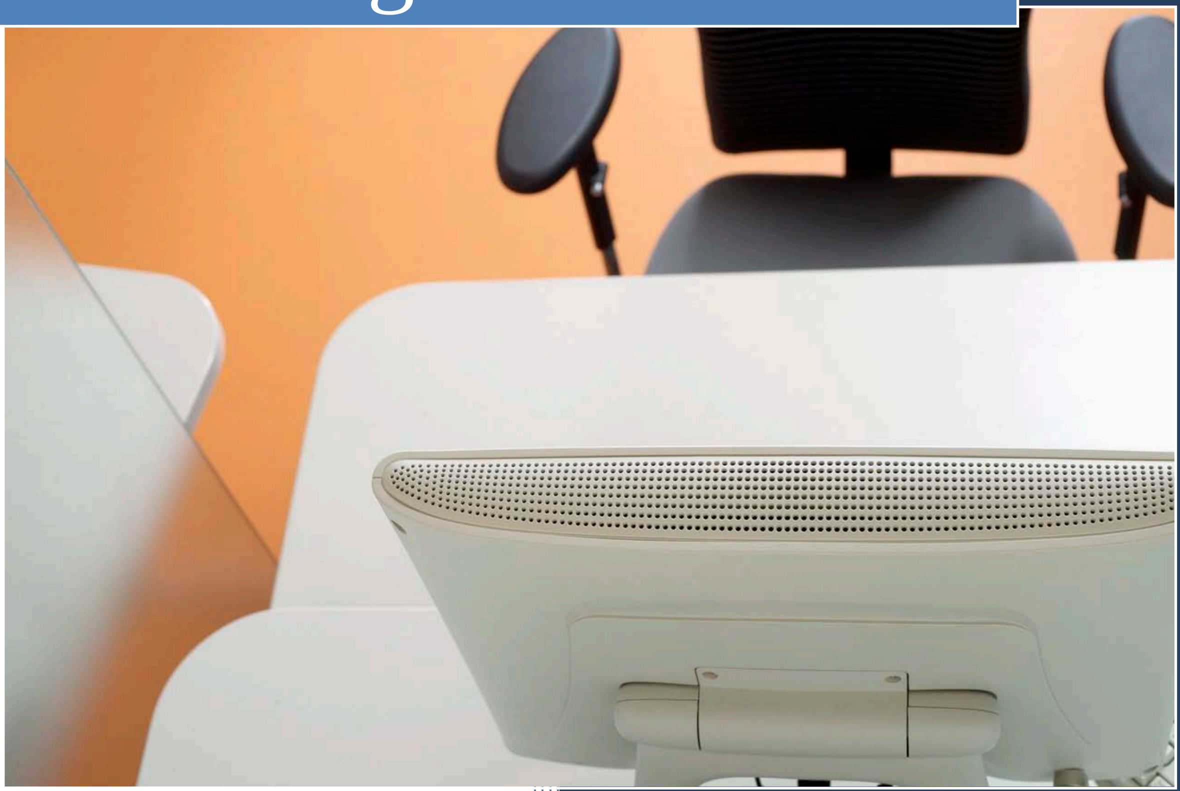
HHS Learning Portal

Local Learning Administrator



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HHS LEARNING PORTAL

LOCAL LEARNING ADMINISTRATOR

Version 1.0

National Institutes of Health Training Center

National Institutes of Health Training Center, Rockville 20852

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1.0	11/16/09	Kimberly Hill NIH LMS Program Manager	11/16/09	Initial publication

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LOCAL LEARNING ADMINISTRATOR

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. 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

Anyone given an NIH Enterprise Directory (NED) account will automatically be given an LMS account. Due to the nightly updates, all data changed in the learner profile will be overwritten, with the exception of the learner e-mail and manager fields.

The Learner Profile fields with which you should be most concerned are:

- **E-mail**: Accurate email addresses in the LMS will ensure learners receive notifications generated in the LMS.
- **Manager**: 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.
- **Organization**: People are grouped in the LMS according to Organization/SAC Code. (See Appendix A.) This code is used to build audience types (which restrict access to courses), narrow the scope of reports, etc. This code must be correct or learners will neither show up in reports correctly nor have access to the correct training opportunities.

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 and its staff and learning resources. (See Appendix C for a graphic depiction.)

Local Learning Administrator

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

Component	*Example…*
Business rules	NIH offerings do not, by default, require manager approval prior to registration.
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 Training Administrator security role at the NIH domain has permission to manage NIH courses, as well as everything in NIH sub-domains).

Every user in the LMS has the security role of Learner. 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:

- Training Administrator
- Content Administrator
- Domain System Administrator
- Human Capital Administrator

There is one Security Role that is defined by Organization/SAC code instead of the domain – Local Learning Registrar (a.k.a. Local Learning Administrator (LLA)). This restricts the LLA to performing actions associated with Learners within a specific organization or SAC code only.

LOCAL LEARNING ADMINISTRATOR ROLE

The LMS Local Learning Administrator role is a combination of the Human Capital Administrator - People and Registrar roles found within the LMS. The Local Learning Administrator is similar in function to the Super User role in the NIHITS system. With Local Learning Administrator privileges you will be able to:

- View and edit account profiles for learners
- Reset learner passwords
- View and edit transcripts for learners
- Add external learning to transcripts
- View enrollments, curricula, certifications, and/or courses assigned to learners
- Register learners for classroom and online training
- View registrations and orders
- Generate various reports

This user manual will guide you through the use of the privileges assigned to you as a Local Learning Administrator.

LMS TERMS AND DEFINITIONS

Audience Types – Audience Types are used to group learners in the system. Similarly, Audience Sub-Types allow for 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.

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

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.

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.

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.

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.

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:

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

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

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

Order – An order is created when a learner, manager or LMS administrator signs another person up for an offering.

LEARNER PROFILE

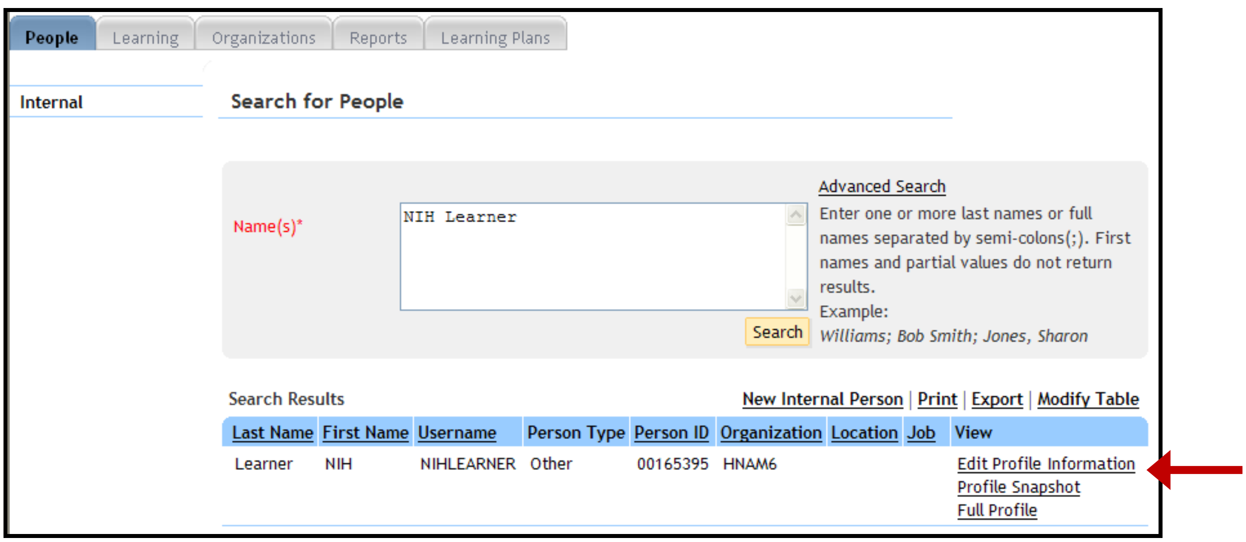
The Learner Profile contains information about each learner. As a Local Learning Administrator, there are two learner profile fields you may edit without the changes being overwritten by the next automated data feed. These fields are E-mail and Manager.

STEP-BY-STEP (VIEW/EDIT LEARNER PROFILE)

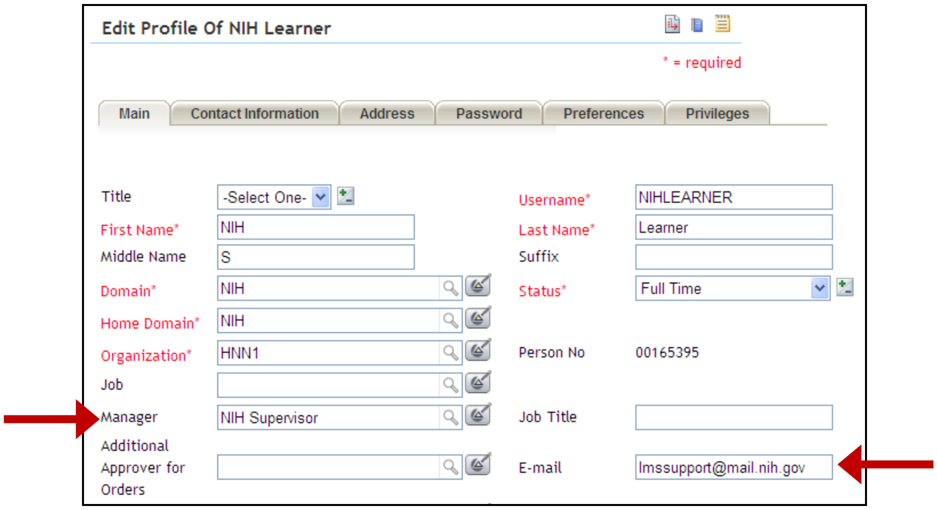
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Enter the learner's name in the search box and click **Search**.

   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.
3. Select the **Edit Profile Information** link to the right of the correct account.



4. Edit the learner's **E-mail** and/or **Manager** fields.
5. Scroll to the bottom of the page and click **Save**.



NOTE: All fields in red with an asterisk (*) require data in order to save changes.

IMPORTANT! Information in the Learner Profile is populated by data feeds from the Capital HR, NED, and/or Commission Corp databases. If any of the information is incorrect, with the exception of e-mail address and manager, it must be corrected in the source system, not the LMS.

STEP-BY-STEP (RESET A LEARNER'S PASSWORD

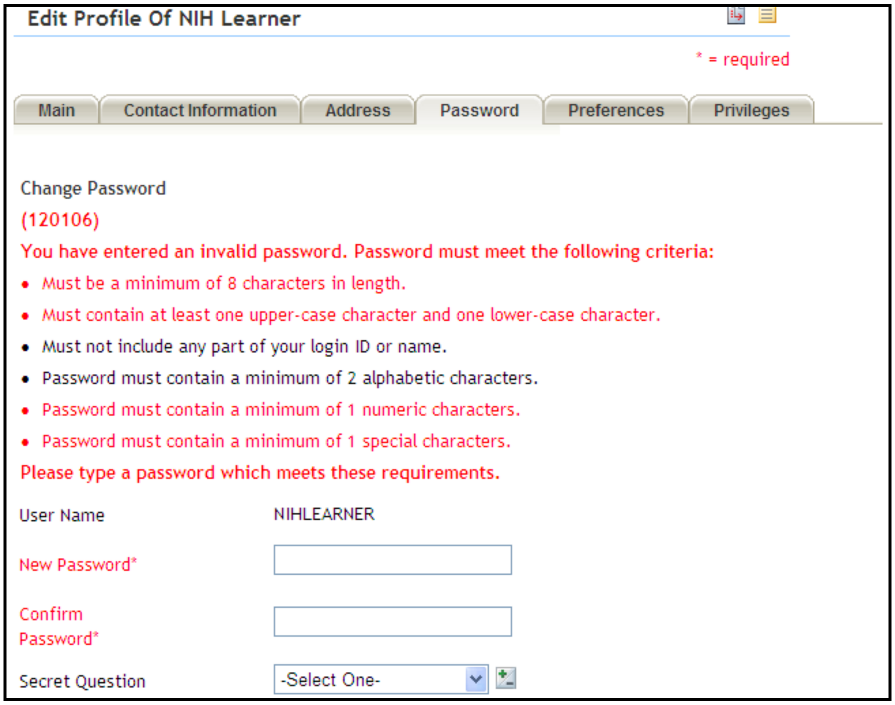
Learners can reset their own passwords using the LMS self-service password reset tool (**Forgot your password?** link) on the login page of the LMS. However, a learner may ask an administrator to reset their password instead. The following instructions will show you how to reset a learner's password.

1. While viewing the learner's edit profile screen, click the **Password** tab.
2. Enter a new (temporary) password for the learner in the **New Password** field.
3. Re-enter the password in the **Confirm** Password field.

   Leave all other fields blank. (Setting these fields will require the learner to know them.)

4. Click **Save**.

   NOTE: LMS passwords follow strong rules for security. You may be prompted that the password you are trying to set does not meet requirements. Simply adjust your choice of password to meet the requirements stated and try again.



   NOTE: Resetting the learner's password provides a temporary password. The learner will be prompted to set a 'permanent' password as soon as he/she logs in again. Learners may set the same password they use for NIH log in to make it easier to remember. Passwords may only be reset once every 24 hours.

STEP-BY-STEP (VIEW/EDIT PROFILE SNAPSHOT)

The snapshot of the learner's profile provides a summary of information about the learner. You can view the learner profile snapshot by following the instructions provided below.

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Enter the learner's name in the search box 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.

3. Select the **Profile Snapshot** link to the right of the correct account.

- The **Full Profile** tab will expand the snapshot to include summary information about current job, competencies, licenses & certifications, and languages.
- The **Resource** tab will allow you to designate the person as a resource.
- The **Quicklinks** tab contains links to the learner's certifications, curricula, enrollments, transcripts, profile snapshot, and learning plan.

LEARNER ENROLLMENTS AND TRANSCRIPTS

An Enrollment is an offering that a learner is registered for, but has not completed. As a Local Learning Administrator, you may view and drop enrollments for learners within your organization.

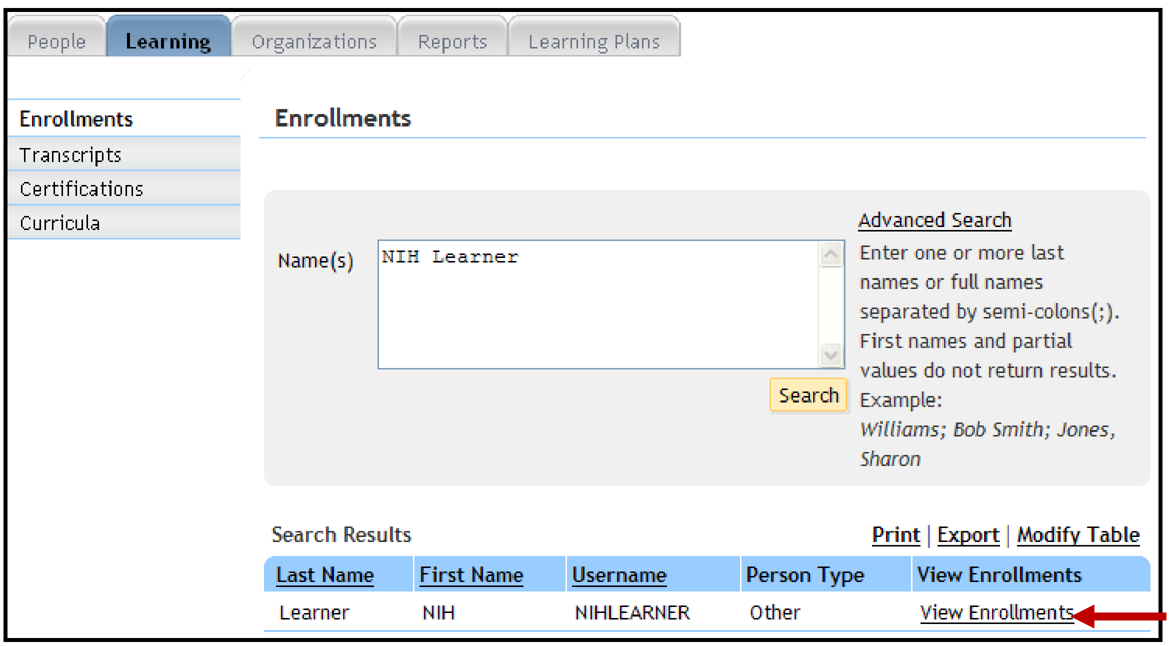
The following instructions will detail how you can view a learner's enrollments and drop an offering when necessary.

STEP-BY-STEP (VIEW ENROLLMENTS)

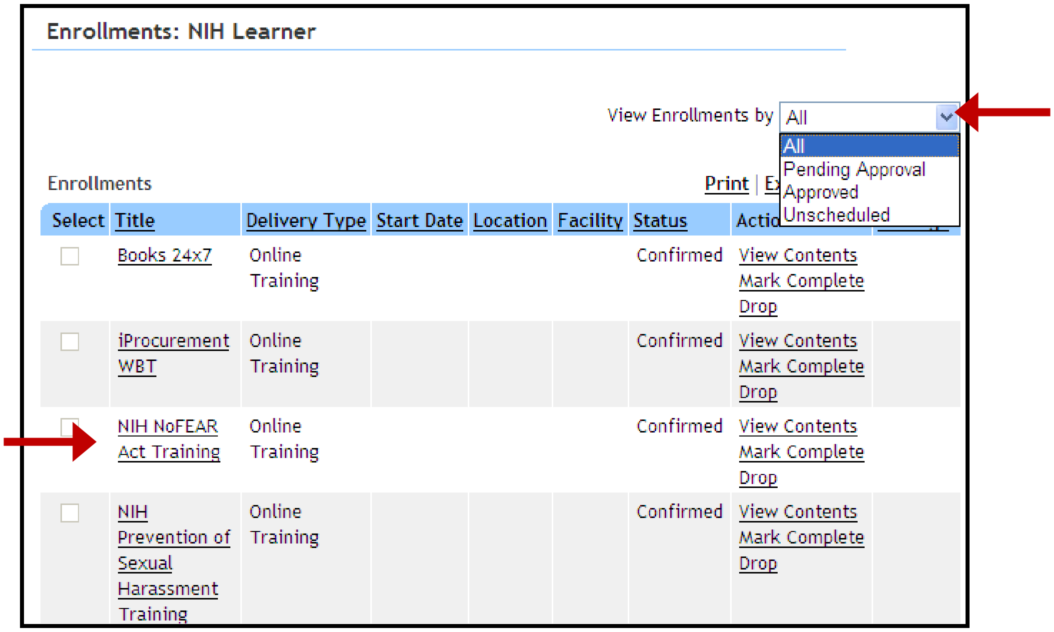
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Select **Enrollments** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

   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. Click the **View Enrollments** link to the right of the correct account.



6. Change your view of enrollments by clicking on the drop-down menu and selecting one of the following: All, Pending Approval, Approved, or Unscheduled.



NOTE: From this screen you can verify whether a learner is enrolled in a particular class. Clicking the title of an item will give you more detail about it.

The Actions column of the Enrollments table allows you to perform the following:

- **View Contents** will allow you to see how long a learner has spent in an online course.
- **Mark Complete** will allow you to indicate the completion status of a course. This functionality can be used if an online course does not complete successfully.
- **Drop** will allow you to cancel the registration of a learner.

  IMPORTANT! This action does not remove any financial obligation for the learner. Any NIHITS nominations must be cancelled to keep the learner's organization from being charged.

STEP-BY-STEP (VIEW A LEARNER TRANSCRIPT)

The Learner Transcript is a record of training taken by a learner. Transcripts may contain Department of Health and Human Services (HHS) training and external training, such as college coursework. Because the LMS is a department-wide system, transcripts will go with an employee if he/she moves to another agency within HHS.

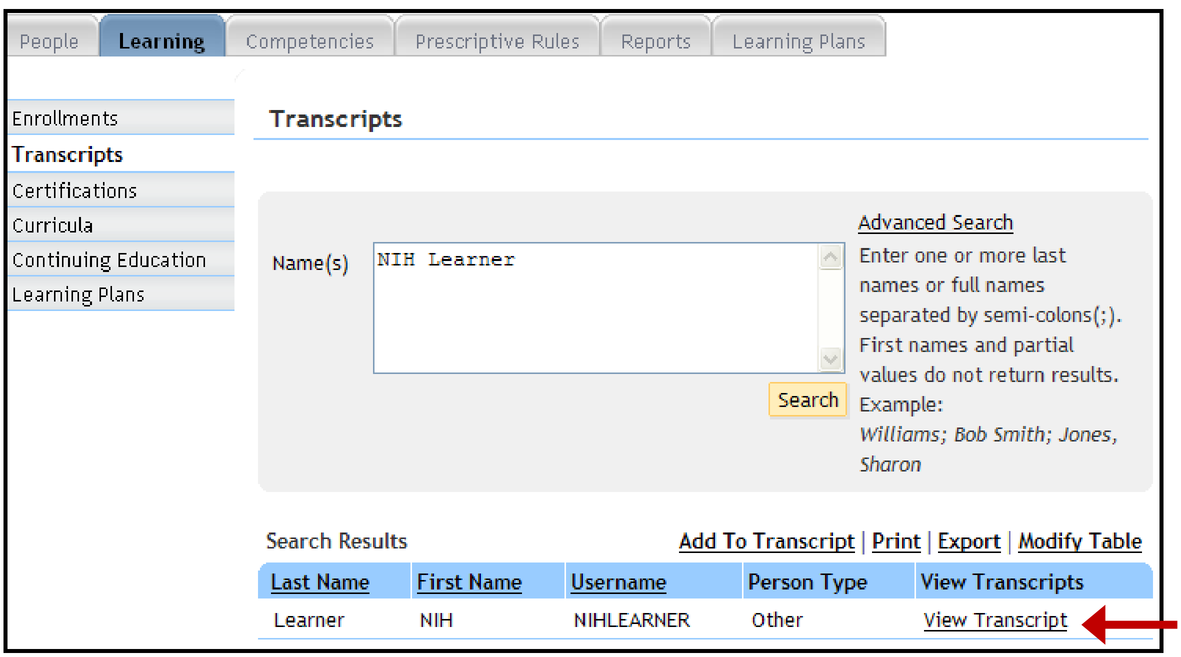
NOTE: Because the LMS is still a relatively new system and not all historic training has been migrated, some records may not appear on the LMS transcript.

The following instructions will show you how to view, edit, delete, and add learning to a Learner Transcript.

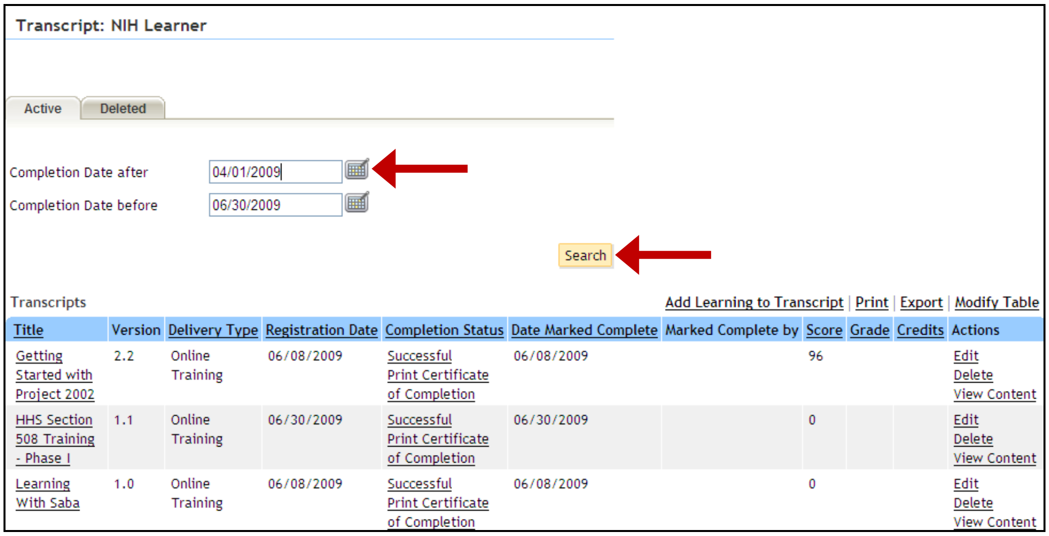
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Click on the **Transcripts** link.
4. Enter the learner's name in the search field and click **Search**.

   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 Transcript** link to the right of the correct account.



6. Set the desired date range for display items on the Learner Transcript and click **Search**.



Title	Version	Delivery Type	Registration Date	Completion Status	Date Marked Complete	Marked Complete by	Score	Grade	Credits	Actions
Getting Started with Project 2002	2.2	Online Training	06/08/2009	Successful Print Certificate of Completion	06/08/2009		96			Edit Delete View Content
HHS Section 508 Training - Phase I	1.1	Online Training	06/30/2009	Successful Print Certificate of Completion	06/30/2009		0			Edit Delete View Content
Learning With Saba	1.0	Online Training	06/08/2009	Successful Print Certificate of Completion	06/08/2009		0			Edit Delete View Content

NOTE: The default date range of the transcript view is 90 days. To view training events that were completed more than 90 days in the past, you must adjust the **Completion Date after** field.

The Transcripts table allows you to perform the following:

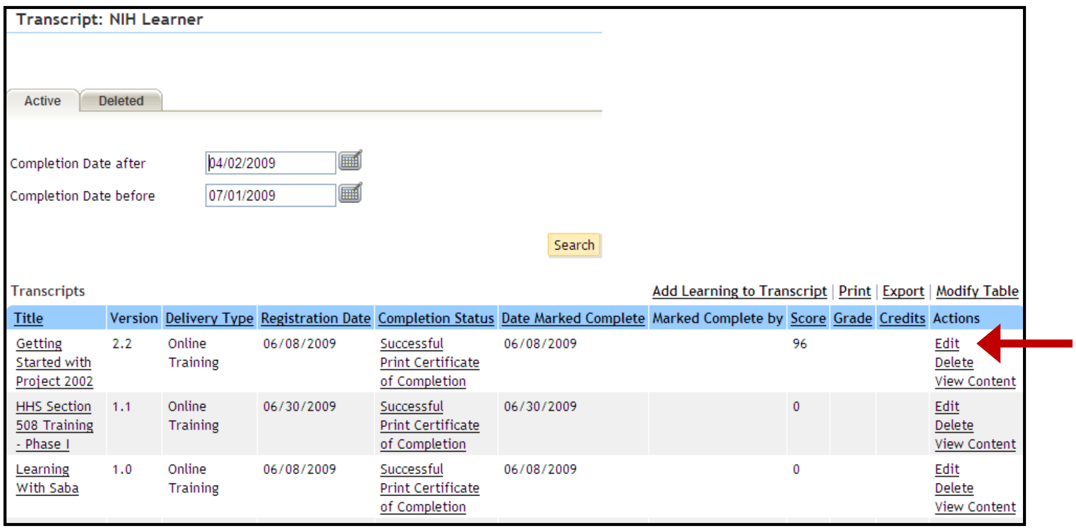
- View details of a training item by clicking on its title.
- Print a certificate of completion and modify the completion status using the links in the **Completion Status** column.
- View details of training items, including time spent in an online course, by clicking the **View Content** link.
- Re-launch completed online content by clicking the **View Content** link and then **Launch**.

STEP-BY-STEP (EDIT A LEARNER'S TRANSCRIPT ITEM)

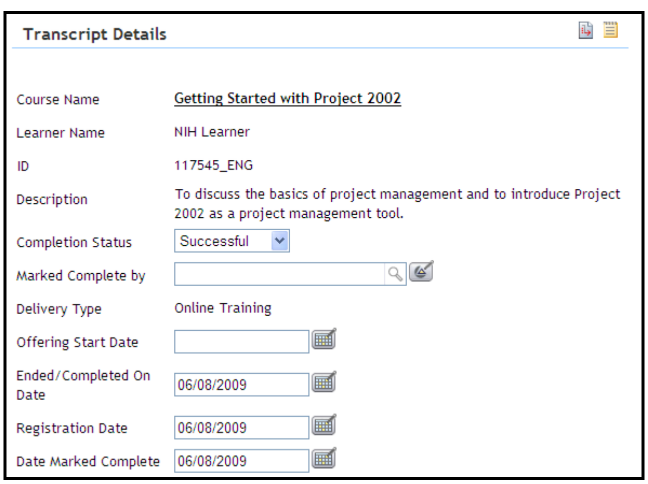
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Click on the **Transcripts** link.
4. Enter the learner's name in the search field and click **Search**.

   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 Transcript** link to the right of the correct account.
6. Click the **Edit** link on the right for transcript item being edited.



7. Edit the information on the **Transcript Details** screen.



8. Click **Save** located at the bottom of the screen.

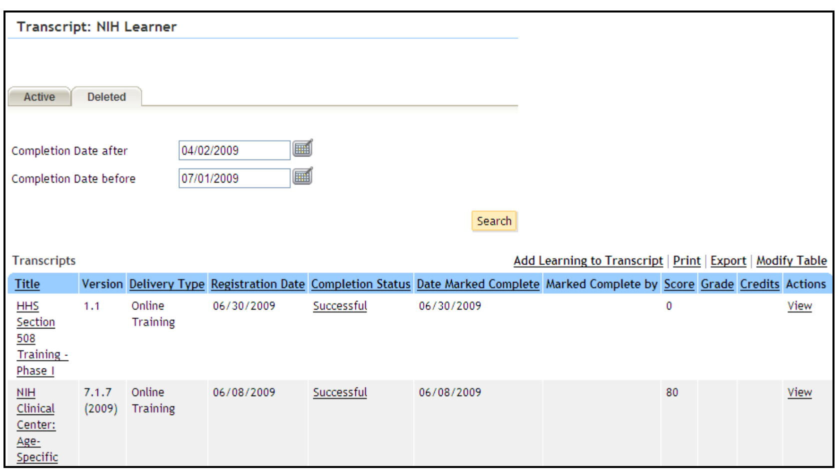
STEP-BY-STEP (DELETE A TRANSCRIPT ITEM)

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Click on the **Transcripts** link.
4. Enter the learner's name in the 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 Transcript** link to the right of the correct account.
6. Click the **Delete** link on the right for the transcript item being deleted.
7. If you are sure this is the item you want to delete, click **OK** on the delete confirmation message. The screen will refresh and the transcript item will be deleted.

8. A copy of the deleted transcript item is kept on the **Deleted** tab.



STEP-BY-STEP (ADD LEARNING TO A TRANSCRIPT: METHOD ONE)

Use this method to add learning to a single learner's transcript.

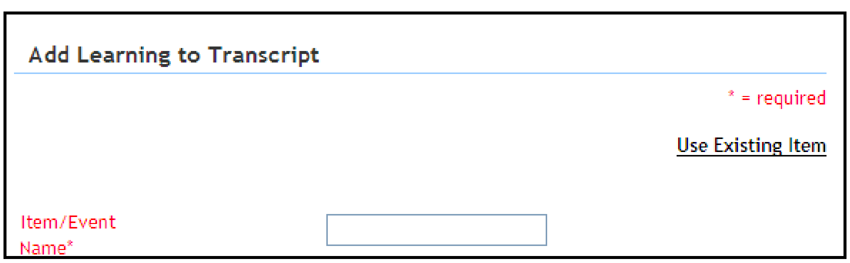
IMPORTANT! Guidelines for verifying completed training may vary by IC, office, division, etc. Please be sure to check with your organization to determine the process for verifying the completion of training prior to manually entering it into a learner's LMS record.

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Click on the **Transcripts** link.
4. Enter the learner's name in the 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 Transcript** link to the right of the correct account.
6. Click the **Add Learning to Transcript** link.
7. Perform one of the following:
   - If the training you are adding is unique, enter all the data available in the appropriate fields and click **Save** at the bottom of the page and continue to Step 14 below.
   - If the training you want to add is in the LMS catalog or may have been added to someone else's transcript already, click the **Use Existing Item** link and continue to Step 8 below.

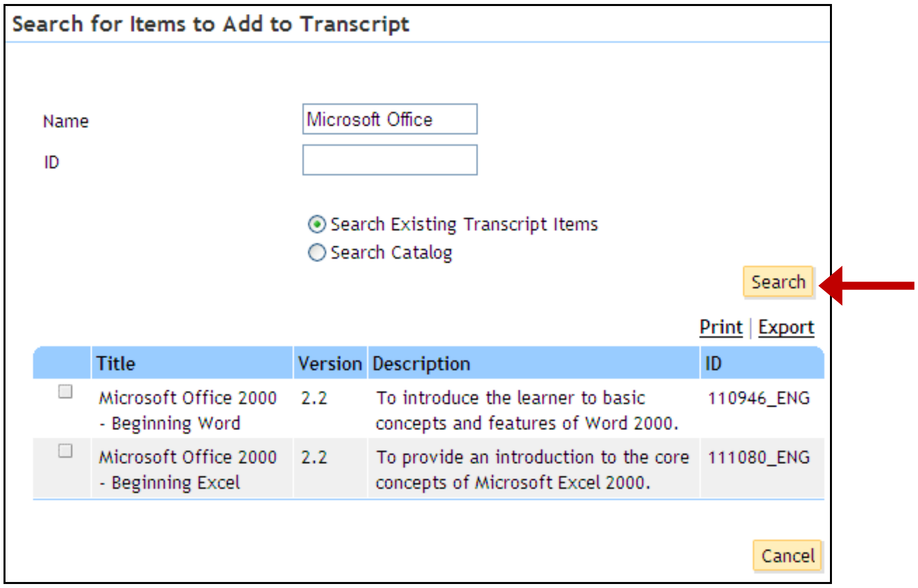
   (See Appendix B for explanations of data fields required for EHRI reporting.)



8. Perform one of the following:
   - To search for the course from those available in the LMS, select the **Search Catalog** radio button.
   - To search for a course that is not in the LMS course catalog but may have been added to someone else's transcript already, select the **Search Existing Transcript Items** radio button.

     NOTE: This is useful for finding learning that was taken from a non-HHS entity.

9. Enter the course **Name** and/or the course **ID** and click **Search**.

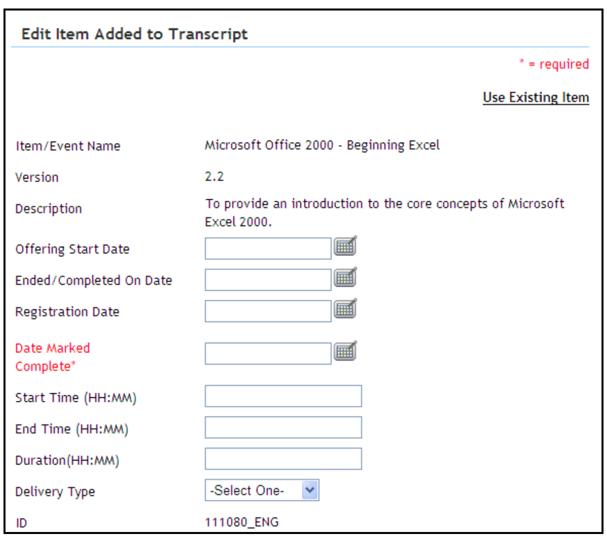


NOTE: Remember that you can use the percent symbol (%) as a wildcard.

10. Click on the box to the left of the course you wish to add to the learner's transcript. This will close the **Search for Items to Add to Transcript** window and take you back to the previous screen.

NOTE: The screen will now be pre-populated with course information such as the title, description, and course ID.

11. Enter additional data into all appropriate fields.

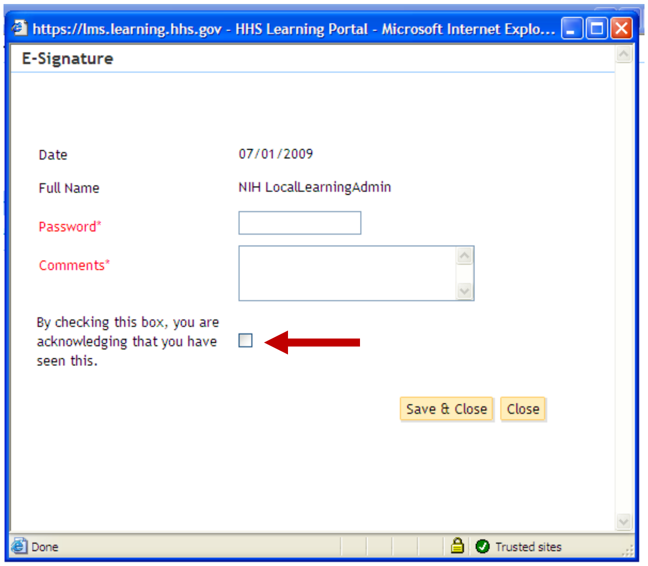


IMPORTANT! Fields labeled in Red with an asterisk are required.

12. At the bottom of the screen you will find an area to indicate the learner's score and grade if applicable.

13. After entering in all the data you have for the course, click **Save** at the bottom of the screen.

14. You will then be asked to complete an e-signature block. Enter your LMS log in password and comments pertaining to why you are editing the transcript. Then select the check box acknowledging that you have seen the e-signature box.



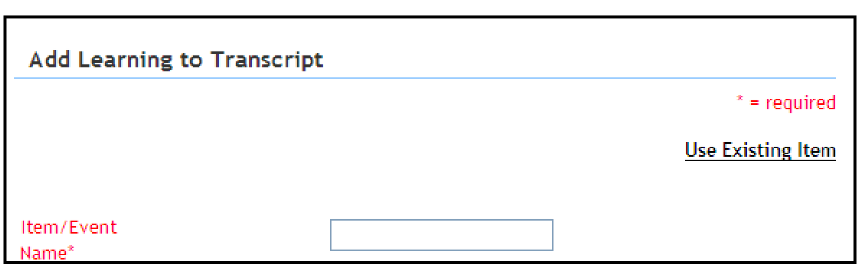
15. Click **Save & Close**.

STEP-BY-STEP (ADD LEARNING TO A TRANSCRIPT: METHOD TWO)

Use this method if you would like to add a transcript item to multiple learners.

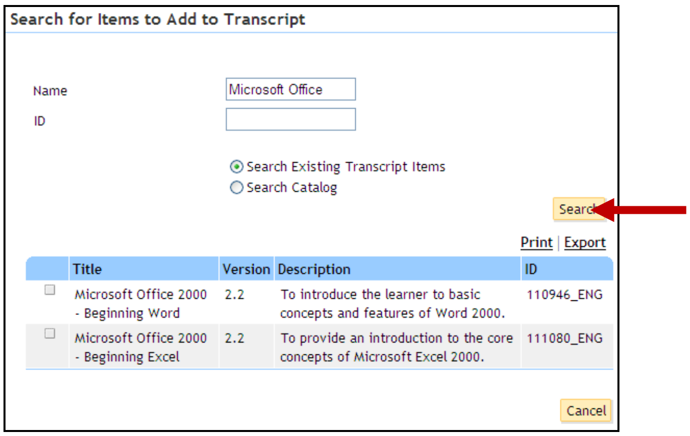
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Click on the **Transcripts** link.
4. Click on the **Add to Transcript** link.
5. Perform one of the following:
   - If the training you are adding is unique, enter all the data available in the appropriate fields and click **Save** at the bottom of the page and continue to Step 10 below.
   - If the training you want to add is in the LMS catalog or may have been added to someone else's transcript already, click the **Use Existing Item** link and continue to Step 6 below.

   (See Appendix B for explanations of data fields required for EHRI reporting.)



6. Perform one of the following:
   - To search for the course from those available in the LMS, select the **Search Catalog** radio button.
   - To search for a course that is not in the LMS course catalog but may have been added to someone else's transcript already, select the **Search Existing Transcript Items** radio button.

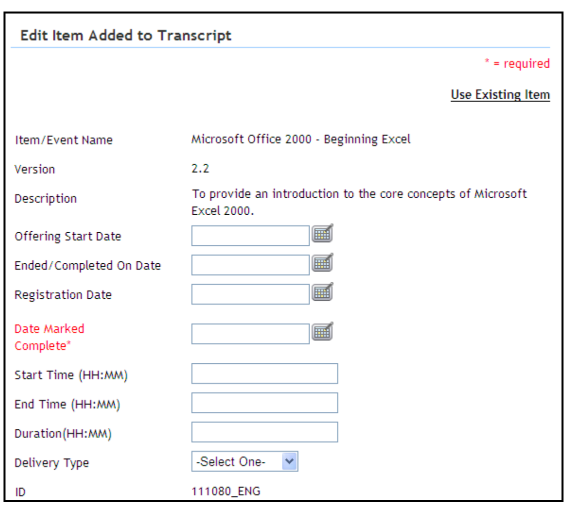
     NOTE: This is useful for finding learning that was taken from a non-HHS entity.
7. Enter the course title and/or the course ID and click **Search**.



NOTE: Remember that you can use the percent symbol (%) as a wildcard.

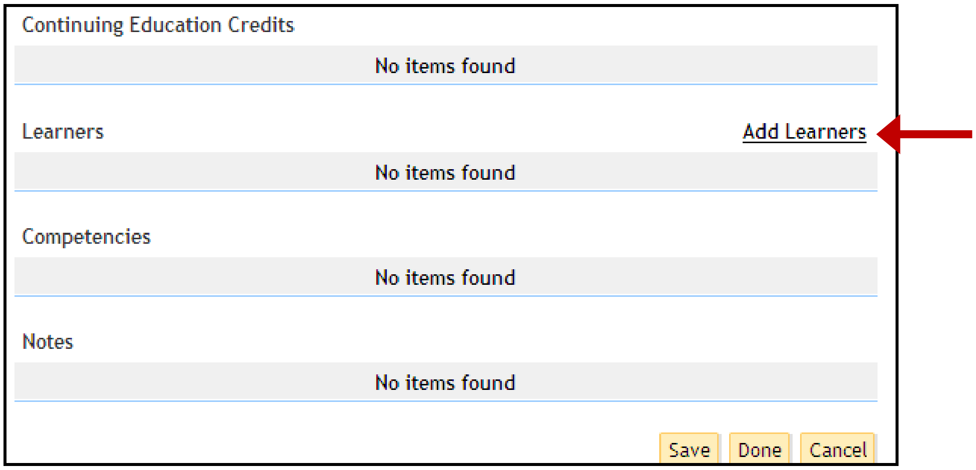
8. Click on the box to the left of the course you wish to add to the learner's transcript. This will close the **Search for Items to Add to Transcript** window and take you back to the previous screen.

   NOTE: The screen will now be pre-populated with course information such as the title, description, and course ID.
9. Enter additional data into all appropriate fields.

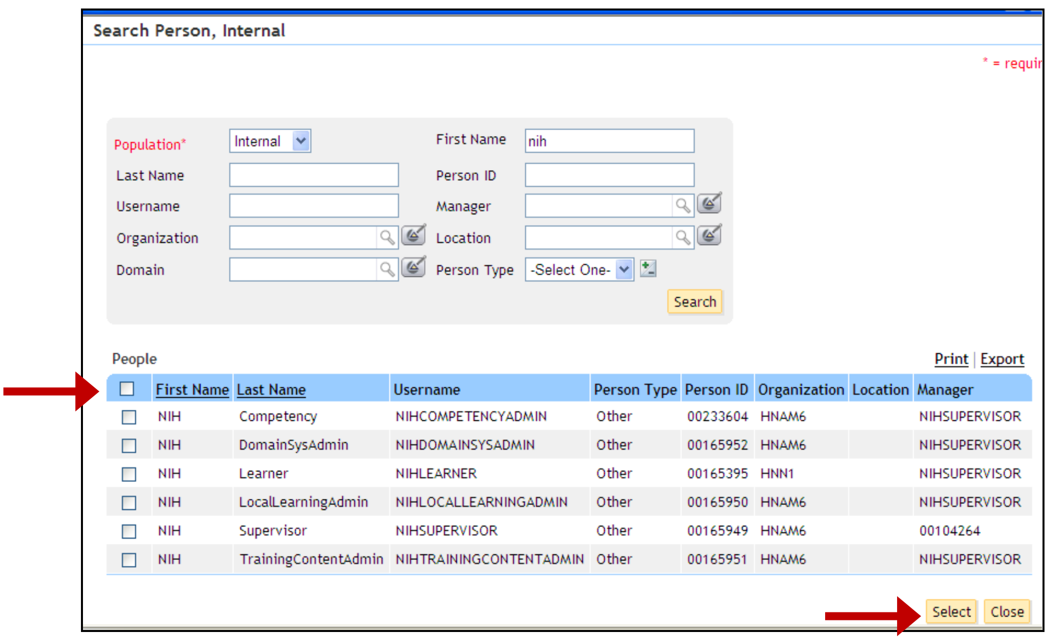


IMPORTANT! Fields labeled in Red with an asterisk are required.

10. Click the **Add Learners** link found toward the bottom of the screen.

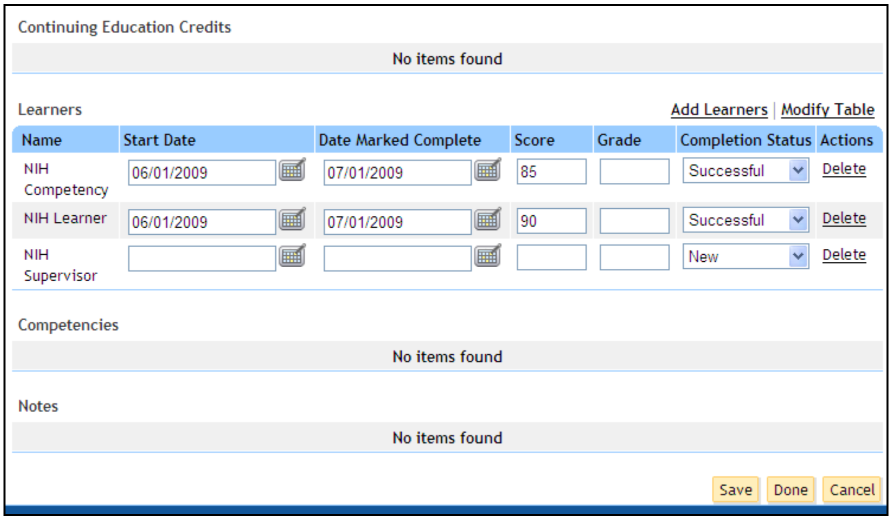


11. Enter the criteria to search for one or more learners.
12. Click the box to the left of the name of an individual learner, or click the box in the blue table header to select everyone in the list.
13. Click **Select**.



14. The learner's name will now appear at the bottom of the **Add Learning to Transcript** screen.
15. Update the **Start Date, Date Marked Complete, Score, Grade**, and **Completion Status** fields as appropriate.

Local Learning Administrator

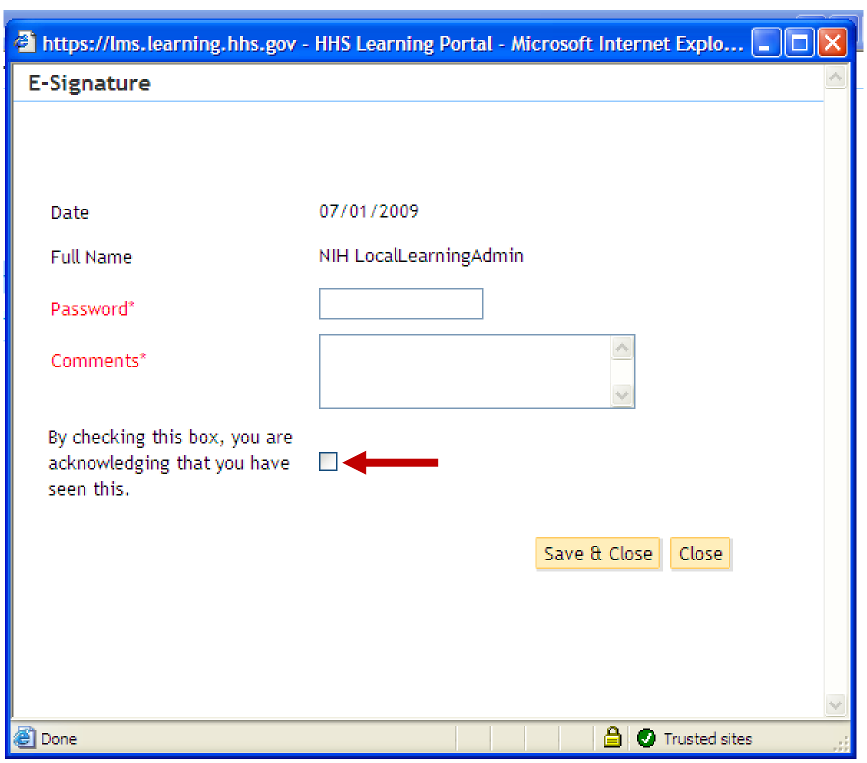


16. Repeat steps 10 through 15 to add more learners that will receive this item on their transcript.

    NOTE: Learners can be deleted by clicking the **Delete** link on the right.

17. When you are finished adding learners, scroll to the bottom, click **Save** and then **Done**. This will add the transcript item to all of the learners at one time.

18. You will then be asked to complete an e-signature block. Enter your LMS log in password and comments pertaining to why you are editing the transcript. Then select the check box acknowledging that you have seen the e-signature box.



19. Click **Save & Close**.

LEARNER CERTIFICATIONS AND CURRICULA

As a Local Learning Administrator, you may view curricula and certifications for learners within your organization.

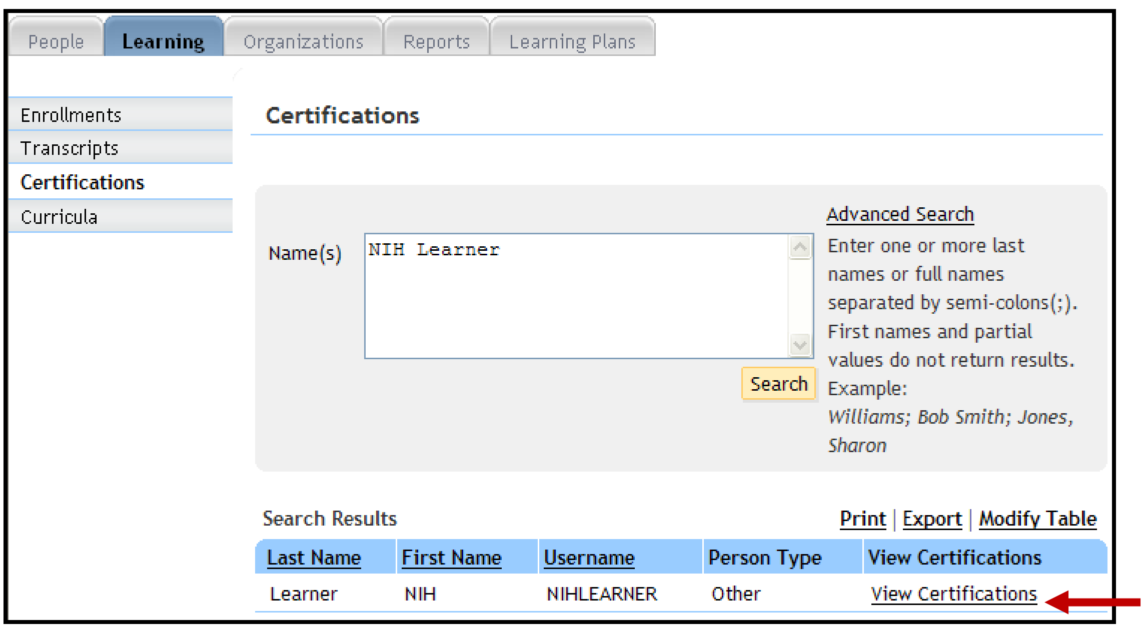
- **Certification** – A predefined set of courses that have been grouped together, with a deadline for completion. Credentials earned by completing the certification may expire on a predetermined date.
- **Curriculum** – A predefined set of courses that have been grouped together. A learner must complete all courses to complete the curriculum.

STEP-BY-STEP (VIEW CERTIFICATIONS)

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab
3. Select **Certifications** from the menu on the left
4. Enter the learner's name in the search field and click **Search**

   NOTE: See instructions for searching listed to the right of the search box.

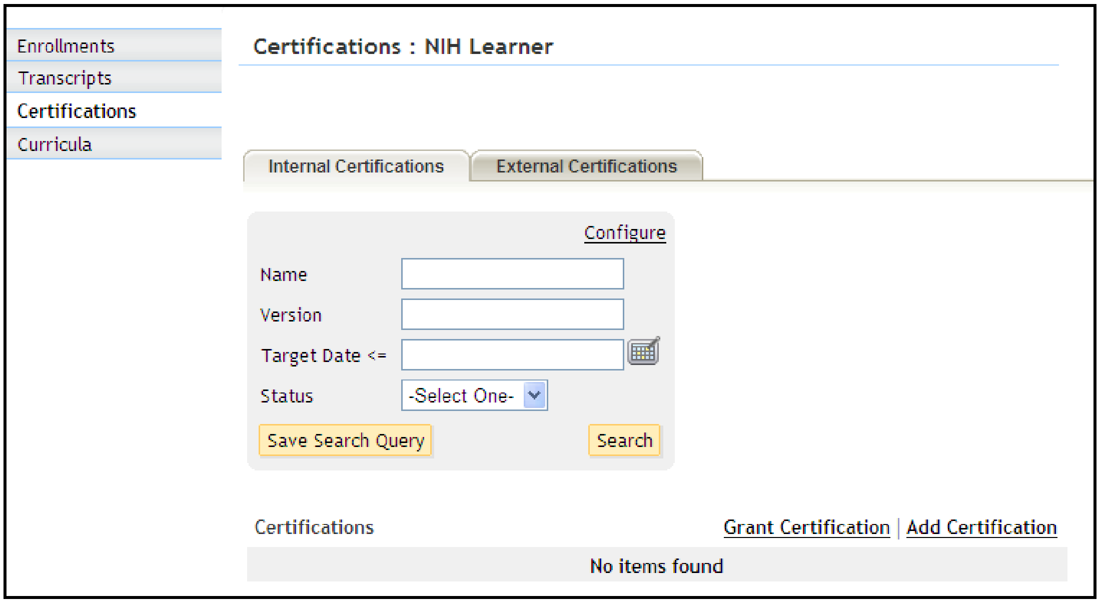
   If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.
5. Click **View Certifications** to the right of the correct account.



6. Select **Internal Certifications** tab (for HHS certifications) or **External Certifications** (for non-HHS certifications)

   NOTE: The **External Certifications** tab will list any certifications the learner has completed and entered that are not administered through the LMS. **Internal Certifications** refers to any certification that an LMS Training Administrator has created to administer through the LMS.

7. If the learner's account has a certification associated with it, it will be listed. You may use the search filters to narrow down the list for a learner who has many certifications.



STEP-BY-STEP (GRANT INTERNAL CERTIFICATION)

As a Local Learning Administrator, you may grant a certification for a learner, which means you mark the certification as complete, even though the learner has not completed all elements of the certification through the LMS. You may wish to do this if the learner has documented completion of equivalent learning outside the LMS. Your IC should have a business process in place for verifying actual course completion. Before you can grant completion of a certification, it must exist in the system. LMS Training Administrators have the ability to create certifications.

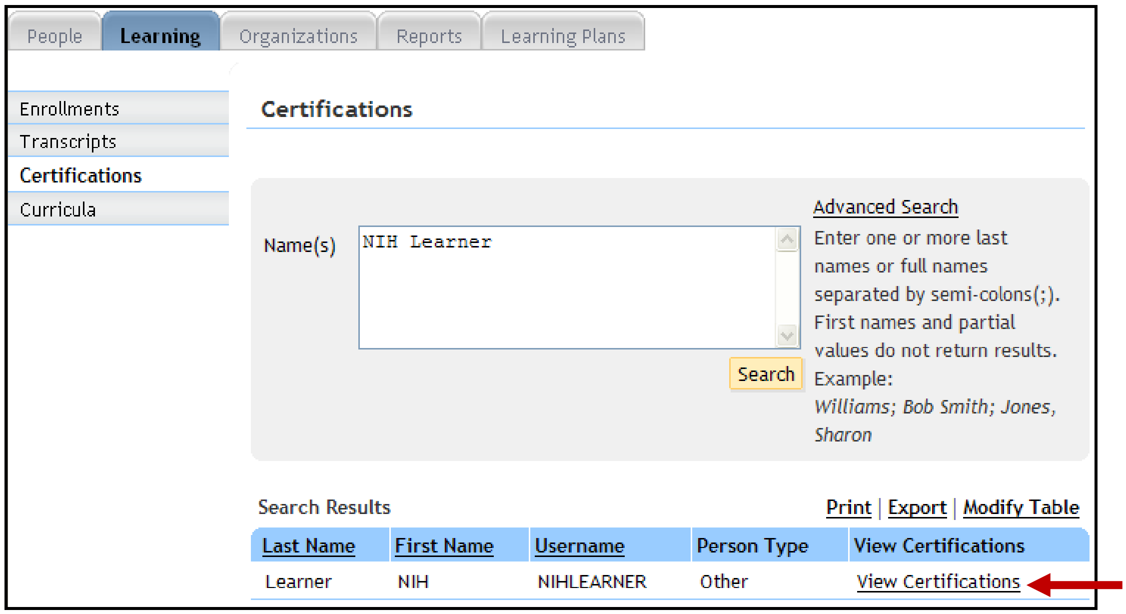
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Select **Certifications** from the menu on the left.

4. Enter the learner's name in the search field and click **Search**.

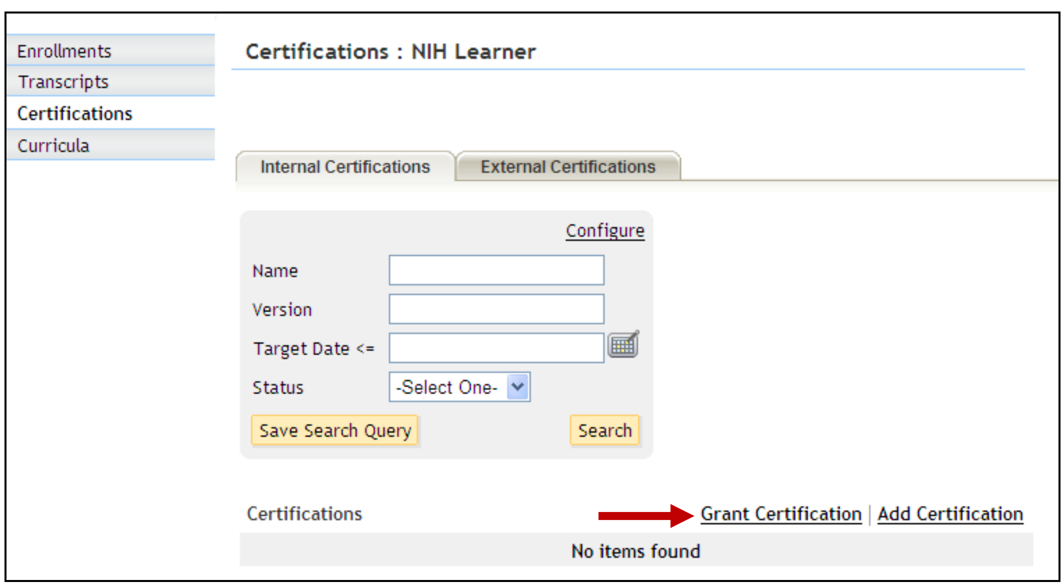
   NOTE: See instructions for searching listed to the right of the search box.

   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. Click **View Certifications** to the right of the correct account.

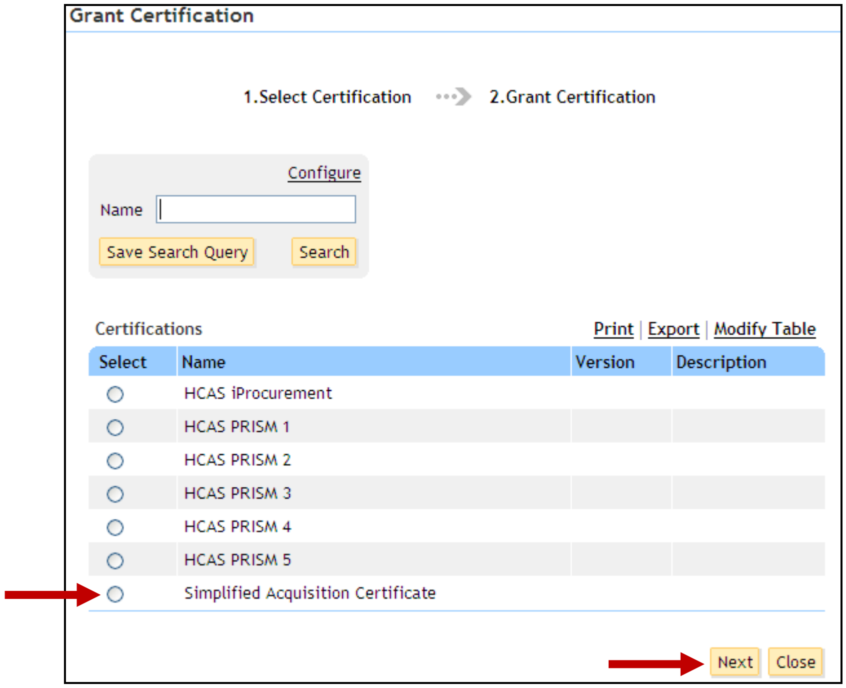


6. Click **Grant Certification**.



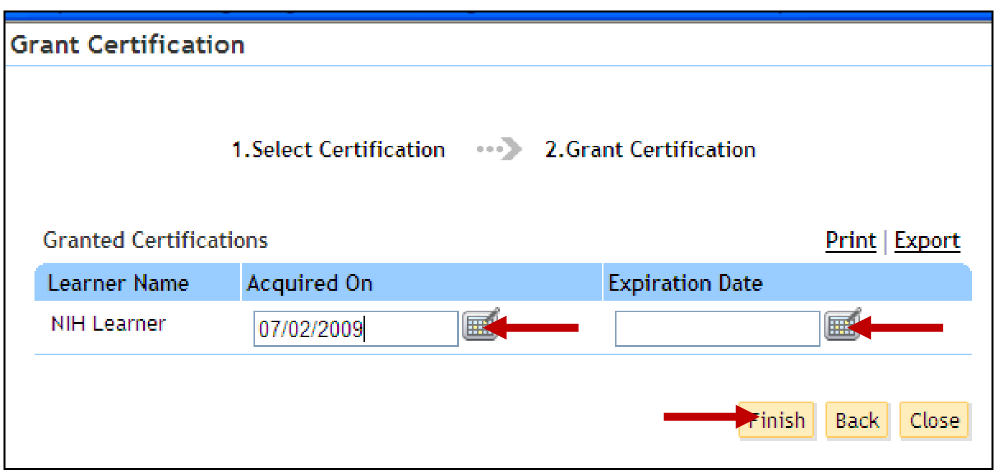
7. Search for the certification you would like to grant.

8. Select the radio button to the left of the certification you would like to grant and then click **Next**.

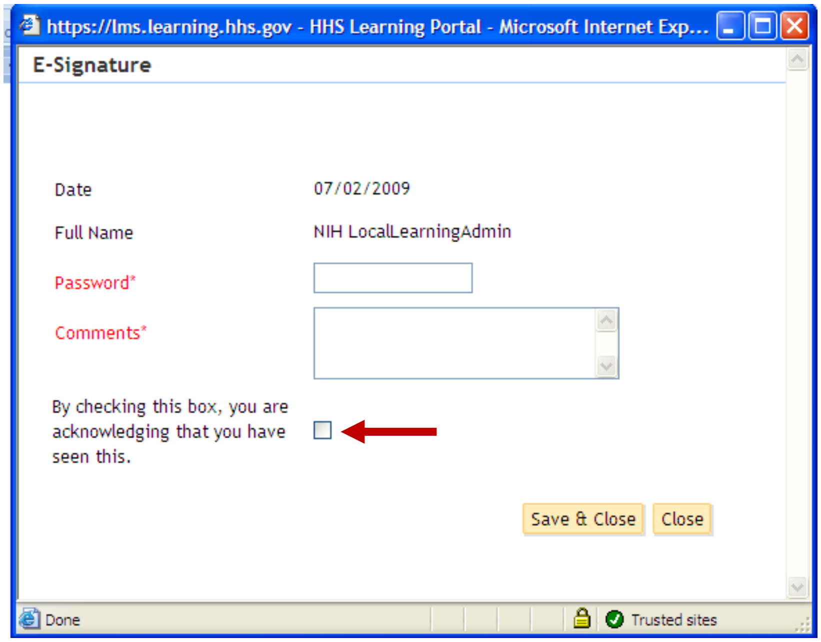


NOTE: If you are granting a certification that has already been assigned to the leaner, you will be asked to confirm that you want to continue with the Grant Certification process.

9. Enter the date on which the learner aquired (completed) the certification and the date the certification expires, then click **Finish**.



10. You will then be asked to complete an e-signature block. Enter your LMS log in password and comments pertaining to why you are granting the certification. Then select the check box acknowledging that you have seen the e-signature box.



11. Click **Save & Close**.

STEP-BY-STEP (ADD INTERNAL CERTIFICATION)

A certification must first be created in the LMS by an LMS Training Administrator before it will be available for you to add to a learner record.

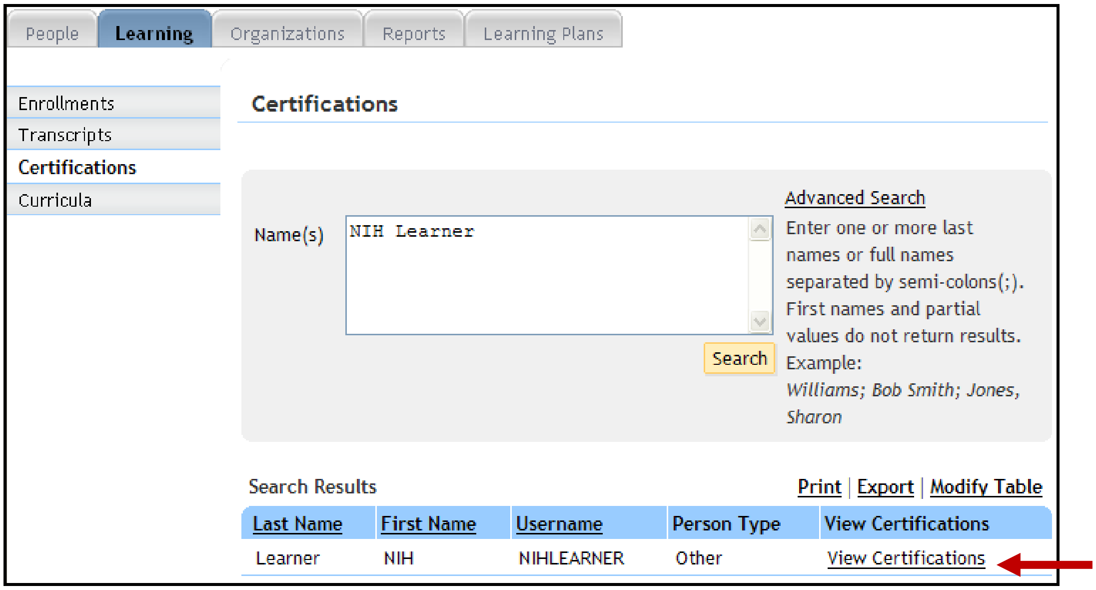
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Select **Certifications** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

   NOTE: See instructions for searching listed to the right of the search box.

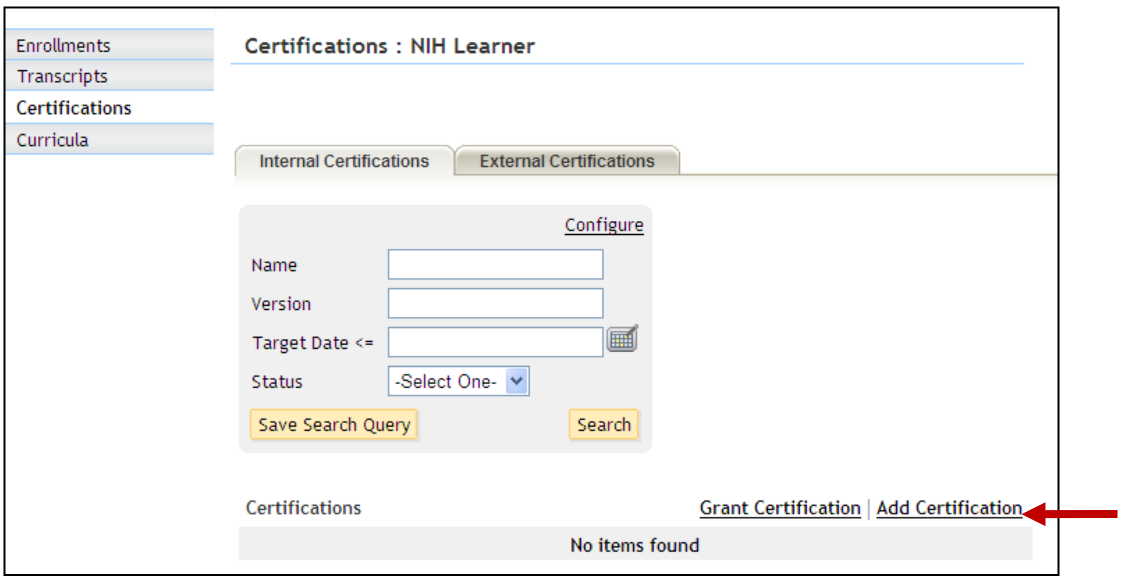
   If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

Local Learning Administrator

5. Click **View Certifications** to the right of the correct account.

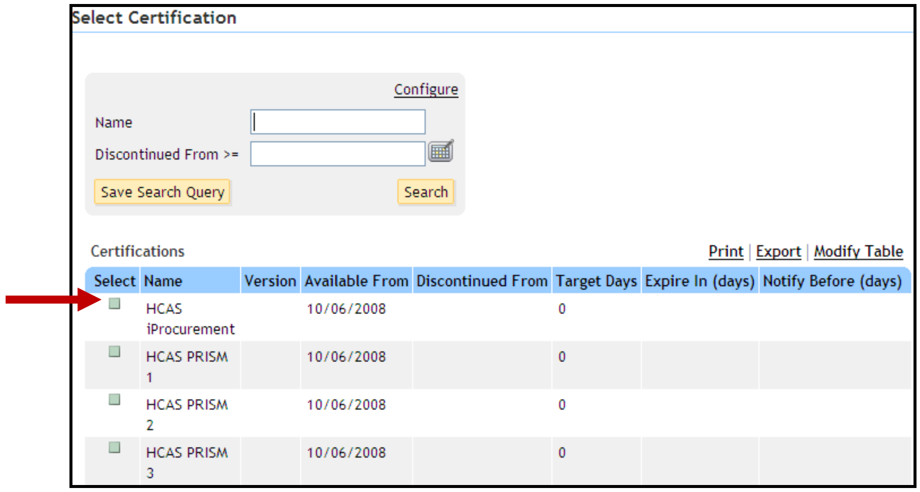


6. Click **Add Certification**.



7. Search for certification you would like to grant.

8. Select the box in front of the certification you would like to grant, and it will automatically populate to the learner's Certifications list.

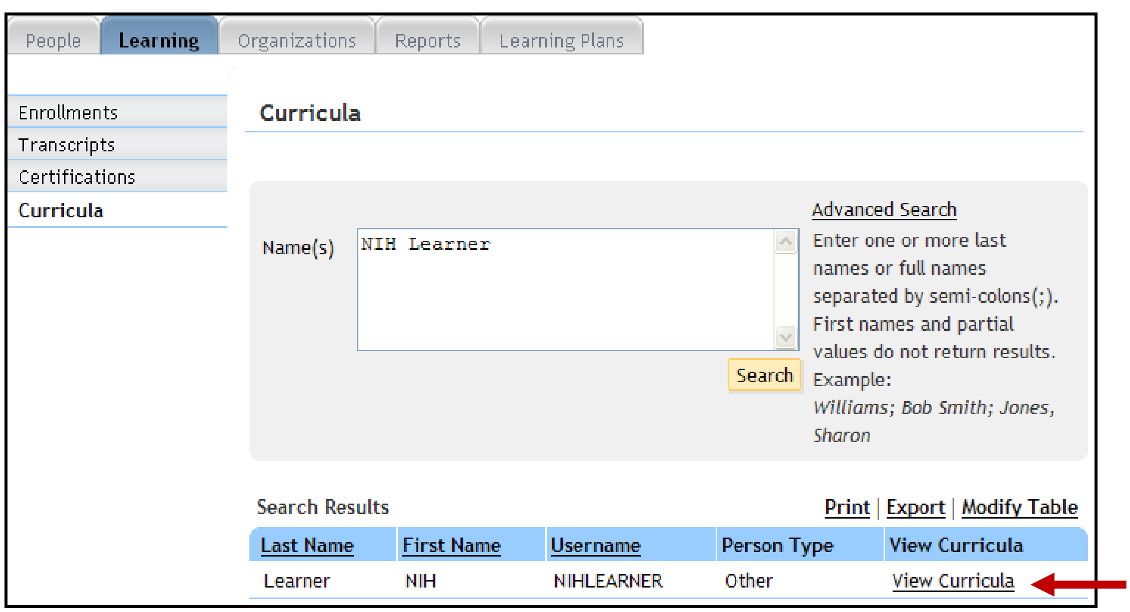


STEP-BY-STEP (VIEW CURRICULA)

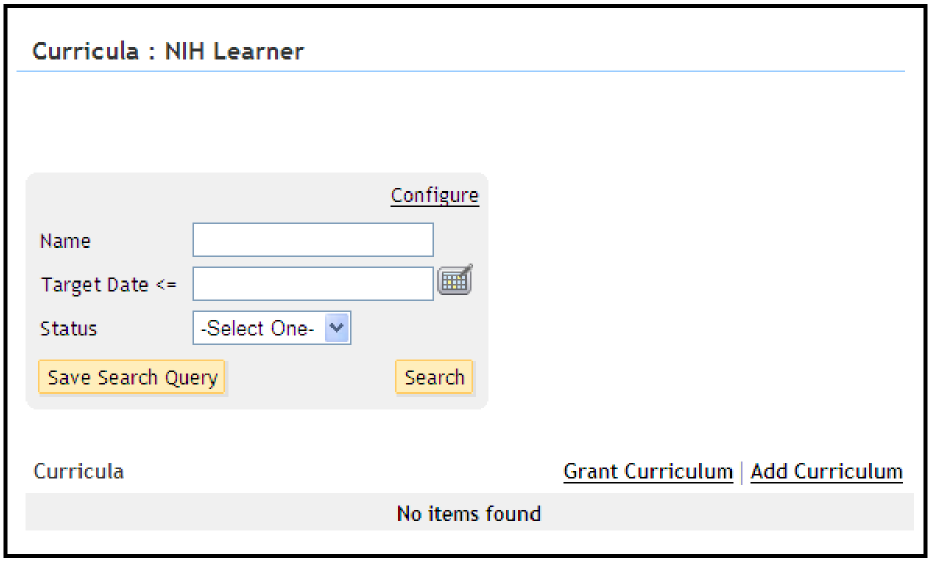
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Select **Curricula** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

   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. Click **View Curricula** to the right of the correct account.



6. If the learner's account has a curriculum associated with it, it will be listed. You may use the search filters to narrow down the list for a learner who has many curricula.



STEP-BY-STEP (GRANT CURRICULUM)

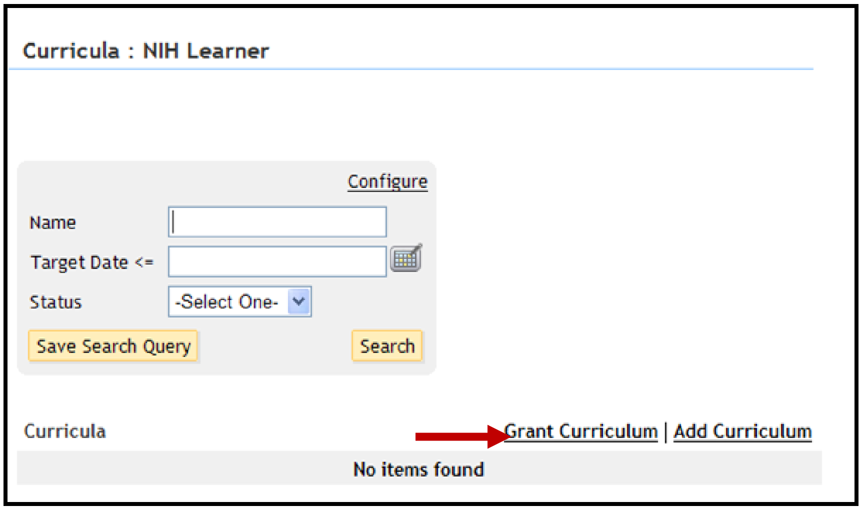
As a Local Learning Administrator, you may grant a curriculum for a learner, which means you mark the curriculum as complete, even though the learner has not completed all elements of the curriculum through the LMS. You may wish to do this if the learner has documented completion of equivalent learning outside the LMS. Your IC should have a business process in place for verifying actual course completion. Before you can grant completion of a curriculum, it must exist in the LMS. LMS Training Administrators have the ability to create curricula.

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Select **Curricula** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

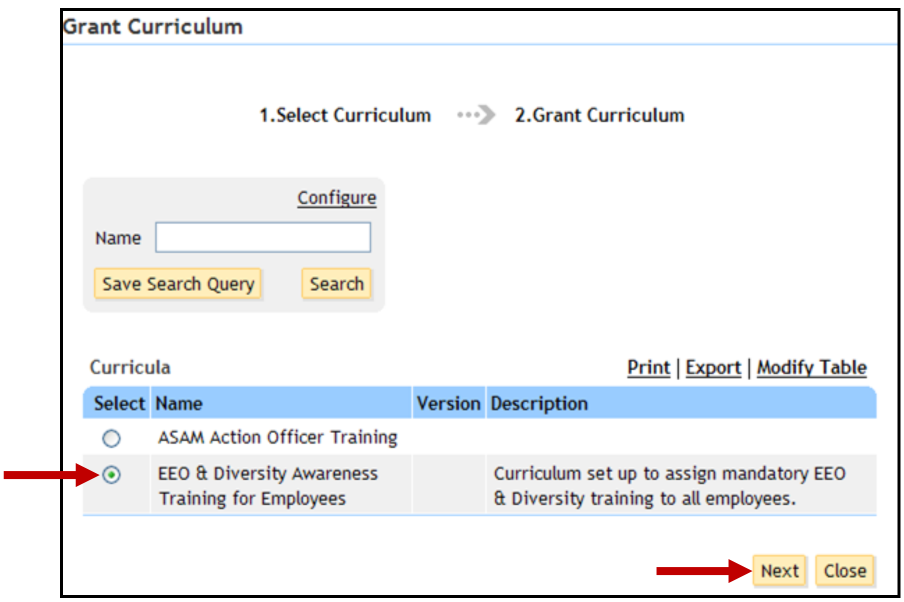
   NOTE: See instructions for searching listed to the right of the search box.

   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. Click **View Curricula** to the right of the correct account.

6. Click **Grant Curriculum**.

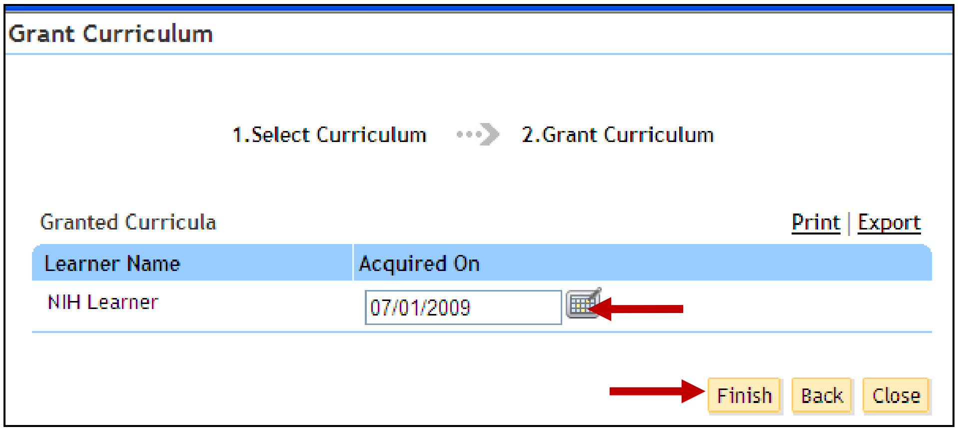


7. Search for the curriculum you would like to grant.
8. Select the radio button in front of the curriculum you would like to grant. Then click **Next**.

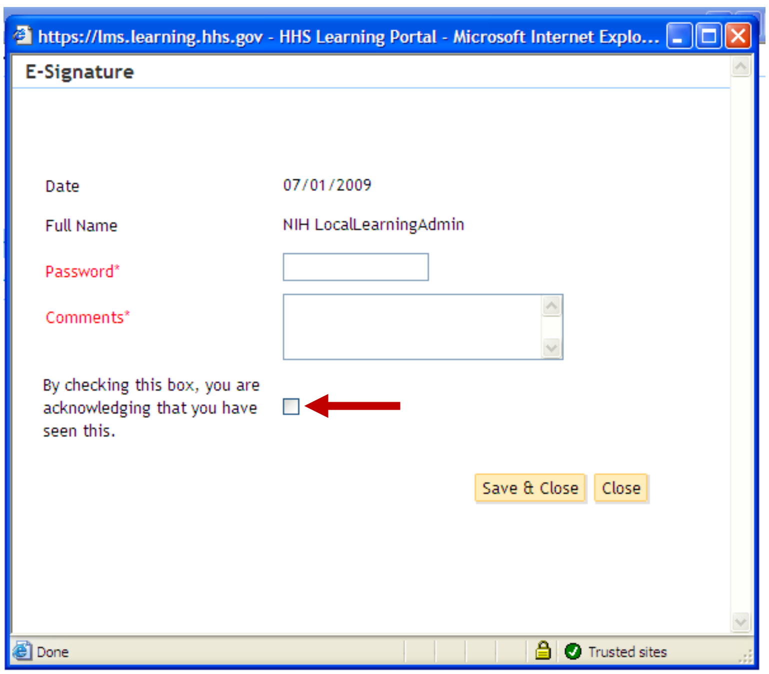


9. If you are granting a curriculum that has already been assigned to the leaner, you will be asked to confirm that you want to continue with the Grant Curriculum process.

10. Enter the date on which the learner aquired the curriculum (finished it), then click **Finish**.



11. You will then be asked to complete an e-signature block. Enter your LMS log in password and comments pertaining to why you are granting the curriculum. Then select the check box acknowledging that you have seen the e-signature box.



12. Click **Save & Close**.

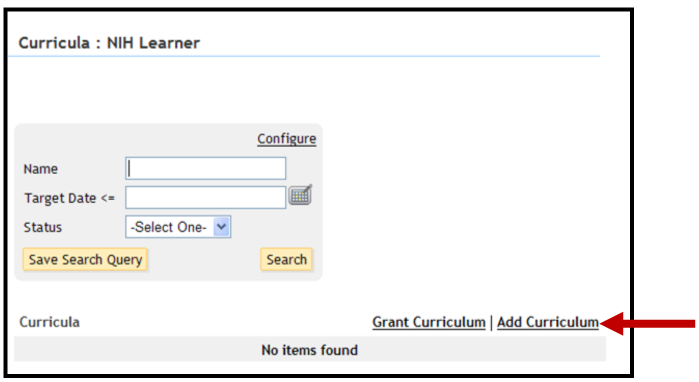
STEP-BY-STEP (ADD CURRICULUM)

A curriculum must first be created in the LMS by an LMS Training Administrator before it will be available for you to add to a learner record.

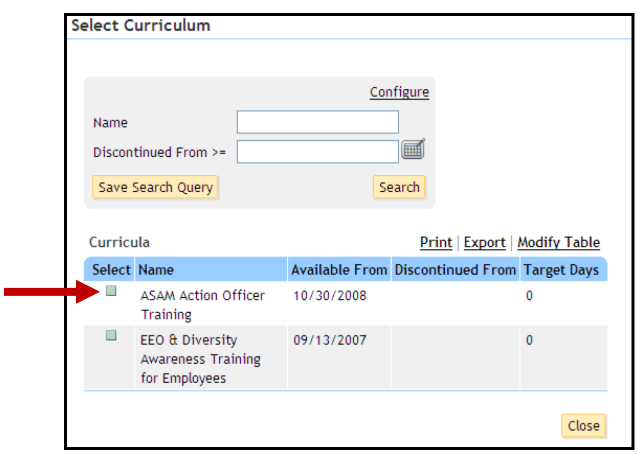
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2.
3. Click on the **Learning** tab.
4. Select **Curricula** from the menu on the left.
5. Enter the learner's name in the search field and click Search.

   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.
6. Click **View Curricula** to the right of the correct account.
7. Click **Add Curriculum**.

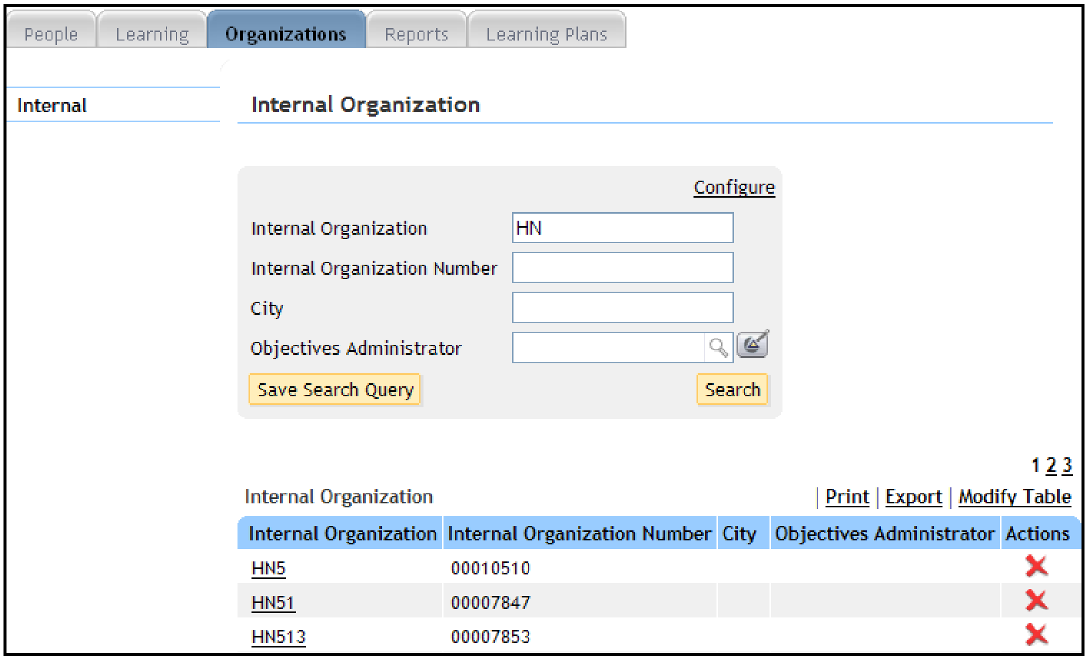


8. Search for the curriculum you would like to grant.
9. Select the box in front of the curriculum you would like to grant, and it will automatically populate to the learner's Curricula list.



ORGANIZATIONS

As a Local Learning Administrator, you have access to the **Organizations** tab under the Human Capital Administrator – People role. From this tab, you may search for Internal Organizations, which are identified by Org/SAC Code in the LMS.



The ONLY action you should EVER perform from this screen is to click the code of the organization you are interested in to access more detailed information about it.

From the Internal Organization Details screen, **Profile** tab, you may:

- Create a community through which people in your organization may share documents and other information through the LMS,
- Add contact information for your organization ONLY,

  IMPORTANT: Do not alter data in any of the required fields marked in red with an asterisk (*). These are populated automatically and referenced by several functions throughout the LMS.

- View the names of any Local Learning Registrars (a.k.a. Local Learning Administrators) in your organization,

  IMPORTANT: You are not authorized to add Local Learning Registrar permission to anyone. Doing so would be grounds for removing your administrative access to the LMS.

From the Internal Organization Details screen, **Members** tab, you may view all learners in the LMS assigned to your org/SAC code. This list can be exported to an Excel file in order to verify names and designated supervisors.

Local Learning Administrator

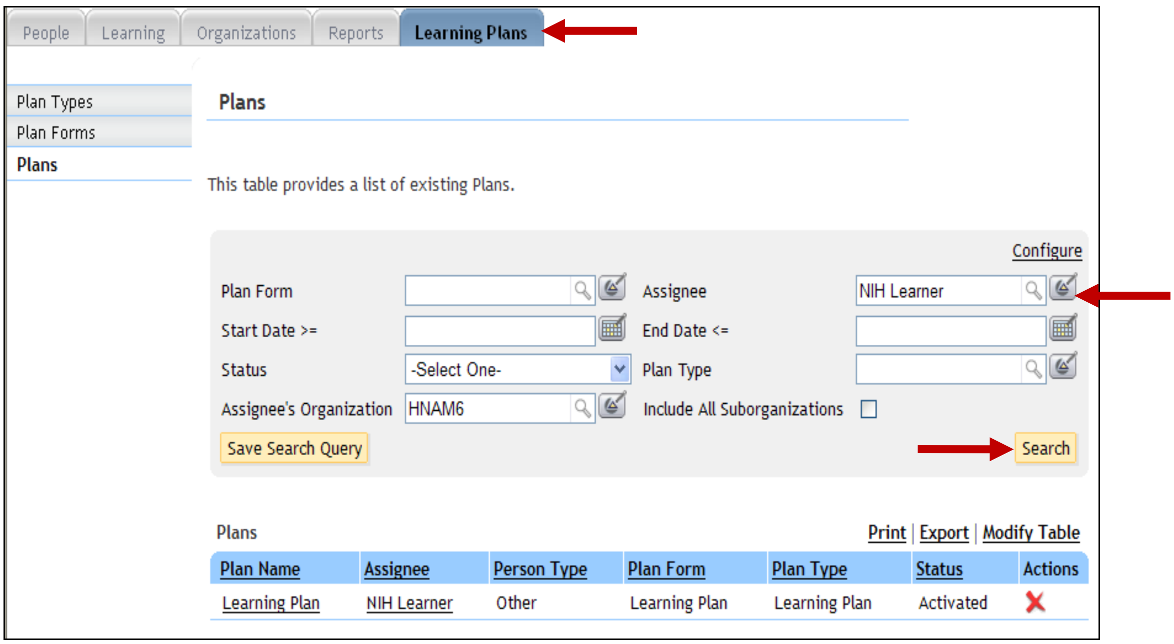
This can be a good way to ensure the appropriate people are designated to your organization and identify any learner accounts that should not be designated to your organization. (Remember: Incorrect org/SAC codes must be corrected in the source HR system.) You will need to access individual user profiles to edit incorrect or missing supervisor names.

LEARNER LEARNING PLANS

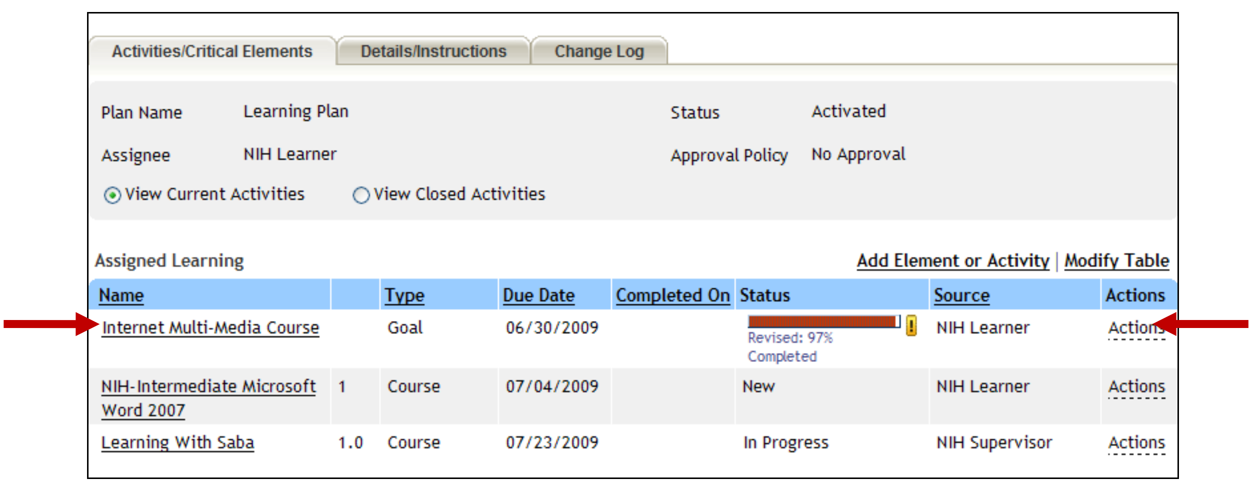
Local Learning Administrators may view individuals' learning plans.

STEP-BY-STEP (VIEW AND ADD TO LEARNING PLANS)

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning Plans** tab.
3. Select **Plans** from the menu on the left.
4. Use the Pick Assignee tool to the right of the **Assignee** field to locate the learner account you want, and then click **Search**.



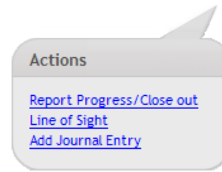
5. Click the **Learning Plan** link to the left of the assignee (learner) name.



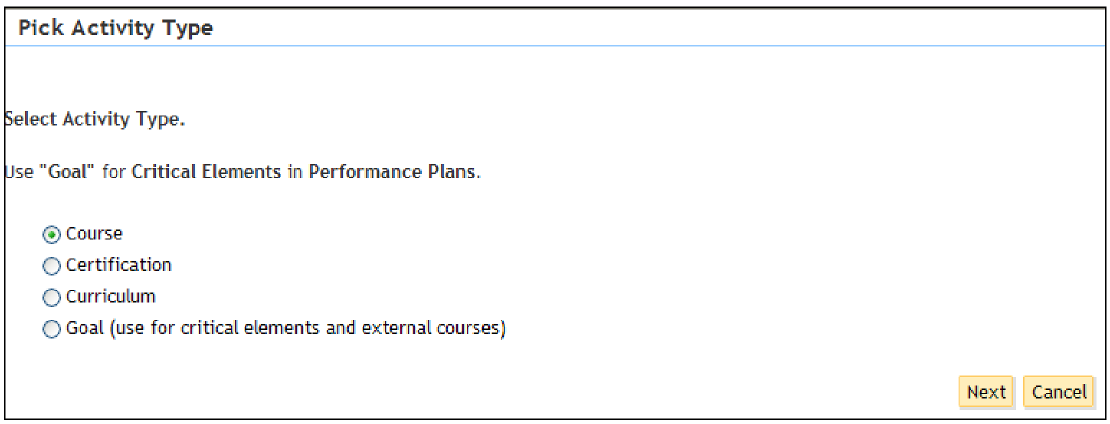
6. You may add items to the learning plan by clicking on the **Add Element or Activity** link.

   NOTE: From the learning plan **Activities/ Critical Elements** tab, you may click the title of any item to access details about it, including its type, due date, and view progress (if applicable).

   Depending on the type of item, you will be able to take various actions using the pop-up links that appear when you hold your mouse over the **Actions** link to the right of each item.



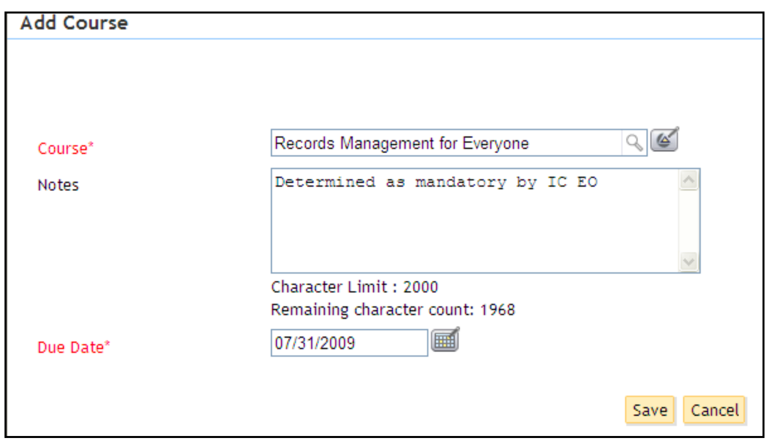
7. Select an Activity Type, and then click **Next**.



8. Based on the Activity Type selected in Step 7 above, perform the steps for one of the following:

   COURSES:

   a. Complete required and optional fields, then click **Save**.



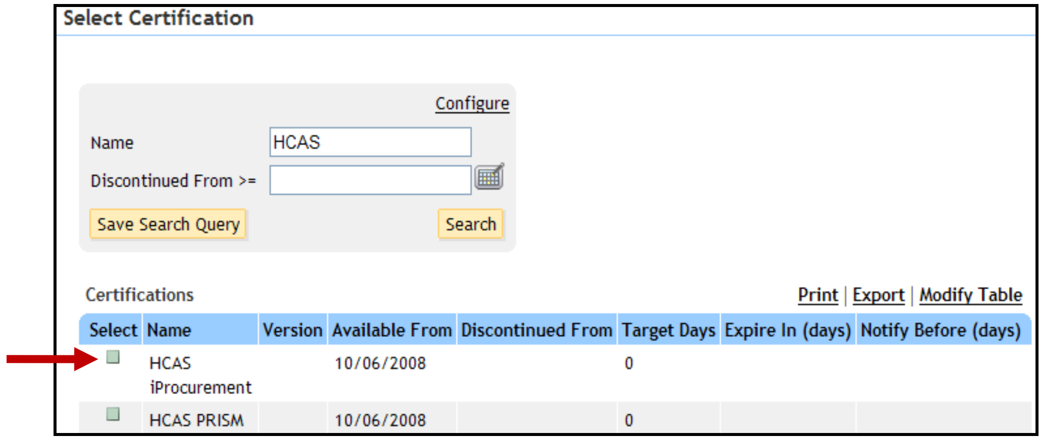
   b. You will see a confirmation message that the item has been added to the plan. Click **Close** to exit the message pop-up and return to the **Plan Details** screen. You should now see your item added to the activities list.

CERTIFICATIONS:

a. Search for the certification by typing the appropriate criteria into the search fields and click **Search**.

NOTE: You may also do an empty search by leaving the fields blank and clicking the **Search** button.

b. Select the checkbox next to the name of the certification.



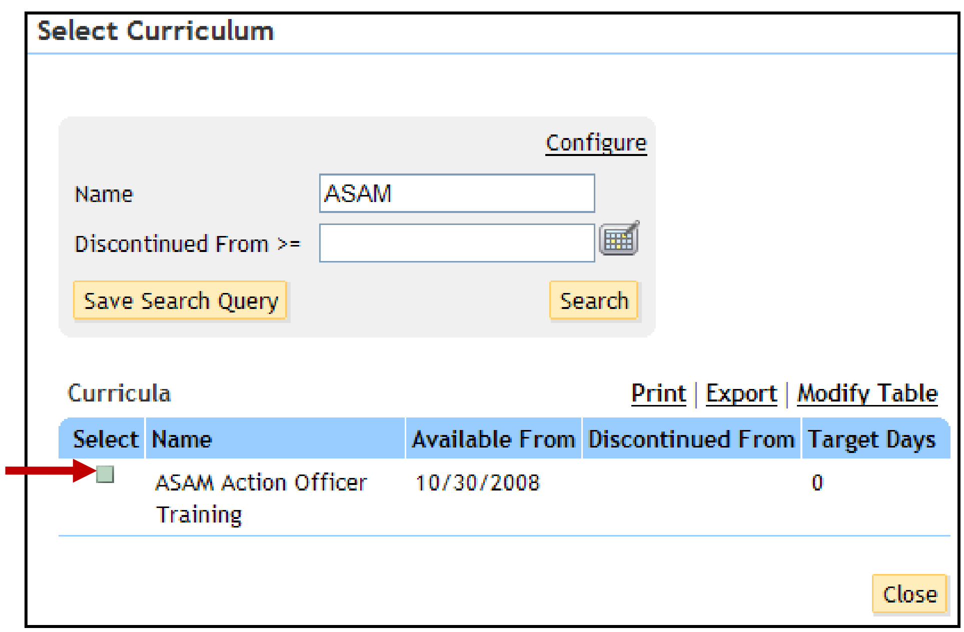
c. You will see a confirmation message that the item has been added to the plan. Click **Close** to exit the message pop-up and return to the **Plan Details** screen. You should now see your item added to the activities list.

CURRICULA:

a. Search for the curriculum by typing the appropriate criteria into the search fields and click **Search**.

NOTE: You may also do an empty search by leaving the fields blank and clicking the **Search** button.

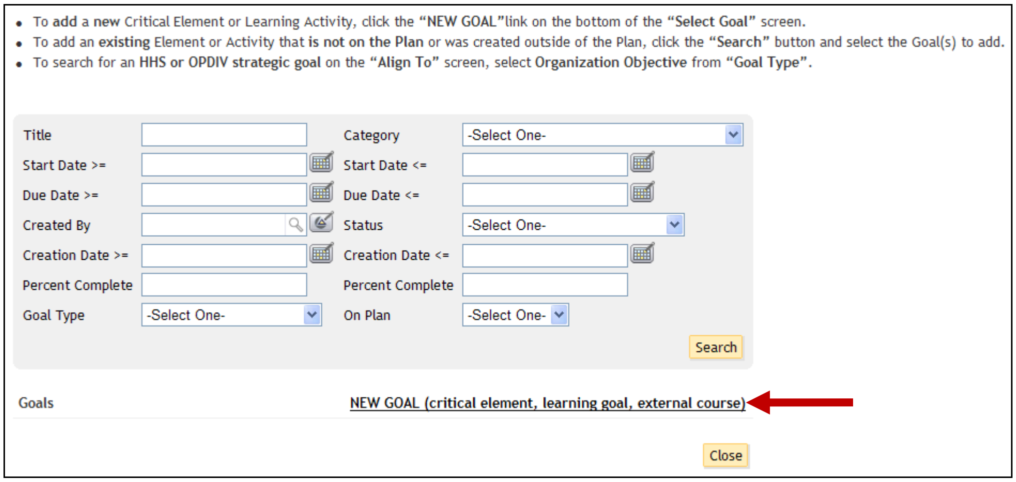
b. Select the checkbox next to the name of the curriculum.



c. You will see a confirmation message that the item has been added to the plan. Click **Close** to exit the message pop-up and return to the **Plan Details** screen. You should now see your item added to the activities list.

GOAL:

a. Click the **New Goal** link.



b. Select **Learning Goal** from the **Type** dropdown menu.

c. Enter appropriate data into all required fields labeled in red.

d. Click the **Save** button once all fields are completed.

LEARNER REGISTRATIONS AND ORDERS

When a learner is registered for a course, it is identified in two ways; as a registration or as an order.

- A *registration* is generated when a learner uses the LMS to register him/herself for an offering.
- An *order* is generated when a learner, manager or administrator registers a learner for an offering.

The end result for either is that the learner is registered for the offering.

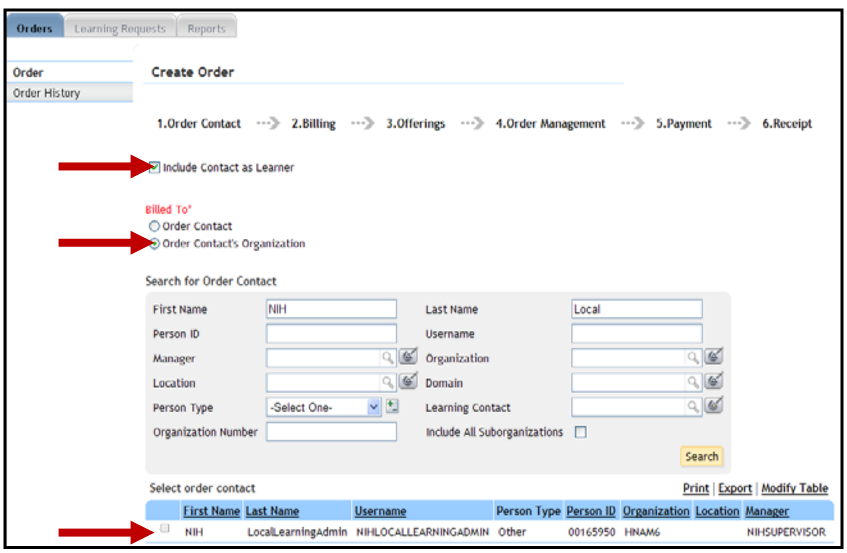
The following instructions will guide you through creating an order for a learner.

STEP-BY-STEP (CREATE AN ORDER FOR A LEARNER)

1. Select the **Registrar** role in the drop-down **Go To** menu.
2. Select **Order** from the menu on the left side of the screen.
3. Use the search fields to find the name of the contact for the order.

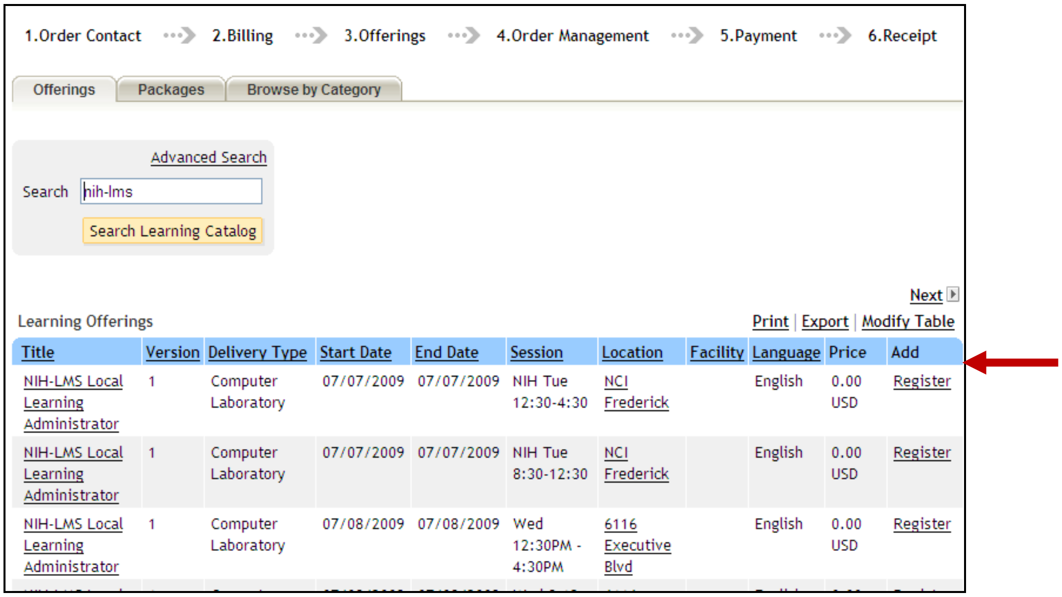
   NOTE: This should be the person that is responsible for the order. It may or may not be the name of the person being registered.

4. If the contact person is not also a learner being registered for the class, uncheck the **Include Contact as Learner** check box.
5. Select the check box next to the account of the contact person, and you will be taken to the next screen.



IMPORTANT! Leave the Billed To toggle button set to Order Contact's Organization.

6. Search for the offering using the **Simple Search, Advanced Search**, or **Browse by Category** options.

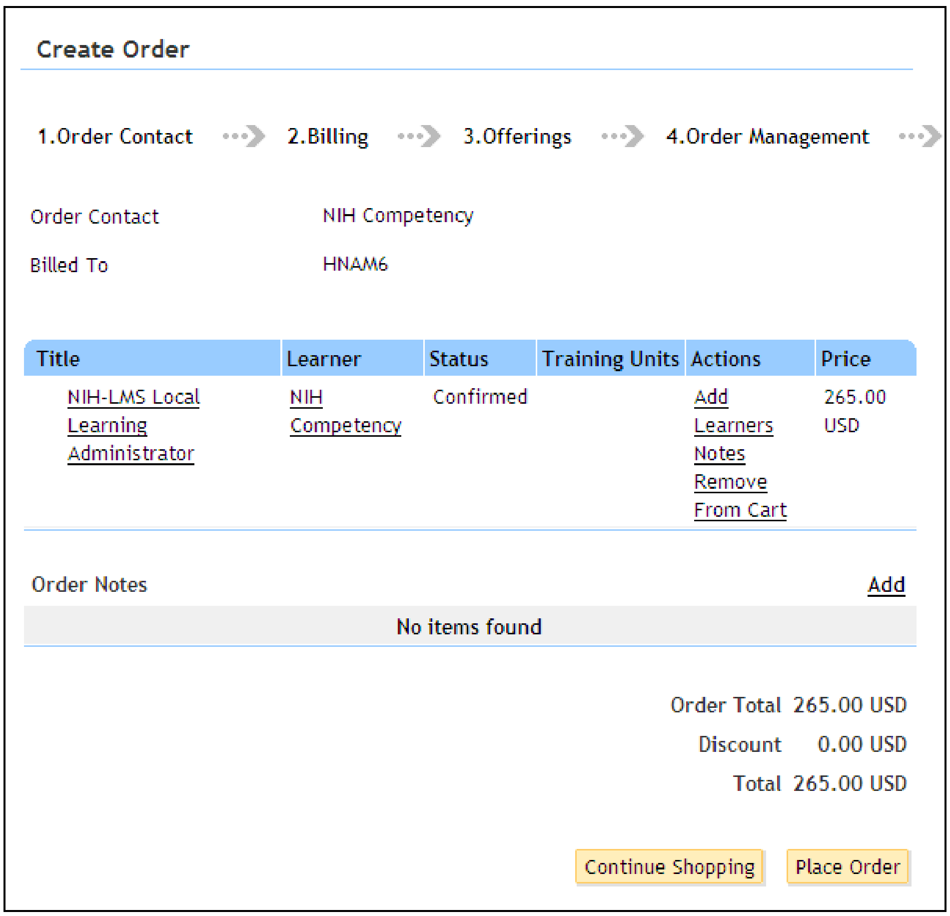


7. Click the **Register** link to the right of the correct offering.

NOTE: You may receive a warning message if the class you selected is full, the waitlist is full, or manager approval is required to take the class. Proceed or go back to select a different offering as needed.

IMPORTANT! From this point, you cannot use you web browser's BACK button or you will lose your order.

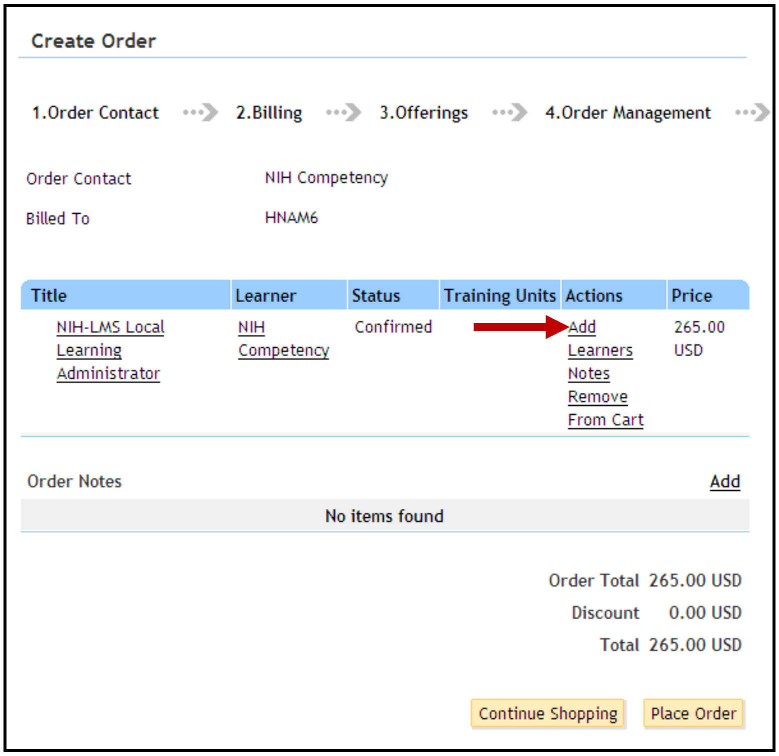
8. From the Create Order screen, you may do one of the following:
   a. **Add Learners:** to add additional learners to the same order (See *Step-By-Step (Adding Additional Learners/Offerings – Optional)* on page 50 of this guide.)
   b. **Add Notes:** to include additional information for the Training Administrator about a specific learner or the order as a whole. (See *Step-By-Step (Adding Notes to a Learner's Line Item – Optional)* on page 52 and (*Step-By-Step (Adding a Note to the Order – Optional)* on page 53 of this guide.)
   c. **Remove From Cart:** to remove line items from the order;
   d. **Continue Shopping**: to add registrations for another offering to the same order.
   e. **Place Order:** when you are finished. (See *Step-By-Step (Place the Order)* on page 55 of this guide.)



IMPORTANT: The system will time you out if you take a long time to place the final order. Be sure you have all the information you need readily available when you start. Consider placing a few smaller orders rather one large order encompassing many different offerings. It is recommended that you register multiple people for the same offering or one person for several offerings per order.

STEP-BY-STEP (ADD ADDITIONAL LEARNERS/OFFERINGS – OPTIONAL)

1. Complete Steps 1 through 7 of *Step-By-Step (Create an Order for a Learner)* on page 47 of this guide.
2. Click the **Add Learners** link to search for additional learners you want to register for the same exact offering.



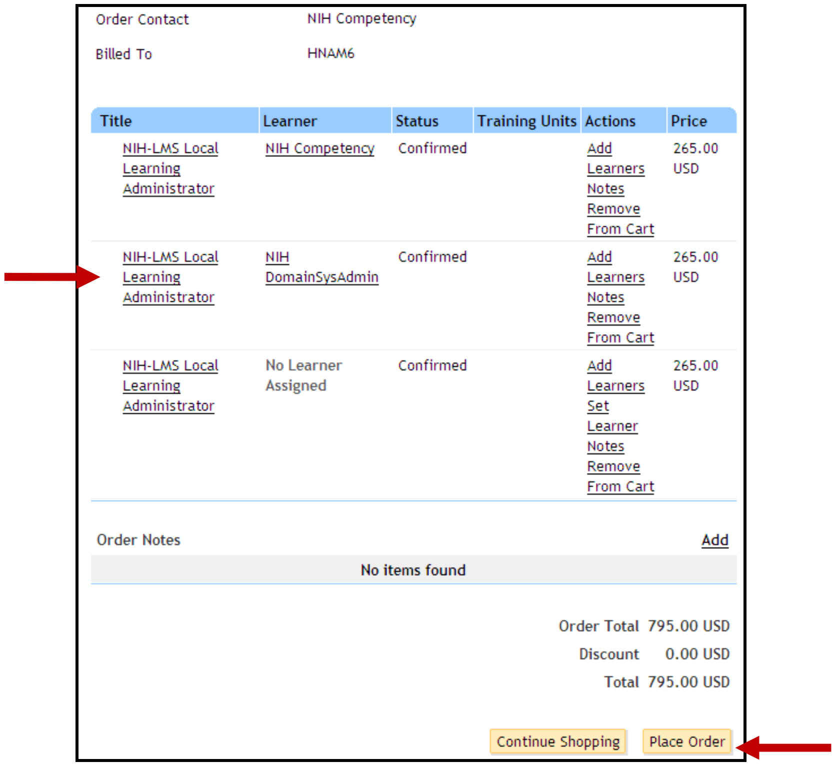
NOTE: If you unchecked the box to not include the contact as a learner when searching for your contact, then your first line item will display the learner name as "No Learner Assigned". From the Actions column, click the **Set Learner** link and proceed to the next step.

3. Enter the name (or other known criteria) in the search fields and click **Search**.
4. Click the box to the left of the learner's name. To reserve unnamed seats in the class, enter the appropriate number in the **Unassigned Learners** field.

   NOTE: Use the check box in the blue menu bar to select all the learners listed.

5. Click **Select**.

6. The learner(s) and seats will now be added to the roster and displayed in the order.



NOTE: To add learners for a different offering to the same order, click **Continue Shopping**. This will take you back to step 6 in the Create an Order for a Learner section of the guide (See page 46). From there you may choose a different offering to include on the order. You will then have the same options to add learners, make notes, etc.

7. Repeat Steps 1 through 6 as needed to add all offerings, learners, and reserved seats to the order.

NOTE: If you make a mistake, click the **Remove from Cart** link next to the incorrect item to remove that line item from the order.

IMPORTANT! Do not use your web browser's BACK button.

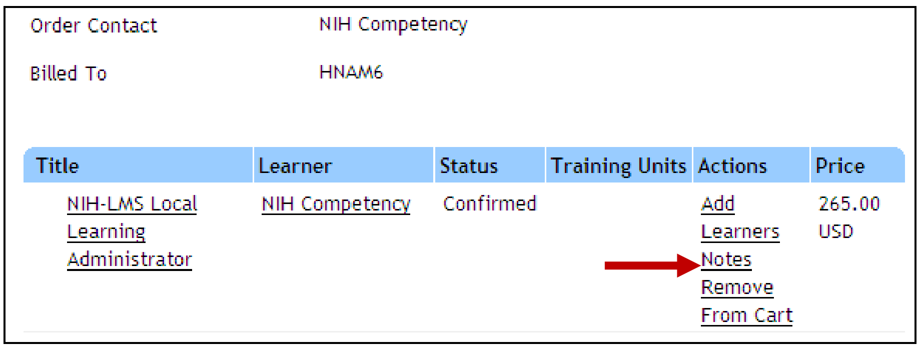
8. Please perform one of the following:

- If you are finished, click **Place Order** (See *Step-By-Step (Place Order)* on page 53 of this guide).
- To add notes to an individual learner or to the order as a whole, (See *Step-By-Step (Adding Notes to a Learner's Line Item – Optional)* on page 52 and (*Step-By-Step (Adding a Note to the Order – Optional)* on page 53 of this guide.)

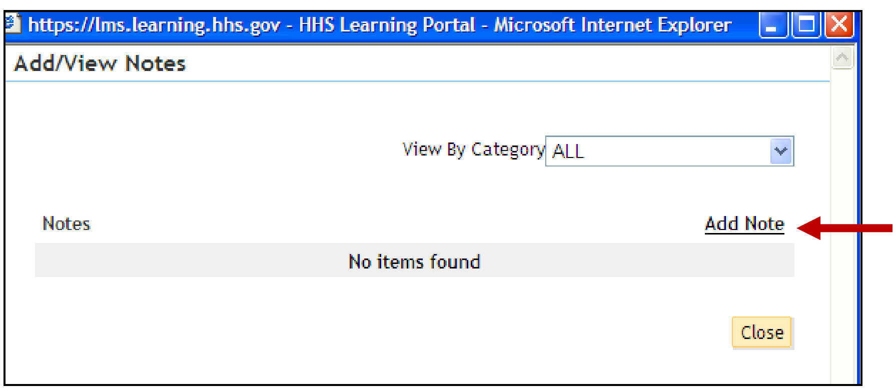
STEP-BY-STEP (ADD A NOTE TO A LEARNER'S LINE ITEM – OPTIONAL)

A note about a specific learner can be added to the order. These notes may be helpful to record unique details of the learner's registration that serve as reminders for you or as helpful information to other administrators. Notes are only viewable by administrators.

1. Complete Steps 1 through 7 of *Step-By-Step (Create an Order for a Learner)* on page 47 of this guide.
2. Click the **Notes** link in the Actions column to the right of the appropriate line item.

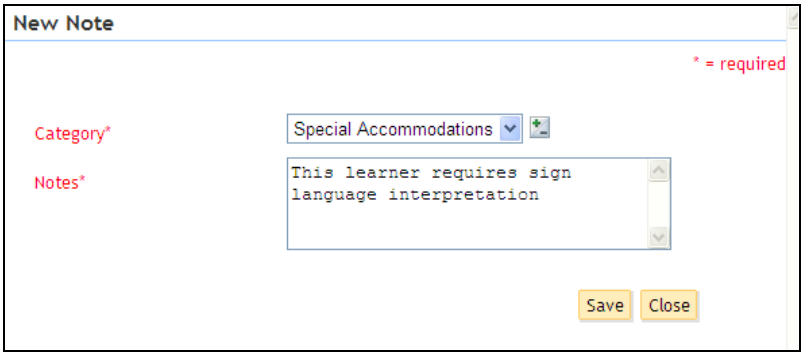


3. Click **Add Note**.



4. Select a category from the **Category** drop-down menu.
5. Enter an appropriate comment in the **Notes** field.

6. Click **Save**.



IMPORTANT! Notes are permanent! They cannot be deleted nor edited after they are created. Proofread carefully before saving. For long notes, you may want to use a word processor to construct the text. Then copy and paste into the field.

NOTE: There is no visible indicator that a note is associated with a specific learner on the order. If you make a note for the learner, it is recommended that you add a note in the Order Notes section, indicating that a note exists for a specific learner.

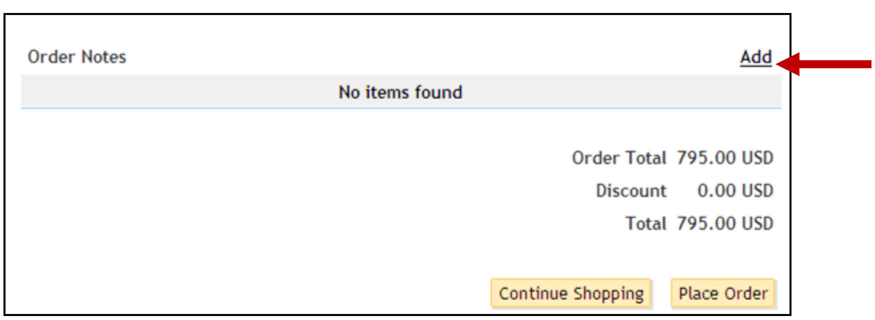
7. Click **Close** to close the **Add/View Notes** pop-up window.

NOTE: To view previously entered notes, click on the **Notes** link in the Action column of the order.

8. If you are finished, click **Place Order** (See *Step-By-Step (Place Order)* on page 55 of this guide).

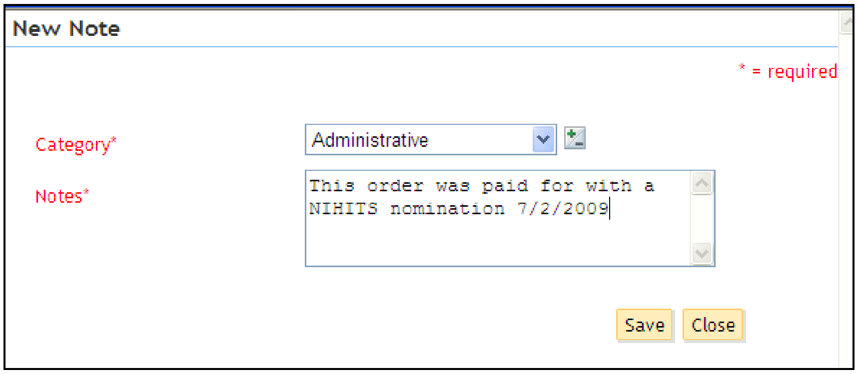
STEP-BY-STEP (ADD A NOTE TO THE OVERALL ORDER – OPTIONAL)

1. Complete Steps 1 through 7 of *Step-By-Step (Create an Order for a Learner)* on page 47 of this guide.
2. Click the **Add** link in the **Order Notes** section.



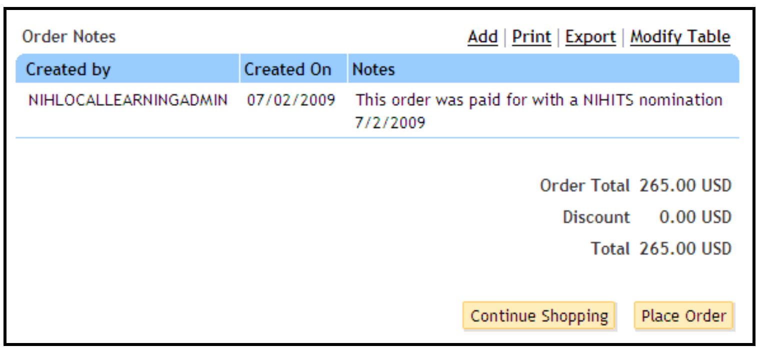
3. Select a category from the **Category** drop-down menu.
4. Enter an appropriate comment in the **Notes** field.

5. Click **Save.**



IMPORTANT! Notes are permanent! They cannot be deleted nor edited after they are created. Proofread carefully before saving. For long notes, you may want to use a word processor to construct the text. Then copy and paste into the field.

NOTE: Notes for the overall order are displayed in the **Order Notes** section.

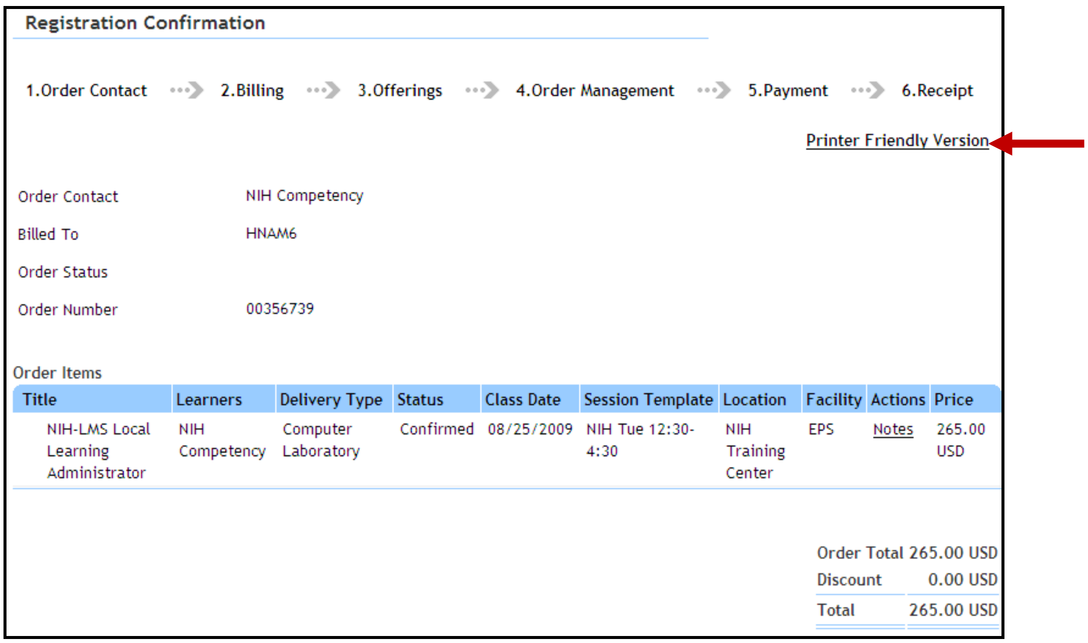


6. If you are finished, click **Place Order** (See *Step-By-Step (Place Order)* on page 55 of this guide).

STEP-BY-STEP (PLACE THE ORDER)

1. Complete Steps 1 through 7 of *Step-By-Step (Create an Order for a Learner)* on page 47 of this guide.
2. When the order appears exactly as you want it, click **Place Order**.

   IMPORTANT! For security purposes, the system will time you out if you take a long time to place the final order. Consider placing a few smaller orders rather than one large order encompassing many different offerings.
3. To print a hard copy of the order receipt for your records, click the **Printer Friendly Version** link.



Registration Confirmation

1.Order Contact → 2.Billing → 3.Offerings → 4.Order Management → 5.Payment → 6.Receipt

Printer Friendly Version

Order Contact NIH Competency

Billed To HNAM6

Order Status

Order Number 00356739

Order Items

Title	Learners	Delivery Type	Status	Class Date	Session Template	Location	Facility	Actions	Price
NIH-LMS Local Learning Administrator	NIH Competency	Computer Laboratory	Confirmed	08/25/2009	NIH Tue 12:30-4:30	NIH Training Center	EPS	Notes	265.00 USD

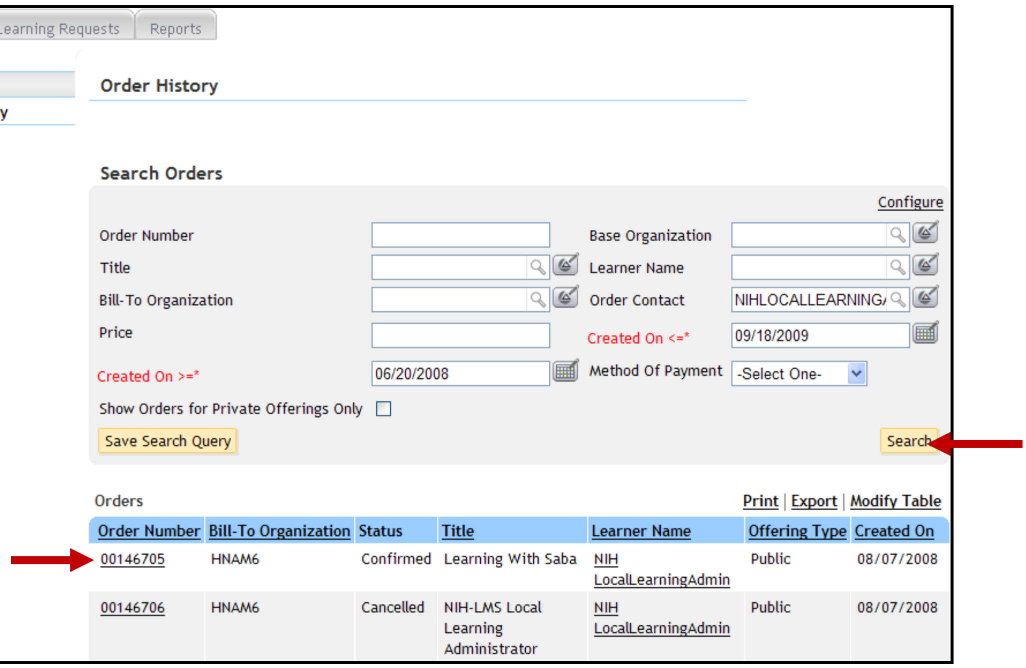
Order Total	265.00 USD
Discount	0.00 USD
Total	265.00 USD

IMPORTANT! Although you place the order to complete the registration process in the LMS, there are no financial transactions taking place through the LMS at this time. For any offering that has tuition, you MUST follow-up by completing a NIHITS nomination to obligate the funds. Your registration in any offering may be dropped if you do not pay for it.

STEP-BY-STEP (SEARCHING FOR AND MODIFYING ORDERS)

The **Order History** menu option can be useful if you need to look up or change an order previously placed in the LMS.

1. From the Orders tab, click **Order History** from the left menu.
2. Enter your search criteria in the appropriate fields and click **Search**.
3. Click on the **Order Number** link for the order you wish to see.



4. From the Order Details page, you may view more details about the following:
   - Click the **Title** link to get more information about the course.
   - Click the **Learner** link to view details about the learner.
5. From the **Actions** column of the Order Details page, you may click to edit the following:
   - **Change Learner** to search for a new learner. This is considered a substitution.

     IMPORTANT!! If a NIHITS nomination has already been placed, you must revise the NIHITS nomination to reflect this change.

   - **Reschedule** to move the learner to another available offering. Only offerings with available seats will be displayed. Select the appropriate offering's toggle button and click **Reschedule Without Charge** or **Reschedule With Charge,** as appropriate.

     NOTE: A learner cannot be rescheduled for a different course, only a different offering of the same course.

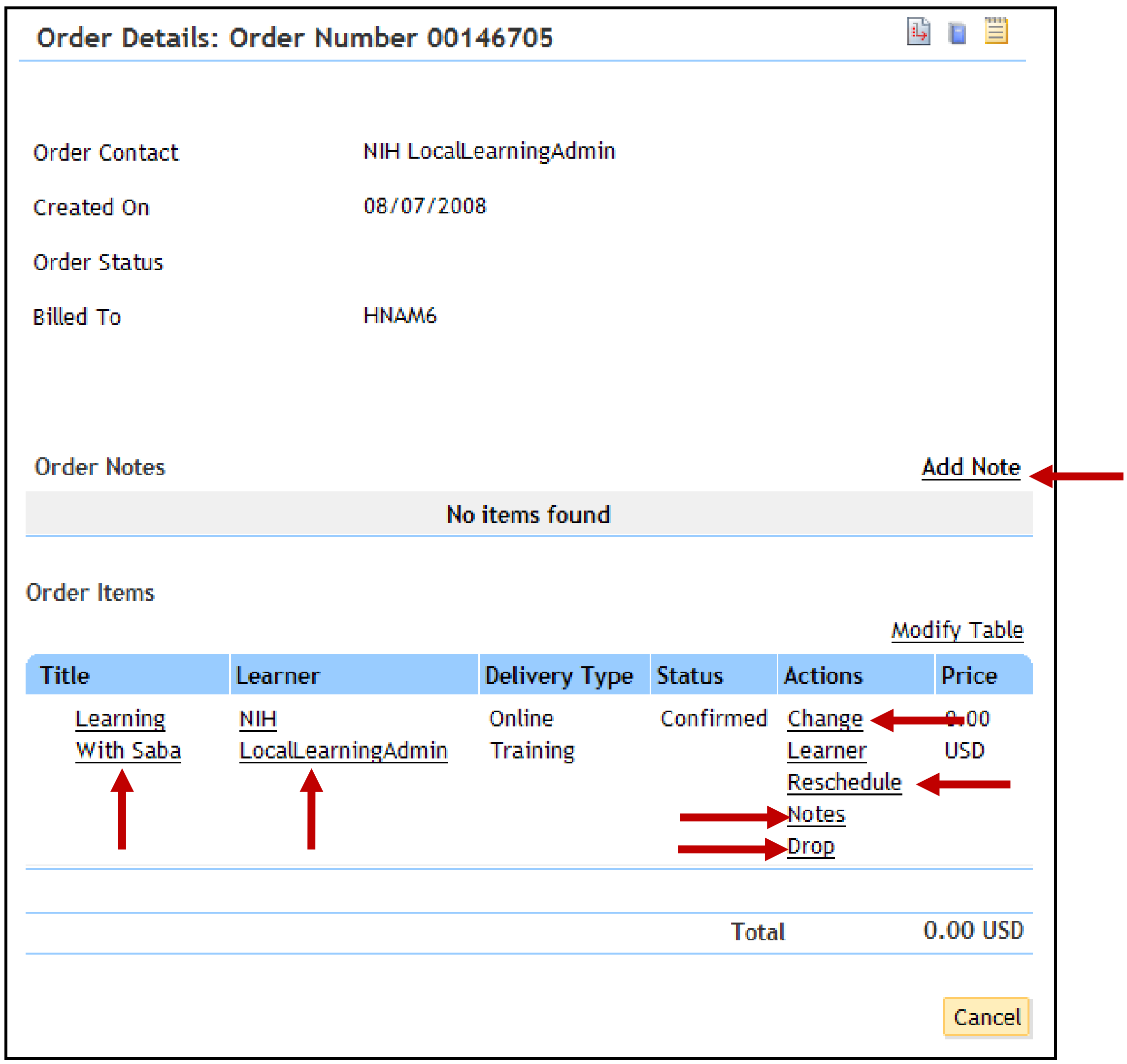
     IMPORTANT! This does not actually process any financial transaction.

- **Notes** to add notes about the learner.

  IMPORTANT! Notes are permanent! They cannot be deleted nor edited after they are created. Proofread carefully before saving. For long notes, you may want to use a word processor to construct the text then copy and paste into the field.

- **Drop** to remove the learner from the order and the course roster.

  IMPORTANT! This does not release the learner or their organization from financial obligations to pay for the course If this action is done during the cancellation period, Always notify the learner.



LEARNING REQUESTS

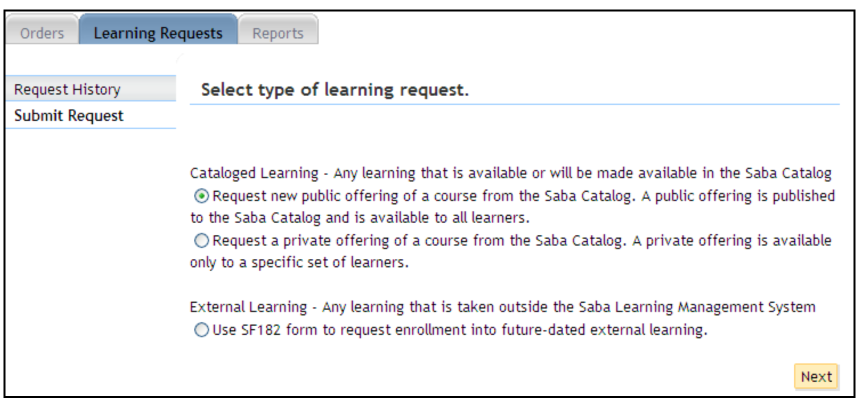
When there is a demand for a course that is not offered in a location and or time that is convenient for learners, an electronic request may be submitted. This request will notify the Training Administrator that there is a demand for the course that exceeds what is currently offered. The Training Administrator can accept the request based on the needs given or can reject the request. The following instructions will guide you through the process of creating a request.

NOTE: There is no formal process in place requiring Training Administrators to monitor learning requests in the LMS. If your request is very important and/or time sensitive, you need to contact the training organization outside the LMS for follow-up.

STEP-BY-STEP (CREATE A LEARNING REQUEST)

1. Select the **Registrar** role in the drop-down Go To menu.
2. Click on the **Learning Requests** tab.
3. Select **Submit Request** from the menu on the left.
4. Select the type of learning request by clicking on the appropriate radio button.
   - *Public offering* – Use this if you are requesting the addition of an open enrollment class for which anyone at NIH may register.
   - *Private offering* – Use this if you would like a special class set up just for your organization or group.

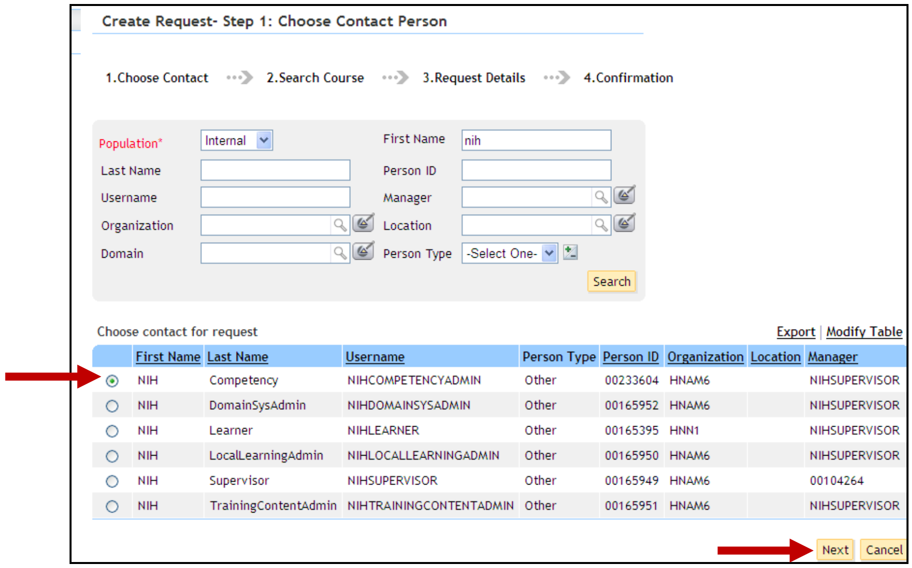
   NOTE: Although you may see a menu option for **External Learning**, external learning requests are not currently processed through the LMS. Do not select that option.
5. Click **Next**.



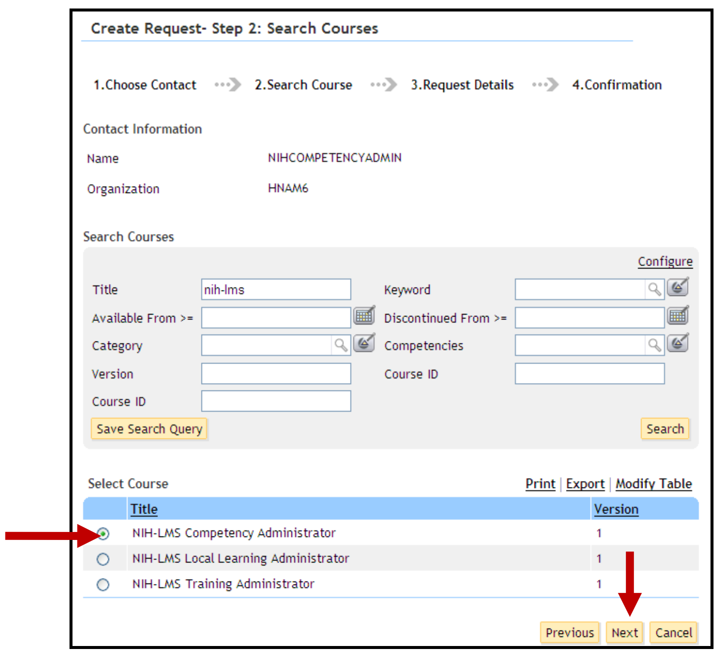
6. As with creating an order, enter search criteria for the name of a contact person and click **Search**. (This will be the person the Training Administrator will contact if there are questions about the request.)

Local Learning Administrator

7. Click the radio button next to the contact person’s name, then click **Next**.



8. Enter search criteria of the course for which you would like to request an offering and click **Search**.
9. Select the radio button to the left of the correct course, then click **Next**.

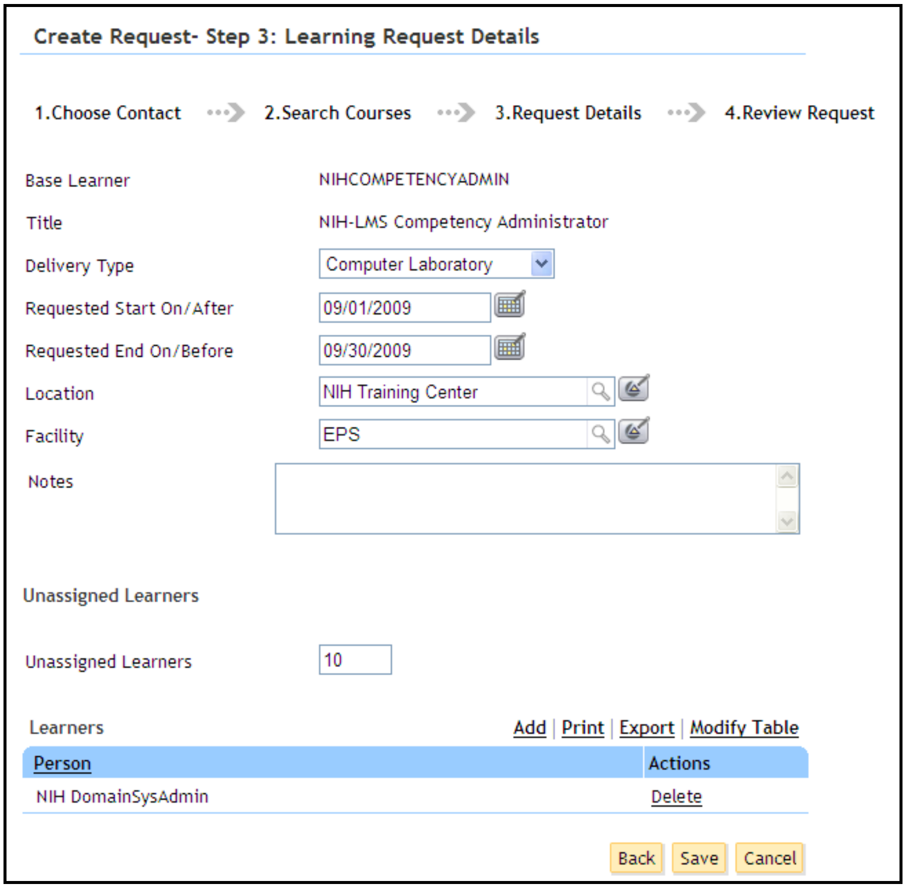


10. Enter any specific parameters you would like the LMS Training Administrator to consider when creating a new offering.

NOTE: The available parameters vary depending on whether you selected Public Offering or Private Offering in Step 4 above.

11. If creating a Public Offering Learning Request, then you may add any known learners by clicking the **Add** link in the **Learners** section and searching for each learner to be added. Added learners' names will appear listed in the table.

    NOTE: You may delete learners from the request by clicking the **Delete** link in the **Actions** column of the Learners table before saving



.

12. If creating a Public Offering Learning Request, then you may request unassigned seats in the offering (for learners not yet identified) by indicating the number of learners in the **Unassigned Learners** field.

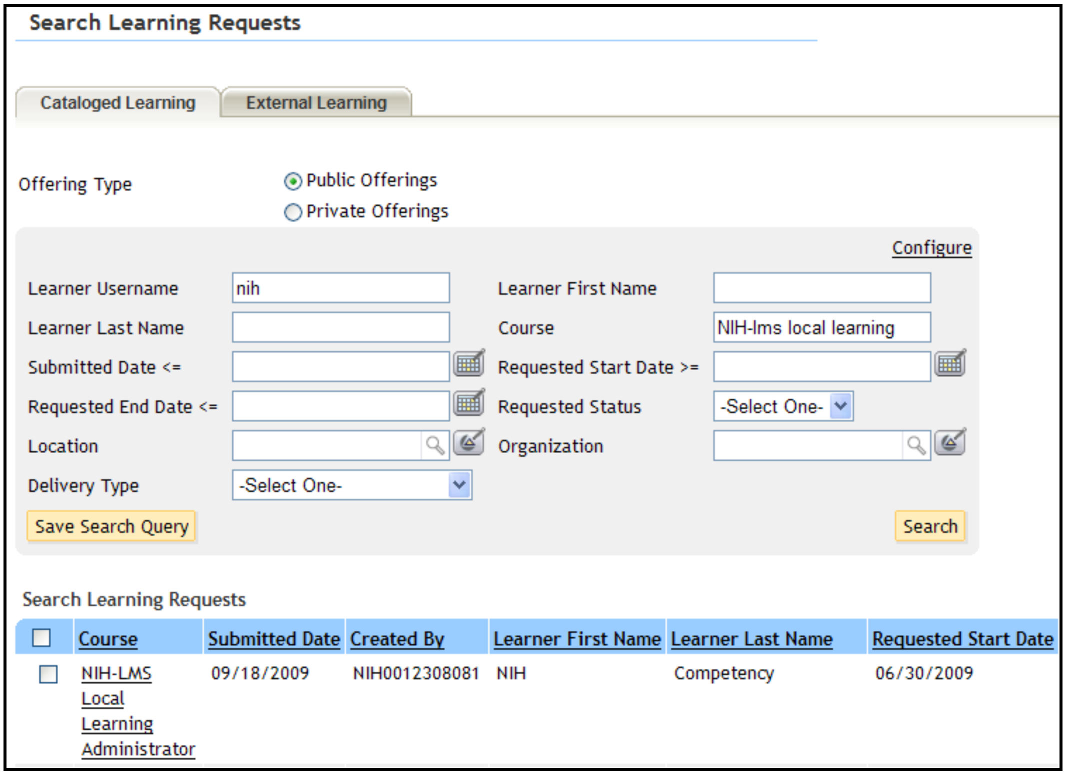
13. Click **Save**.

    IMPORTANT! This is merely a request for a class. Do not submit a NIHITS nomination for payment! The Training Administrator of the course will decide whether to create a new offering to fill your request.

STEP-BY-STEP (REVIEW A SUBMITTED LEARNING REQUEST)

The **Request History** menu area allows you to search for learning requests placed previously. You will be able to view the status of any previous learning requests. You may also register learners from a learning request to an offering that is already scheduled.

1. From the **Learning Requests** tab, select **Request History** from the vertical navigation.
2. Enter appropriate search criteria to find the learning request and click **Search**.

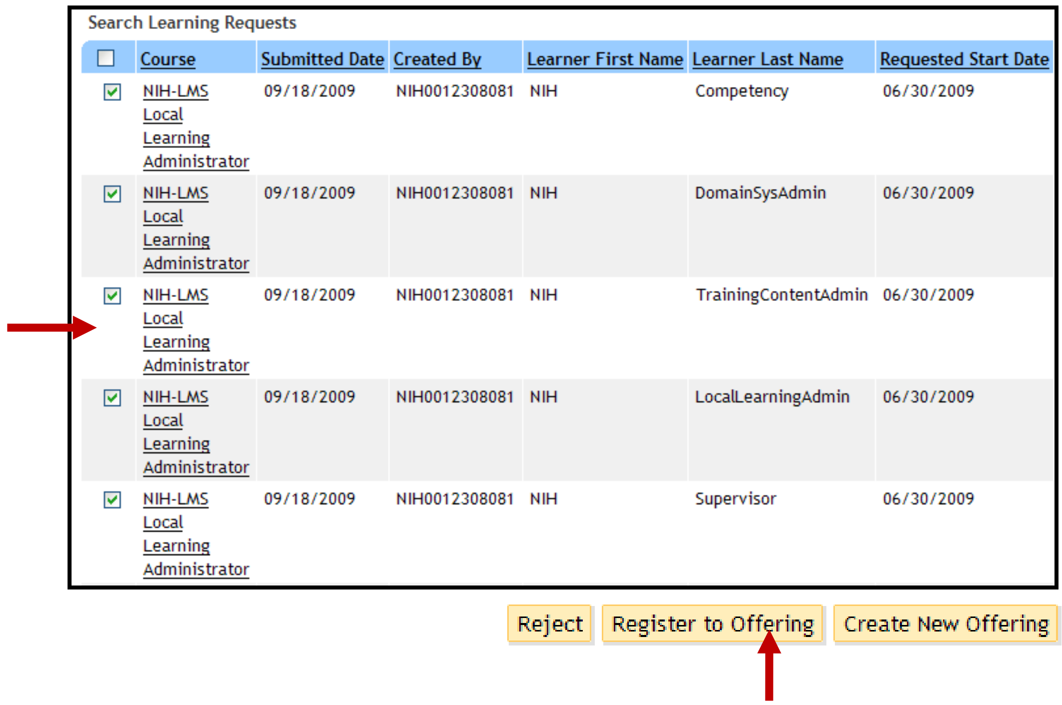


3. From the **Actions** column of the **Search Learning Requests** search results table, you can perform the following:
   - Click **Delete** to cancel the request.

     NOTE: This must be done for each learner.
   - Click **View Details** to view the request details.

STEP-BY-STEP (REGISTER LEARNERS FROM A LEARNING REQUEST)

1. Complete Steps 1 and 2 from *Step-By-Step (Review a Submitted Learning Request)* on page 62 of this guide.
2. Select the checkbox to the left of the learning request(s) from which you want to register learners.
3. Scroll to the bottom of the page and click **Register to Offering**.



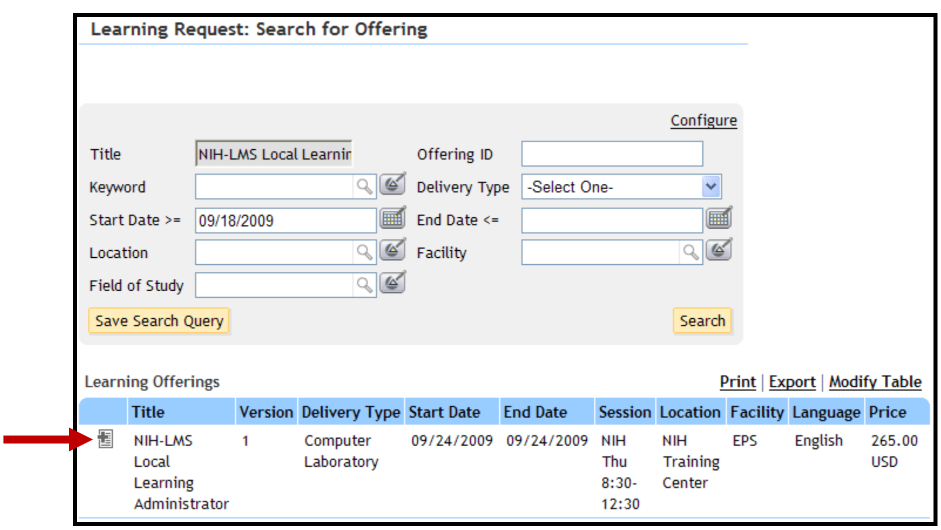
Search Learning Requests

☐	Course	Submitted Date	Created By	Learner First Name	Learner Last Name	Requested Start Date
☑	NIH-LMS Local Learning Administrator	09/18/2009	NIH0012308081	NIH	Competency	06/30/2009
☑	NIH-LMS Local Learning Administrator	09/18/2009	NIH0012308081	NIH	DomainSysAdmin	06/30/2009
☑	NIH-LMS Local Learning Administrator	09/18/2009	NIH0012308081	NIH	TrainingContentAdmin	06/30/2009
☑	NIH-LMS Local Learning Administrator	09/18/2009	NIH0012308081	NIH	LocalLearningAdmin	06/30/2009
☑	NIH-LMS Local Learning Administrator	09/18/2009	NIH0012308081	NIH	Supervisor	06/30/2009

IMPORTANT! Reject & **Create New Offering** buttons will only work for Training Administrators!

4. Click the plus (**+**) symbol to the left of the title.

NOTE: Only available offerings for the course will be displayed.



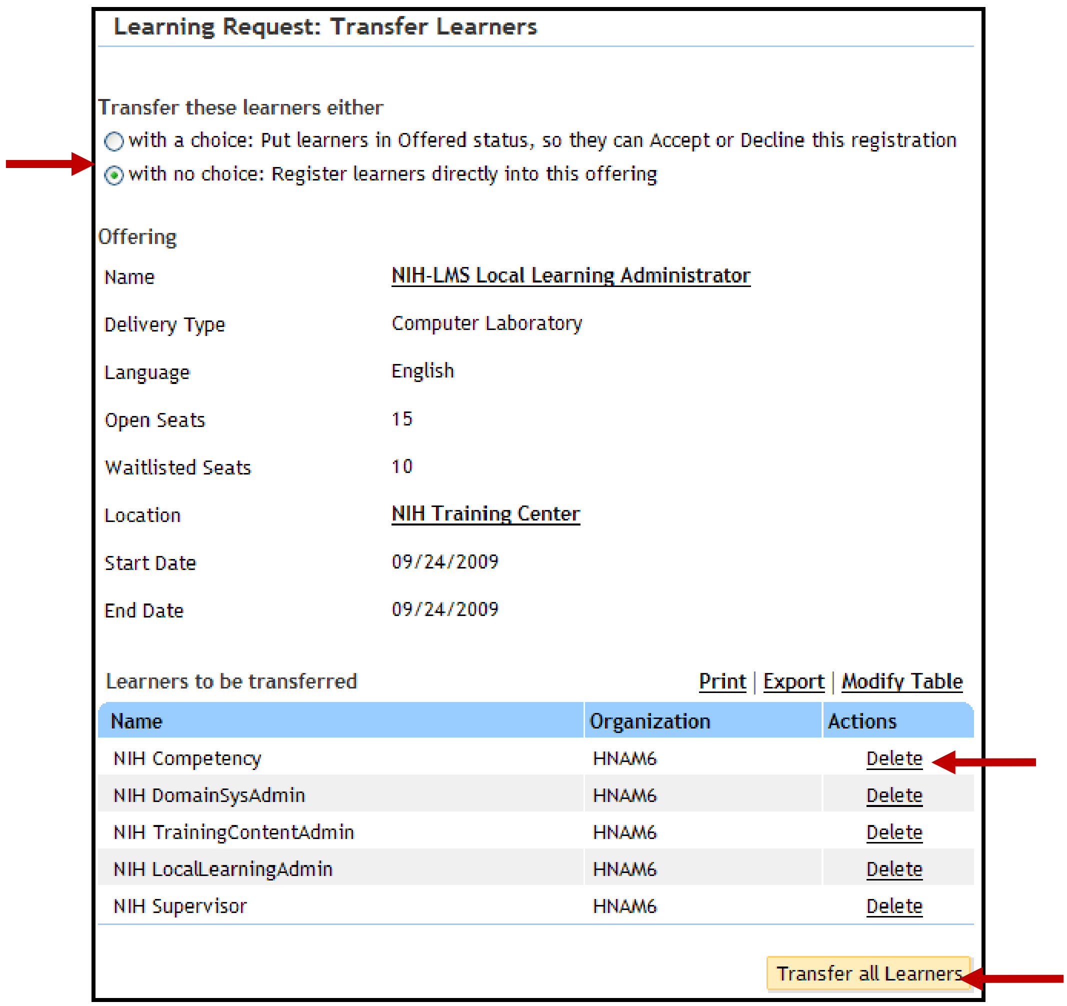
Title	Version	Delivery Type	Start Date	End Date	Session	Location	Facility	Language	Price
NIH-LMS Local Learning Administrator	1	Computer Laboratory	09/24/2009	09/24/2009	NIH Thu 8:30-12:30	NIH Training Center	EPS	English	265.00 USD

5. Select how to transfer the learners from the learning request to the offering by selecting one of the following radio buttons at the top of the **Learning Request: Transfer Learners** page:

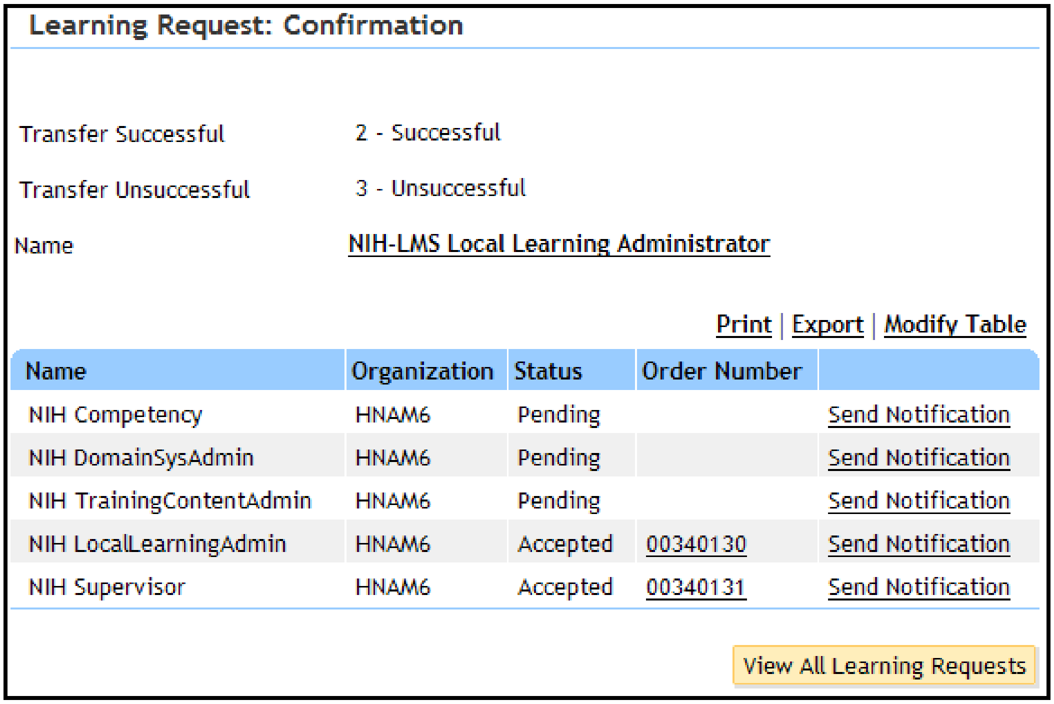
   - **With a choice**: Learners will be notified and have five days to login to the LMS and confirm their registration. If the status is not confirmed, the learner will lose their seat.
   - **With no choice**: Learners are confirmed and placed on the roster.

   NOTE: Verify that the offering has enough seats to accommodate the number of learners you wish to transfer.

   Any learners that should not be enrolled can be deleted at this time by clicking the **Delete** link.



6. Click **Transfer all Learners**.
7. Review the **Learning Request: Confirmation** page for any errors.
   - **Successful** – Learners have been registered for the offering. A NIHITS nomination needs to be done for all classes that have tuition.
   - **Unsuccessful** – This could be the result of not enough space on the roster/waitlist, manager needs to approve, an invalid SAC code for offerings with an audience type, etc. Further investigation is required.



Learning Request: Confirmation

Transfer Successful 2 - Successful

Transfer Unsuccessful 3 - Unsuccessful

Name NIH-LMS Local Learning Administrator

Print | Export | Modify Table

Name	Organization	Status	Order Number	
NIH Competency	HNAM6	Pending		Send Notification
NIH DomainSysAdmin	HNAM6	Pending		Send Notification
NIH TrainingContentAdmin	HNAM6	Pending		Send Notification
NIH LocalLearningAdmin	HNAM6	Accepted	00340130	Send Notification
NIH Supervisor	HNAM6	Accepted	00340131	Send Notification

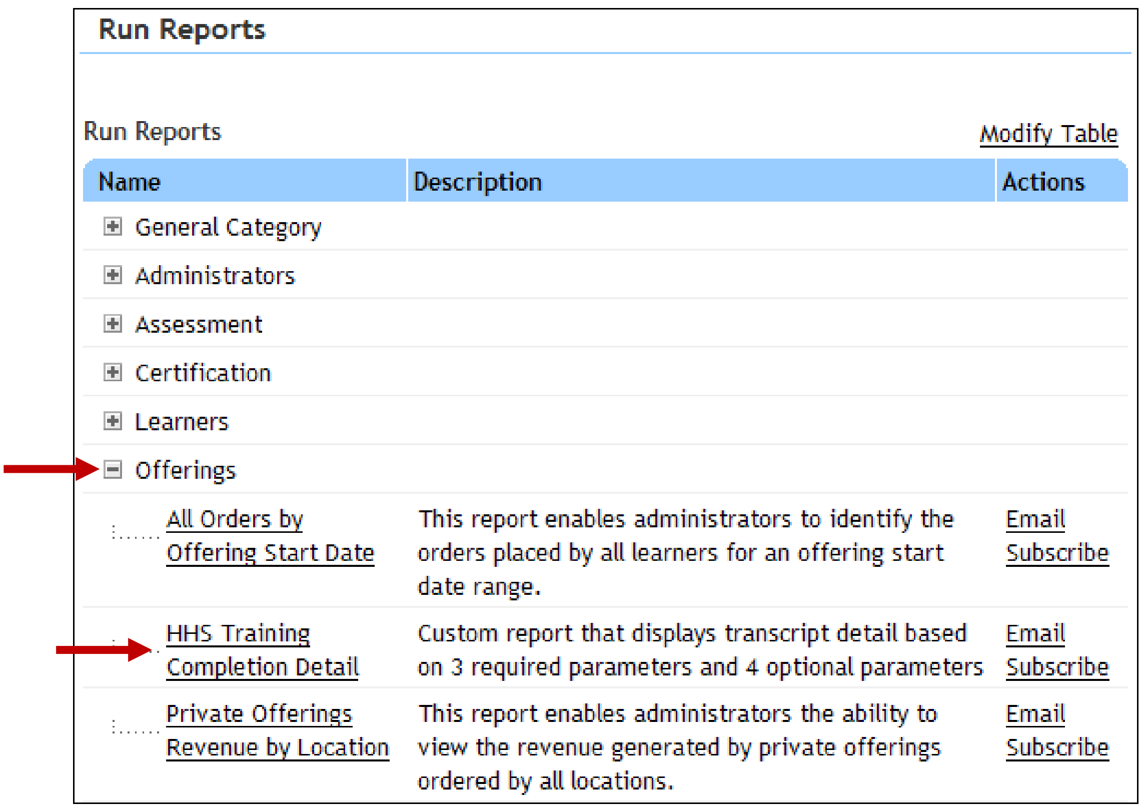
View All Learning Requests

REPORTS

The Local Learning Administrator has access to a variety of reports in the LMS. Reports can be generated, exported, printed, emailed and subscribed to if desired. The reports available for you to run vary slightly between the roles of Human Capital Administrator – People and Registrar. Below you will find instructions on how to work with reports in the LMS.

STEP-BY-STEP (GENERATE A REPORT)

1. Select the **Human Capital Administrator – People** or **Registrar** role in the drop-down **Go To** menu.
2. Click on the **Reports** tab.
3. Click on the (**+**) symbol on the left of the **Offerings** category to expand the list of reports available.
4. Click **HHS Training Completion Detail** to bring up the **Report Parameters** screen.


Run Reports

Run Reports | Modify Table

Name	Description	Actions
General Category		
Administrators		
Assessment		
Certification		
Learners		
Offerings		
All Orders by Offering Start Date	This report enables administrators to identify the orders placed by all learners for an offering start date range.	Email Subscribe
HHS Training Completion Detail	Custom report that displays transcript detail based on 3 required parameters and 4 optional parameters	Email Subscribe
Private Offerings Revenue by Location	This report enables administrators the ability to view the revenue generated by private offerings ordered by all locations.	Email Subscribe

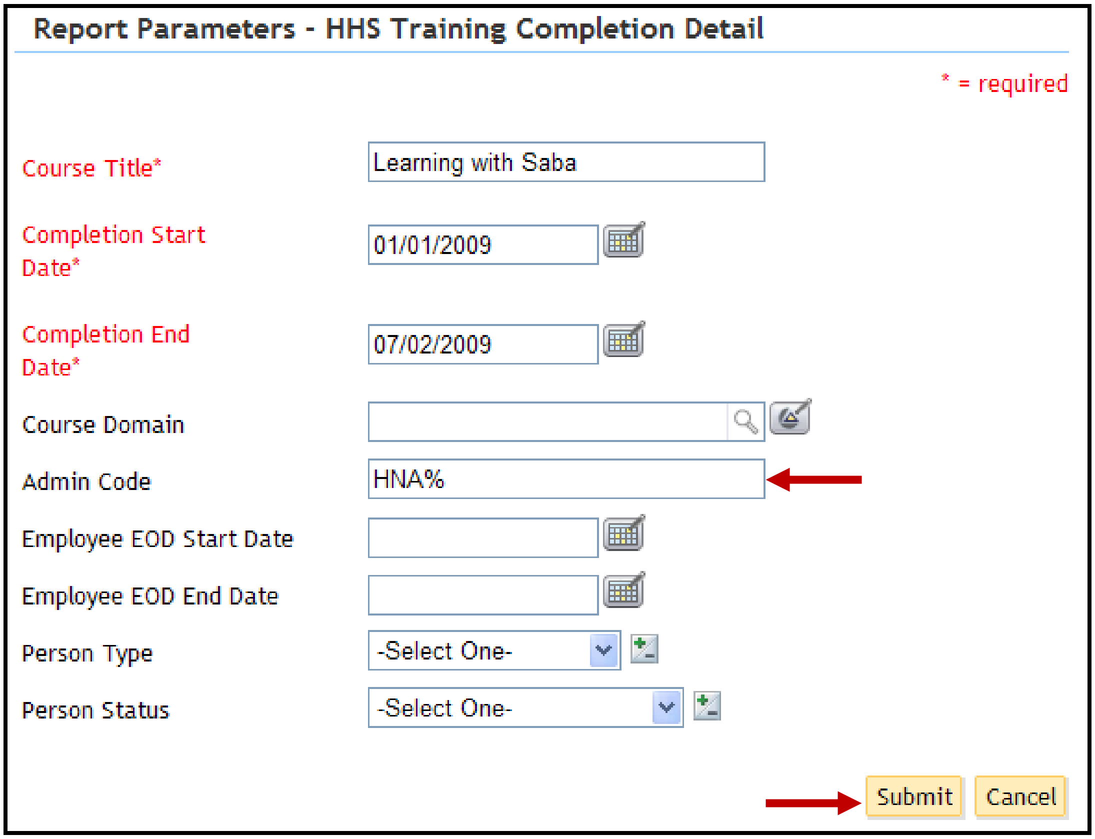
Local Learning Administrator

5. Enter criteria into appropriate fields.

   IMPORTANT! Fields labeled in Red with an asterisk are required.

   NOTE: You do not need to enter the complete title for this report. Using ‘HNA%’ for an admin code will return all completions for users within HNA and all of its sub-orgs.

6. Click **Submit**.

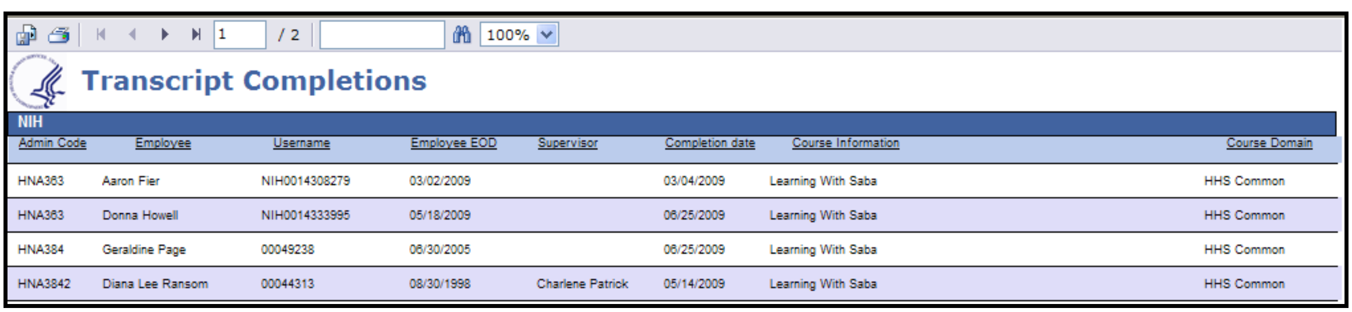

Report Parameters - HHS Training Completion Detail

* = required

Course Title*	Learning with Saba
Completion Start Date*	01/01/2009
Completion End Date*	07/02/2009
Course Domain	
Admin Code	HNA%
Employee EOD Start Date	
Employee EOD End Date	
Person Type	-Select One-
Person Status	-Select One-

Submit Cancel

The following is a sample report, based on the parameters above:


1 / 2 100%

Transcript Completions

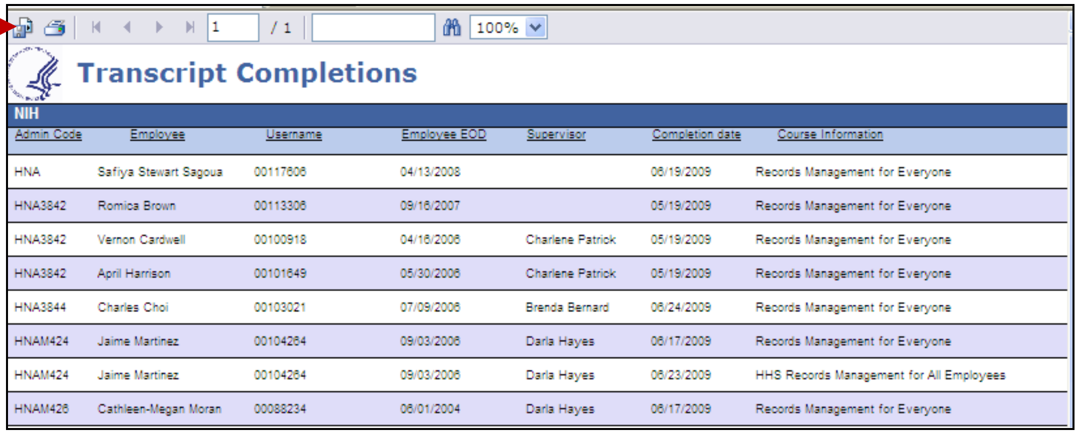
NIH

Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information	Course Domain
HNA363	Aaron Fier	NIH0014308279	03/02/2009		03/04/2009	Learning With Saba	HHS Common
HNA363	Donna Howell	NIH0014333995	05/18/2009		06/25/2009	Learning With Saba	HHS Common
HNA384	Geraldine Page	00049238	06/30/2005		06/25/2009	Learning With Saba	HHS Common
HNA3842	Diana Lee Ransom	00044313	08/30/1998	Charlene Patrick	05/14/2009	Learning With Saba	HHS Common

STEP-BY-STEP (EXPORT A REPORT)

Once a report is generated, it can be exported from the LMS into other file formats. Of these, "Adobe Acrobat – PDF" and "Microsoft Excel 97-2000 – Data Only (XLS)" are the most commonly used.

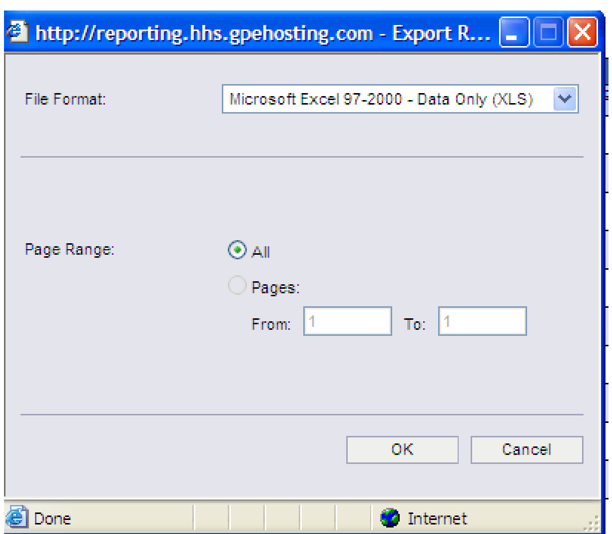
1. Complete the steps in section *Step-By-Step (Generate a Report)* on page 67 of this guide.
2. Click the export icon in the upper left corner of the report.



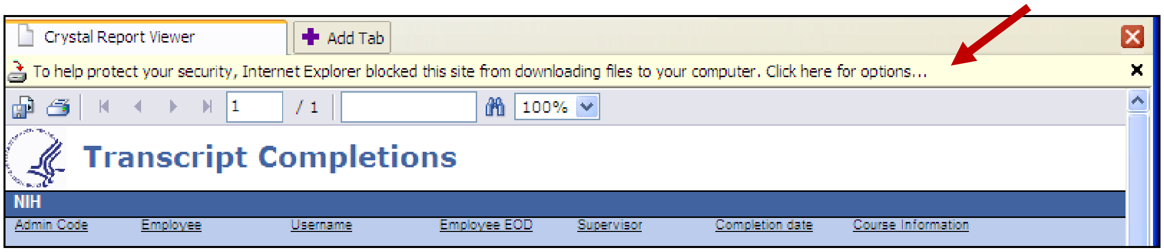
Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information
HNA	Safiya Stewart Sagoua	00117606	04/13/2008		06/19/2009	Records Management for Everyone
HNA3842	Romica Brown	00113306	09/16/2007		05/19/2009	Records Management for Everyone
HNA3842	Vernon Cardwell	00100918	04/16/2006	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3842	April Harrison	00101649	05/30/2006	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3844	Charles Choi	00103021	07/09/2006	Brenda Bernard	06/24/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104264	09/03/2006	Darla Hayes	06/17/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104264	09/03/2006	Darla Hayes	06/23/2009	HHS Records Management for All Employees
HNAM426	Cathleen-Megan Moran	00088234	06/01/2004	Darla Hayes	06/17/2009	Records Management for Everyone

3. Select the **File Format** you want, indicate the **Page Range**, and click **OK**. The following two formats are the most commonly used:
   - The **Adobe Acrobat (PDF)** format will export a report ready for printing.
   - 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.

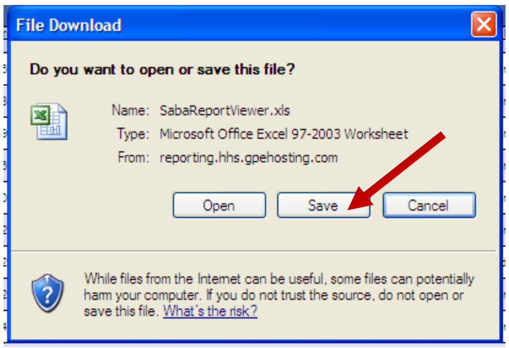
NOTE: The Page Range option during export is not available for all export formats.



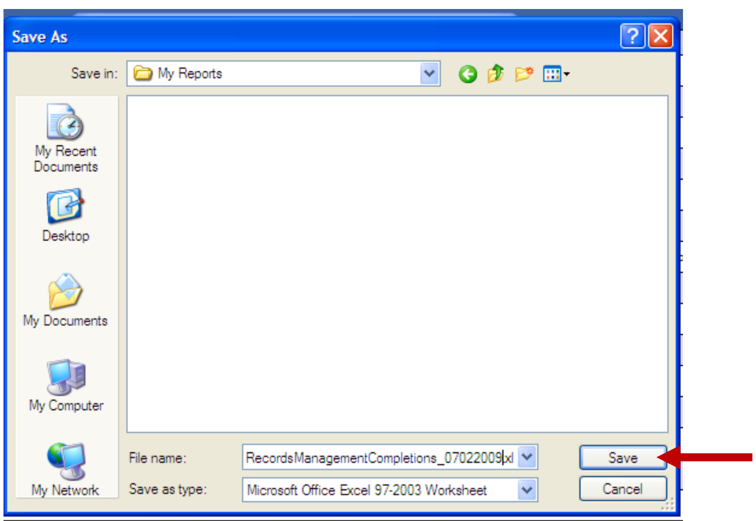
4. You may see the following browser warning. Click the yellow warning bar and select **Download File.** Repeat Step 2.



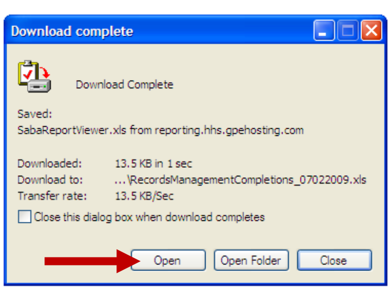
5. You will be prompted to open or save the file. Click **Save**.



6. Select a location in which to save the file and give it a meaningful name; click **Save**.

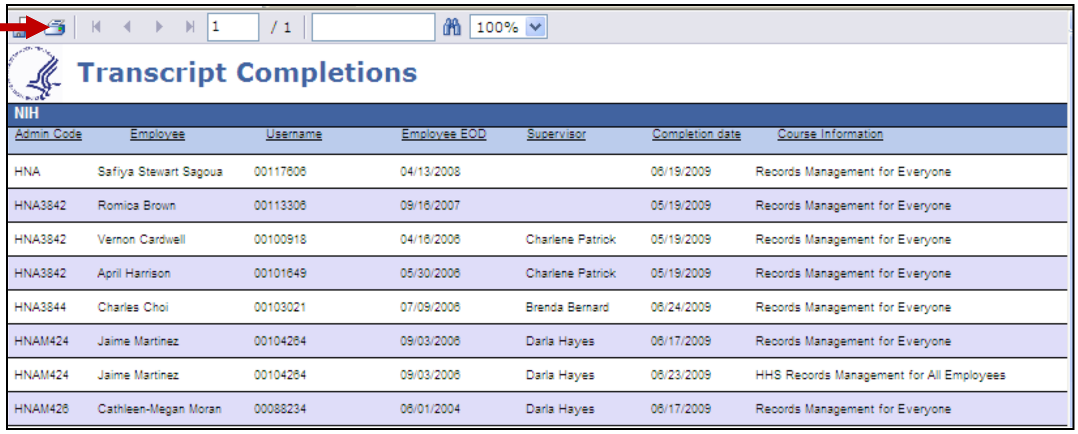


7. You will receive a prompt when the download is complete. Click **Open** to open the report file you just downloaded.

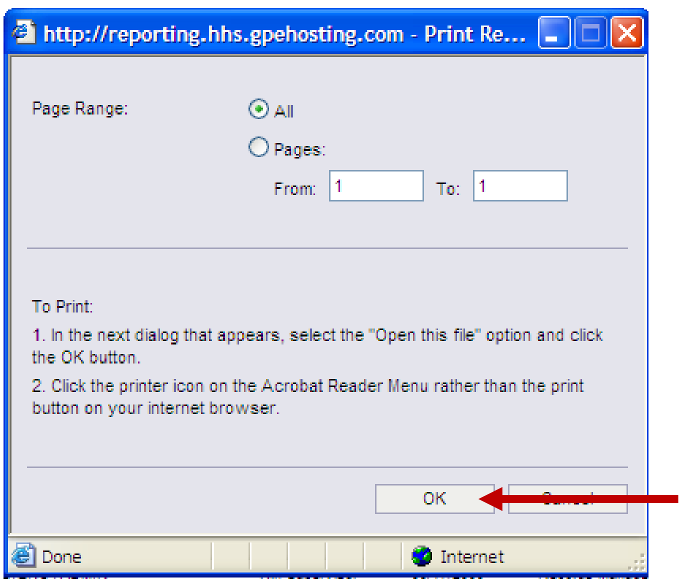


STEP-BY-STEP (PRINT A REPORT)

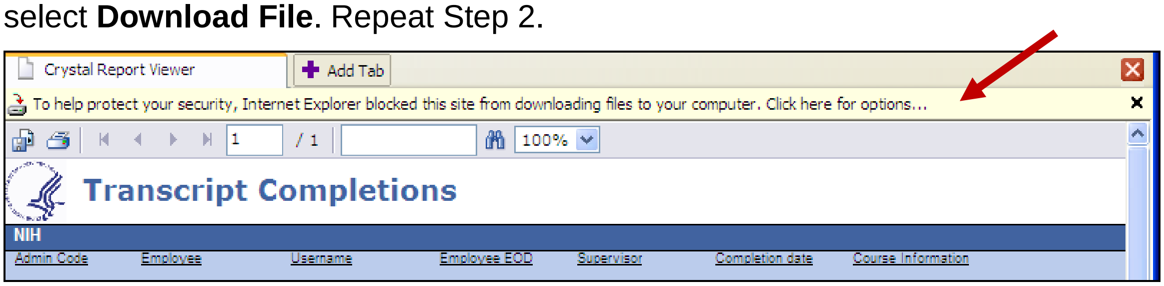
1. Complete the steps in section *Step-By-Step (Generate a Report)* on page 67 of this guide.
2. Click the print icon in the upper left corner of the report.



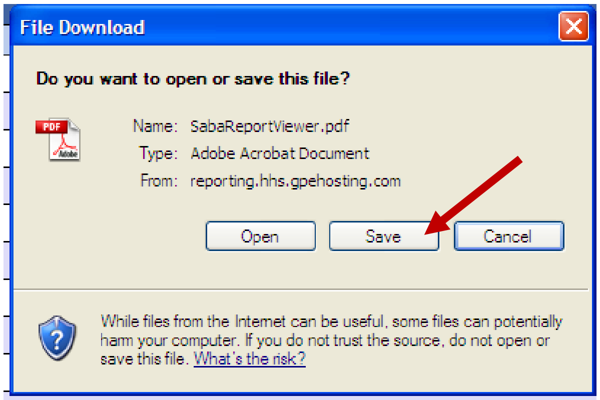
3. Indicate the **Page Range** you want, and click **OK**.



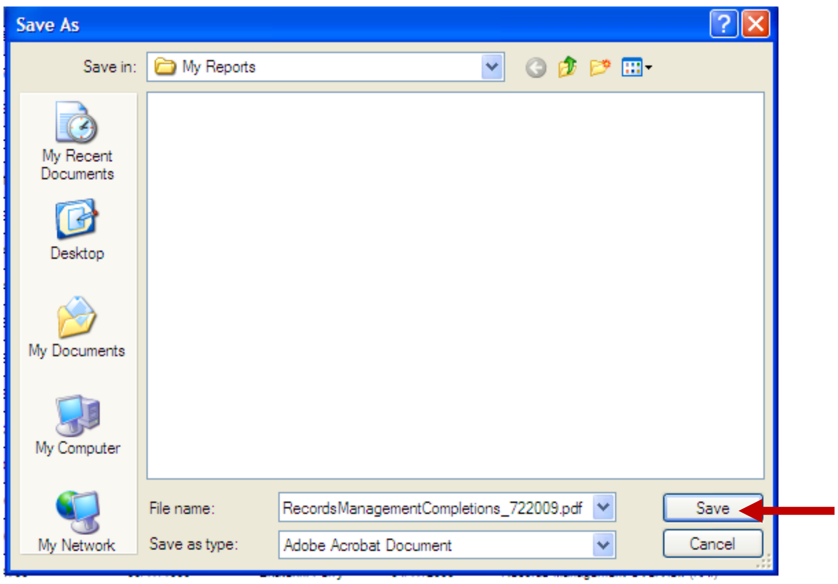
4. You may see the following browser warning. Click the yellow warning bar and select **Download File**. Repeat Step 2.



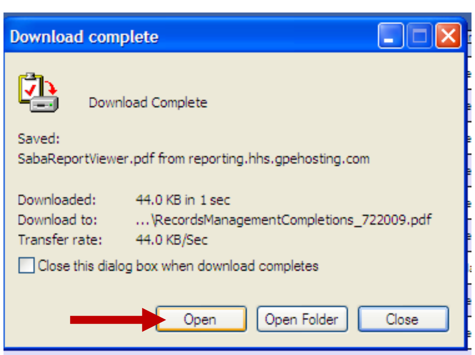
5. You will be prompted to open or save the file. Click **Save**.



6. Select a location in which to save the file and give it a meaningful name; click **Save**.



7. You will receive a prompt when the download is complete. Click **Open** to open the report file you just downloaded in Adobe Reader and

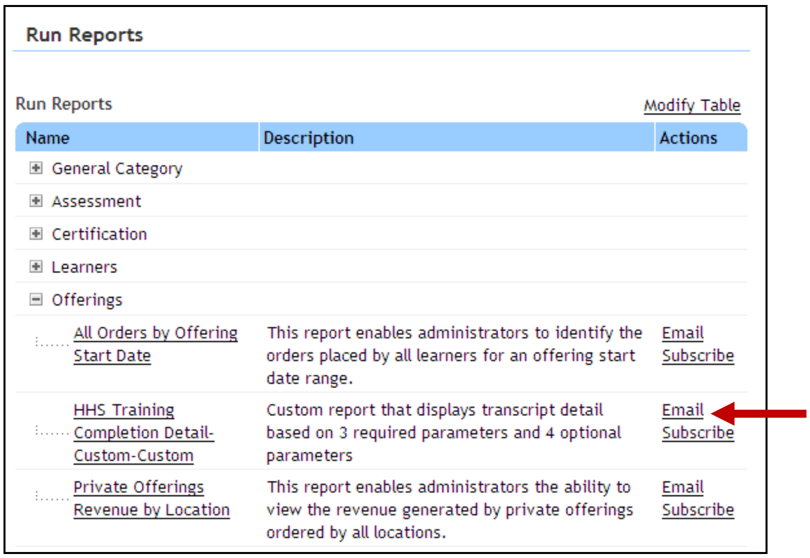


8. Click the Adobe Reader print icon to send the report to your printer.

STEP-BY-STEP (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. Select the **Human Capital Administrator – People** or **Registrar** role in the drop-down **Go To** menu.
2. Click on the **Reports** tab.
3. Click on the (**+**) symbol on the left of the **Offerings** category to expand the list of reports available.
4. Click the **Email** link to the right of the report description of the report you want to send via email.



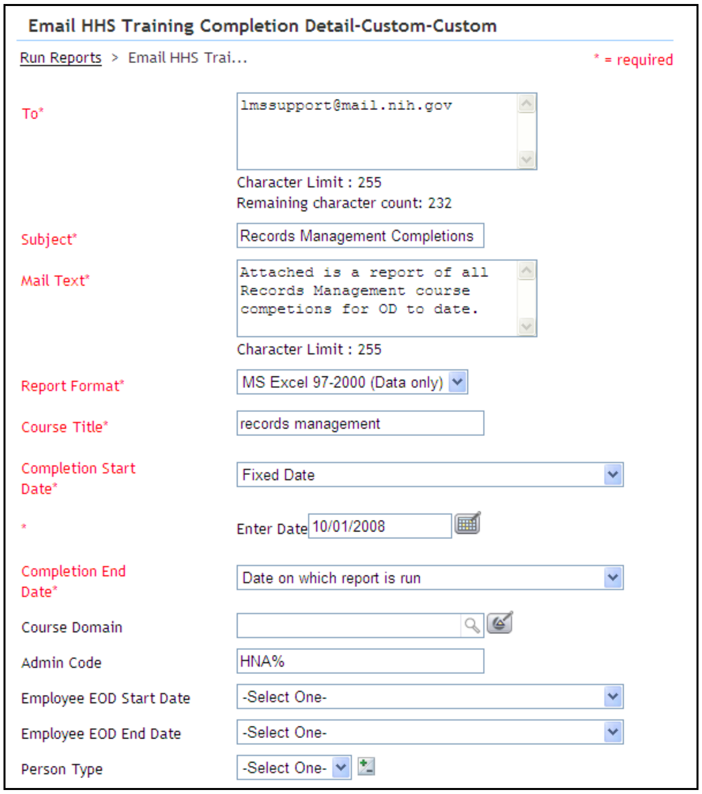
Run Reports

Run Reports — Modify Table

Name	Description	Actions
⊞ General Category		
⊞ Assessment		
⊞ Certification		
⊞ Learners		
⊟ Offerings		
All Orders by Offering Start Date	This report enables administrators to identify the orders placed by all learners for an offering start date range.	Email Subscribe
HHS Training Completion Detail-Custom-Custom	Custom report that displays transcript detail based on 3 required parameters and 4 optional parameters	Email Subscribe
Private Offerings Revenue by Location	This report enables administrators the ability to view the revenue generated by private offerings ordered by all locations.	Email Subscribe

5. Enter one or more recipient email addresses in the **To** field. (Separate multiple emails with either a comma or semi-colon)

6. Modify the **Subject** and **Mail Text** (the email body) fields to appear as you want them in the email.



7. Choose a **Report Format** from the drop-down choices.

8. Enter all or part of the **Course Title**.

9. Choose from the following drop-down choices for **Completion Start Date** and **Completion End Date**.

   - Selecting **Date on which report is run** for both start and end date fields, returns only get data gathered for the day the report is generated.

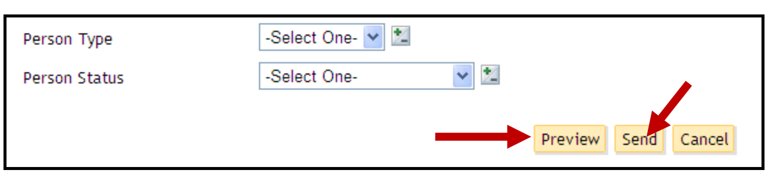
   - Selecting **Number of days before the date on which report is run** for the completion start date and **Date on which report is run** for the completion end date, returns data from the number of days indicated up to the date the report is run.

   - Selecting **Fixed date** for both fields returns data gathered between those two dates only.

10. Enter your IC's **Admin Code** to limit returns to your IC only.

11. Click **Preview** to see the report based with the parameters you entered.

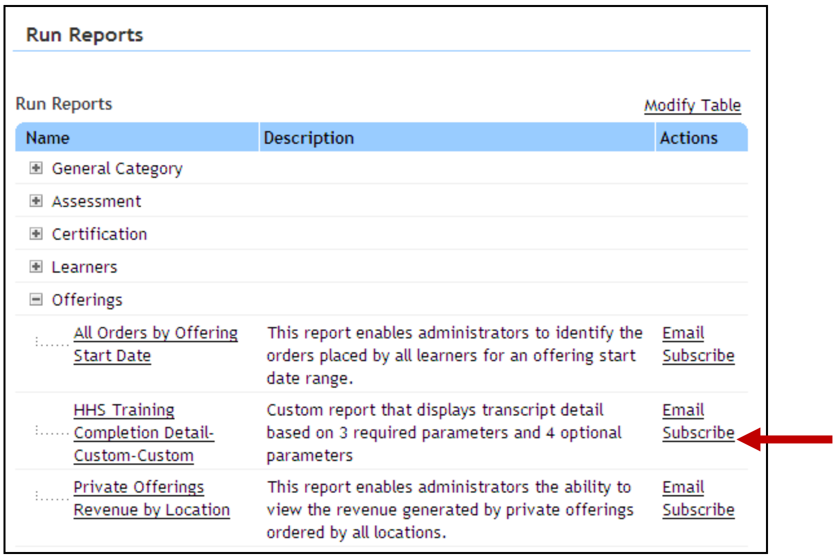
12. Click **Send** to send the report to the email recipients.



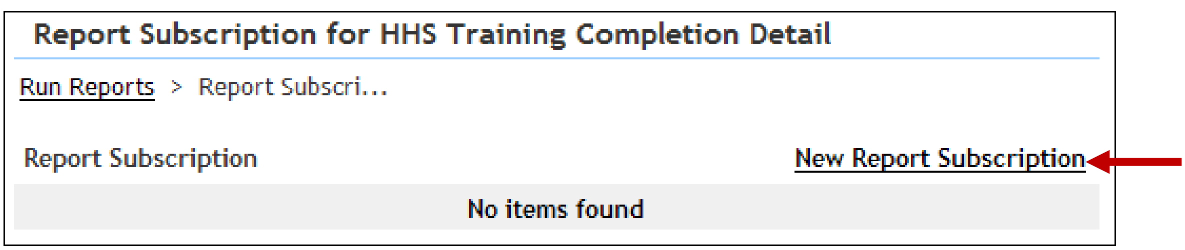
STEP-BY-STEP (SUBSCRIBE TO A REPORT)

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. Select the **Human Capital Administrator – People** or **Registrar** role in the drop-down **Go To** menu.
2. Click on the **Reports** tab.
3. Click on the (**+**) symbol on the left of the **Offerings** category to expand the list of reports available.
4. Click the **Subscribe** link to the right of the report description. Of the report for which you want to create a subscription.

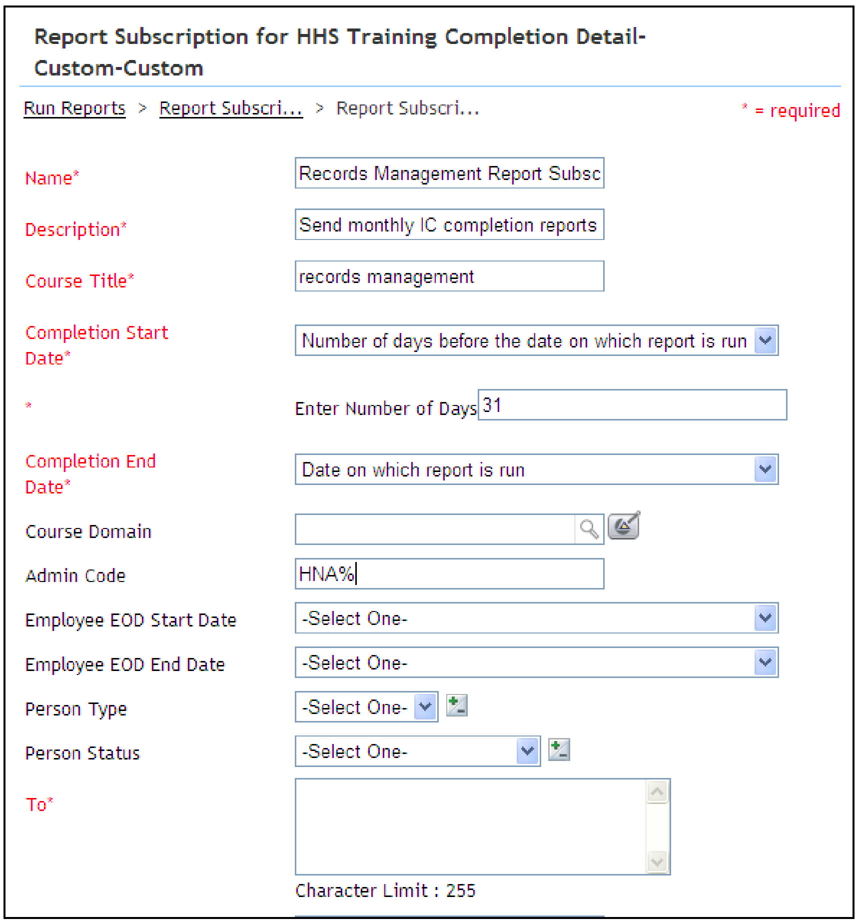


5. Click the **New Report Subscription** link.



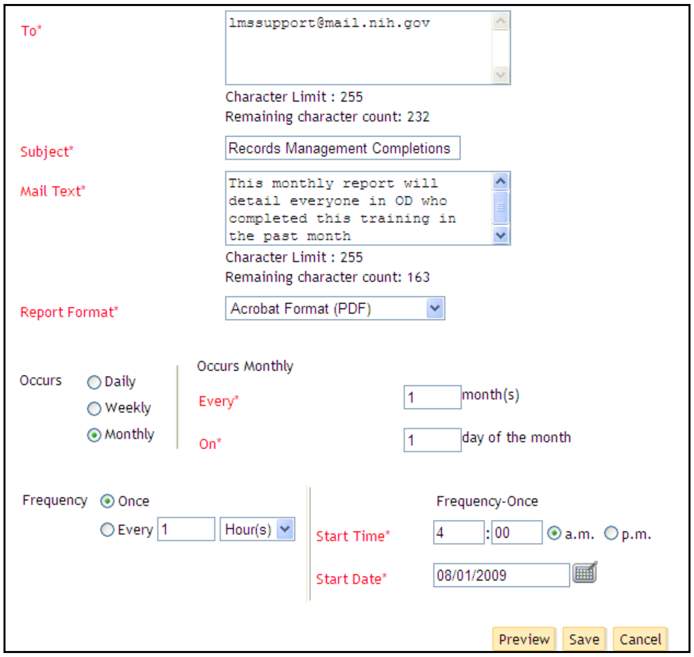
6. Enter a **Name** for the report subscription and a meaningful **Description**.
7. Enter all or part of the **Course Title**.

8. Choose from the following drop-down choices for **Completion Start Date** and **Completion End Date**.
   - Selecting **Date on which report is run** for both start and end date fields, returns only get data gathered for the day the report is generated.
   - Selecting **Number of days before the date on which report is run** for the completion start date and **Date on which report is run** for the completion end date, returns data from the number of days indicated up to the date the report is run.
   - Selecting **Fixed date** for both fields returns data gathered between those two dates only.
9. Enter your IC's **Admin Code** to limit returns to your IC only.



10. Enter one or more recipient email addresses in the **To** field.

11. Modify the **Subject** and **Mail Text** fields to appear as you want them in the email.



12. Choose a **Report Format** from the drop-down choices.

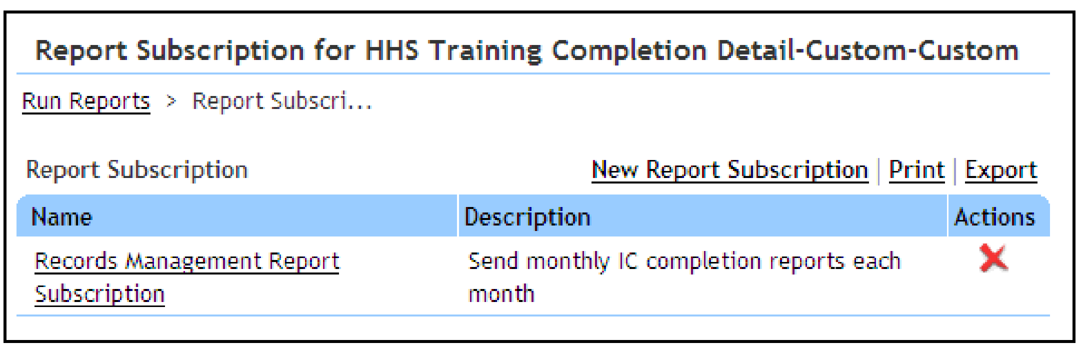
13. Select whether you want the report to email **Daily, Weekly**, or **Monthly**, and indicate the number for each.

14. Set corresponding options for **Frequency**.

15. Click **Preview** to see the report as it will appear.

16. Click **Save** to activate the report subscription. The report will send at the times you designated, to email recipients you entered.

NOTE: Click **Subscribe** next to the report to view any subscriptions you have set up. Click the subscription title to edit details, or click the **X** in the **Actions** column to delete the subscription.



HELPFUL INFORMATION

LINKS AND RESOURCES

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

- HHS Learning Portal Help Desk
  1-866-246-5440
  DHHSHelp@gpworldwide.com

- NIH Training Center web site
  http://trainingcenter.nih.gov

NIH LMS ADMINISTRATOR HELP CONTACTS

Please use the HHS Learning Portal Help Desk contact information about for learners having trouble logging on to the LMS and other technical issues. Feel free to contact and of the people below if you are having problems performing your Local Learning Administrator tasks in the LMS.

- Kim Hill
  NIHTC, hillk@mail.nih.gov

- Carlye Fuller
  NIHTC, fullerc@mail.nih.gov

- Jaime Martinez
  HR SAID, martinezja@mail.nih.gov

- Brian Hughes
  NIHTC, hughesba@mail.nih.gov

- Tom Holscher
  NIHTC, holschertm@mail.nih.gov

APPENDIX A – ORGANIZATION CODES

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

HNAll of NIH
HNA (OD) Immediate 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 (NCMHD) National Center on 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

APPENDIX B - ENTERPRISE HUMAN RESOURCES INTEGRATION (EHRI) FIELDS

LEGEND

LMS Required Fields

EHRI Required Fields

Non Required Fields

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Item/Event Name*	Item or Event Title	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	Auditorium, Book, Coaching, Computer Laboratory, Conference, Correspondence Course, DVD/CD, Instructor led, Mentoring, Online Training, On the Job Training, Recorded Online Offering, Satellite, Scientific Laboratory, TeleConferencing, Traditional classroom, Video conferencing, Video Tape, Virtual Class, Web Cast, Workshop

Local Learning Administrator

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
ID*	Unique ID that identifies this entry	User Initials + Completion Date = JM09132008 where user = Jaime Martinez and Completion Date = 09/13/2008
Location	Location where course was taken. It could be a building or a city.	Examples: **Executive Plaza North** or **Rockville**
Marked Complete by	Search for the username of the person entering this record (yourself).	At first your username will display but once the record is saved the field will display your name.
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 that the course has been accredited by an accreditation body.	N => No NA => Non Applicable Y => Yes
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 Source Type (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: Default Training Purpose (1122)	Code representing the purpose of the training completed by the employee	Develop Unavailable skills; Future Staffing Needs; Improve Present Performance; Mandatory Training; New Work Assignment; Program/Mission Change; Retention

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
EHRI: Default Training Type (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 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 CPE hours. This value is used for reporting to EHRI.	If amount of credit is known, input the number. If not available or not applicable input 0.
EHRI: Training Credit Designation Type (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 (1129)	Code for the type of training delivery for the training course completed by the employee.	Blended; Conference or Retreat; Correspondence; Instructor Lead; On the Job; Technology based
EHRI: Training Credit Type Code (1131)	Code representing the type of credit hours the employee received for the completed training.	CPEs; 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	Input the name of the other language the course was provided in. If not known or if it wasn't delivered in another language, **leave empty.**
Internal or External Course (1202)	Determine if the course is external or internal to the organization	External, Internal
Training Certification Type (1211)	Enter the type of certification earned after completing the course.	If any available enter the name of the certification, if don't know or if no certification was earned, **leave empty**.

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
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: Estimated 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.	Enter the total cost paid for taking the course, if none available or no cost were incurred, input **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.	Enter the total cost of training materials, if none available or no cost were incurred, input **0**.
EHRI: 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 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**

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
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**
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.	Choose from availabilities in the LMS
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