



LEARNING MANAGEMENT SYSTEM (LMS) MANAGING YOUR LEARNING PLAN

A Learning Plan is used to organize training you will take in the future. Learning Plans can be managed by the Learner and/or the manager of the Learner. This QRG will guide you through setting up your Learning Plan.

1. Log into the LMS.

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

2. Click the **Plans** link in the left navigation menu.

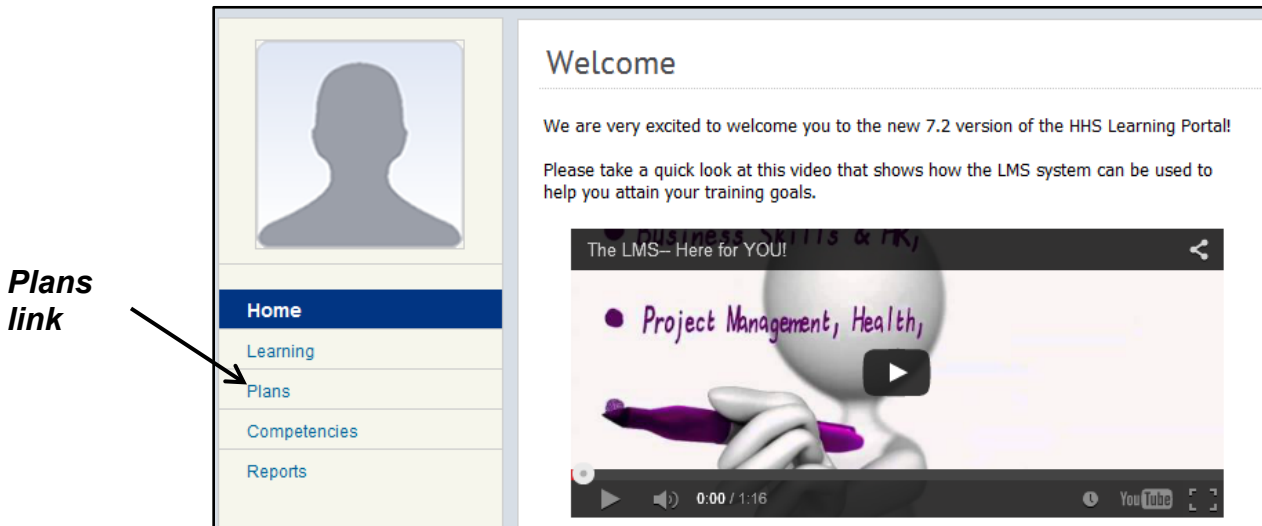


Figure 1 – Plans link on the LMS home page

3. Click the **Add Activity** button.

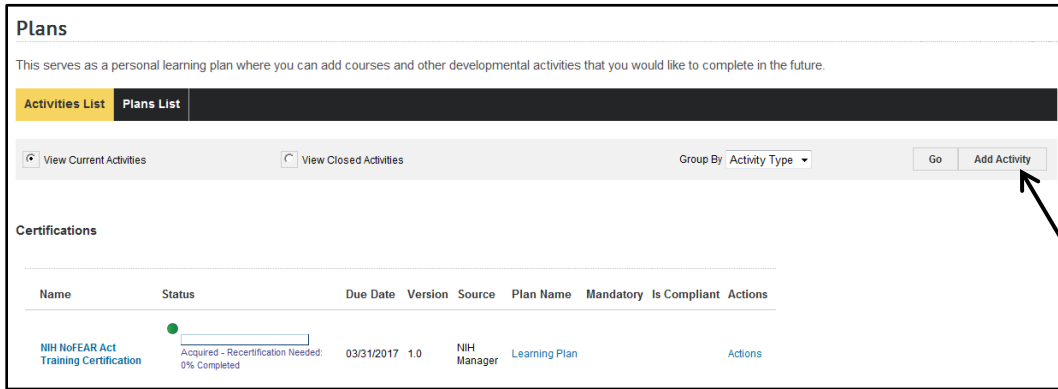


Figure 2 – Add Activity button in the Plans section

4. Pick an activity type you want to add.

NOTE: The screen shots below detail when the Add Course activity is selected. Other activities may have varying screens that follow from this point.

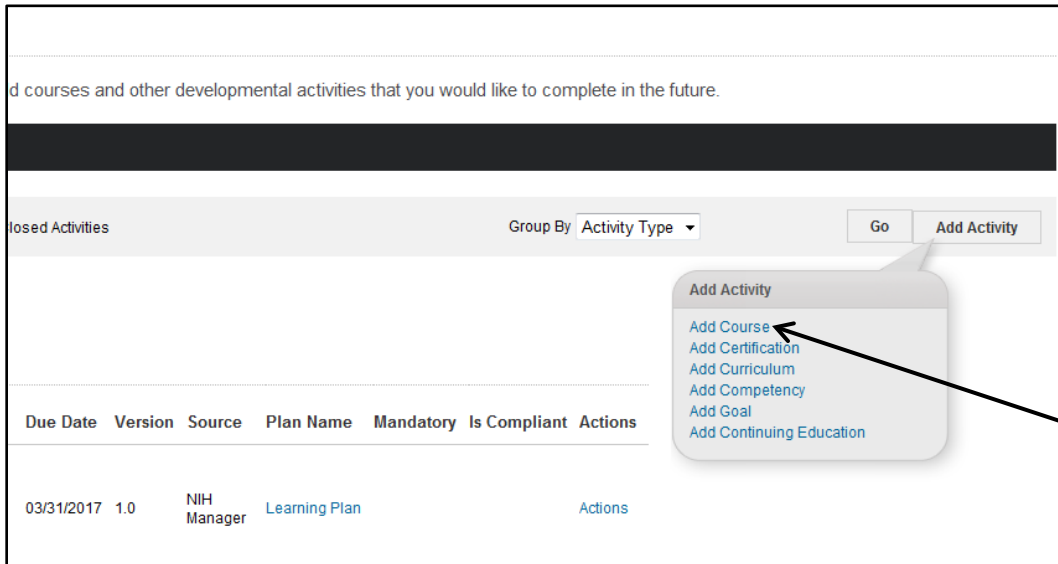


Figure 3 – Add Course link on the Add Activity action menu

- To select a Course, click the **Pick Course** pick list button.

The screenshot shows the 'Add Course' form. It has a title 'Add Course' at the top left. On the right side, there is a red asterisk followed by the text '* = required'. The form contains three main input areas: 'Course*' (a text box with a small pick list icon to its right), 'Notes' (a large text area with a vertical scrollbar), and 'Due Date' (a date picker). Below the 'Notes' area, there is a label 'Character Limit:64000' and a small calendar icon. At the bottom of the form, there are two buttons: 'Next' and 'Cancel'. An arrow points from the text 'Pick Course pick icon' to the pick list icon on the 'Course*' field.

Figure 4 – Pick Course pick icon on the Add Course screen

- Enter information in the Title, Course ID, and/or Domain fields and then click the **Search** button.

The screenshot shows the 'Select Course' form. It has a title 'Select Course' at the top left. The form contains three input fields: 'Title', 'Course ID', and 'Domain'. The 'Domain' field has a small pick list icon to its right. Below the input fields, there are two links: 'Configure' and 'Save Search Query'. To the right of these links is a 'Search' button. At the bottom of the form, there is a 'Close' button. An arrow points from the text 'Search button' to the 'Search' button.

Figure 5 – Search button on the Select Course screen

7. Click the checkbox for the **Select** field for the Course to add to your plan.

Select Course

Title: %ethics% Course ID: []
Domain: []

[Configure](#) | [Save Search Query](#)

Courses [Print](#) | [Export](#) | [Modify Table](#)

Showing 16 out of 16 results

Select	Version	Course ID	Title
<input type="checkbox"/>	1	NIHRETHICS100	SAIC-F Ethics Training
<input checked="" type="checkbox"/>	1.0	HHS-IEO	HHS Initial Ethics Orientation
<input type="checkbox"/>	2	00050473	SAIC-Frederick Ethics Training
<input type="checkbox"/>	2.2	FGOV_01_A22_LC_ENUS	Government Ethics

**Select
checkbox**

Figure 6 – Select checkbox on the Select Course screen

8. After you click the checkbox for the course, you should receive a pop-up message advising you that the course has been selected. Click the **OK** button to continue.

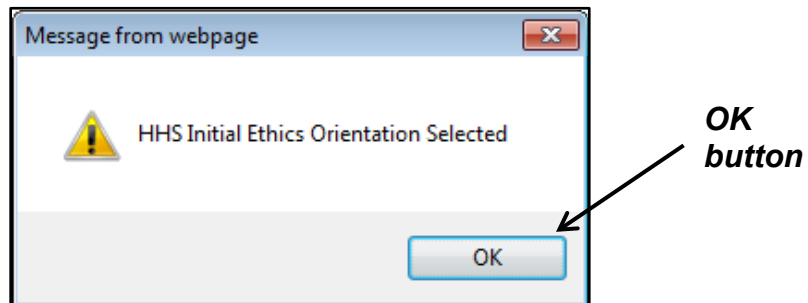


Figure 8 – OK button on the confirmation pop-up window

9. You should be returned to the Add Course screen with the Course field populated with the name of the Course and the Due Date field populated with today's date. Update the Due Date field as needed and then add any optional notes. Click the **Next** button to continue.

Add Course * = required

Course*

Notes

Character Limit:64000

Due Date

Next button

Figure 9 – Next button on the Add Course screen with Course and Due Date populated

10. Click **Close** on the following confirmation screen.

Add Activity To Plan

Confirmation

The selected activity has been assigned.

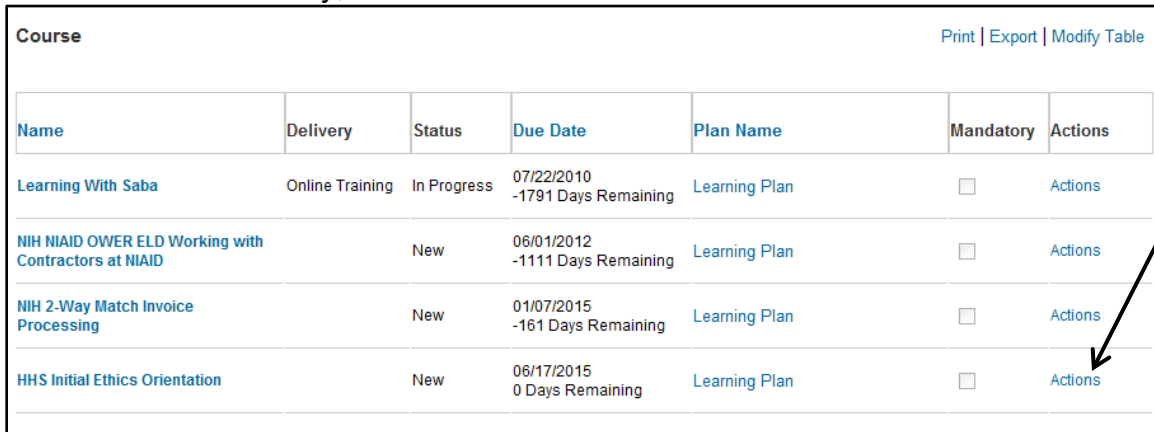
Close button

Figure 10 – Close button on the Add Activity To Plan screen

NOTE: The screen will refresh. Your specified activity will now have a status of New.

Deleting an activity from your plan:

1. To delete an activity, click the **Actions** link in the Actions column.

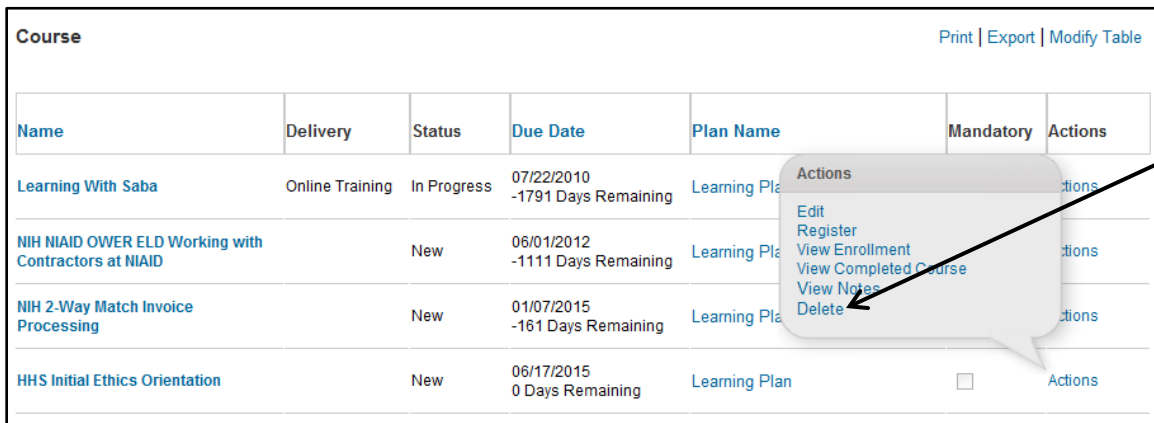


Name	Delivery	Status	Due Date	Plan Name	Mandatory	Actions
Learning With Saba	Online Training	In Progress	07/22/2010 -1791 Days Remaining	Learning Plan	<input type="checkbox"/>	Actions
NIH NIAID OWER ELD Working with Contractors at NIAID		New	06/01/2012 -1111 Days Remaining	Learning Plan	<input type="checkbox"/>	Actions
NIH 2-Way Match Invoice Processing		New	01/07/2015 -161 Days Remaining	Learning Plan	<input type="checkbox"/>	Actions
HHS Initial Ethics Orientation		New	06/17/2015 0 Days Remaining	Learning Plan	<input type="checkbox"/>	Actions

Actions link

Figure 11 – Actions link in the Courses section on the Plans page

2. Click the **Delete** link from the Actions activity menu.



Name	Delivery	Status	Due Date	Plan Name	Mandatory	Actions
Learning With Saba	Online Training	In Progress	07/22/2010 -1791 Days Remaining	Learning Plan	<input type="checkbox"/>	Actions
NIH NIAID OWER ELD Working with Contractors at NIAID		New	06/01/2012 -1111 Days Remaining	Learning Plan	<input type="checkbox"/>	Actions
NIH 2-Way Match Invoice Processing		New	01/07/2015 -161 Days Remaining	Learning Plan	<input type="checkbox"/>	Actions
HHS Initial Ethics Orientation		New	06/17/2015 0 Days Remaining	Learning Plan	<input type="checkbox"/>	Actions

Delete link

Figure 12 – Delete link on the Actions activity menu

3. Click the **Learning Plan** checkbox and then click the **Delete from plans(s)** button.

Delete: HHS Initial Ethics Orientation

IMPORTANT NOTE: Items assigned by a Prescriptive Rule cannot be deleted by a manager.

This activity is assigned by the following source(s).

Select	Source Type	Source Name
<input type="checkbox"/>	Person	NIH Learner

This activity resides on the following plan(s).

<input type="checkbox"/>	Plan Name	Status
<input type="checkbox"/>	Learning Plan	Activated

Learning Plan checkbox



Delete from plan(s) button



Figure 13 – Learning Plan checkbox and Delete from plan(s) button

4. A confirmation screen will be displayed. Click the **Close** button to return to your Learning Plans page.

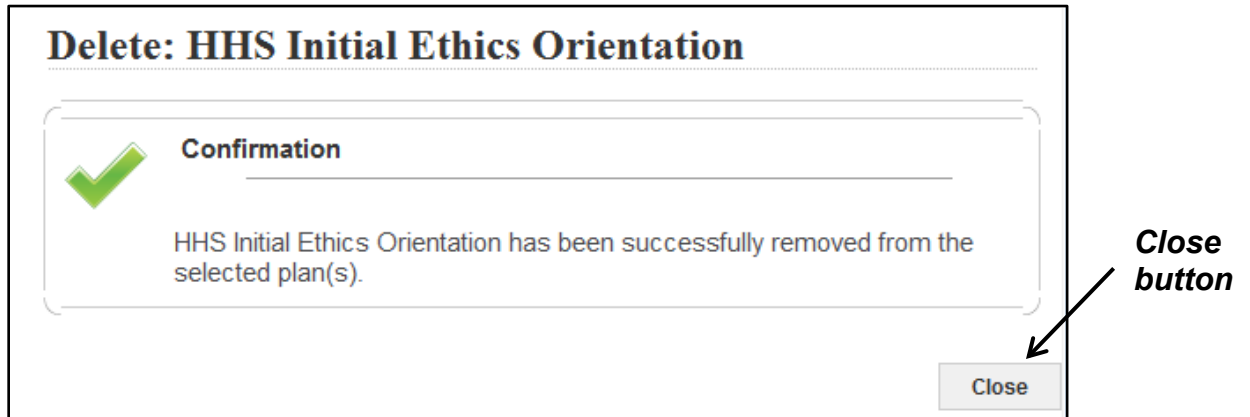


Figure 14 – Close button on the Delete course from Learning Plan confirmation screen

NOTE: You can only delete activities that you have added and that are currently not in progress.

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