National Institutes of Health
Office of Management

LEARNING MANAGEMENT SYSTEM (LMS)

SUBSCRIBING TO A REPORT

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

1. Log into the LMS.

2. Click the **Admin** icon.

Figure 1 – Admin icon

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

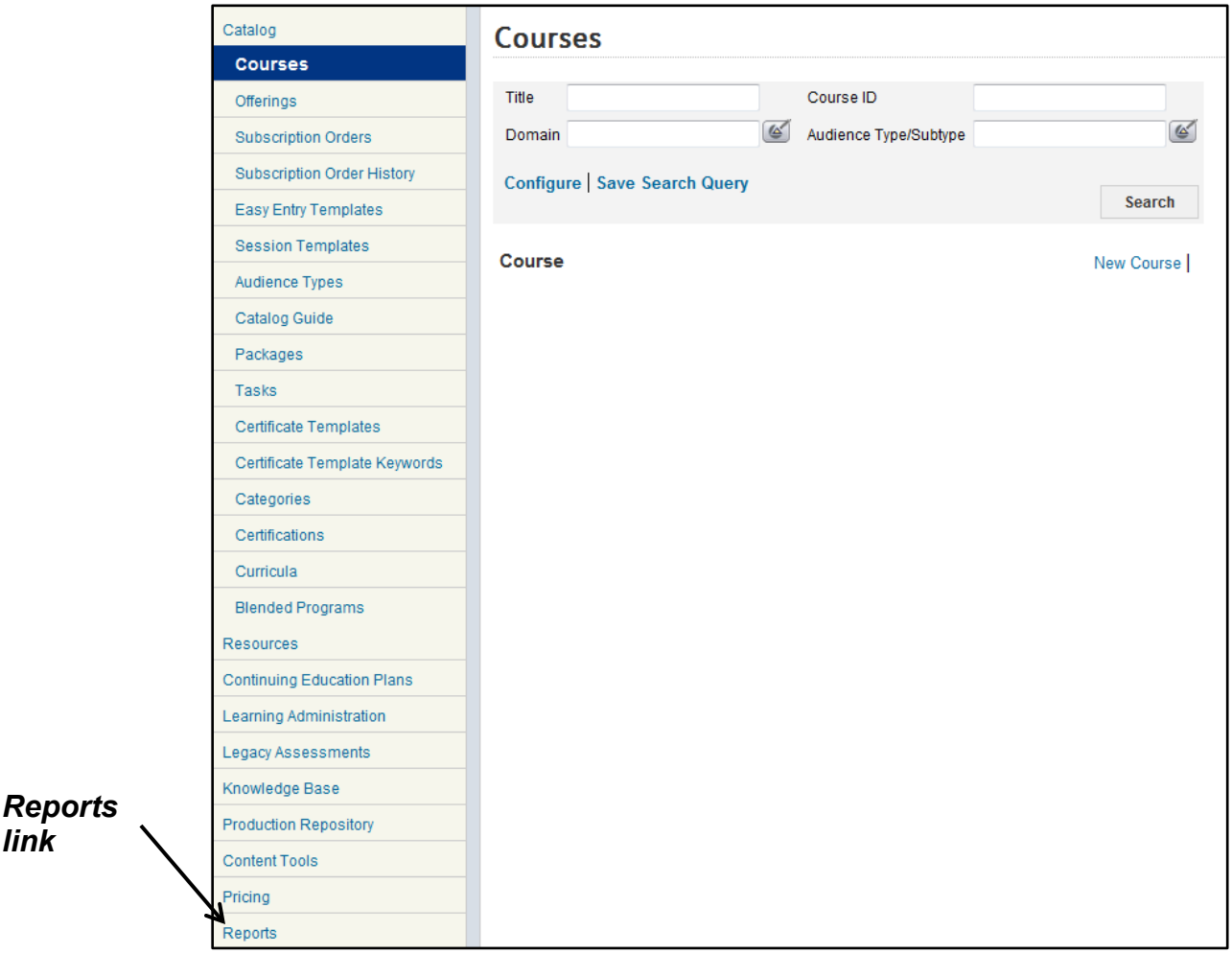

Figure 2 – Reports link

4. Enter the name of the report in the Name field and click the **Search** button.

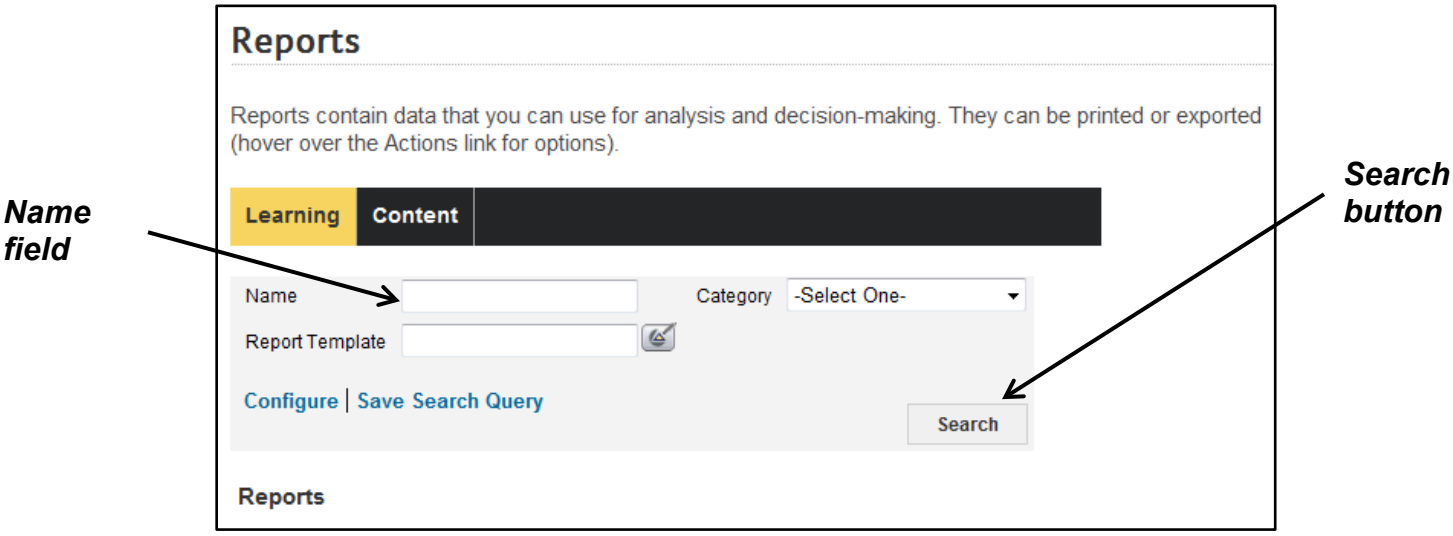

Figure 3 – Name field and Search button

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

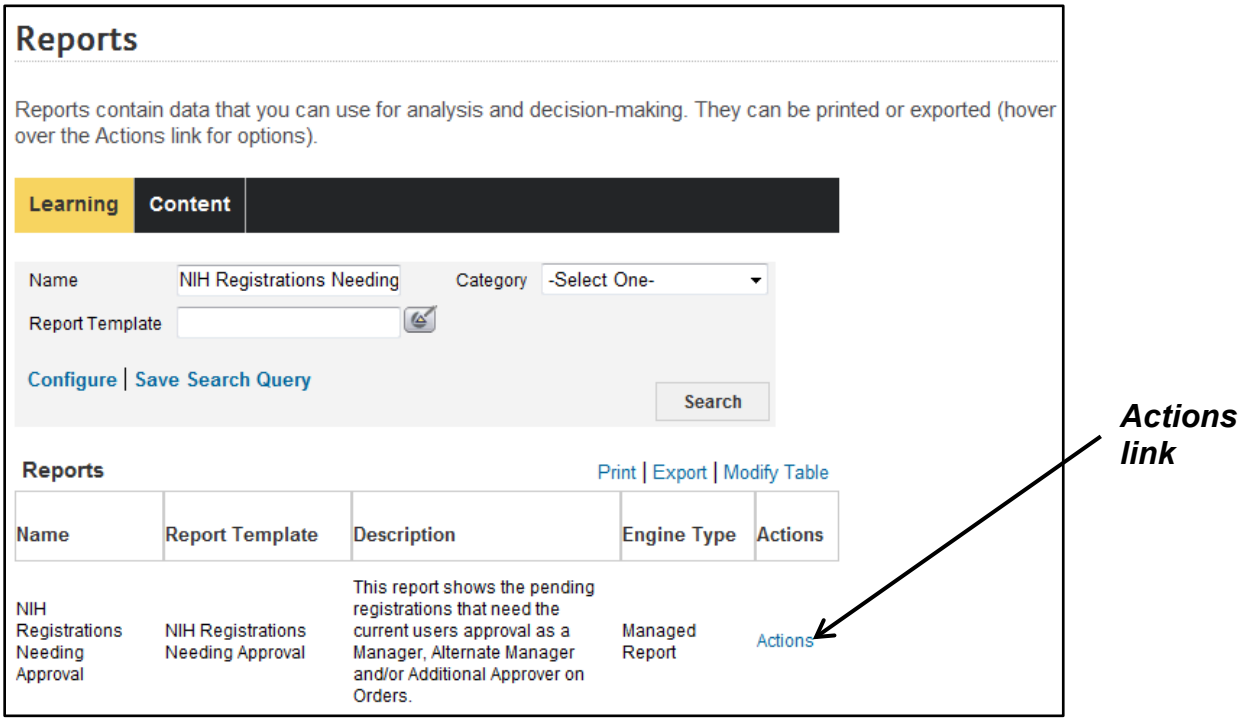

Figure 4 – Actions link

6. Click the **Subscribe** link in the Actions activity menu.

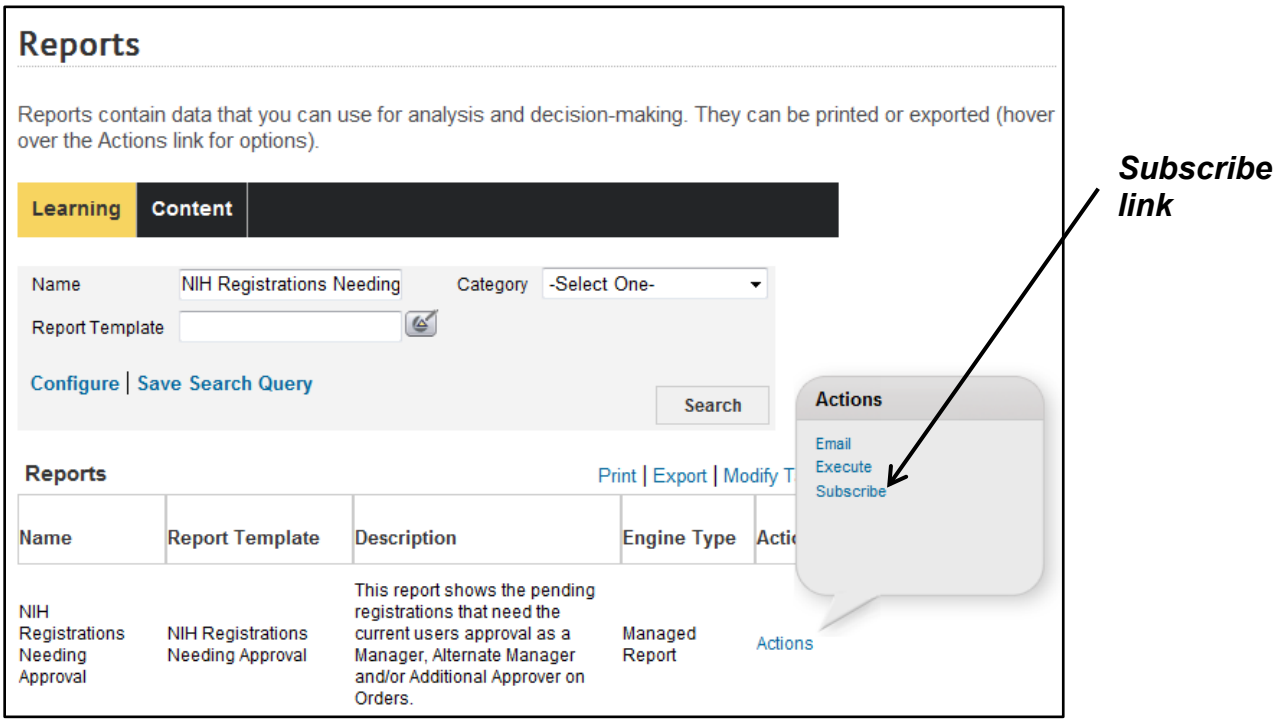

Figure 5 – Subscribe link on the Actions activity menu

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

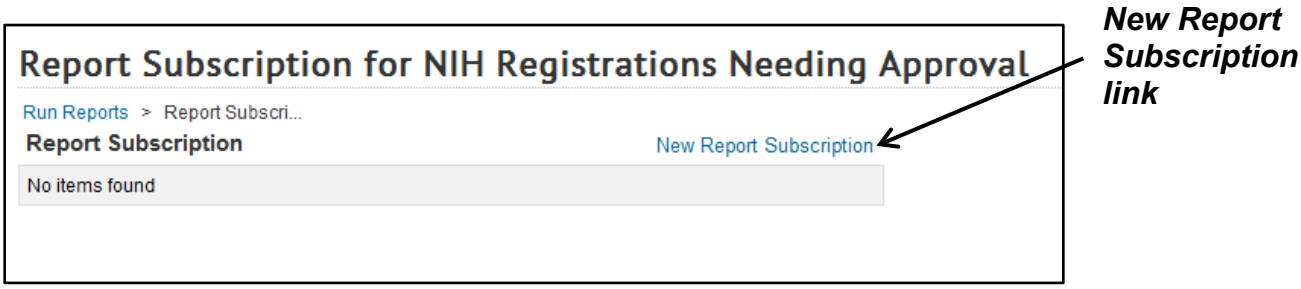

Figure 6 – New Report Subscription link

8. The Report Subscription page is displayed for the NIH Registrations Needing Approval report.

Report Subscription for NIH Registrations Needing Approval

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

* = required

Report Subscription Name*

Description*

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

Character Limit:255

Subject* NIH Registrations Needing Approva

Mail Text*

Character Limit:255

Report Format* Acrobat Format (PDF)

Occurs Daily Weekly Monthly

Occurs Daily

Every* 1 day(s)

Frequency Once Every 1 Hour(s)

Start Time* a.m. p.m.

Start Date*

Frequency-Once

Preview Report Save Cancel

Figure 7 – Report Subscription page

Complete the following mandatory fields:

- Report Subscription Name – enter a meaningful name for the report

- Description – enter a brief description for the scheduled report

- To Email Address(es) – enter the full email address (e.g., firstname.lastname@nih.gov), multiple addresses should be separated by a semi-colon (;)

- Subject – this field will populate the Subject field of the email messages sent from the LMS

- Mail Text – this field will populate the Body of the email messages sent from the LMS; include contact information so that the recipients can opt-out of the report if they no longer want to receive it

- Report Format – select Adobe Format or MS Excel 97-2000

- Occurs – choose the occurrence based on the following information:

  - Daily Occurrence – this option delivers the report every set number of days. Entering a value of 1 would send the report daily; entering a value of 2 would send it every other day; entering a value of 3 would send it every third day.

  - Weekly Occurrence – this option delivers the report each week on the specified days. Click the checkbox to include the day in the delivery cycle.

  - Monthly Occurrence – this option delivers the report every set number of months on the set day number. Entering a value of 1 for the month and 15 for the day of the month would send the report on the 15th day of each month; entering a value of 3 for the month and 28th for the day of the month would send the report on the 28th day of every third month (for a quarterly report).

- Frequency – use the default option of Once

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

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

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

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

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