



## **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.

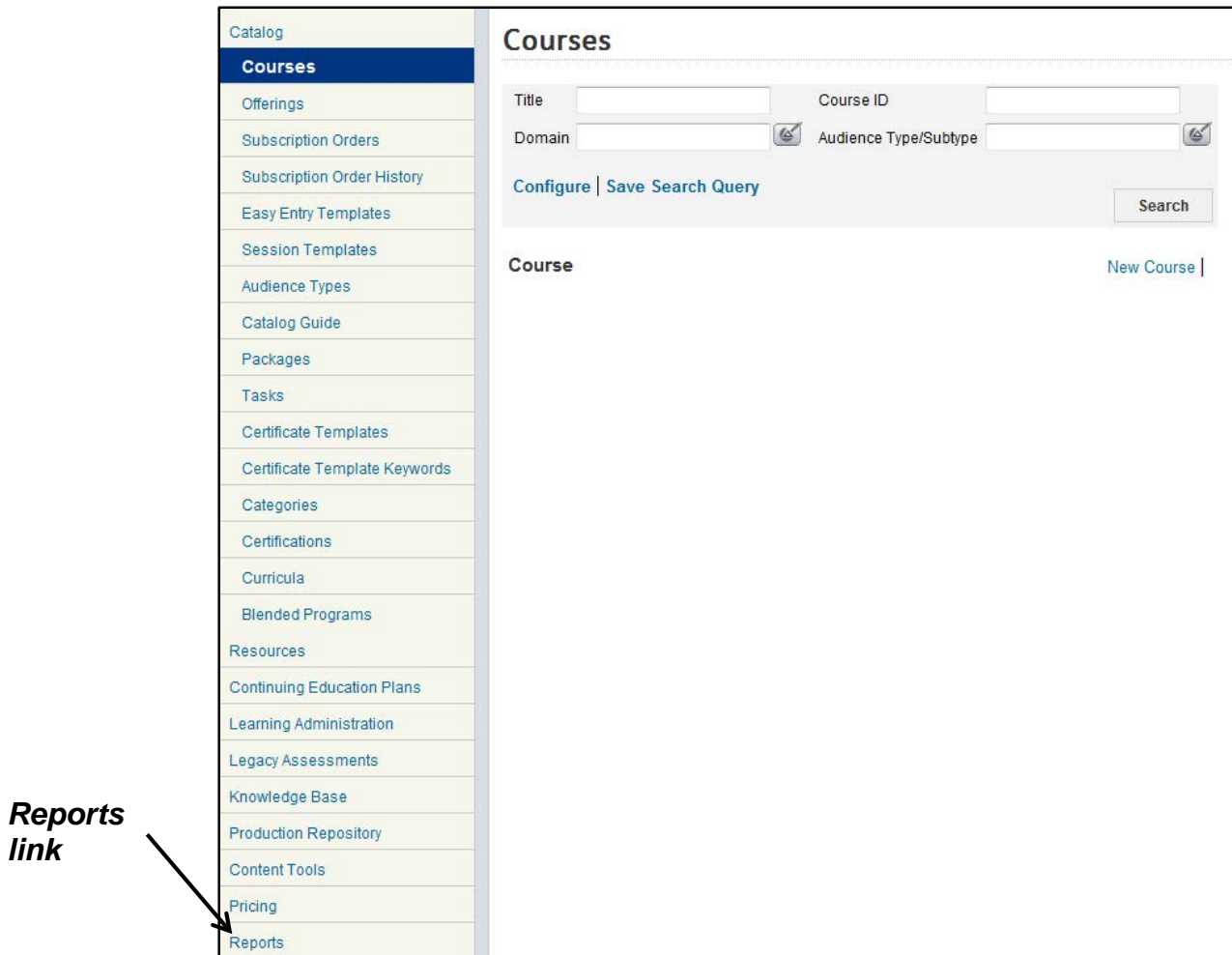


Figure 2 – Reports link

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

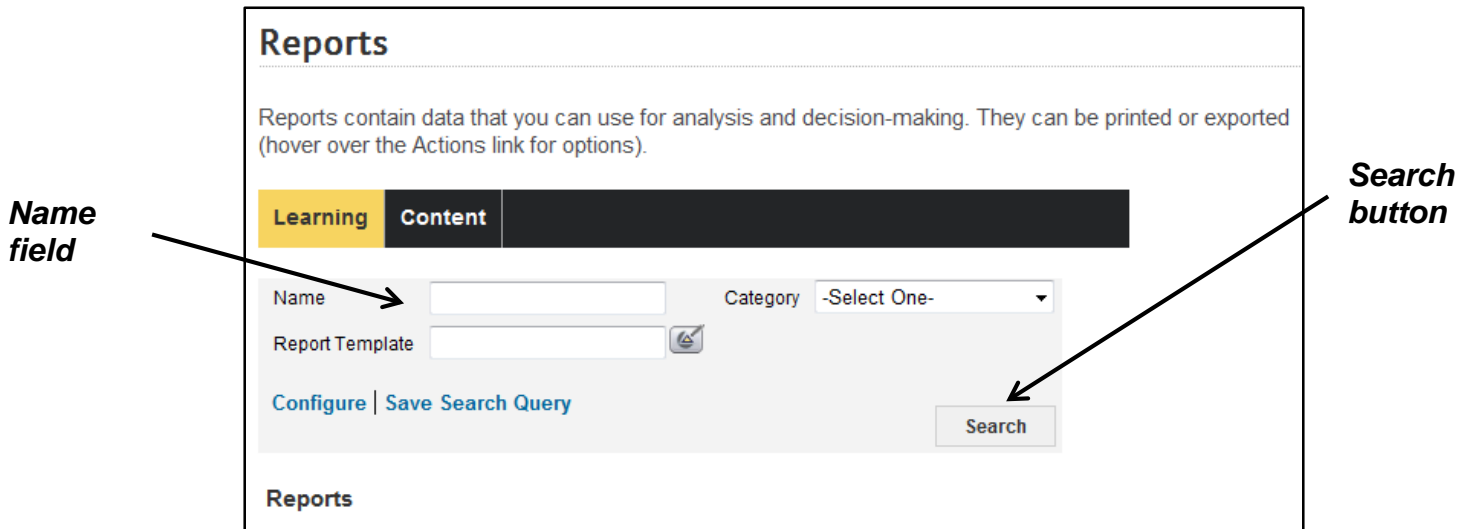


Figure 3 – Name field and Search button

- Click the **Actions** link for the report. The HHS Mandatory Training by Audience Type report will be used for the purposes of demonstration.

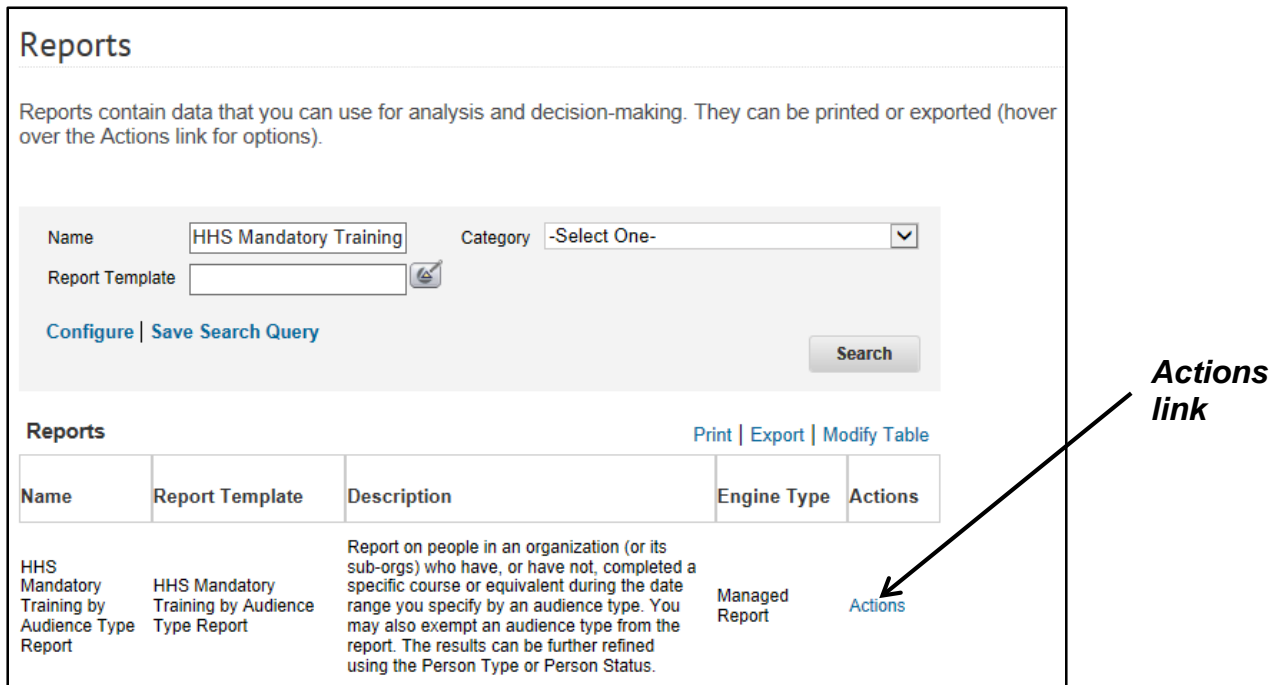


Figure 4 – Actions link

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

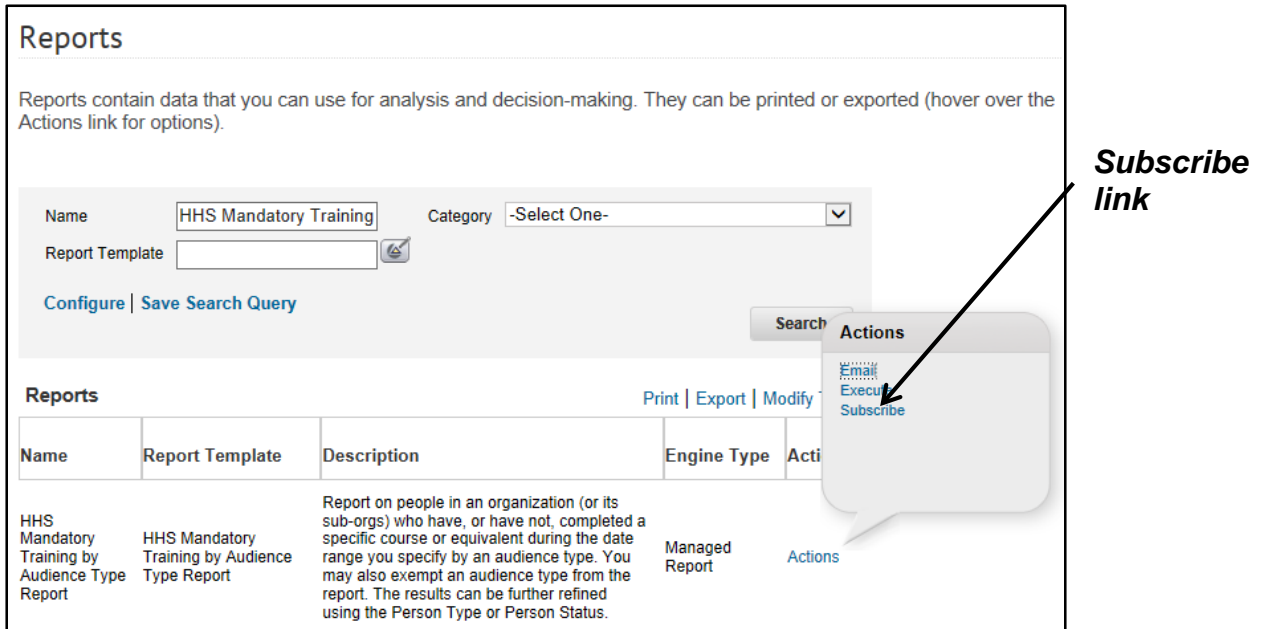


Figure 5 – Subscribe link on the Actions activity menu

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

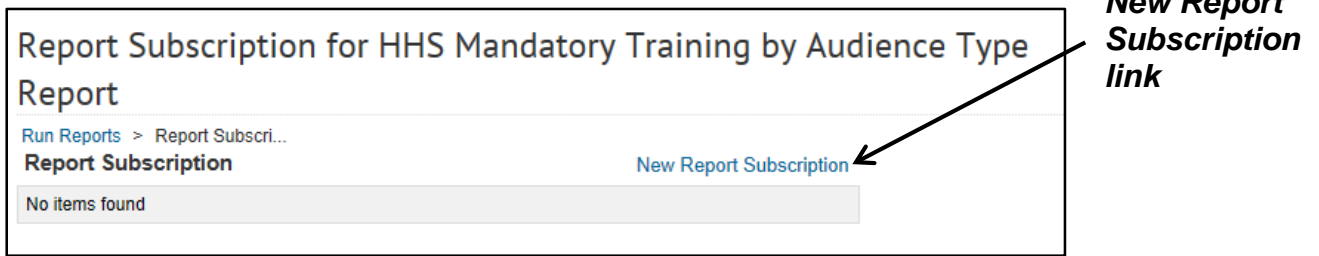


Figure 6 – New Report Subscription link

- The Report Subscription page is displayed for the HHS Mandatory Training by Audience Type report.

**Report Subscription for HHS Mandatory Training by Audience Type Report**

Run Reports > Report Subscri... > Report Subscri... \* = required

Report Subscription Name\*

Description\*

Course Title\*

Course Equivalents

From Date\*

To Date\*

Organization ID (Use % to include sub-orgs)\*

Mandatory Audience Type\*

Exempt Audience Type

Person Type

Person Status\*

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\*

Mail Text\*

Character Limit:255

Report Format\*

Occurs  Daily  Weekly  Monthly

Occurs Daily **Every\***  day(s)

Frequency  Once  Every  Hour(s)

Frequency-Once

Start Time\*  :  a.m.  p.m.

Start Date\*

Figure 7 – Report Subscription page

Complete the following fields to create the Report Subscription, mandatory fields are identified with an asterisk (\*):

- Report Subscription Name\* – enter a meaningful name for the report, this will be displayed in the LMS [255 characters maximum]
- Description\* – enter a brief description for the scheduled report (a suggestion is to enter the purposed or desired outcome for why this Subscription is being created) [255 characters maximum]
- Course Title\* – select the **Course Title** pick icon to select a Course to use in the report. (Refer to Steps 8 and 9 in the TS103-A Running the Mandatory Training by Audience Type Report QRG for additional instructions)
- Course Equivalents – select the checkbox to include Equivalents in the Course
- From Date\* – this pull-down menu specifies the starting date for completions for the report. Select from the following options:
  - Number of days before the date on which the report is run – add a number to the **Enter Number of Days** field to determine the starting date for completions for the report. As an example, if the Subscription is created on 02/01/2016 with the Number of days before the date on which the report is run option and the Enter Number of Days field populated with 14, the starting date for completions for the report would be 01/18/2016 (14 days prior to 02/01/2016)
  - Date on which report is run – this option will use the date on which the Subscription is created as the starting date for completions for the report
  - Number of days after the date on which the report is run – add a number to the **Enter Number of Days** field to determine the starting date for completions for the report. As an example, if the Subscription is created on 02/01/2016 with the Number of days before the date on which the report is run option and the Enter Number of Days field populated with 14, the starting date for completions for the report would be 02/15/2016 (14 days after to 02/01/2016)
  - Fixed Date – enter a specific date in the **Enter Date** field to use as the starting date for completions for the report

- To Date\* – this pull-down menu specifies the end date for completions for the report. Select from the following options:
  - Number of days before the date on which the report is run – add a number to the **Enter Number of Days** field to determine the end date for completions for the report. As an example, if the Subscription is created on 02/01/2016 with the Number of days before the date on which the report is run option and the Enter Number of Days field populated with 14, the end date for completions for the report would be 01/18/2016 (14 days prior to 02/01/2016)
  - Date on which report is run – this option will use the date on which the Subscription is created as the end date for completions for the report
  - Number of days after the date on which the report is run – add a number to the **Enter Number of Days** field to determine the end date for completions for the report. As an example, if the Subscription is created on 02/01/2016 with the Number of days before the date on which the report is run option and the Enter Number of Days field populated with 14, the end date for completions for the report would be 02/15/2016 (14 days after to 02/01/2016)
  - Fixed Date – enter a specific date in the **Enter Date** field to use as the end date for completions for the report
- Organization ID\* – add your Organization ID to the **Organization ID** field. You can use a percent symbol (%) to search for all sub-Organizations
- Mandatory Audience Type\* - select the **Mandatory Audience Type** pick icon to select a Mandatory Audience Type to use in the report. (Refer to Steps 14 - 16 in the TS103-A Running the Mandatory Training by Audience Type Report QRG for additional instructions)
- Exempt Audience Type - select the **Exempt Audience Type** pick icon to select an Exempt Audience Type to use in the report. (Refer to Steps 18 - 20 in the TS103-A Running the Mandatory Training by Audience Type Report QRG for additional instructions)
- Person Type – to focus the report on a specific type of Learner, select the appropriate value from the pull-down menu
- Person Status\* – select **All Accounts** from the pull-down menu

- To Email Address(es)\* – enter the full email address (e.g., firstname.lastname@nih.gov), multiple email 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 day; 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 15<sup>th</sup> day of each month, entering a value of 3 for the month and 28<sup>th</sup> for the day of the month would send the report on the 28<sup>th</sup> day of every third month (for a quarterly report)
  - Frequency – use the default option of Once, do not change this value
  - 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 of 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
9. Click the **Save** button to activate the report subscription. The report will be sent to email recipients entered at the designated times.

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