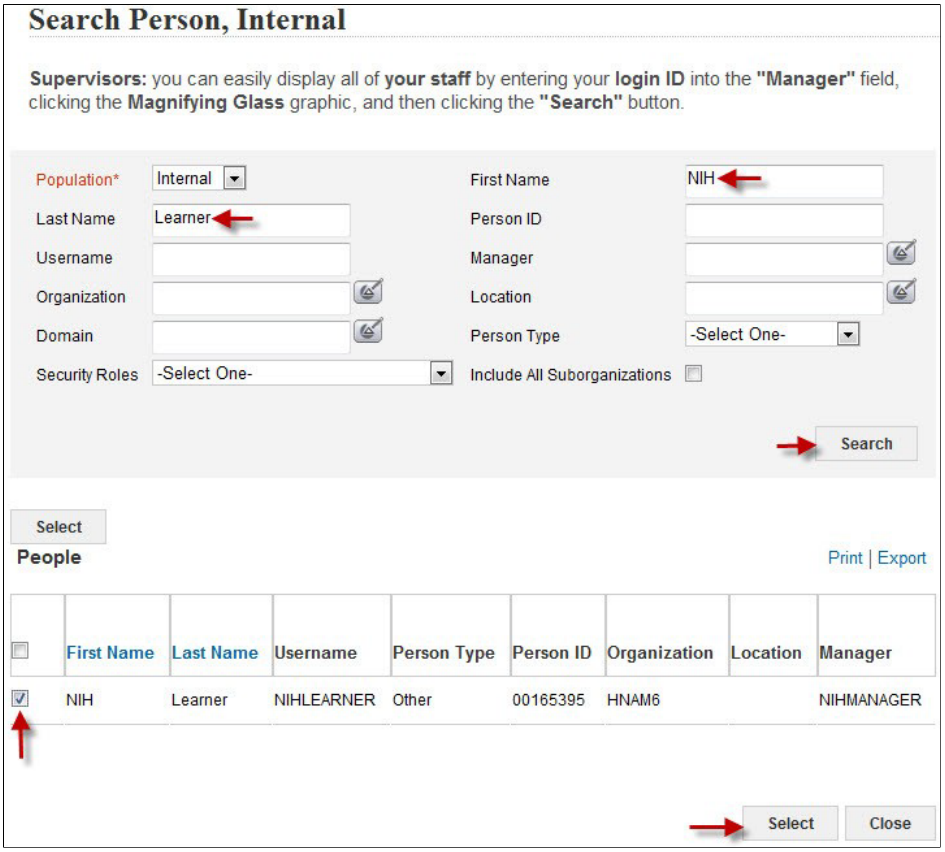
1. Click the **Add Learners link**.



2. Enter the **First and Last Name** of the learner.
3. Click **Search**.

NOTE: If the learner is not found, make sure that the legal name is being used as search criteria. It is also possible that the learner's account may be deactivated.

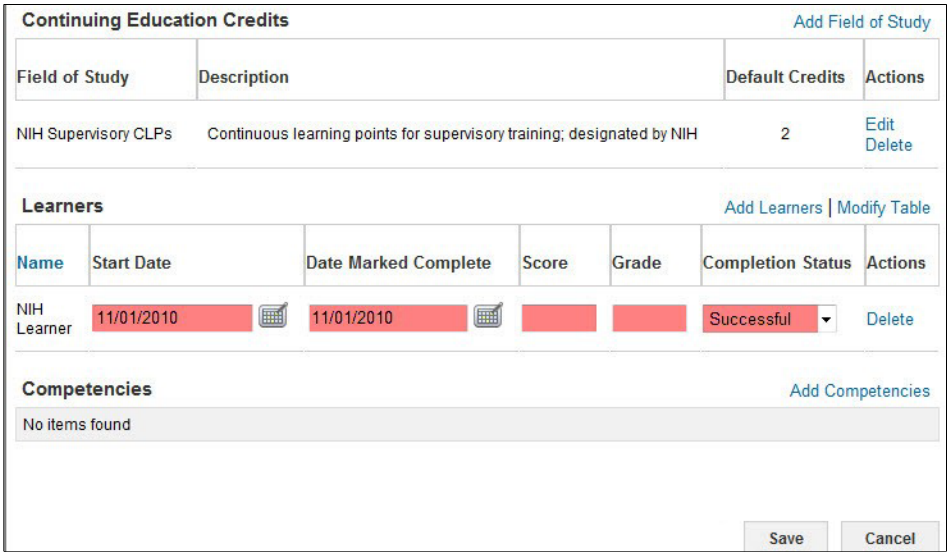
4. Select the **checkbox** associated with the learner.
5. Click **Select**.



NOTE: Repeat steps 1 through 5 to add additional learners as needed.

6. In the Learners section at the bottom of the page, update the Score and Grade fields as appropriate.

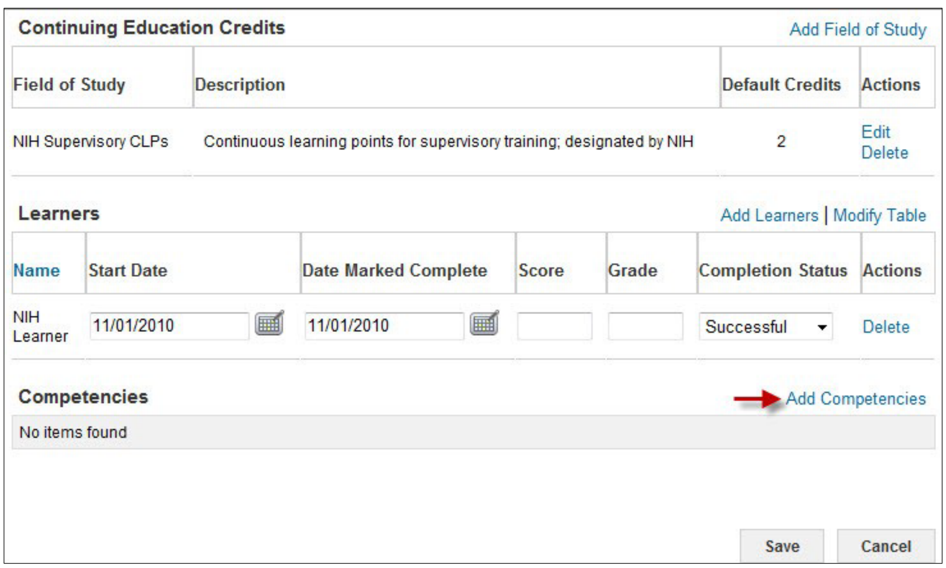
   NOTE: The **Score** field will default to a value of "0". Delete this value when entering transcript items that do not have scores earned by the learner.



ADDING COMPETENCIES TO THE TRANSCRIPT ITEM (OPTIONAL)

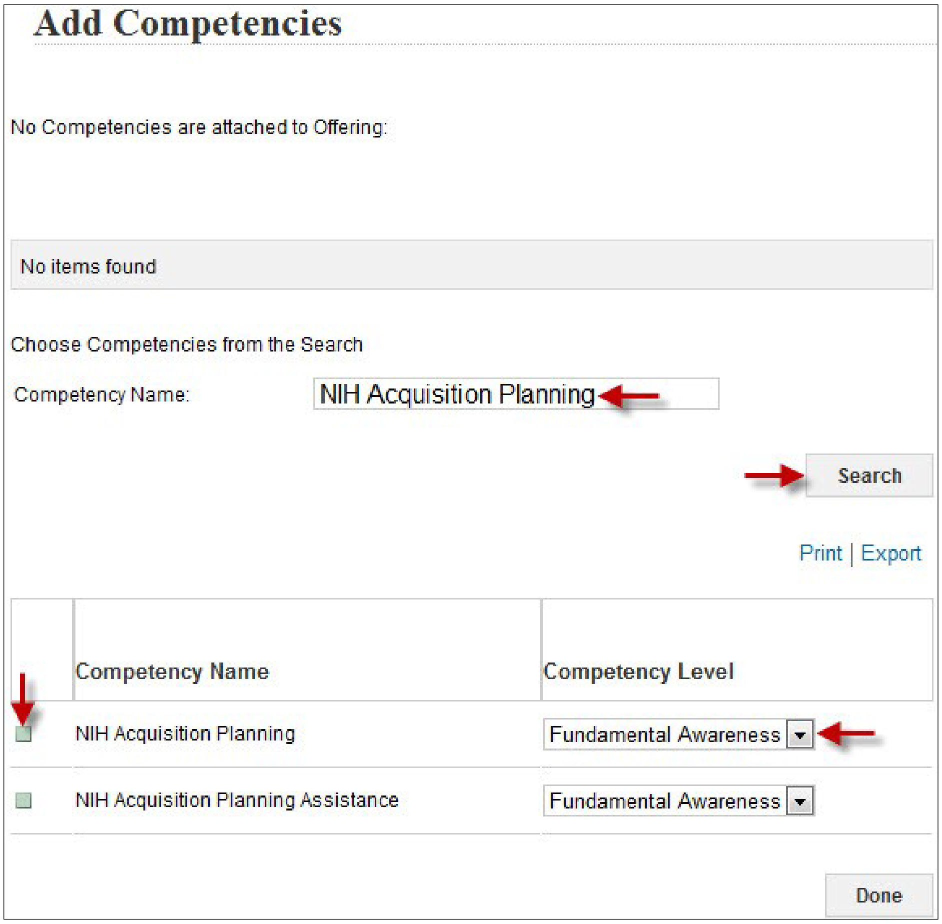
Competencies and their respective levels may be associated with transcript items. Follow the instructions below to add a competency to the transcript item.

1. Click the Add Competencies link.

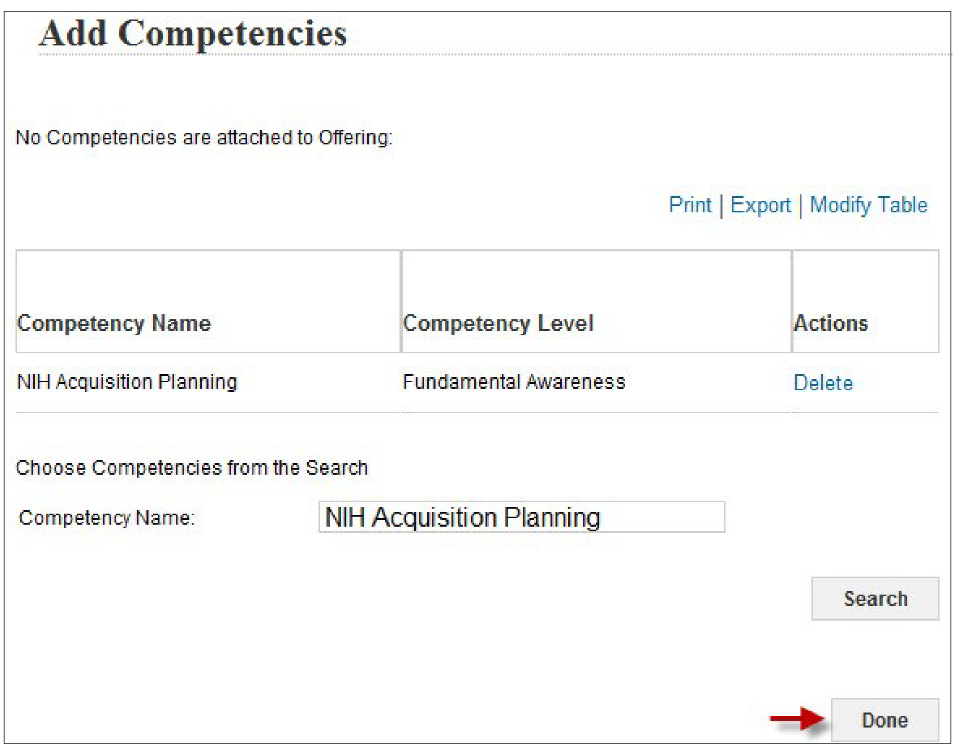


2. Type the name of the competency in the **Competency Name field**.
3. Click **Search**.
4. Select the **Competency Level**.

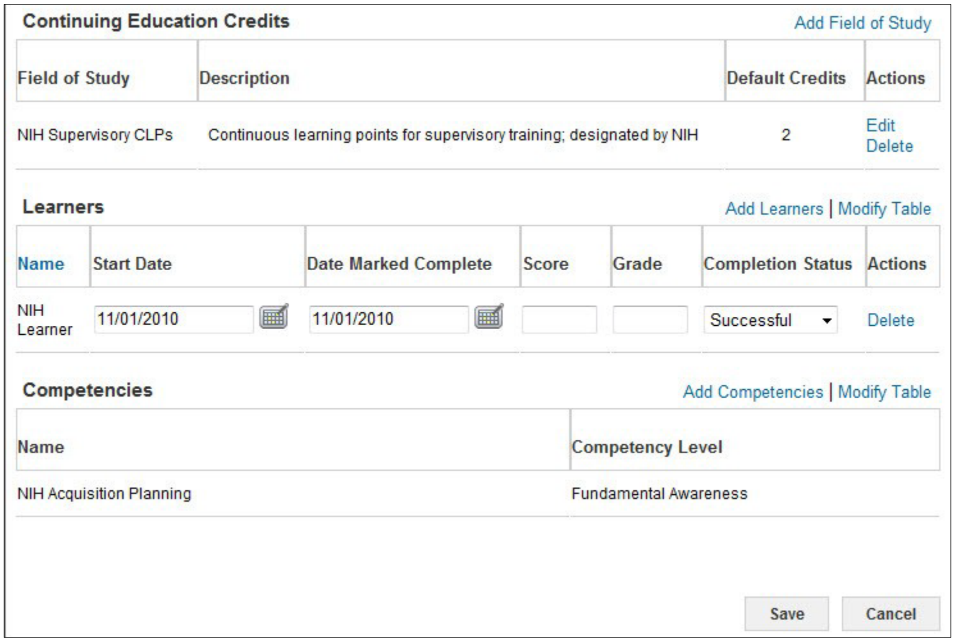
5. Click the **checkbox** associated with the Competency.



6. Click **Done**.



7. The Competency will be displayed in the Competencies section.



Continuing Education Credits — Add Field of Study

Field of Study	Description	Default Credits	Actions
NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH	2	Edit Delete

Learners — Add Learners \| Modify Table

Name	Start Date	Date Marked Complete	Score	Grade	Completion Status	Actions
NIH Learner	11/01/2010	11/01/2010			Successful	Delete

Competencies — Add Competencies \| Modify Table

Name	Competency Level
NIH Acquisition Planning	Fundamental Awareness

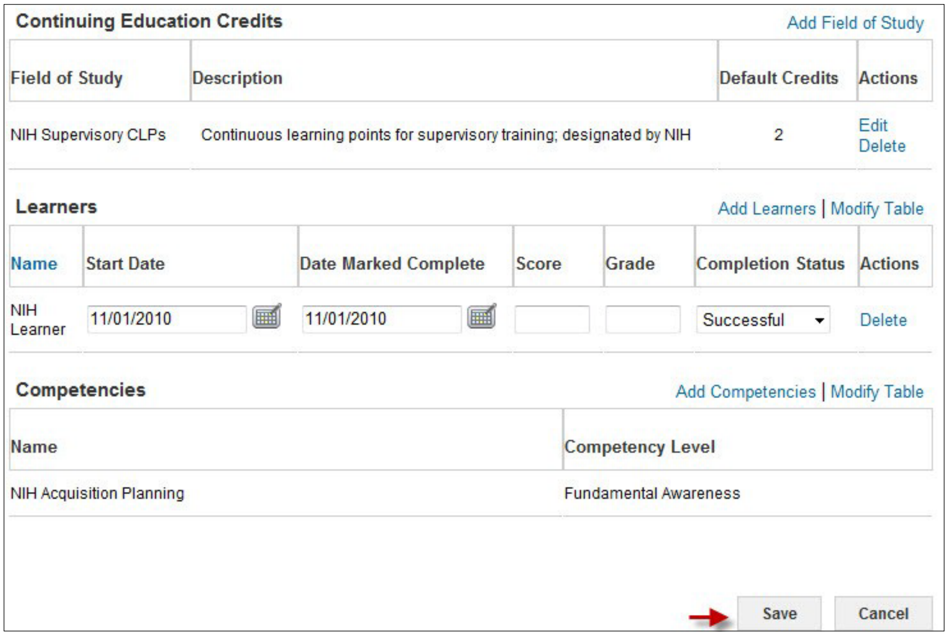
Save Cancel

NOTE: Repeat steps 1 through 7 to add additional competencies.

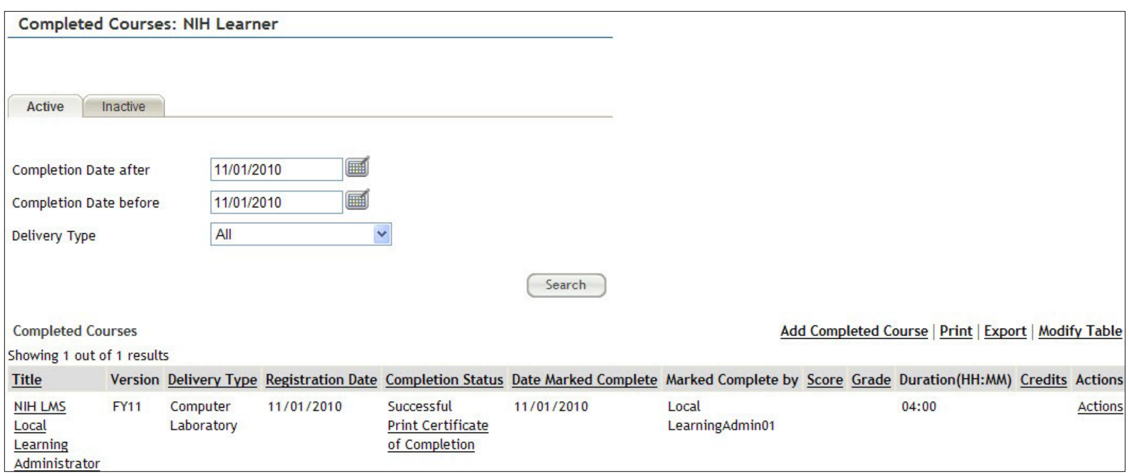
NOTE: To delete a competency, click the **Add Competencies link** and then the **Delete link** associated with the competency being deleted.

SAVING THE TRANSCRIPT ITEM

After entering in all the data for the transcript item, click **Save** at the bottom of the screen.



The learner's transcript will now be displayed. Search through the transcript to verify that the item has been successfully added. The completion date ranges may need to be adjusted if the training was completed more than 90 days in the past.



REPORTS

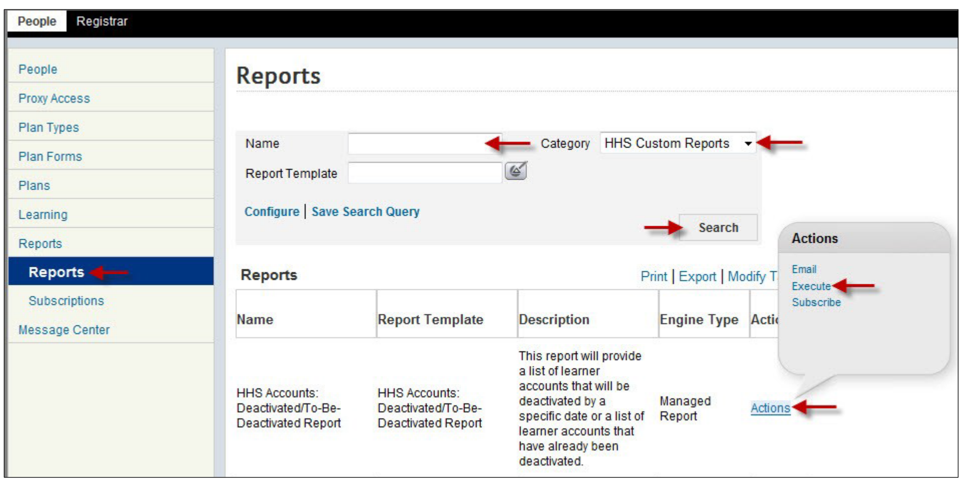
Local Learning Registrars have access to a variety of reports in the LMS. Reports can be generated, exported, printed, emailed and subscribed to if desired. The reports that are available vary slightly between the roles of Human Capital Administrator – People and Registrar's Desk.

Follow the instructions below to run a report in the LMS.

GENERATE A REPORT

1. Click the **Admin Icon**.

2. Click **Reports** in the left menu.
3. Enter the name of the report in the **Name field** or select a **Category** in the Category pull-down menu**.**
4. Click **Search**.
5. Click the **Actions link** in the Actions column.
6. Click **Execute** in the popup window.



NOTE: To see a list of all the available reports in the LMS, click the Search button without entering any other criteria.

All reports are assigned to categories. To view all of the reports in a category, select the category from the category pull-down menu and then click the Search button.

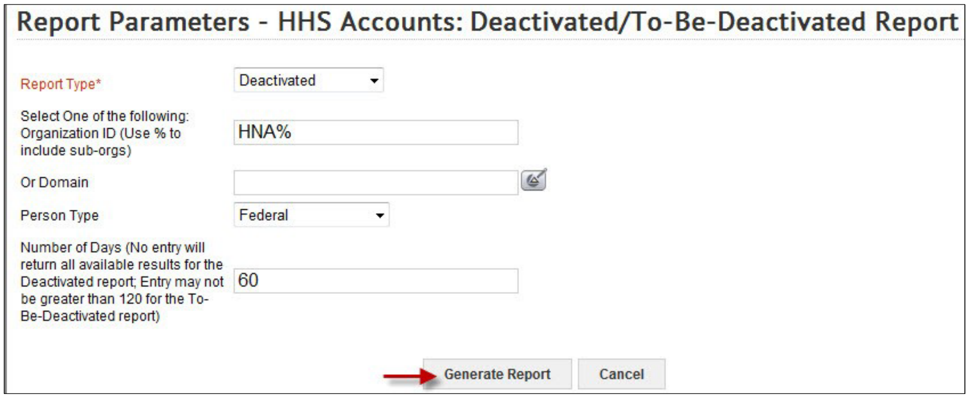
The HHS Custom Reports Category contains all of the reports that have been custom designed for NIH and all of HHS.

7. Enter report parameters into the appropriate fields.

IMPORTANT! Fields labeled with red letters are required in order to run the report.

NOTE: Many reports will use the organization code as a required parameter. Use the % symbol to include sub-organizations.

8. Click **Generate Report**.



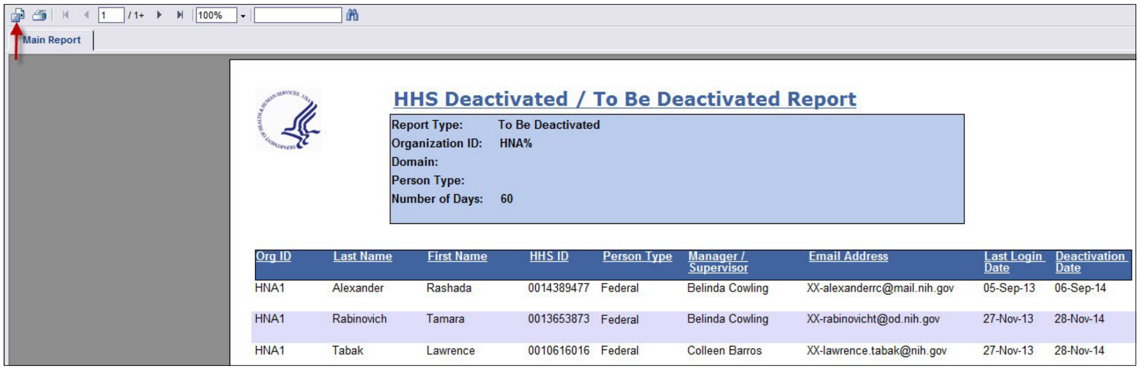
9. You will now see a report similar to what is shown in the graphic below.

EXPORT A REPORT

All reports can be exported from the LMS into other file formats. Of these formats, “Adobe Acrobat – PDF” and “Microsoft Excel 97-2000 – Data Only (XLS)” are the most commonly used.

Follow the instructions below to export an LMS report:

1. While viewing an LMS report, click the **Export button** in the Reports Menu Bar in the upper left-hand corner.



2. Select the file format you want to export the report data into from the **File Format pull-down menu**.

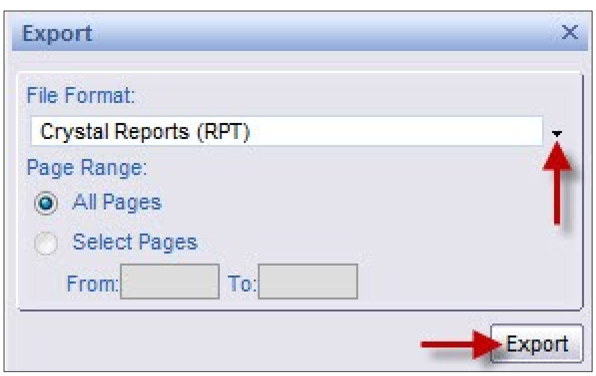
NOTE: The following two formats are the most commonly used:

- The **Adobe Acrobat (PDF)** format will export a report ready for printing or to be saved and emailed.
- The **Microsoft Excel 97-2000 – Data Only (XLS)** format will export a report ready to open in MS Excel so you can work with the data.

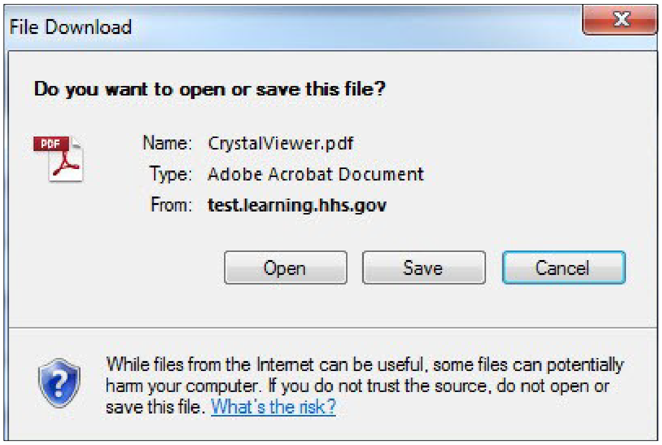
3. Select the range of pages that should be exported.
   a. Unless otherwise indicated, all pages in the report will be exported.

NOTE: The Page Range option during export is not available for all export formats.

4. Click **Export**.

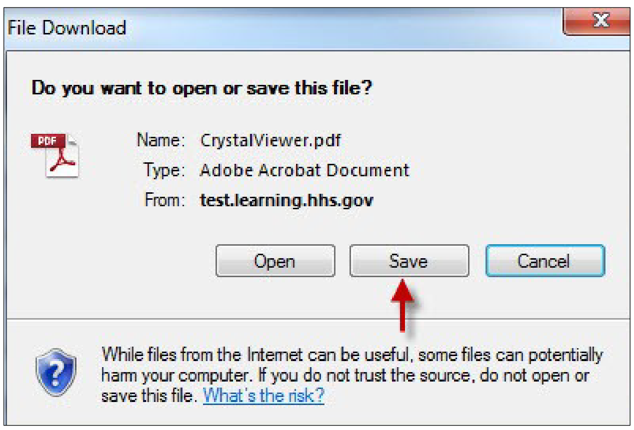


5. You will be prompted to open or save the file.
   a. Clicking **Save** will allow you to save the file before opening.
   b. Clicking **Open** will open the data in the chosen format.

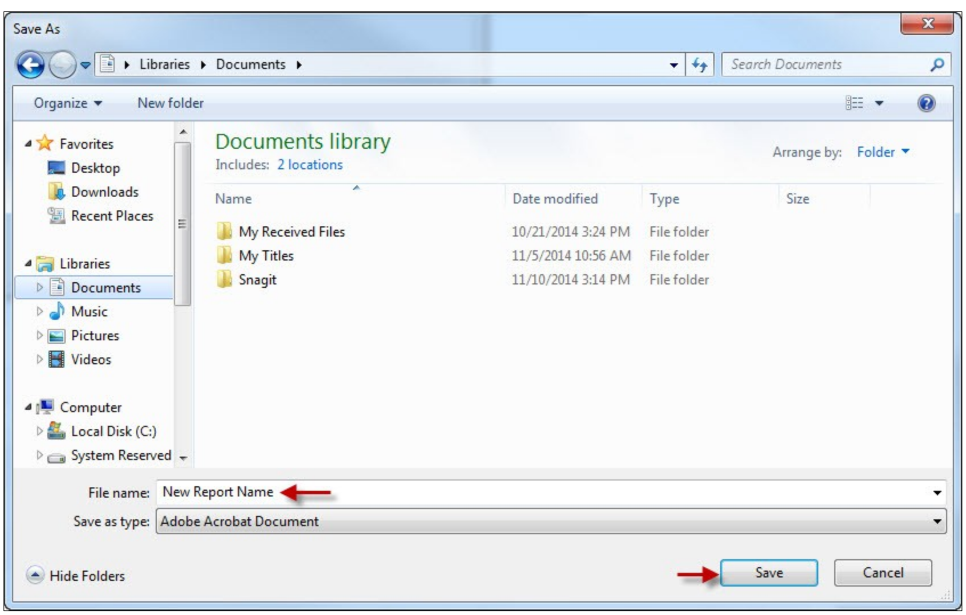


SAVING AN EXPORTED REPORT

1. While viewing the File Download popup window, click Save.



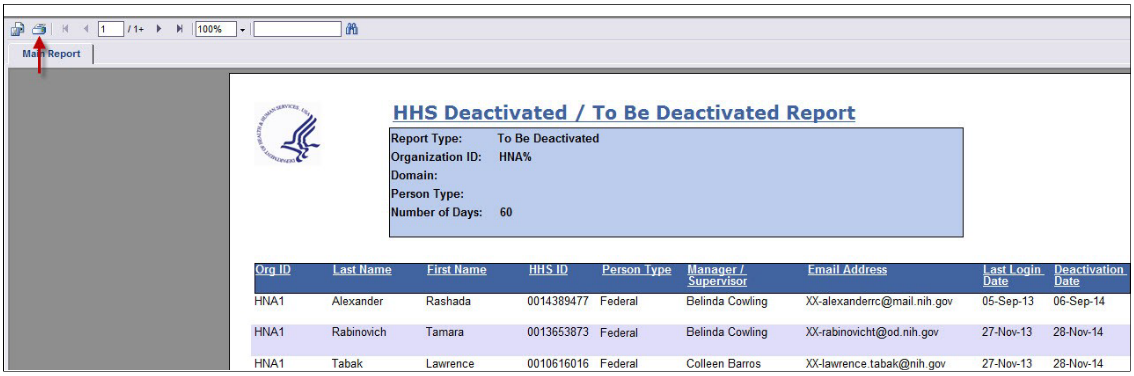
2. Select a location in which to save the file and give it a meaningful name.
3. Click **Save**.



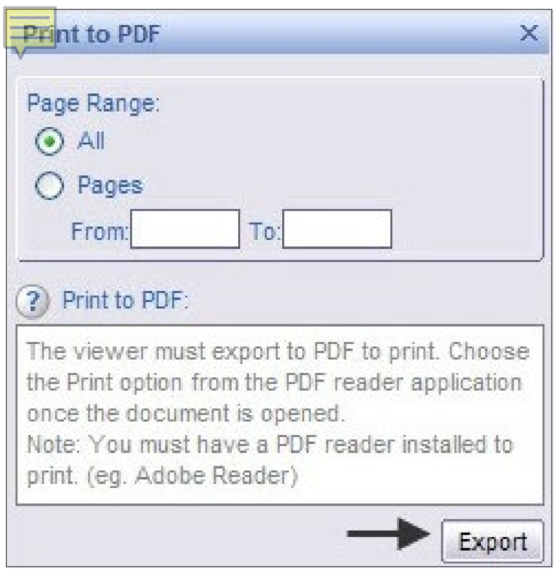
4. You will receive a prompt when the download is complete. Click Open to open the report file you just downloaded.

PRINT A REPORT

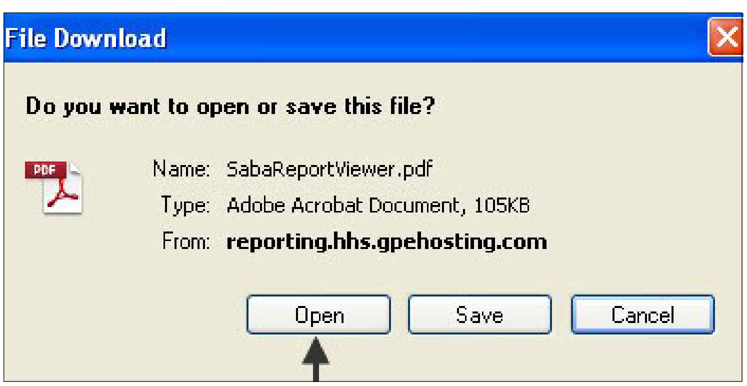
1. While viewing an LMS report, click the **printer icon** in the Reports Menu Bar.



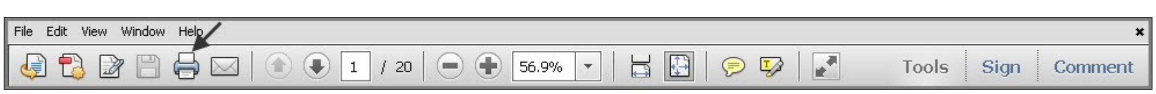
2. Click **Export**.



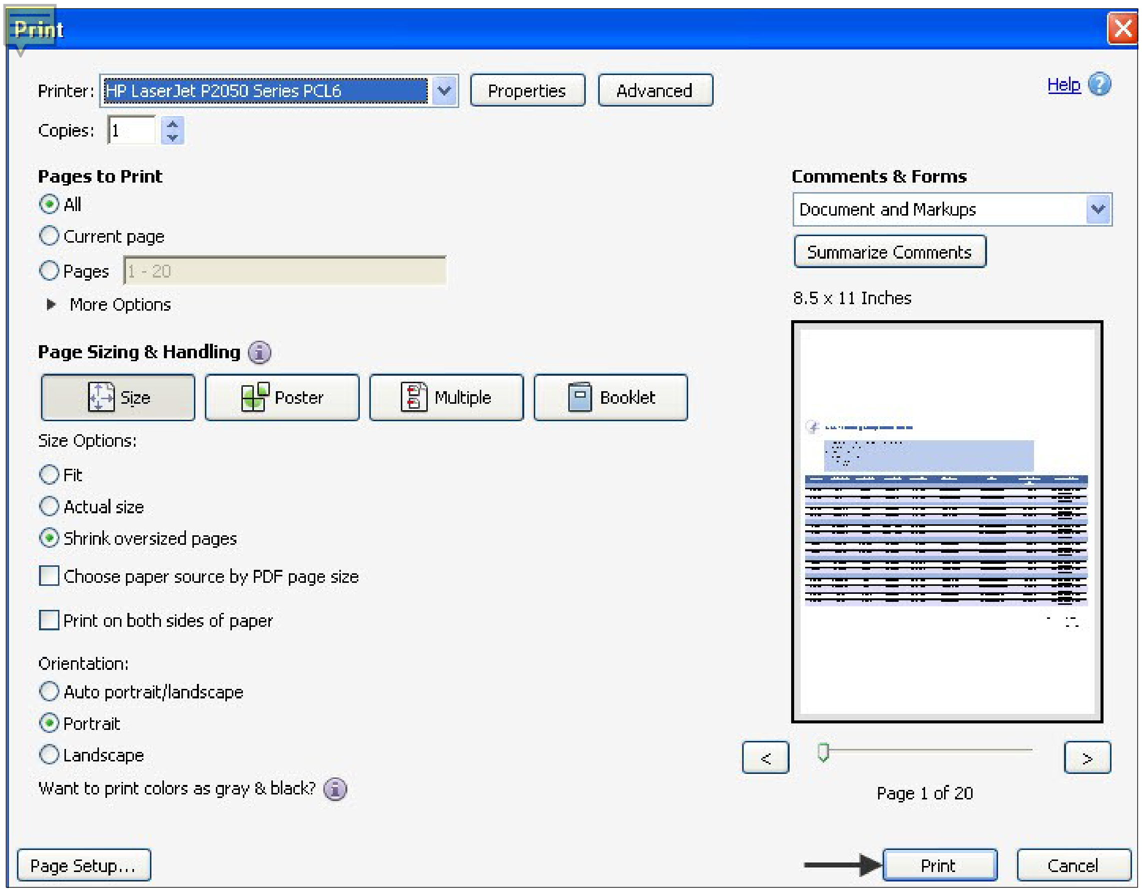
3. Click **Open**.



4. Click the Printer button in the PDF Menu Bar.



5. Set up all printer parameters in the Print window then click **Print**.

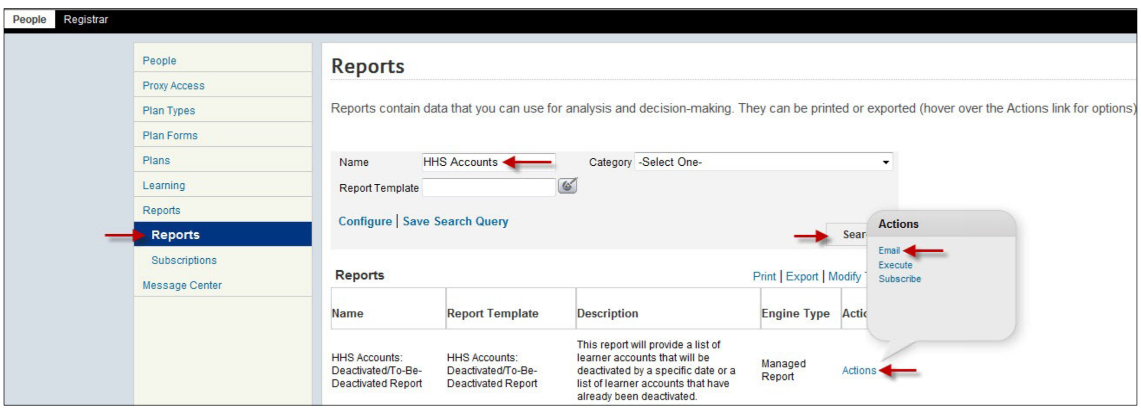


EMAIL A REPORT

The LMS allows reports to be emailed, on-demand, to any valid email address. Those who receive the email do not need to log on or have access to the LMS in order to view the emailed report.

1. Click the **Admin icon**.

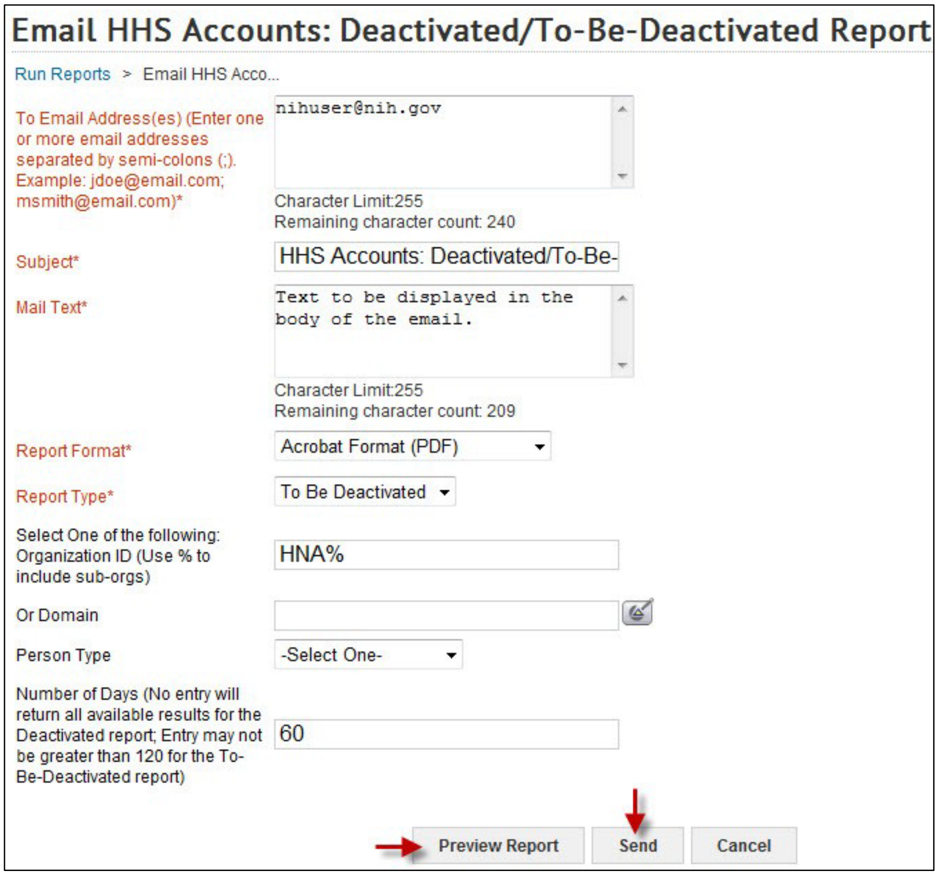
2. Click **Reports** in the left menu.
3. Enter the name of the report in the **Name field.**
4. Click **Search**.
5. Click the **Actions link** in the Actions column.
6. Click the **Email link** in the Actions popup window.



7. Enter one or more recipient email addresses in the **To** field. (Separate multiple emails with either a comma or semi-colon)
8. Modify the **Subject** and **Mail Text** (the email body) fields to appear as you want them in the email.
9. Choose a **Report Format** from the report format pull-down menu.
10. Enter all remaining report parameters.

NOTE: The remaining parameters will vary by report. All fields labeled with red letters are required to email the report.

12. Click **Preview** to see the report based with the parameters you entered.
13. Click **Send** to send the report to the email recipients.



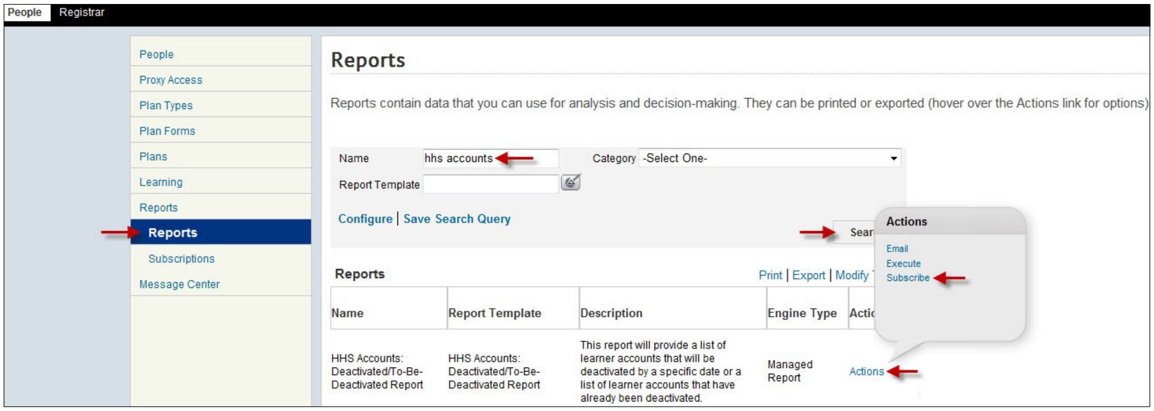
14. The report will be sent to all people with valid emails in the To field.

SUBSCRIBE TO A REPORT

Report subscriptions in the LMS allow reports to be emailed at scheduled intervals, to any valid email address. Those who receive the email do not need to log on or have access to the LMS in order to view the emailed report.

1. Click the **Admin icon**.

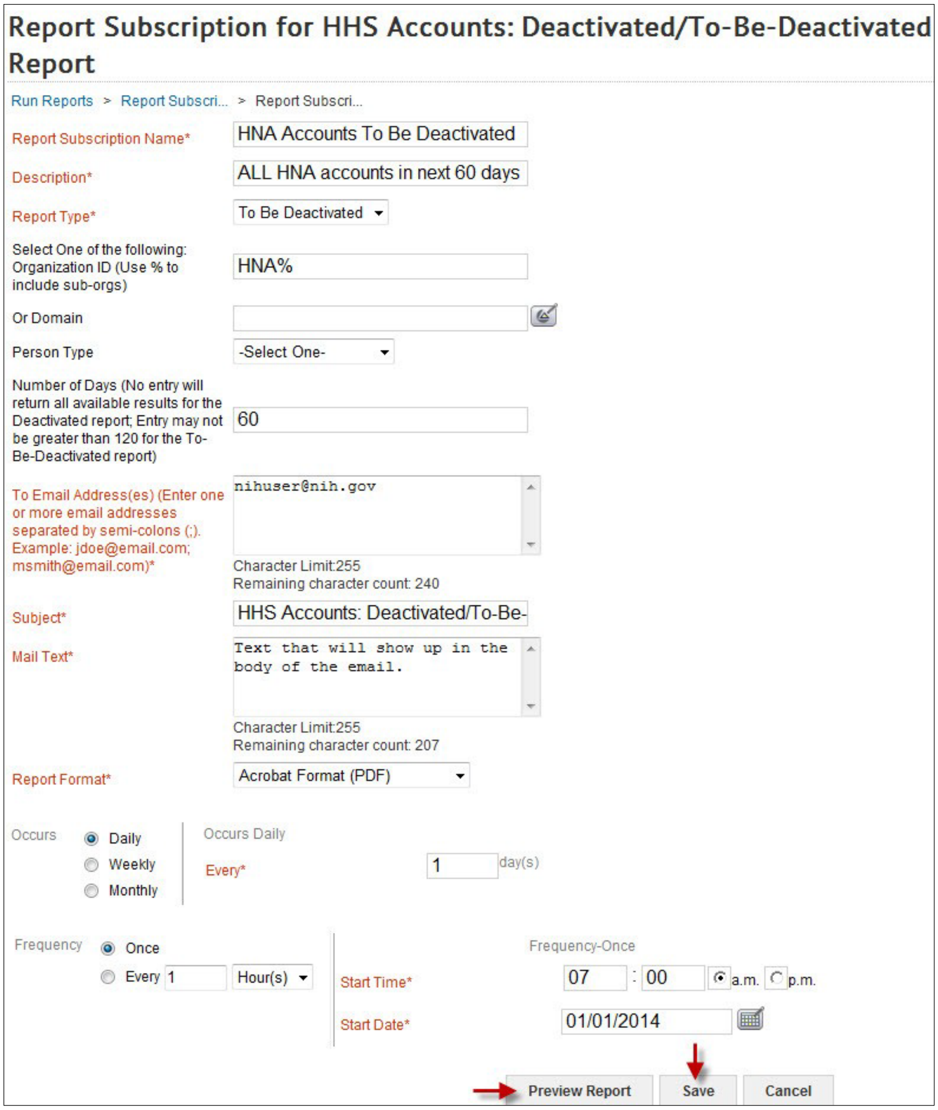
2. Click on the **Reports** tab.
3. Enter the name of the report in the **Name field.**
4. Click **Search**.
5. Click the **Actions link** in the Actions column.
6. Click the **Subscribe link** in the Actions popup window.



7. Click the **New Report Subscription link**.

NOTE: Any previously created subscriptions for this report will be listed in the Report Subscription table.

8. Enter parameters for at least all fields that are required. These fields are labeled with red letters. It is recommended that you include yourself as a recipient to ensure the subscription is running at the designated intervals.



Report Subscription for HHS Accounts: Deactivated/To-Be-Deactivated Report

Run Reports > Report Subscri... > Report Subscri...

Report Subscription Name*: HNA Accounts To Be Deactivated

Description*: ALL HNA accounts in next 60 days

Report Type*: To Be Deactivated

Select One of the following: Organization ID (Use % to include sub-orgs): HNA%

Or Domain:

Person Type: -Select One-

Number of Days (No entry will return all available results for the Deactivated report; Entry may not be greater than 120 for the To-Be-Deactivated report): 60

To Email Address(es) (Enter one or more email addresses separated by semi-colons (;). Example: jdoe@email.com; msmith@email.com)*: nihuser@nih.gov

Character Limit:255
Remaining character count: 240

Subject*: HHS Accounts: Deactivated/To-Be-

Mail Text*: Text that will show up in the body of the email.

Character Limit:255
Remaining character count: 207

Report Format*: Acrobat Format (PDF)

Occurs: Daily / Weekly / Monthly

Occurs Daily
Every* 1 day(s)

Frequency: Once / Every 1 Hour(s)

Frequency-Once
Start Time* 07 : 00 a.m. p.m.
Start Date* 01/01/2014

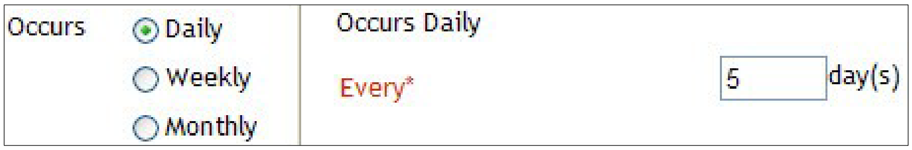
Preview Report | Save | Cancel

NOTE: It is recommended that you include your name in the Mail Text section so that the recipients know who the report came from. Reports are sent automatically by the LMS and will not have the creator's information attached to it.

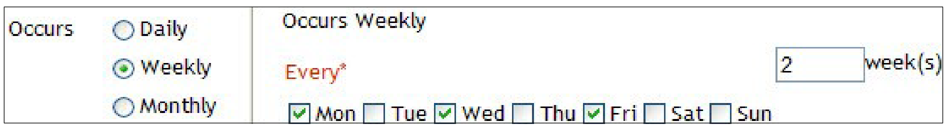
SET THE OCCURANCE OF A REPORT SUBSCRIPTION

Report subscriptions can be set up to send the report at various intervals of occurrence. They are Daily, Weekly and Monthly. Make your selection based on the information below.

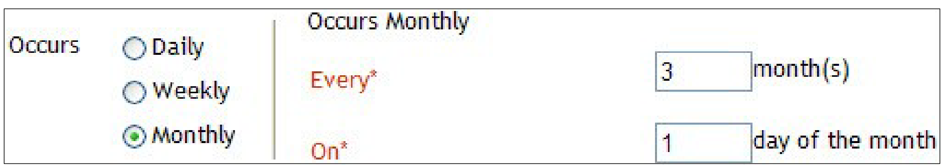
Daily Occurrence – This option allows the report to be sent out by a specific number of days. The picture below shows a report subscription set to run every five days.



Weekly Occurrence – This option allows the report to be sent out on specific days of the week on a weekly cycle.



Monthly Occurrence – This option allows the report to be sent out on a specific date within a month on a monthly basis.

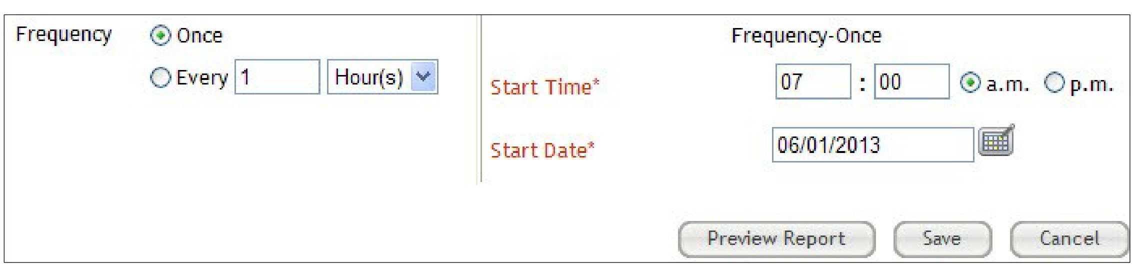


SET THE FREQUENCY OF A REPORT SUBSCRIPTION

Reports can be sent at various frequencies however it is recommended to use the default setting of “Once” for all report subscriptions.

The Start Time should be set to off-peak hours. It is recommended that subscriptions be set to run before 8AM or after 5PM.

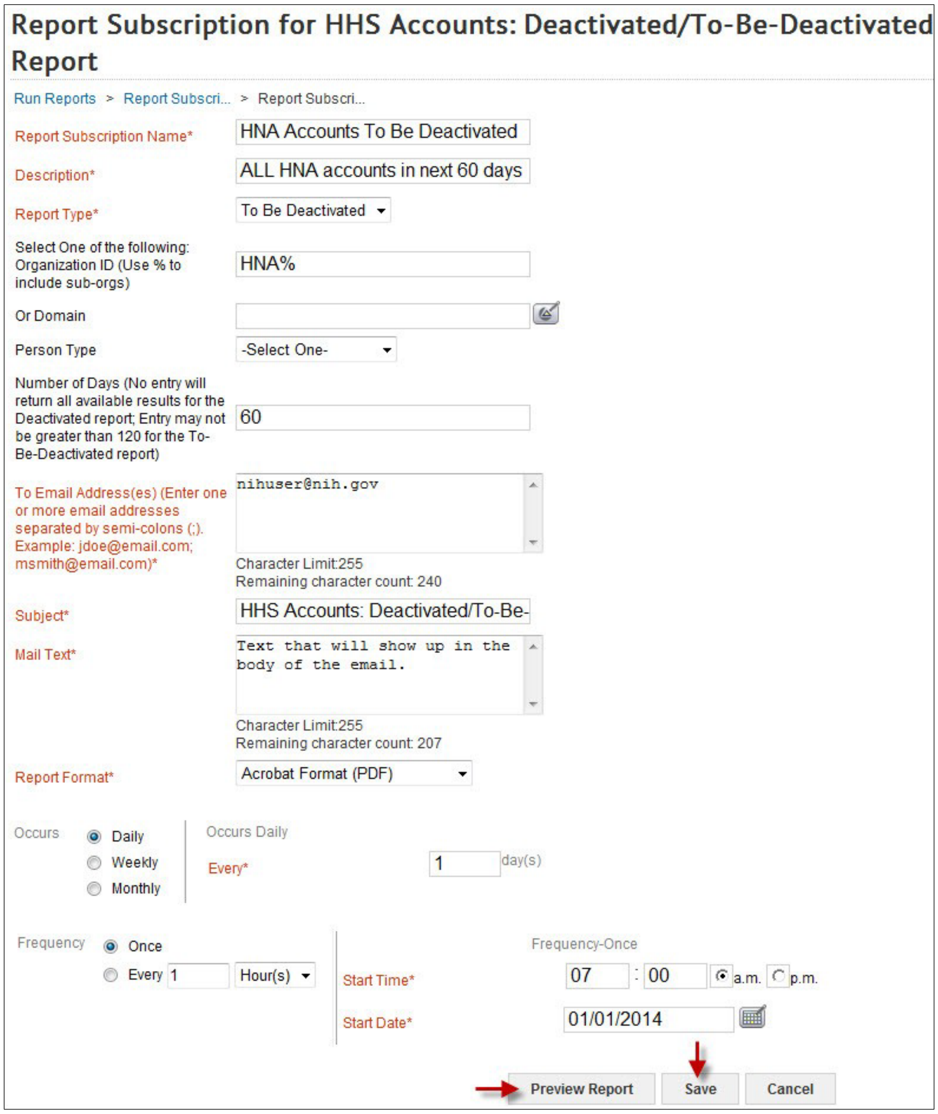
Following these guidelines for setting the frequency of a report subscription will help to improve the overall LMS responsiveness for all users during normal business hours.



The Start Date is the date that the report subscription becomes active. It is **not** the date that the report will be sent. Timing of the report delivery is determined in the occurrence section.

SAVING A REPORT SUBSCRIPTION

1. After all report subscription parameters have been entered, click **Preview Report** 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 were previously entered.
2. Click **Save** to activate the report subscription. The report will be sent to email recipients entered at the times designated.

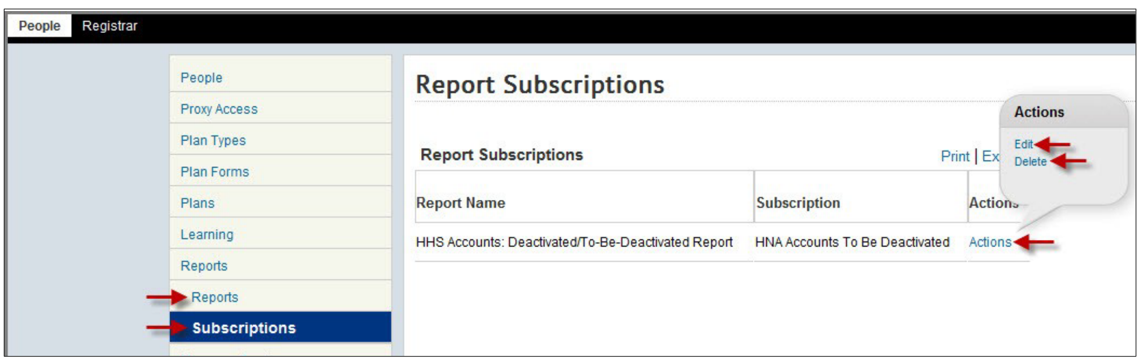


LOCATE AND EDIT A SUBSCRIPTION

Once a subscription is created, it can be edited or deleted at any time. Follow the instructions below to locate your subscriptions for edits or to delete them.

1. Click the **Admin icon**.

2. Click **Reports** in the left menu.
3. Click **Subscriptions** in the left menu.
4. All the subscriptions you have created will be displayed in the Report Subscription table.
5. Click the **Actions link** in the Actions column associated with the report subscription.
    a. Click **Edit** to return back the Report Subscription Parameters screen and make edits to the subscription.
    b. Click **Delete** to cancel the subscription.



HELPFUL INFORMATION

LINKS AND RESOURCES

- HHS Learning Portal log on page
  https://lms.learning.hhs.gov

- HRSS Help Desk
  Submit a help ticket:
  https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx

  HRSS Hours of Operation: Monday through Friday: 8:00 AM to 4:30 PM

- NIH Training Center website
  http://trainingcenter.nih.gov

- HRSS LMS Support website (Tip sheets, Online Manuals, LMS Resources, etc.) https://hr.nih.gov/hr-systems/lms

APPENDIX A – ORGANIZATION CODES

Organization (org) Codes are also referred to as SAC Codes

HN All of NIH

HNA (OD) Office of the Director

HNB (NIAMS) National Institute of Arthritis and Musculoskeletal and Skin Diseases
HNC (NCI) National Cancer Institute

HND (NCCAM) National Center for Complementary and Alternative Medicine
HNE (NIMHD) National Institute of Minority Health and Health Disparities

HNF (FIC) John E. Fogarty International Center for Advanced Study in the Health Sciences
HNG (CSR) Center for Scientific Review

HNH (NHLBI) National Heart, Lung, and Blood Institute
HNJ (CC) Clinical Center

HNK (NIDDK) National Institute of Diabetes and Digestive and Kidney Diseases
HNL (NLM) National Library of Medicine

HNM (NIAID) National Institute of Allergy and Infectious Diseases
HNN (NIA) National Institute on Aging

HNP (NIDCR) National Institute of Dental and Craniofacial Research
HNQ (NINDS) National Institute of Neurological Disorders and Stroke
HNR (NCRR) National Center for Research Resources

HNS (NIGMS) National Institute of General Medical Sciences

HNT (NICHD) National Institute of Child Health and Human Development
HNU (CIT) Center for Information Technology

HNV (NIEHS) National Institute of Environmental Health Sciences
HNW (NEI) National Eye Institute

HN2 (NINR) National Institute of Nursing Research

HN3 (NIDCD) National Institute on Deafness and Other Communication Disorders
HN4 (NHGRI) National Human Genome Research Institute

HN5 (NIAAA) National Institute on Alcohol Abuse and Alcoholism
HN6 (NIDA) National Institute on Drug Abuse

HN7 (NIMH) National Institute of Mental Health

HN8 (NIBIB) National Institute of Biomedical Imaging and Bioengineering
HN9 (NCATS) National Center for Advancing Transitional Sciences

APPENDIX B – ENTERPRISE HUMAN RESOURCES INTEGRATION (EHRI) FIELDS

LEGEND

LMS Required Fields | EHRI Required Fields | Non Required Fields

Item/Event Name*	Item or Event Title (255 character limit)	**Microsoft Excel 2007 for PC Users**
Description	Description of the Item or Event entering Character limit: 1000	**This class will expand the learner's knowledge of Microsoft Excel 2007.**
Offering Start Date	Date the class started	**MM/DD/YYYY**
Ended/Completed On Date	Date the class ended	**MM/DD/YYYY**
Registration Date	Date the learner registered for the Item/Event	**MM/DD/YYYY**
Date Marked Complete*	Date the Item/Event was marked complete by an administrator	**MM/DD/YYYY**
Start Time (HH:MM)	Start time of the Item/Event	**08:30**
End Time (HH:MM)	End time of the Item/Event	**16:30**
Duration (HH:MM)	How many hours and minutes the class lasted	**07:30**
Delivery Type	Method the Item/Event was delivered in	**Instructor Led, Online Training, DVD/CD**
Course ID*	Unique ID used to identify the course in a training catalog.	**Letters and numbers (UMD0001)**
Location	**A general location where course was**	**Examples:** NIH Main Campus **or** Rockville

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Marked Complete by	The username of the person entering this record.	NIH00000001. It is recommended that you use the search screen to find your name. Selecting your name will automatically insert your username.
Training Accreditation Organization Type (1103)	The name and description of the accreditation organization	**Leave empty** if unknown.
Course ID From Vendor (1105)	The course ID as assigned by the vendor	**Leave empty** if unknown.
EHRI: Training Credit (1126)	Amount of academic credit hours or continued education units earned by the employee for the completed training. This should match either credit hours or CLPs.	If amount of credit is known, input the number. If not available or not applicable input 0.
EHRI: Training Credit Designation Type Code (1127)	Code for the type of academic credit hours or continued education units earned by the employee for the completed training course.	Continuing Education Units, Graduate Credit; NA; Post Graduate Credit; Undergraduate Credit
EHRI: Training Delivery Type Code (1129)	A code that indicates the general method of delivery for the course.	Blended, Conference/Workshop, Correspondence, On the Job, Technology Based, Traditional Classroom (no technology)
EHRI: Training Credit Type Code (1131)	Code representing the type of credit hours the employee received for the completed training.	Continuing Education Unit; NA; Quarter Hours; Semester Hours
Instructor Competencies (1200)	Description of areas the instructor should be competent in to teach the class.	If don't have any particular information on competencies for the instruction, leave empty.
Multilingual Course (1201)	List of alternate languages for the course.	Spanish, German, French, Italian. If not known or if it wasn't delivered in another language, **leave empty.**
Internal or External Course (1202)	Indicates whether the course is external or internal to NIH.	External, Internal

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Training Certification Type (1211)	Enter the type of certification earned after completing the course.	MCSE, ANP If no certification was earned, **leave empty**.
Course Development Cost (1220)	The cost for developing the course. This only applies for internally developed courses the Federal Organization sponsored.	If no cost were incurred, **leave empty**.
EHRI: Training Tuition and Fees Cost (1221)	The cost of the training tuition and fee for training completed by the employee that was paid for by the Federal Government.	2500 If no cost was incurred, enter **0**.
EHRI: Training Materials Cost (1222)	Cost to the Government for the training materials used during the training unit completed by the employee. This includes all direct costs associated with purchasing the training materials used by the employee that is in addition to the tuition cost. It can include but is not limited to costs of supplies, cost of equipment, and cost of software used by the student during the training event.	700 If no cost was incurred, enter **0**.
Continued Service Agreement Required Indicator (1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Accreditation Indicator (1102)	Indicates whether or not the course is accredited by an accreditation body.	No, Non Applicable, Yes
EHRI: Training Source Type Code (1120)	Source of the training which has been completed by the employee.	Foreign Governments and Organizations; Government External; Government Internal; Government State/Local; Non-government
EHRI: Training Purpose Type Code(1122)	Code representing the purpose of the training completed by the employee	Develop Unavailable skills; Future Staffing Needs; Improve Present Performance;

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
		Mandatory Training; New Work Assignment; Program/Mission Change; Retention
EHRI: Training Type Sub Code (1124)	Code for the type of training which has been completed by the employee.	Acquisition; Adult Basic Education; Agency Required Training; Basic Computer Training; etc. ***There are more options available in this drop-down***
EHRI: Training Duty Hours (1101)	Number of employee duty hours the employee used to complete the training unit.	Enter the amount of duty hours, if none available or none duty hours were used, input **0**.
EHRI: Training Non Duty Hours (1102)	Number of employee non-duty hours for the completed training course.	Enter the amount of non-duty hours, if none available or none duty hours were used, input **0**.
EHRI: Training Per Diem Cost (1103)	Cost of the per diem (meal, lodging, misc. expenses) for training completed by the employee that was paid for by the Federal Government.	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no per diem was allotted, input **0.00**
EHRI: Training Travel Cost (1104)	Cost for the travel, excluding per diem, for training completed by the employee that was paid for by the Federal Government	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no travel cost was allotted, input **0.00**
EHRI: Training Nongovernment Contribution Cost (1105)	Cost contributed by the employee or other non-government organizations for the training completed by the employee.	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no nongovernment contribution was allotted, input **0.00**

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
EHRI: Training Travel Indicator (1106)	Indicates if the employee traveled to attend the training course.	Y=Yes N=No, NA=Non Applicable
EHRI: Continued Service Agreement Expiration Date (1230)	The date to which an employee is obligated to remain in service as a stipulation for taking the training course.	If date applicable, enter it in the following format: MM/DD/YYYY. If not applicable or if unknown, enter **NA**.
Continuing Education Credits	If a field of study has been set up in the LMS for continuing education credits, you will be able to select it here.	NIH Supervisory CLPs NIH Acquisition CLPs
Learners	Specify the learner(s) to whose transcript(s) this item should be recorded	Name, Score, Grade, Completion Status
Competencies	Specify whether any competencies were gained by the completion of the class	Choose from availabilities in the LMS and indicate proficiency level attained

APPENDIX C – HHS LEARNING PORTAL DOMAIN STRUCTURE