



## ***LEARNING MANAGEMENT SYSTEM (LMS)*** **RUNNING THE HHS COURSE** **COMPLIANCE/EXCEPTION REPORT BY** **ORGANIZATION**

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

1. Log into the LMS.
2. Click the **Admin** icon.



**Admin  
icon**

Figure 1 – Admin icon

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

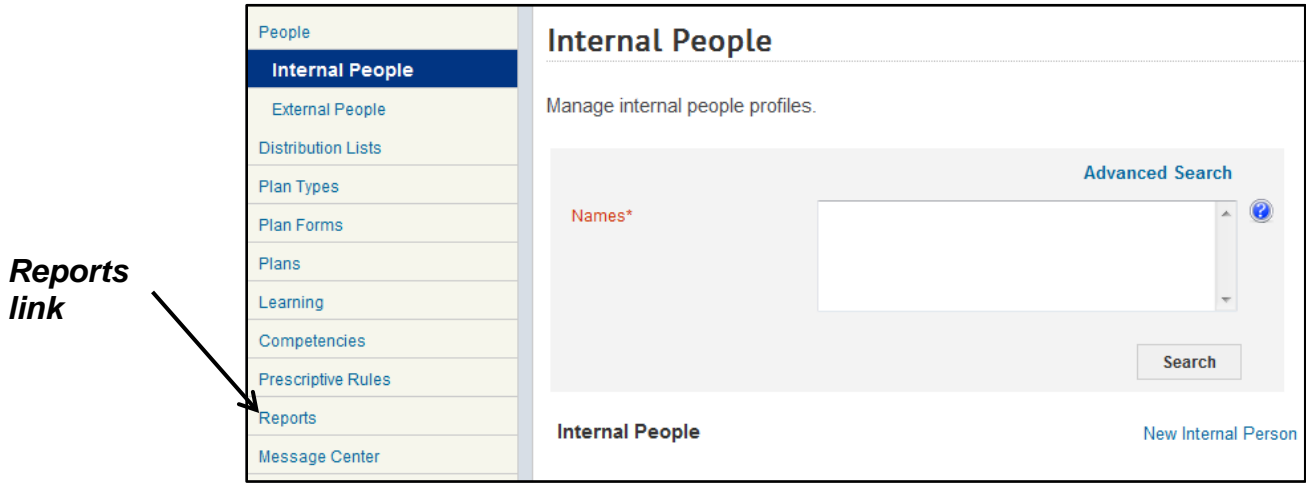


Figure 2 – Reports link

4. Select **HHS Custom Reports** from the Category pull-down menu and click the **Search** button.

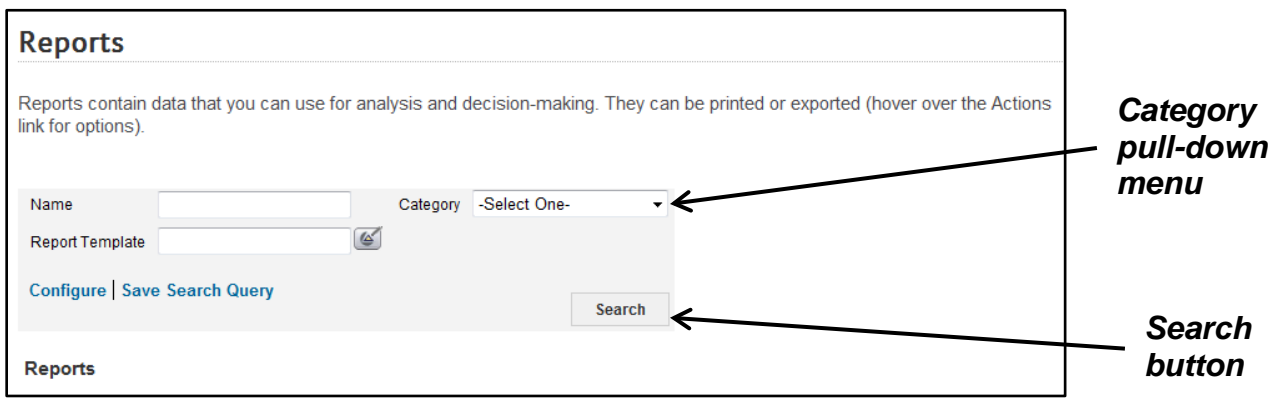


Figure 3 – Category pull-down menu and Search button

- Click the **Actions** link for HHS Course Compliance/Exception Report by Organization.

HHS Competency Summary by Job Series/Organization	HHS Competency Summary by Job Series/Organization	This report will provide competency assessment information on learner, by job series and/or organization.	Managed Report	<a href="#">Actions</a>
HHS Course Catalog Report	HHS Course Catalog Report	This report enables an administrator to pull a Course Catalog by Domain, Course Title, Category, Delivery Type, Competency and/or Job	Managed Report	<a href="#">Actions</a>
HHS Course Compliance/Exception Report by Organization	HHS Course Compliance/Exception Report by Organization	Report on people in an organization (or its sub-orgs) who have, or have not, completed a specific course or equivalent during the date range you specify. The results can be further refined using the employee EOD Date, Course Domain, and Person Type. This report was custom developed by NIH.	Managed Report	<a href="#">Actions</a>

**Actions link** →

Figure 4 – Actions link

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

HHS Competency Summary by Job Series/Organization	HHS Competency Summary by Job Series/Organization	This report will provide competency assessment information on learner, by job series and/or organization.	Managed Report	Actions
HHS Course Catalog Report	HHS Course Catalog Report	This report enables an administrator to pull a Course Catalog by Domain, Course Title, Category, Delivery Type, Competency and/or Job	Managed Report	Actions
HHS Course Compliance/Exception Report by Organization	HHS Course Compliance/Exception Report by Organization	Report on people in an organization (or its sub-orgs) who have, or have not, completed a specific course or equivalent during the date range you specify. The results can be further refined using the employee EOD Date, Course Domain, and Person Type. This report was custom developed by NIH.	Managed Report	Actions

**Execute link**

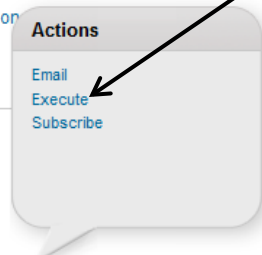





Figure 5 – Execute link on the Actions activity menu


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

### Report Parameters - HHS Course Compliance/Exception Report by Organization

Course Title (Equivalents incl. in results)\*  

From Date\*  


To Date\*  

Organization ID\*  

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain  

Person Type:

Person Status\*

Report Type\*

**Course Title pick icon**

Figure 6 – Course Title pick icon

- Use the Title, Course ID, Domain, and/or Audience Type/Subtype fields and the **Search** button to search for the course.

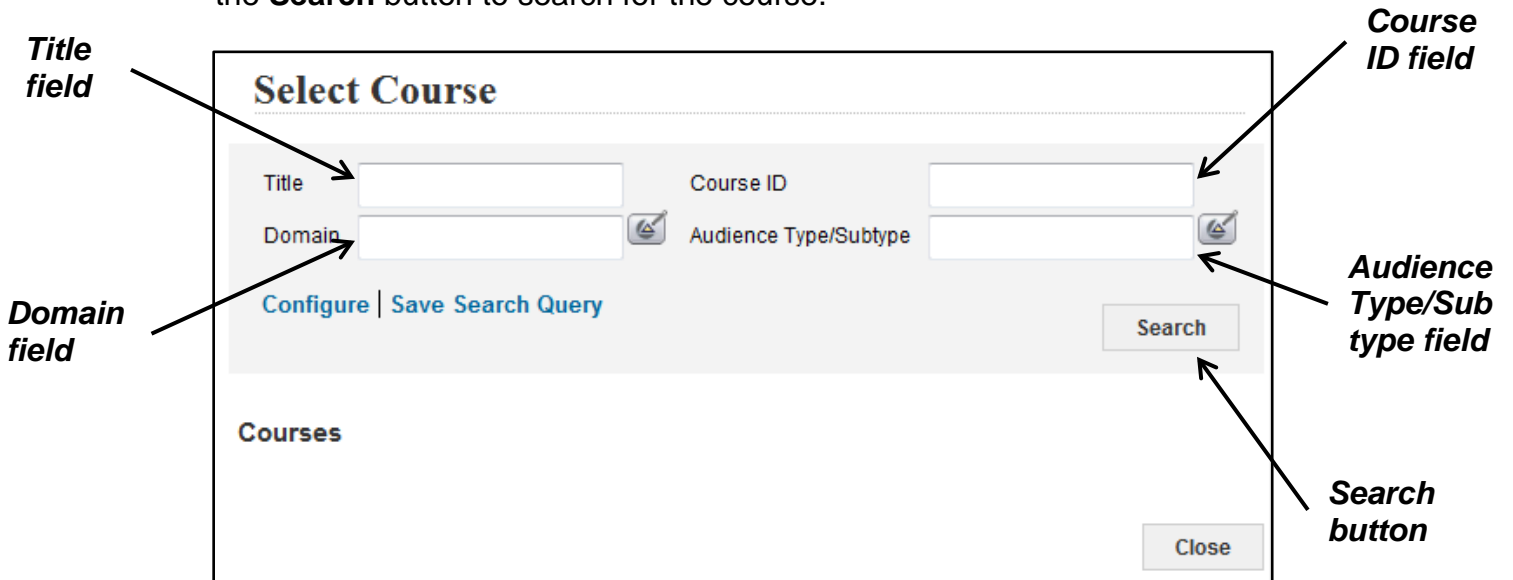


Figure 7 – Title, Course ID, Domain, and Audience Type/Subtype fields and the Search button

- Click the Select checkbox to select the course.

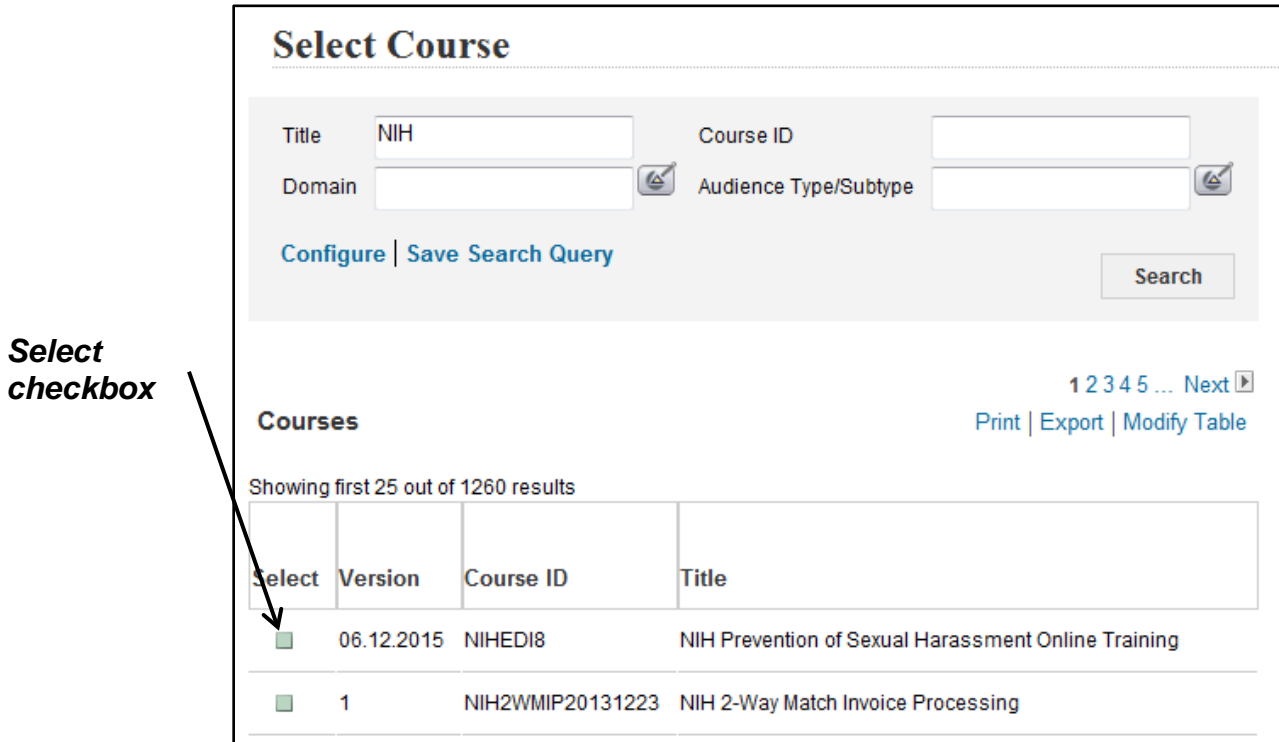





Figure 8 – Select checkbox


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

**Report Parameters - HHS Course Compliance/Exception Report by Organization**

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm 

From Date\*  


To Date\*  

Organization ID\*  

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain  

Person Type: -Select One-

Person Status\* -Select One-

Report Type\* -Select One-

*From Date pick icon*

*To Date pick icon*

Figure 9 – From Date and To Date pick icons

11. Enter the Organization ID in the Organization ID field. Alternately, you can use the **Organization ID** pick icon to select the Organization ID.

Report Parameters - HHS Course Compliance/Exception Report by Organization

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm

From Date\* 01/01/2012

To Date\* 12/31/2014

Organization ID\*

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain

Person Type: -Select One-

Person Status\* -Select One-

Report Type\* -Select One-

Generate Report Cancel

*Organization ID pick icon*

Figure 10 – Organization ID field

12. Use the **Name** field and the **Search** button to search for an Organization ID.

Select Internal Organizations

Name  Number

City  Audience Type

Configure | Save Search Query

Search

Internal Organizations

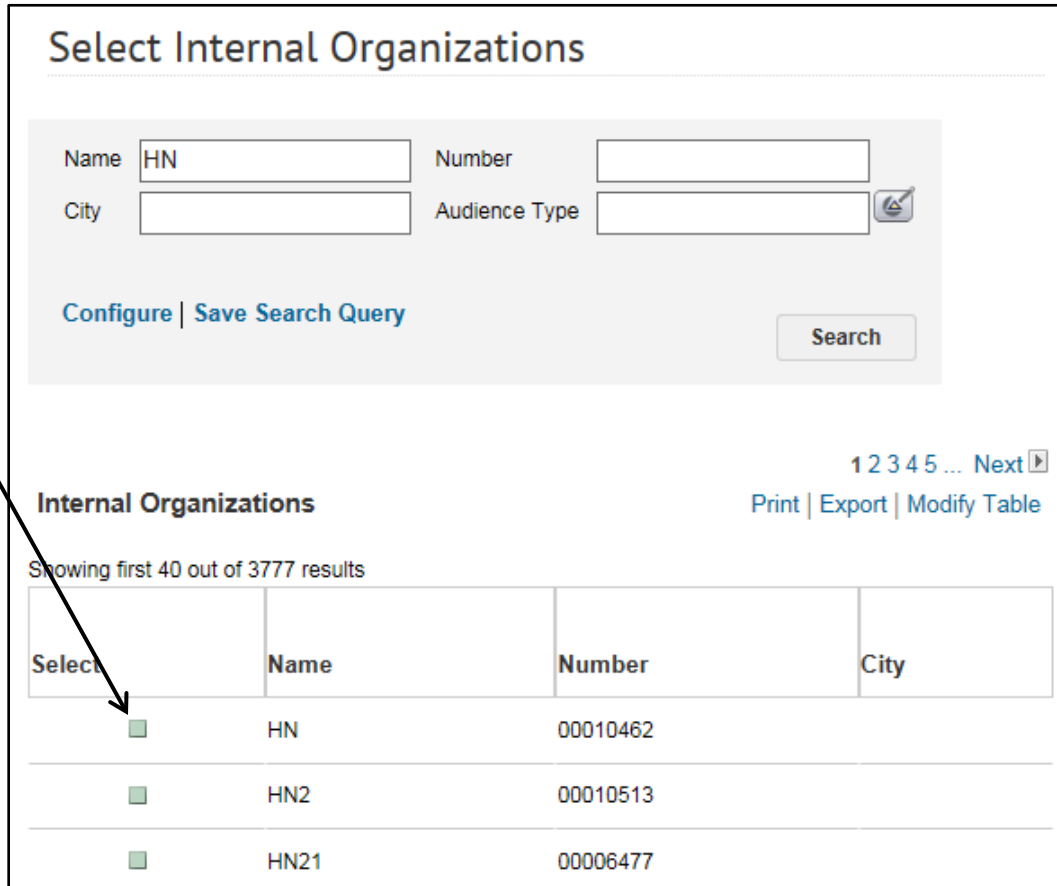
Close

*Name field*

*Search button*

Figure 11 – Name field and Search button

13. Click the Select checkbox to select the Organization.



**Select Internal Organizations**

Name  Number

City  Audience Type

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

**Internal Organizations** 1 2 3 4 5 ... Next ▾  
[Print](#) | [Export](#) | [Modify Table](#)

Showing first 40 out of 3777 results

Select	Name	Number	City
<input type="checkbox"/>	HN	00010462	
<input type="checkbox"/>	HN2	00010513	
<input type="checkbox"/>	HN21	00006477	

**Select  
checkbox**

Figure 12 – Select checkbox



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

***Include Child Organizations checkbox***

**Report Parameters - HHS Course Compliance/Exception Report by Organization**

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm

From Date\* 01/01/2012

To Date\* 12/31/2014

Organization ID\* HN

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain

Person Type: -Select One-

Person Status\* -Select One-

Report Type\* -Select One-

Generate Report Cancel

Figure 13 – Include Child Organizations checkbox

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

**Report Parameters - HHS Course Compliance/Exception Report by Organization**

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm

From Date\* 01/01/2012

To Date\* 12/31/2014

Organization ID\* HN

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain

Person Type: -Select One-

**Person Status\***

**Report Type\***

Active Accounts Only

All Accounts

Deactivated Accounts Only

Generate Report Cancel

*Person Status pull-down menu*

Figure 14 – Person Status pull-down menu

16. To run a Compliance report, select Compliance from the Report Type pull-down menu. Select Exception from the Report Type pull-down menu to run an Exception report. Select All to view both Compliance and Exception information in the same report.

Report Parameters - HHS Course Compliance/Exception Report by Organization

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm

From Date\* 01/01/2012

To Date\* 12/31/2014

Organization ID\* HN

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain

Person Type: -Select One-

Person Status\* Active Accounts Only

Report Type\* **All**  
Compliance  
Exception

Generate Report Cancel

*Report Type pull-down menu*

Figure 15 – Report Type pull-down menu

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

17. Select the **Generate Report** button.

Report Parameters - HHS Course Compliance/Exception Report by Organization

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm

From Date\* 01/01/2012

To Date\* 12/31/2014

Organization ID\* HN

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain

Person Type: -Select One-

Person Status\* Active Accounts Only

Report Type\* All

Generate Report Cancel

Figure 16 – Generate Report button

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

Print this report icon

HHS Course Compliance/Exception Report by Organization

Course Title: NIH Prevention of Sexual Harassment Online Training

From Date: 01/01/2012 EOD Start Date: Course Domain:

To Date: 12/31/2014 EOD End Date: Person Status: Active

Org ID: HN Include Child Org: True Person Type:

Report Type: All

Summary

Total Records: 35,628 # Complete: 13,852 # Incomplete: 21,776

% Complete: 39 % Incomplete: 61

ORG ID	LAST NAME	FIRST NAME	HHS ID	EOD DATE	PERSON TYPE	MANAGER	EMAIL	COMPLETION DATE	PAY PLAN	PERSON STATUS	SUPRV STATUS
--------	-----------	------------	--------	----------	-------------	---------	-------	-----------------	----------	---------------	--------------

Figure 17 – Print this report icon

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

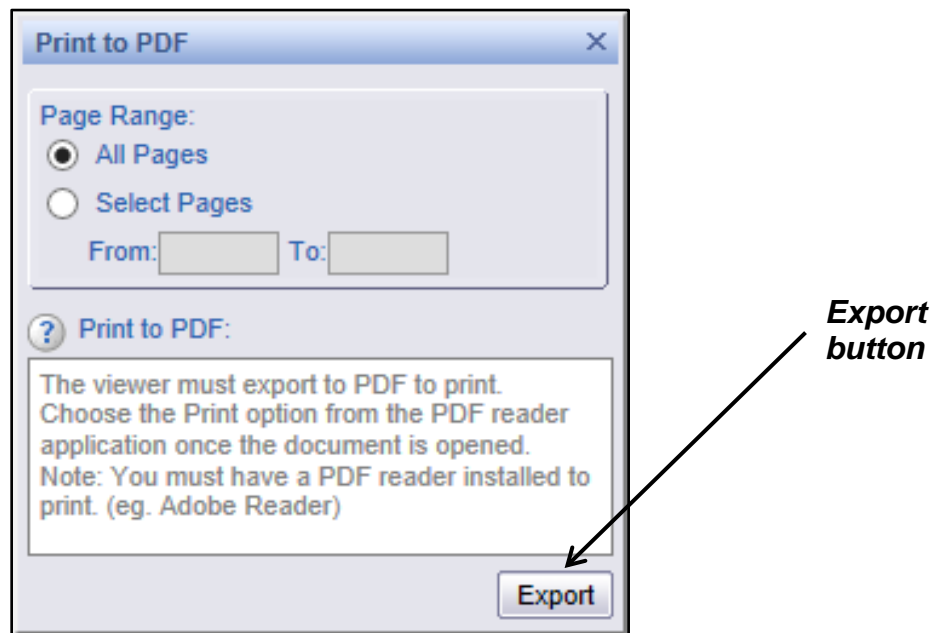


Figure 18 – Export button

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

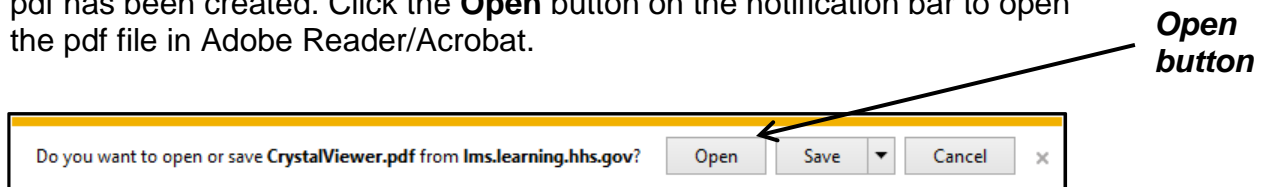


Figure 19 – Open button

21. Print the file from Adobe Reader/Acrobat.

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