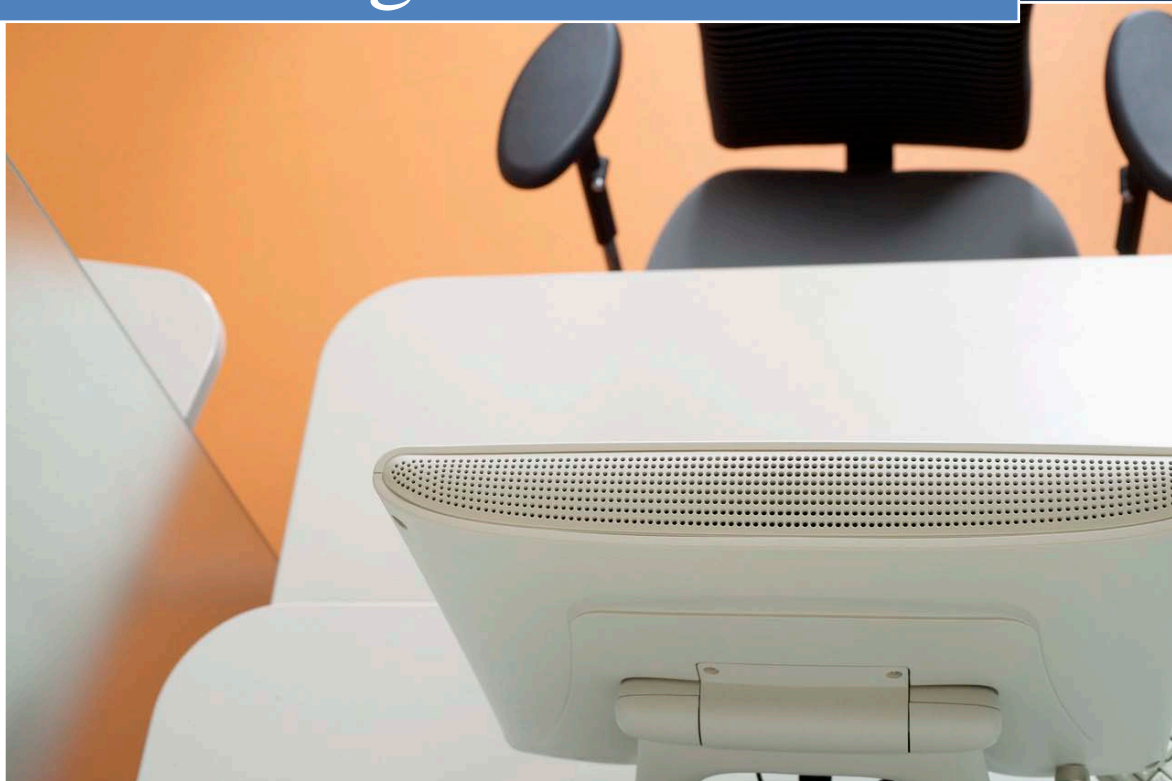


# HHS Learning Portal

## Local Learning Administrator



NIH Training Center  
National Institutes of Health  
OD/OM/OHR/WSDD  
6120 Executive Blvd., Suite 350  
MSC 7170



# 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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## 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.)

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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.

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## 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



## **Local Learning 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.

The screenshot shows the 'Search for People' interface. At the top, there are tabs for 'People', 'Learning', 'Organizations', 'Reports', and 'Learning Plans'. Below these is a search box labeled 'Search for People' with the text 'NIH Learner' entered. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search box is a 'Search Results' table. The table has columns: Last Name, First Name, Username, Person Type, Person ID, Organization, Location, Job, and View. The first row of results shows: Learner, NIH, NIHLEARNER, Other, 00165395, HNAME. The 'View' column for this row contains three links: 'Edit Profile Information', 'Profile Snapshot', and 'Full Profile'. A red arrow points to the 'Edit Profile Information' link.

Last Name	First Name	Username	Person Type	Person ID	Organization	Location	Job	View
Learner	NIH	NIHLEARNER	Other	00165395	HNAME			<a href="#">Edit Profile Information</a> <a href="#">Profile Snapshot</a> <a href="#">Full Profile</a>

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

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**Edit Profile Of NIH Learner**

\* = required

Main Contact Information Address Password Preferences Privileges

Title: -Select One-  
First Name\*: NIH  
Middle Name: S  
Domain\*: NIH  
Home Domain\*: NIH  
Organization\*: HNN1  
Job:   
Manager: NIH Supervisor  
Additional Approver for Orders:   
Username\*: NIHLEARNER  
Last Name\*: Learner  
Suffix:   
Status\*: Full Time  
Person No: 00165395  
Job Title:   
E-mail: lmsupport@mail.nih.gov

**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.

The screenshot shows a web interface titled "Edit Profile Of NIH Learner". At the top right, there is a red asterisk and the text "\* = required". Below the title is a navigation bar with tabs: "Main", "Contact Information", "Address", "Password", "Preferences", and "Privileges". The "Password" tab is selected. The main content area is titled "Change Password" and shows a red error message: "(120106) You have entered an invalid password. Password must meet the following criteria:". Below this are five bullet points: "Must be a minimum of 8 characters in length.", "Must contain at least one upper-case character and one lower-case character.", "Must not include any part of your login ID or name.", "Password must contain a minimum of 2 alphabetic characters.", "Password must contain a minimum of 1 numeric characters.", and "Password must contain a minimum of 1 special characters.". Below the error message is the text "Please type a password which meets these requirements.". The form fields are: "User Name" with the value "NIHLEARNER", "New Password\*" with an empty text box, "Confirm Password\*" with an empty text box, and "Secret Question" with a dropdown menu showing "-Select One-".

**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.

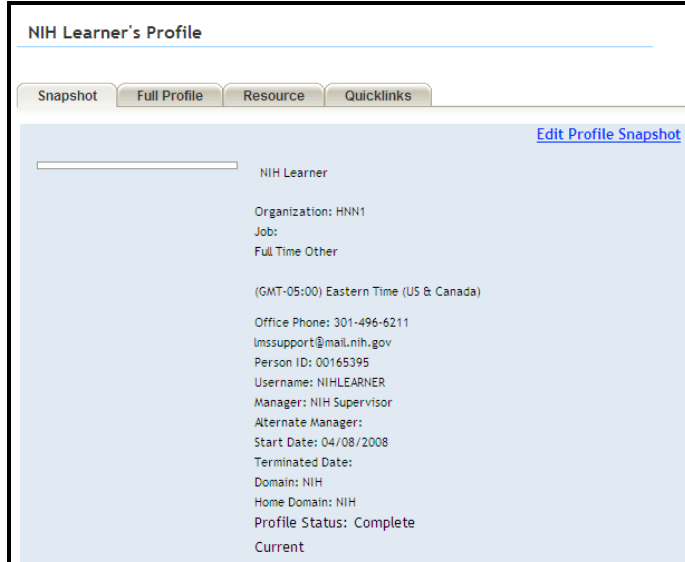
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Enter the learner's name in the search box and click **Search**.

**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.

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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.

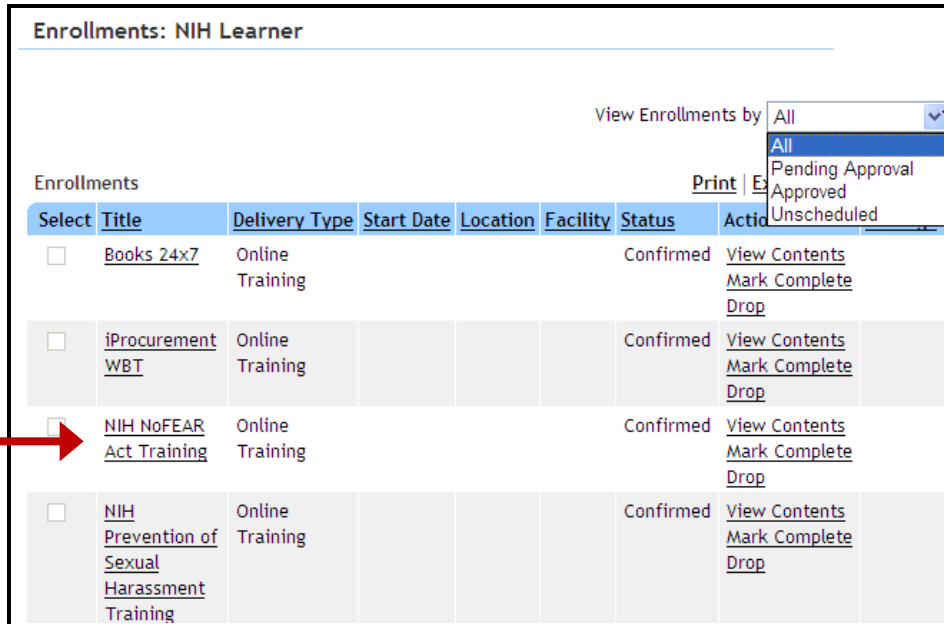
5. Click the **View Enrollments** link to the right of the correct account.

The screenshot shows the 'Learning' tab selected in the top navigation bar. On the left, a sidebar menu has 'Enrollments' selected. The main content area is titled 'Enrollments' and contains a search box with 'NIH Learner' entered. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. A 'Search' button is located below the search box. Below the search area, there are links for 'Print', 'Export', and 'Modify Table'. A table displays search results with columns: Last Name, First Name, Username, Person Type, and View Enrollments. The first row shows 'Learner', 'NIH', 'NIHLEARNER', 'Other', and 'View Enrollments'. A red arrow points to the 'View Enrollments' link in the table row.

Last Name	First Name	Username	Person Type	View Enrollments
Learner	NIH	NIHLEARNER	Other	<a href="#">View Enrollments</a>

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



Enrollments: NIH Learner

View Enrollments by All

Print | E

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Actions
<input type="checkbox"/>	<a href="#">Books 24x7</a>	Online Training				Confirmed	<a href="#">View Contents</a> <a href="#">Mark Complete</a> <a href="#">Drop</a>
<input type="checkbox"/>	<a href="#">iProcurement WBT</a>	Online Training				Confirmed	<a href="#">View Contents</a> <a href="#">Mark Complete</a> <a href="#">Drop</a>
<input type="checkbox"/>	<a href="#">NIH NoFEAR Act Training</a>	Online Training				Confirmed	<a href="#">View Contents</a> <a href="#">Mark Complete</a> <a href="#">Drop</a>
<input type="checkbox"/>	<a href="#">NIH Prevention of Sexual Harassment Training</a>	Online Training				Confirmed	<a href="#">View Contents</a> <a href="#">Mark Complete</a> <a href="#">Drop</a>

**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.

The screenshot shows the LMS interface with the 'Learning' tab selected. On the left, a sidebar contains links for 'Enrollments', 'Transcripts', 'Certifications', 'Curricula', 'Continuing Education', and 'Learning Plans'. The main content area is titled 'Transcripts' and features a search box with the text 'NIH Learner' and a 'Search' button. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search results, there is a table with the following data:

Last Name	First Name	Username	Person Type	View Transcripts
Learner	NIH	NIHLEARNER	Other	<a href="#">View Transcript</a>



At the top of the interface, there are tabs for 'People', 'Learning', 'Competencies', 'Prescriptive Rules', 'Reports', and 'Learning Plans'. At the bottom of the search results table, there are links for 'Add To Transcript', 'Print', 'Export', and 'Modify Table'. A red arrow points to the 'View Transcript' link in the table.


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

Transcript: NIH Learner

Active Deleted

Completion Date after   

Completion Date before  



Transcripts [Add Learning to Transcript](#) | [Print](#) | [Export](#) | [Modify Table](#)

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

**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.


Transcript: NIH Learner

Active Deleted

Completion Date after

Completion Date before

Transcripts [Add Learning to Transcript](#) | [Print](#) | [Export](#) | [Modify Table](#)

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

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

Transcript Details

Course Name **Getting Started with Project 2002**

Learner Name NIH Learner

ID 117545\_ENG

Description To discuss the basics of project management and to introduce Project 2002 as a project management tool.

Completion Status

Marked Complete by

Delivery Type Online Training

Offering Start Date

Ended/Completed On Date

Registration Date

Date Marked Complete

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

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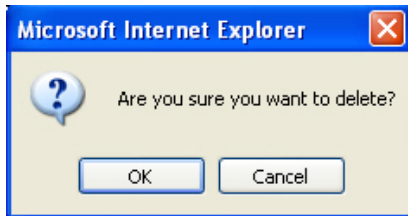
### STEP-BY-STEP (DELETE A TRANSCRIPT ITEM)

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**.

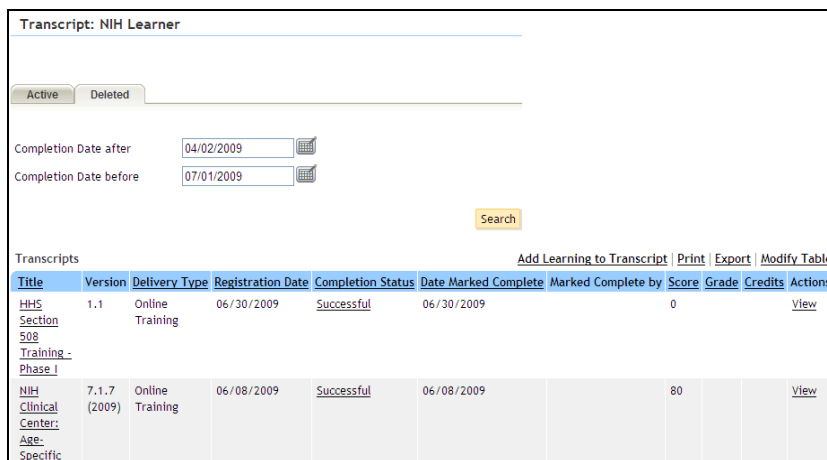
**NOTE:** See instructions for searching listed to the right of the search box.

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.



Transcript: NIH Learner

Active Deleted

Completion Date after: 04/02/2009

Completion Date before: 07/01/2009

Search

Transcripts Add Learning to Transcript Print Export Modify Table

Title	Version	Delivery Type	Registration Date	Completion Status	Date Marked Complete	Marked Complete by	Score	Grade	Credits	Actions
HHS Section 508 Training - Phase I	1.1	Online Training	06/30/2009	Successful	06/30/2009		0			<a href="#">View</a>
NIH Clinical Center: Age-Specific	7.1.7 (2009)	Online Training	06/08/2009	Successful	06/08/2009		80			<a href="#">View</a>

**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.)

The screenshot shows a web form titled "Add Learning to Transcript". In the top right corner, there is a red asterisk legend: "\* = required". Below this, there is a blue underlined link that says "Use Existing Item". At the bottom left of the form, there is a red label "Item/Event Name\*" followed by a white rectangular text input field.

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.

## Local Learning Administrator

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

Search for Items to Add to Transcript

Name

ID

Search Existing Transcript Items  
 Search Catalog

**Search**

[Print](#) | [Export](#)

	Title	Version	Description	ID
<input type="checkbox"/>	Microsoft Office 2000 - Beginning Word	2.2	To introduce the learner to basic concepts and features of Word 2000.	110946_ENG
<input type="checkbox"/>	Microsoft Office 2000 - Beginning Excel	2.2	To provide an introduction to the core concepts of Microsoft Excel 2000.	111080_ENG

**Cancel**

**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.

Edit Item Added to Transcript

\* = required

[Use Existing Item](#)

Item/Event Name Microsoft Office 2000 - Beginning Excel

Version 2.2

Description To provide an introduction to the core concepts of Microsoft Excel 2000.

Offering Start Date

Ended/Completed On Date

Registration Date

Date Marked Complete\*

Start Time (HH:MM)

End Time (HH:MM)

Duration(HH:MM)

Delivery Type

ID 111080\_ENG

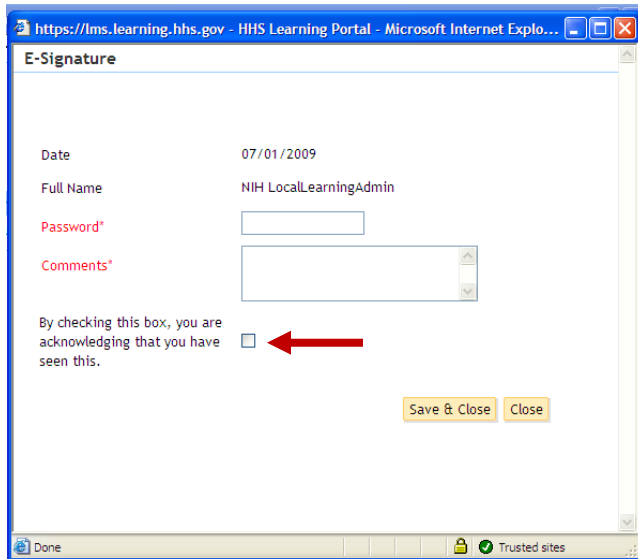
**IMPORTANT!** Fields labeled in Red with an asterisk are required.

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.



## Local Learning Administrator

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.



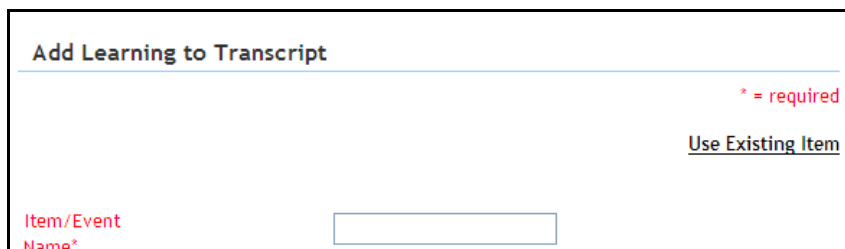
15. Click **Save & Close**.

### 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.)



## Local Learning Administrator

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**.

Title	Version	Description	ID
<input type="checkbox"/> Microsoft Office 2000 - Beginning Word	2.2	To introduce the learner to basic concepts and features of Word 2000.	110946_ENG
<input type="checkbox"/> Microsoft Office 2000 - Beginning Excel	2.2	To provide an introduction to the core concepts of Microsoft Excel 2000.	111080_ENG

**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.

\* = required

[Use Existing Item](#)

Item/Event Name	Microsoft Office 2000 - Beginning Excel
Version	2.2
Description	To provide an introduction to the core concepts of Microsoft Excel 2000.
Offering Start Date	<input type="text"/>
Ended/Completed On Date	<input type="text"/>
Registration Date	<input type="text"/>
Date Marked Complete*	<input type="text"/>
Start Time (HH:MM)	<input type="text"/>
End Time (HH:MM)	<input type="text"/>
Duration(HH:MM)	<input type="text"/>
Delivery Type	-Select One-
ID	111080_ENG

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

## Local Learning Administrator

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

Continuing Education Credits

No items found

Learners [Add Learners](#)

No items found

Competencies

No items found

Notes

No items found

Save Done Cancel

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**.

Search Person, Internal

\* = required

Population\* Internal First Name nih

Last Name Person ID

Username Manager

Organization Location

Domain Person Type -Select One-

Search

People [Print](#) [Export](#)

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	Competency	NIHCOMPETENCYADMIN	Other	00233604	HNAM6		NIHSUPERVISOR
<input type="checkbox"/>	NIH	DomainSysAdmin	NIHDOMAINSYSADMIN	Other	00165952	HNAM6		NIHSUPERVISOR
<input type="checkbox"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNN1		NIHSUPERVISOR
<input type="checkbox"/>	NIH	LocalLearningAdmin	NIHLOCALLEARNINGADMIN	Other	00165950	HNAM6		NIHSUPERVISOR
<input type="checkbox"/>	NIH	Supervisor	NIHSUPERVISOR	Other	00165949	HNAM6		00104264
<input type="checkbox"/>	NIH	TrainingContentAdmin	NIHTRAININGCONTENTADMIN	Other	00165951	HNAM6		NIHSUPERVISOR

Select Close

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

Continuing Education Credits

No items found

Learners [Add Learners](#) | [Modify Table](#)

Name	Start Date	Date Marked Complete	Score	Grade	Completion Status	Actions
NIH Competency	06/01/2009	07/01/2009	85		Successful	<a href="#">Delete</a>
NIH Learner	06/01/2009	07/01/2009	90		Successful	<a href="#">Delete</a>
NIH Supervisor					New	<a href="#">Delete</a>

Competencies

No items found

Notes

No items found

[Save](#) [Done](#) [Cancel](#)

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.

https://lms.learning.hhs.gov - HHS Learning Portal - Microsoft Internet Explo...


### E-Signature

Date: 07/01/2009

Full Name: NIH LocalLearningAdmin

Password\*

Comments\*

By checking this box, you are acknowledging that you have seen this.  

[Save & Close](#) [Close](#)

Done Trusted sites

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.

The screenshot shows the 'Learning' tab selected in the top navigation bar. On the left sidebar, 'Certifications' is highlighted. The main content area is titled 'Certifications' and contains a search box with 'NIH Learner' entered. To the right of the search box is a 'Search' button and an 'Advanced Search' section with instructions. Below the search box, the 'Search Results' table is displayed with one entry for 'NIH Learner'. A red arrow points to the 'View Certifications' link in the table.

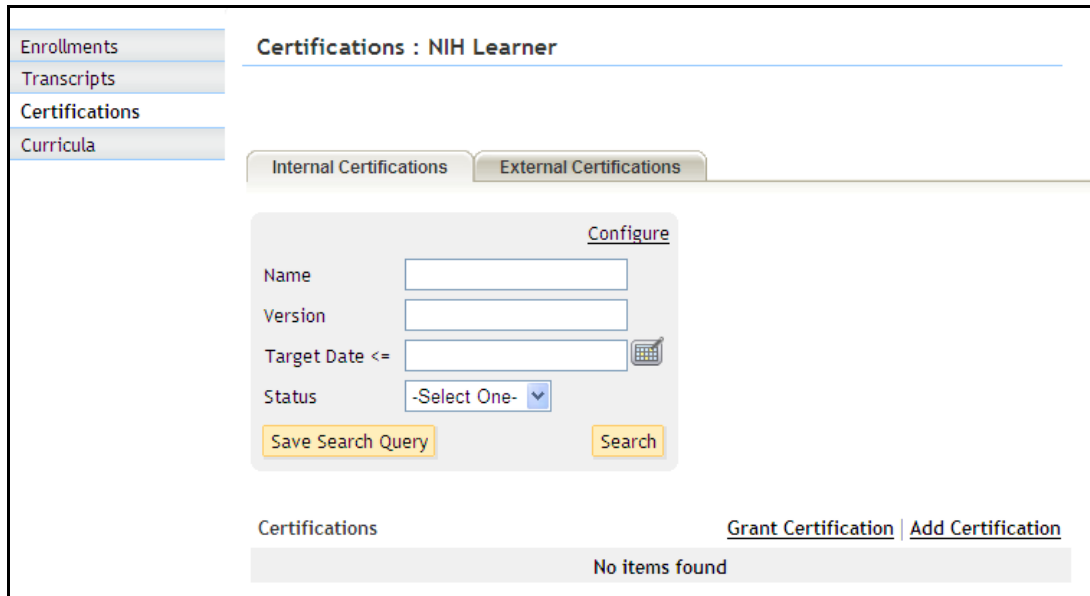
Last Name	First Name	Username	Person Type	View Certifications
Learner	NIH	NIHLEARNER	Other	<a href="#">View Certifications</a>

## Local Learning Administrator

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.



The screenshot shows the 'Certifications : NIH Learner' page. On the left is a navigation menu with 'Enrollments', 'Transcripts', 'Certifications', and 'Curricula'. The 'Certifications' section is active, showing two tabs: 'Internal Certifications' and 'External Certifications'. Below the tabs is a search configuration box with fields for 'Name', 'Version', 'Target Date <=' (with a calendar icon), and 'Status' (a dropdown menu set to '-Select One-'). There are 'Save Search Query' and 'Search' buttons. At the bottom, there are links for 'Grant Certification' and 'Add Certification', and a message that says 'No items found'.

### 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.

## Local Learning Administrator

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.

People **Learning** Organizations Reports Learning Plans

Enrollments  
Transcripts  
**Certifications**  
Curricula

**Certifications**

Name(s) NIH Learner

**Advanced Search**  
Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon

**Search**

Search Results [Print](#) | [Export](#) | [Modify Table](#)

Last Name	First Name	Username	Person Type	View Certifications
Learner	NIH	NIHLEARNER	Other	<a href="#">View Certifications</a>

6. Click **Grant Certification**.

Enrollments  
Transcripts  
**Certifications**  
Curricula

**Certifications : NIH Learner**

Internal Certifications External Certifications

**Configure**

Name

Version

Target Date <=

Status

**Save Search Query** **Search**

Certifications [Grant Certification](#) | [Add Certification](#)

No items found

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

## Local Learning Administrator

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

Grant Certification

1.Select Certification → 2.Grant Certification

[Configure](#)

Name

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

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

Select	Name	Version	Description
<input type="radio"/>	HCAS iProcurement		
<input type="radio"/>	HCAS PRISM 1		
<input type="radio"/>	HCAS PRISM 2		
<input type="radio"/>	HCAS PRISM 3		
<input type="radio"/>	HCAS PRISM 4		
<input type="radio"/>	HCAS PRISM 5		
<input type="radio"/>	Simplified Acquisition Certificate		

[Next](#) [Close](#)

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

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

Grant Certification

1.Select Certification → 2.Grant Certification

Granted Certifications [Print](#) | [Export](#)

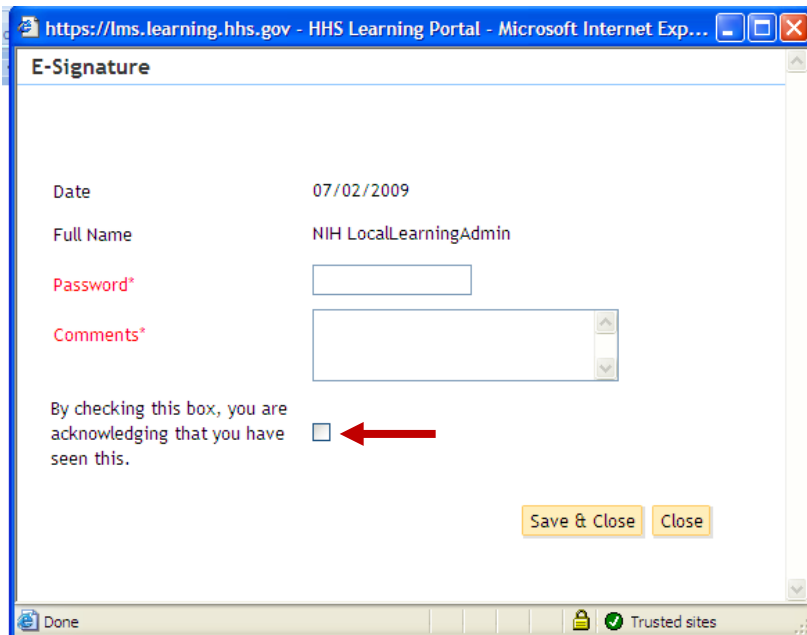
Learner Name	Acquired On	Expiration Date
NIH Learner	<input type="text" value="07/02/2009"/>	<input type="text"/>

[Finish](#) [Back](#) [Close](#)



## Local Learning Administrator

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.



The screenshot shows a web browser window titled "https://lms.learning.hhs.gov - HHS Learning Portal - Microsoft Internet Exp...". The page content is titled "E-Signature". It contains the following fields and elements:

- Date: 07/02/2009
- Full Name: NIH LocalLearningAdmin
- Password\*: An empty text input field.
- Comments\*: A large empty text area with scrollbars.
- A checkbox with the text: "By checking this box, you are acknowledging that you have seen this." A red arrow points to this checkbox.
- Buttons: "Save & Close" and "Close".

The browser's status bar at the bottom shows "Done" and "Trusted sites".

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.

The screenshot shows the 'Certifications' page in the 'Learning' tab. A search box contains 'NIH Learner' and a 'Search' button is visible. To the right, an 'Advanced Search' section provides instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search box, a table displays search results. A red arrow points to the 'View Certifications' link in the first row of the table.

Last Name	First Name	Username	Person Type	View Certifications
Learner	NIH	NIHLEARNER	Other	<a href="#">View Certifications</a>

6. Click **Add Certification**.

The screenshot shows the 'Certifications : NIH Learner' page. It features tabs for 'Internal Certifications' and 'External Certifications'. A 'Configure' section contains input fields for 'Name', 'Version', 'Target Date <=' (with a calendar icon), and a 'Status' dropdown menu. Below these fields are 'Save Search Query' and 'Search' buttons. At the bottom, a table shows 'No items found' under the 'Certifications' header. A red arrow points to the 'Add Certification' link in the bottom right corner.

7. Search for certification you would like to grant.

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

Select Certification

Configure

Name

Discontinued From >=

Save Search Query Search

Certifications [Print](#) [Export](#) [Modify Table](#)

Select	Name	Version	Available From	Discontinued From	Target Days	Expire In (days)	Notify Before (days)
<input type="checkbox"/>	HCAS iProcurement		10/06/2008		0		
<input type="checkbox"/>	HCAS PRISM 1		10/06/2008		0		
<input type="checkbox"/>	HCAS PRISM 2		10/06/2008		0		
<input type="checkbox"/>	HCAS PRISM 3		10/06/2008		0		

### STEP-BY-STEP (VIEW CURRICULA)

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

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

People **Learning** Organizations Reports Learning Plans

Enrollments  
Transcripts  
Certifications  
**Curricula**

**Curricula**

Name(s)  [Advanced Search](#)

Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon

Search

Search Results [Print](#) [Export](#) [Modify Table](#)

Last Name	First Name	Username	Person Type	View Curricula
Learner	NIH	NIHLEARNER	Other	<a href="#">View Curricula</a>

## Local Learning Administrator

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.

Curricula : NIH Learner

Configure

Name

Target Date <=

Status

Save Search Query Search

Curricula [Grant Curriculum](#) | [Add Curriculum](#)

No items found

### 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**.

Curricula : NIH Learner

Configure

Name

Target Date <=

Status

Save Search Query Search

Curricula [Grant Curriculum | Add Curriculum](#)

No items found

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**.

Grant Curriculum

1. Select Curriculum ...> 2. Grant Curriculum

Configure

Name

Save Search Query Search

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

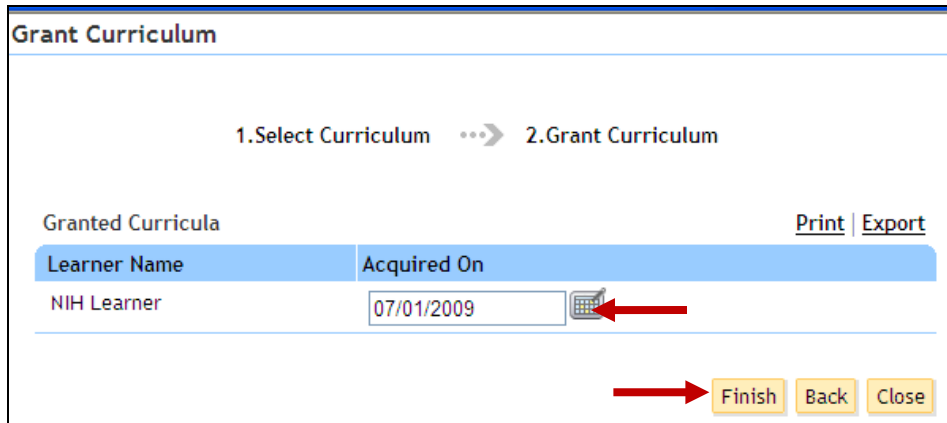
Select	Name	Version	Description
<input type="radio"/>	ASAM Action Officer Training		
<input checked="" type="radio"/>	EEO & Diversity Awareness Training for Employees		Curriculum set up to assign mandatory EEO & Diversity training to all employees.

Next Close

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

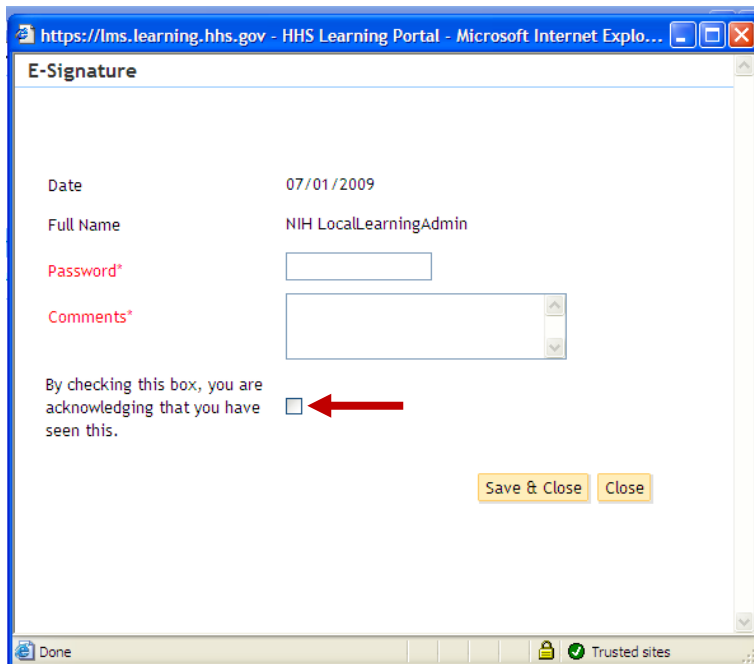
## Local Learning Administrator

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



The screenshot shows a web form titled "Grant Curriculum". At the top, it displays a progress indicator: "1. Select Curriculum" followed by a right-pointing arrow and "2. Grant Curriculum". Below this, there are links for "Print" and "Export". The main content area is a table with two columns: "Learner Name" and "Acquired On". The first row contains "NIH Learner" and "07/01/2009". A red arrow points to a calendar icon next to the date field. At the bottom right, there are three buttons: "Finish", "Back", and "Close". A red arrow points to the "Finish" button.

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.



The screenshot shows a web browser window with the address bar displaying "https://lms.learning.hhs.gov - HHS Learning Portal - Microsoft Internet Explo...". The page title is "E-Signature". The form contains the following fields and elements:

- Date: 07/01/2009
- Full Name: NIH LocalLearningAdmin
- Password\*: A text input field.
- Comments\*: A text area with scrollbars.
- A checkbox with the text: "By checking this box, you are acknowledging that you have seen this." A red arrow points to the checkbox.
- Buttons: "Save & Close" and "Close".

The browser's status bar at the bottom shows "Done" and "Trusted sites".

12. Click **Save & Close**.

**STEP-BY-STEP (ADD CURRICULUM)**

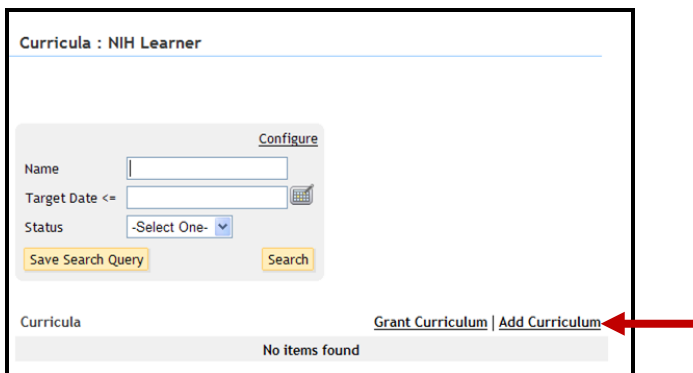
A curriculum must first be created in the LMS by an LMS Training Administrator before it will be available for you to add to a learner record.

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.

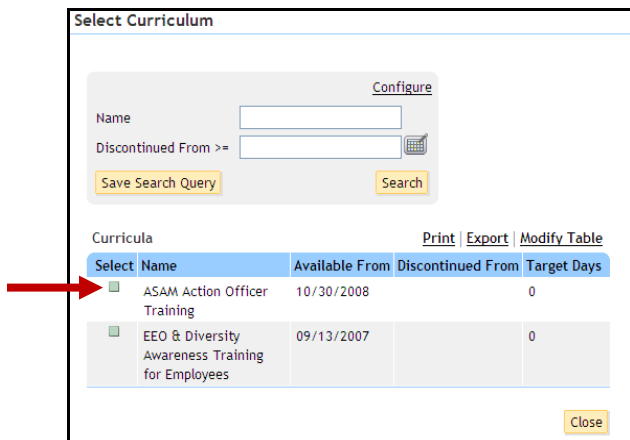
**NOTE:** See instructions for searching listed to the right of the search box.

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.

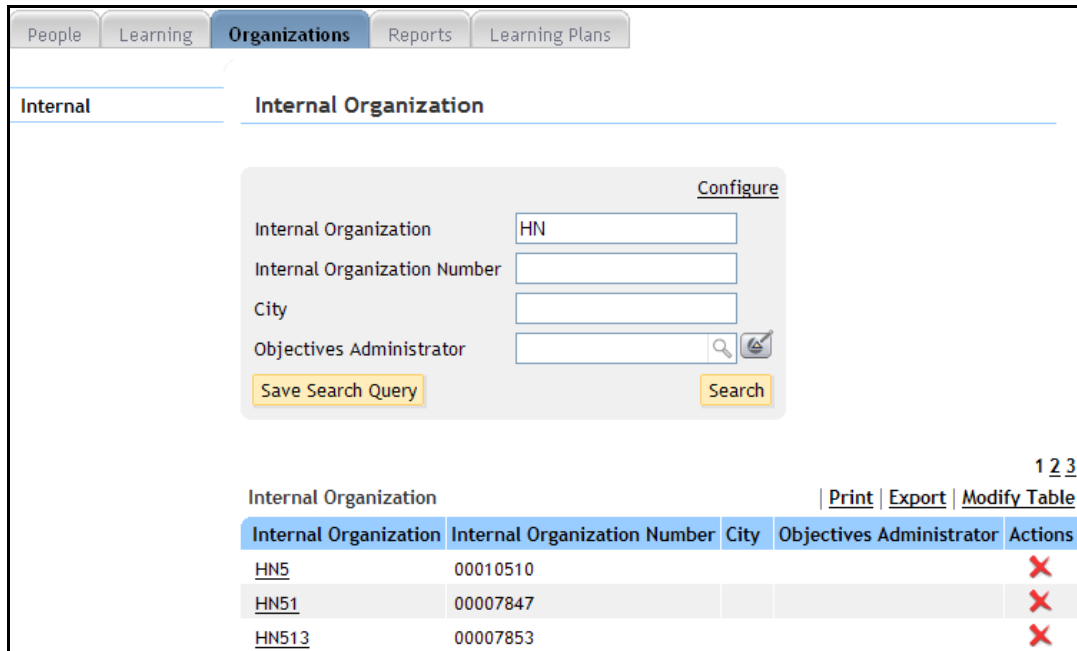






## ORGANIZATIONS

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.



Internal Organization

Configure

Internal Organization: HN

Internal Organization Number:

City:

Objectives Administrator:

Save Search Query Search

1 2 3

Internal Organization	Internal Organization Number	City	Objectives Administrator	Actions
HN5	00010510			X
HN51	00007847			X
HN513	00007853			X

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**.

The screenshot shows the 'Learning Plans' section of a web application. At the top, there are navigation tabs: 'People', 'Learning', 'Organizations', 'Reports', and 'Learning Plans' (highlighted with a red arrow). On the left, there is a sidebar with 'Plan Types', 'Plan Forms', and 'Plans' (selected). The main area contains a search form with fields for 'Plan Form', 'Assignee' (set to 'NIH Learner'), 'Start Date >=', 'End Date <=', 'Status' (set to '-Select One-'), 'Plan Type', and 'Assignee's Organization' (set to 'HNAM6'). There is a 'Save Search Query' button and a 'Search' button (highlighted with a red arrow). Below the search form is a table of existing plans:

Plan Name	Assignee	Person Type	Plan Form	Plan Type	Status	Actions
<a href="#">Learning Plan</a>	<a href="#">NIH Learner</a>	Other	Learning Plan	Learning Plan	Activated	<a href="#">X</a>

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

The screenshot shows the details of a 'Learning Plan' assigned to 'NIH Learner'. The status is 'Activated' and the approval policy is 'No Approval'. There are radio buttons for 'View Current Activities' (selected) and 'View Closed Activities'. Below this is a table of 'Assigned Learning' activities:

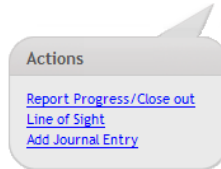
Name	Type	Due Date	Completed On	Status	Source	Actions
<a href="#">Internet Multi-Media Course</a>	Goal	06/30/2009		Revised: 97% Completed	NIH Learner	<a href="#">Actions</a>
<a href="#">NIH-Intermediate Microsoft Word 2007</a>	1 Course	07/04/2009		New	NIH Learner	<a href="#">Actions</a>
<a href="#">Learning With Saba</a>	1.0 Course	07/23/2009		In Progress	NIH Supervisor	<a href="#">Actions</a>

## Local Learning Administrator

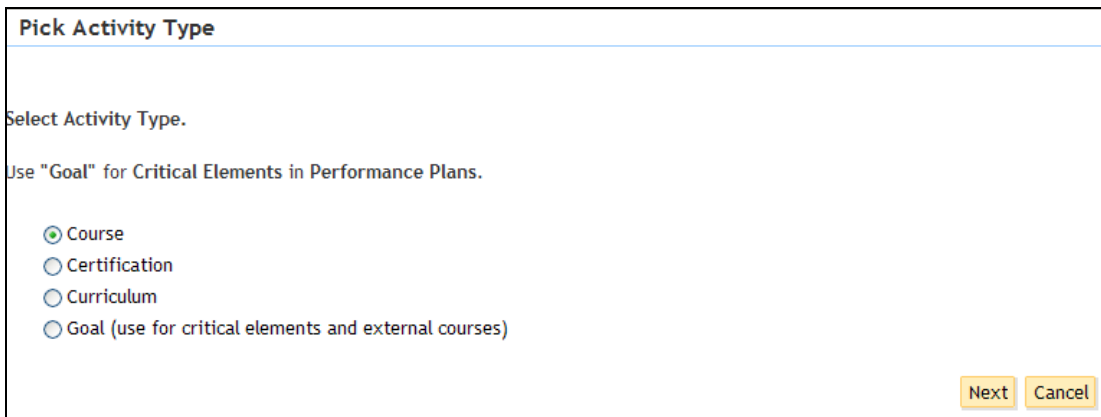
- You may add items to the learning plan by clicking on the **Add Element or Activity** link.

**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.



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

A dialog box titled "Pick Activity Type" with a light blue border. The text inside says "Select Activity Type." and "Use 'Goal' for Critical Elements in Performance Plans." Below this are four radio button options: "Course" (selected), "Certification", "Curriculum", and "Goal (use for critical elements and external courses)". At the bottom right are two buttons: "Next" and "Cancel".

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

### **COURSES:**

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

A dialog box titled "Add Course" with a light blue border. It contains a form with the following fields: "Course\*" (text input with "Records Management for Everyone" and search icons), "Notes" (text area with "Determined as mandatory by IC EO" and scroll arrows), "Character Limit : 2000" and "Remaining character count: 1968" (text labels), and "Due Date\*" (date input with "07/31/2009" and a calendar icon). At the bottom right are two buttons: "Save" and "Cancel".

- 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.

Select Certification

Configure

Name: HCAS

Discontinued From >=

Save Search Query Search

Certifications [Print](#) [Export](#) [Modify Table](#)

Select	Name	Version	Available From	Discontinued From	Target Days	Expire In (days)	Notify Before (days)
<input checked="" type="checkbox"/>	HCAS iProcurement		10/06/2008		0		
<input type="checkbox"/>	HCAS PRISM		10/06/2008		0		

- 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.

Select Curriculum

Configure

Name: ASAM

Discontinued From >=

Save Search Query Search

Curricula [Print](#) [Export](#) [Modify Table](#)

Select	Name	Available From	Discontinued From	Target Days
<input checked="" type="checkbox"/>	ASAM Action Officer Training	10/30/2008		0

Close

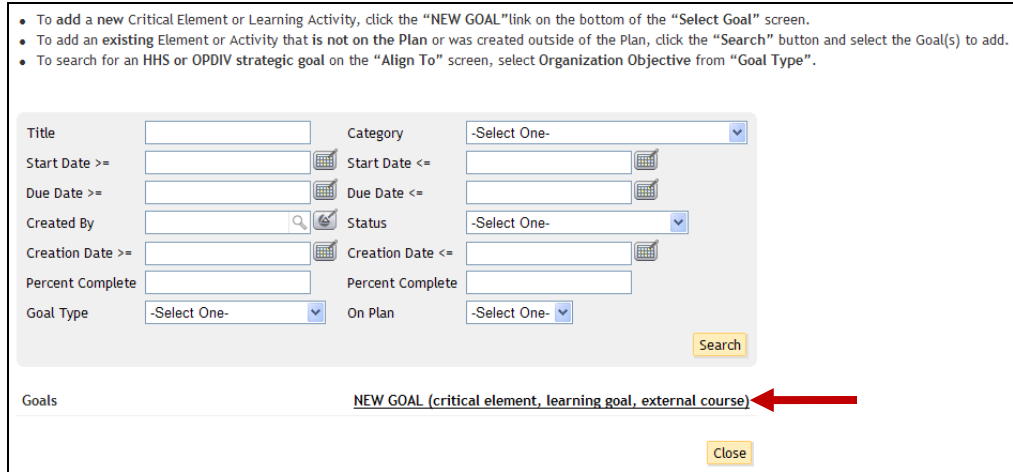
## Local Learning Administrator

- 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.

- To add a new Critical Element or Learning Activity, click the "NEW GOAL" link on the bottom of the "Select Goal" screen.
- To add an existing Element or Activity that is not on the Plan or was created outside of the Plan, click the "Search" button and select the Goal(s) to add.
- To search for an HHS or OPDIV strategic goal on the "Align To" screen, select Organization Objective from "Goal Type".



The screenshot shows a search form with the following fields:

- Title:
- Category:
- Start Date >=:
- Due Date >=:
- Created By:
- Creation Date >=:
- Percent Complete:
- Goal Type:

Buttons: Search, Close

Goals: [NEW GOAL \(critical element, learning goal, external course\)](#)

- 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.

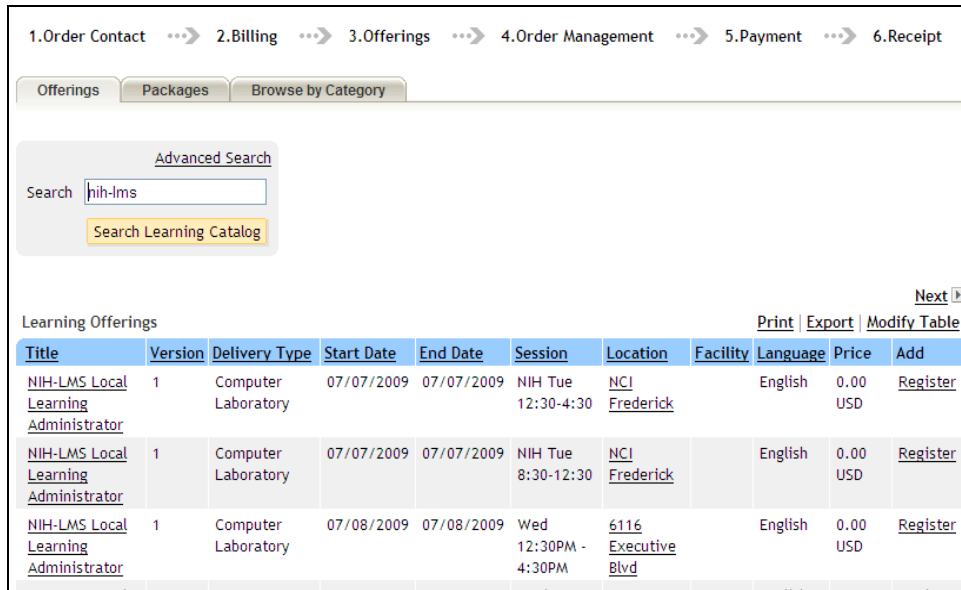
### STEP-BY-STEP (CREATE AN ORDER FOR A LEARNER)

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.

## Local Learning Administrator

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



The screenshot shows the 'Offerings' section of the Local Learning Administrator interface. At the top, there are navigation tabs for 'Offerings', 'Packages', and 'Browse by Category'. Below these is an 'Advanced Search' section with a search input field containing 'nih-lms' and a 'Search Learning Catalog' button. The main content area displays a table of 'Learning Offerings' with columns for Title, Version, Delivery Type, Start Date, End Date, Session, Location, Facility, Language, Price, and Add. A red arrow points to the 'Register' link in the 'Add' column of the first row.

Title	Version	Delivery Type	Start Date	End Date	Session	Location	Facility	Language	Price	Add
<a href="#">NIH-LMS Local Learning Administrator</a>	1	Computer Laboratory	07/07/2009	07/07/2009	NIH Tue 12:30-4:30	<a href="#">NCI Frederick</a>		English	0.00 USD	<a href="#">Register</a>
<a href="#">NIH-LMS Local Learning Administrator</a>	1	Computer Laboratory	07/07/2009	07/07/2009	NIH Tue 8:30-12:30	<a href="#">NCI Frederick</a>		English	0.00 USD	<a href="#">Register</a>
<a href="#">NIH-LMS Local Learning Administrator</a>	1	Computer Laboratory	07/08/2009	07/08/2009	Wed 12:30PM - 4:30PM	<a href="#">6116 Executive Blvd</a>		English	0.00 USD	<a href="#">Register</a>

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 your web browser's BACK button or you will lose your order.



## Local Learning Administrator

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.)

### Create Order

---

1.Order Contact >>> 2.Billing >>> 3.Offerings >>> 4.Order Management >>>

Order Contact                      NIH Competency  
Billed To                              HNAM6

Title	Learner	Status	Training Units	Actions	Price
<a href="#">NIH-LMS Local Learning Administrator</a>	<a href="#">NIH Competency</a>	Confirmed		<a href="#">Add Learners</a> <a href="#">Notes</a> <a href="#">Remove From Cart</a>	265.00 USD

---

Order Notes [Add](#)

No items found

Order Total 265.00 USD  
Discount 0.00 USD  
Total 265.00 USD

[Continue Shopping](#)   [Place Order](#)

**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.

## Local Learning Administrator

### 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.

**Create Order**

1. Order Contact >>> 2. Billing >>> 3. Offerings >>> 4. Order Management >>>

Order Contact: NIH Competency  
Billed To: HNAM6

Title	Learner	Status	Training Units	Actions	Price
<a href="#">NIH-LMS Local Learning Administrator</a>	<a href="#">NIH Competency</a>	Confirmed		<a href="#">Add Learners</a> <a href="#">Notes</a> <a href="#">Remove From Cart</a>	265.00 USD

Order Notes [Add](#)

No items found

Order Total 265.00 USD  
Discount 0.00 USD  
Total 265.00 USD

[Continue Shopping](#) [Place Order](#)

**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**.

## Local Learning Administrator

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

Order Contact	NIH Competency				
Billed To	HNAM6				
Title	Learner	Status	Training Units	Actions	Price
<a href="#">NIH-LMS Local Learning Administrator</a>	NIH Competency	Confirmed		<a href="#">Add Learners</a> <a href="#">Notes</a> <a href="#">Remove From Cart</a>	265.00 USD
<a href="#">NIH-LMS Local Learning Administrator</a>	NIH DomainSysAdmin	Confirmed		<a href="#">Add Learners</a> <a href="#">Notes</a> <a href="#">Remove From Cart</a>	265.00 USD
<a href="#">NIH-LMS Local Learning Administrator</a>	No Learner Assigned	Confirmed		<a href="#">Add Learners</a> <a href="#">Set Learner</a> <a href="#">Notes</a> <a href="#">Remove From Cart</a>	265.00 USD
Order Notes					<a href="#">Add</a>
No items found					
Order Total					795.00 USD
Discount					0.00 USD
Total					795.00 USD
<a href="#">Continue Shopping</a>					<a href="#">Place Order</a>

**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.)

## Local Learning Administrator

### 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.

Order Contact	NIH Competency				
Billed To	HNAM6				
Title	Learner	Status	Training Units	Actions	Price
<a href="#">NIH-LMS Local Learning Administrator</a>	<a href="#">NIH Competency</a>	Confirmed		<a href="#">Add Learners</a> <a href="#">Notes</a> <a href="#">Remove From Cart</a>	265.00 USD

3. Click **Add Note**.

https://lms.learning.hhs.gov - HHS Learning Portal - Microsoft Internet Explorer

Add/View Notes

View By Category: ALL

Notes

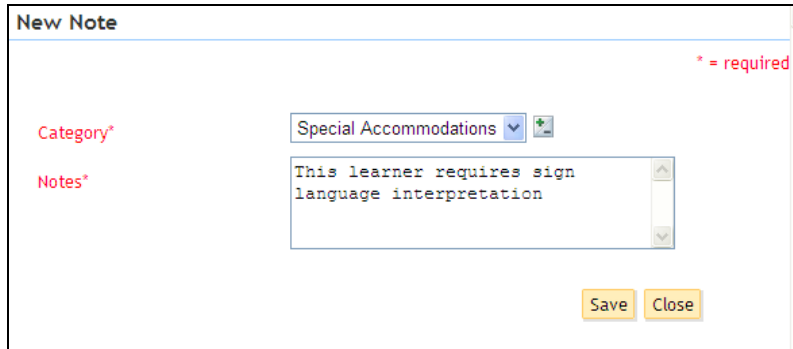
No items found

[Add Note](#)

Close

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.

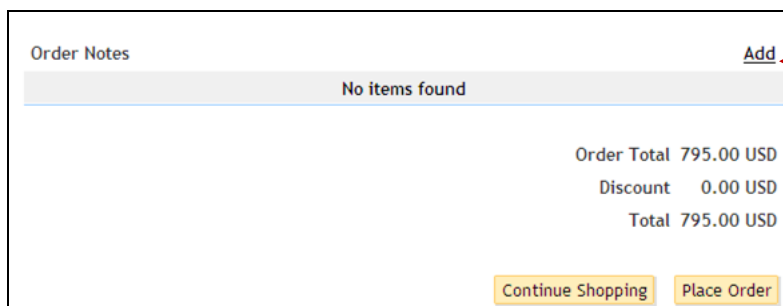
**NOTE:** To view previously entered notes, click on the **Notes** link in the Action column of the order.

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)

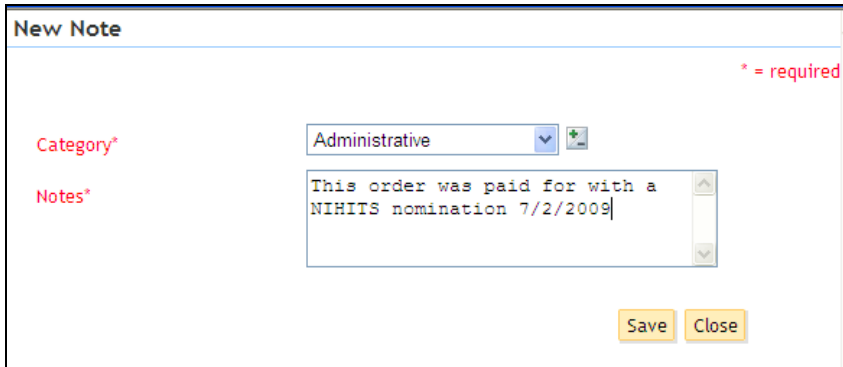
1. Complete Steps 1 through 7 of *Step-By-Step (Create an Order for a Learner)* on page 47 of this guide.
2. Click the **Add** link in the **Order Notes** section.



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

## Local Learning Administrator

5. Click **Save**.



New Note

\* = required

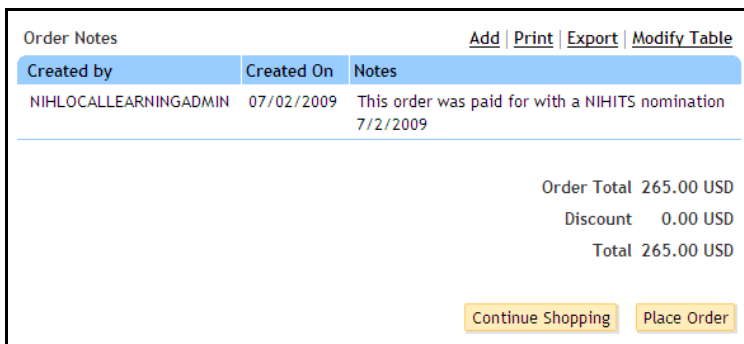
Category\* Administrative

Notes\* This order was paid for with a NIHITS nomination 7/2/2009

Save Close

**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.



Order Notes [Add](#) | [Print](#) | [Export](#) | [Modify Table](#)

Created by	Created On	Notes
NIHLOCALLEARNINGADMIN	07/02/2009	This order was paid for with a NIHITS nomination 7/2/2009

Order Total 265.00 USD  
Discount 0.00 USD  
Total 265.00 USD

Continue Shopping Place Order

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.

The screenshot shows a 'Registration Confirmation' page with a progress bar at the top: 1.Order Contact >>> 2.Billing >>> 3.Offerings >>> 4.Order Management >>> 5.Payment >>> 6.Receipt. Below the progress bar, there is a link for 'Printer Friendly Version' with a red arrow pointing to it. The page displays order details: Order Contact (NIH Competency), Billed To (HNAM6), Order Status, and Order Number (00356739). An 'Order Items' table is shown below, listing one item: NIH-LMS Local Learning Administrator, NIH Competency Laboratory, Confirmed status, Class Date 08/25/2009, Session Template NIH Tue 12:30-4:30, Location NIH Training Center, Facility EPS, Price 265.00 USD. A summary table at the bottom right shows: Order Total 265.00 USD, Discount 0.00 USD, and Total 265.00 USD.

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	<a href="#">Notes</a>	265.00 USD

Order Total	265.00 USD
Discount	0.00 USD
<b>Total</b>	<b>265.00 USD</b>

**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.

Search Orders

Order Number:  Base Organization:  Configure

Title:  Learner Name:

Bill-To Organization:  Order Contact: NIHLOCALLEARNING/

Price:  Created On <=\*: 09/18/2009

Created On >=\*: 06/20/2008 Method Of Payment: -Select One-

Show Orders for Private Offerings Only

Save Search Query Search

Order Number	Bill-To Organization	Status	Title	Learner Name	Offering Type	Created On
<a href="#">00146705</a>	HNAM6	Confirmed	Learning With Saba	NIH LocalLearningAdmin	Public	08/07/2008
<a href="#">00146706</a>	HNAM6	Cancelled	NIH-LMS Local Learning Administrator	NIH LocalLearningAdmin	Public	08/07/2008

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.



## Local Learning Administrator

- **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.

**Order Details: Order Number 00146705**

Order Contact: NIH LocalLearningAdmin  
Created On: 08/07/2008  
Order Status:  
Billed To: HNAM6

Order Notes [Add Note](#)

No items found

Order Items [Modify Table](#)

Title	Learner	Delivery Type	Status	Actions	Price
<a href="#">Learning With Saba</a>	<a href="#">NIH LocalLearningAdmin</a>	Online Training	Confirmed	<a href="#">Change Learner</a> <a href="#">Reschedule</a> <a href="#">Notes</a> <a href="#">Drop</a>	0.00 USD
Total					0.00 USD

[Cancel](#)



## 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.

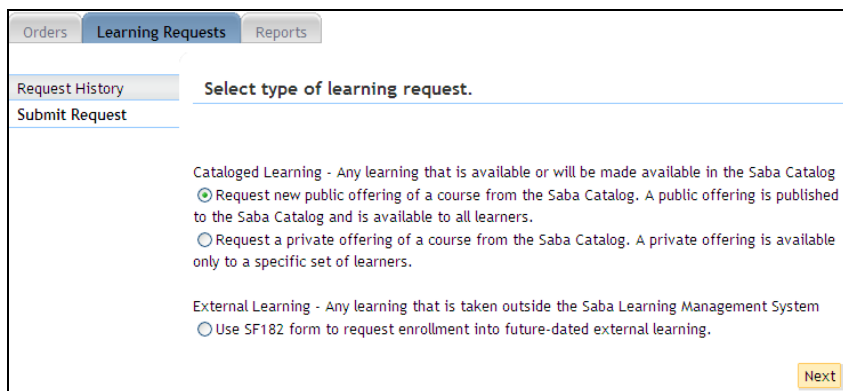
**NOTE:** There is no formal process in place requiring Training Administrators to monitor learning requests in the LMS. If your request is very important and/or time sensitive, you need to contact the training organization outside the LMS for follow-up.

### 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**.



The screenshot shows a web interface with three tabs: 'Orders', 'Learning Requests', and 'Reports'. The 'Learning Requests' tab is active. On the left, there are two menu items: 'Request History' and 'Submit Request'. The main content area is titled 'Select type of learning request.' and contains two sections. The first section is 'Cataloged Learning - Any learning that is available or will be made available in the Saba Catalog' and has two radio button options: 'Request new public offering of a course from the Saba Catalog. A public offering is published to the Saba Catalog and is available to all learners.' (which is selected) and 'Request a private offering of a course from the Saba Catalog. A private offering is available only to a specific set of learners.' The second section is 'External Learning - Any learning that is taken outside the Saba Learning Management System' and has one radio button option: 'Use SF182 form to request enrollment into future-dated external learning.' A 'Next' button is located at the bottom right of the form.

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**.

Create Request- Step 1: Choose Contact Person

1. Choose Contact >>> 2. Search Course >>> 3. Request Details >>> 4. Confirmation

Population\*  First Name   
Last Name  Person ID   
Username  Manager   
Organization  Location   
Domain  Person Type

Choose contact for request Export | Modify Table

	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="radio"/>	NIH	Competency	NIHCOMPETENCYADMIN	Other	00233604	HNAM6		NIHSUPERVISOR
<input type="radio"/>	NIH	DomainSysAdmin	NIHDOMAINSYSADMIN	Other	00165952	HNAM6		NIHSUPERVISOR
<input type="radio"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNN1		NIHSUPERVISOR
<input type="radio"/>	NIH	LocalLearningAdmin	NIHLOCALLEARNINGADMIN	Other	00165950	HNAM6		NIHSUPERVISOR
<input type="radio"/>	NIH	Supervisor	NIHSUPERVISOR	Other	00165949	HNAM6		00104264
<input type="radio"/>	NIH	TrainingContentAdmin	NIHTRAININGCONTENTADMIN	Other	00165951	HNAM6		NIHSUPERVISOR

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**.

Create Request- Step 2: Search Courses

1. Choose Contact >>> 2. Search Course >>> 3. Request Details >>> 4. Confirmation

Contact Information  
Name: NIHCOMPETENCYADMIN  
Organization: HNAM6

Search Courses Configure

Title  Keyword   
Available From >=  Discontinued From >=   
Category  Competencies   
Version  Course ID

Select Course Print | Export | Modify Table

	Title	Version
<input checked="" type="radio"/>	NIH-LMS Competency Administrator	1
<input type="radio"/>	NIH-LMS Local Learning Administrator	1
<input type="radio"/>	NIH-LMS Training Administrator	1

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.

## Local Learning Administrator

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

**Create Request- Step 3: Learning Request Details**

1. Choose Contact >>> 2. Search Courses >>> 3. Request Details >>> 4. Review Request

Base Learner: NIHCOMPETENCYADMIN  
Title: NIH-LMS Competency Administrator  
Delivery Type: Computer Laboratory  
Requested Start On/After: 09/01/2009  
Requested End On/Before: 09/30/2009  
Location: NIH Training Center  
Facility: EPS  
Notes:   
Unassigned Learners: 10

Learners: [Add](#) | [Print](#) | [Export](#) | [Modify Table](#)

Person	Actions
NIH DomainSysAdmin	<a href="#">Delete</a>

Back Save Cancel

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.

## Local Learning Administrator

### 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**.

#### Search Learning Requests

Offering Type  Public Offerings  Private Offerings [Configure](#)

Learner Username  Learner First Name

Learner Last Name  Course

Submitted Date <=   Requested Start Date >=

Requested End Date <=   Requested Status

Location    Organization

Delivery Type

#### Search Learning Requests

<input type="checkbox"/>	Course	Submitted Date	Created By	Learner First Name	Learner Last Name	Requested Start Date
<input type="checkbox"/>	<a href="#">NIH-LMS</a> <a href="#">Local</a> <a href="#">Learning</a> <a href="#">Administrator</a>	09/18/2009	NIH0012308081	NIH	Competency	06/30/2009

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

<input type="checkbox"/>	Course	Submitted Date	Created By	Learner First Name	Learner Last Name	Requested Start Date
<input checked="" type="checkbox"/>	NIH-LMS Local Learning Administrator	09/18/2009	NIH0012308081	NIH	Competency	06/30/2009
<input checked="" type="checkbox"/>	NIH-LMS Local Learning Administrator	09/18/2009	NIH0012308081	NIH	DomainSysAdmin	06/30/2009
<input checked="" type="checkbox"/>	NIH-LMS Local Learning Administrator	09/18/2009	NIH0012308081	NIH	TrainingContentAdmin	06/30/2009
<input checked="" type="checkbox"/>	NIH-LMS Local Learning Administrator	09/18/2009	NIH0012308081	NIH	LocalLearningAdmin	06/30/2009
<input checked="" type="checkbox"/>	NIH-LMS Local Learning Administrator	09/18/2009	NIH0012308081	NIH	Supervisor	06/30/2009

Reject Register to Offering Create New Offering

**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.

Learning Request: Search for Offering

Configure

Title: NIH-LMS Local Learnin  
 Keyword:   
 Start Date >=: 09/18/2009  
 Location:   
 Field of Study:   
 Offering ID:   
 Delivery Type: -Select One-  
 End Date <=:   
 Facility:   
 Save Search Query Search

Learning Offerings Print | Export | Modify Table

	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

## Local Learning Administrator

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.

**Learning Request: Transfer Learners**

Transfer these learners either

with a choice: Put learners in Offered status, so they can Accept or Decline this registration

with no choice: Register learners directly into this offering

Offering

Name NIH-LMS Local Learning Administrator

Delivery Type Computer Laboratory

Language English

Open Seats 15

Waitlisted Seats 10

Location NIH Training Center

Start Date 09/24/2009

End Date 09/24/2009

Learners to be transferred [Print](#) | [Export](#) | [Modify Table](#)

Name	Organization	Actions
NIH Competency	HNAM6	<a href="#">Delete</a>
NIH DomainSysAdmin	HNAM6	<a href="#">Delete</a>
NIH TrainingContentAdmin	HNAM6	<a href="#">Delete</a>
NIH LocalLearningAdmin	HNAM6	<a href="#">Delete</a>
NIH Supervisor	HNAM6	<a href="#">Delete</a>

[Transfer all Learners](#)



## Local Learning Administrator

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	<u>NIH-LMS Local Learning Administrator</u>			
<a href="#">Print</a>   <a href="#">Export</a>   <a href="#">Modify Table</a>				
Name	Organization	Status	Order Number	
NIH Competency	HNAM6	Pending		<a href="#">Send Notification</a>
NIH DomainSysAdmin	HNAM6	Pending		<a href="#">Send Notification</a>
NIH TrainingContentAdmin	HNAM6	Pending		<a href="#">Send Notification</a>
NIH LocalLearningAdmin	HNAM6	Accepted	<u>00340130</u>	<a href="#">Send Notification</a>
NIH Supervisor	HNAM6	Accepted	<u>00340131</u>	<a href="#">Send Notification</a>
<a href="#">View All Learning Requests</a>				



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

## 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*	<input type="text" value="Learning with Saba"/>
Completion Start Date*	<input type="text" value="01/01/2009"/>
Completion End Date*	<input type="text" value="07/02/2009"/>
Course Domain	<input type="text"/>
Admin Code	<input type="text" value="HNA%"/>
Employee EOD Start Date	<input type="text"/>
Employee EOD End Date	<input type="text"/>
Person Type	<input type="text" value="-Select One-"/>
Person Status	<input type="text" value="-Select One-"/>

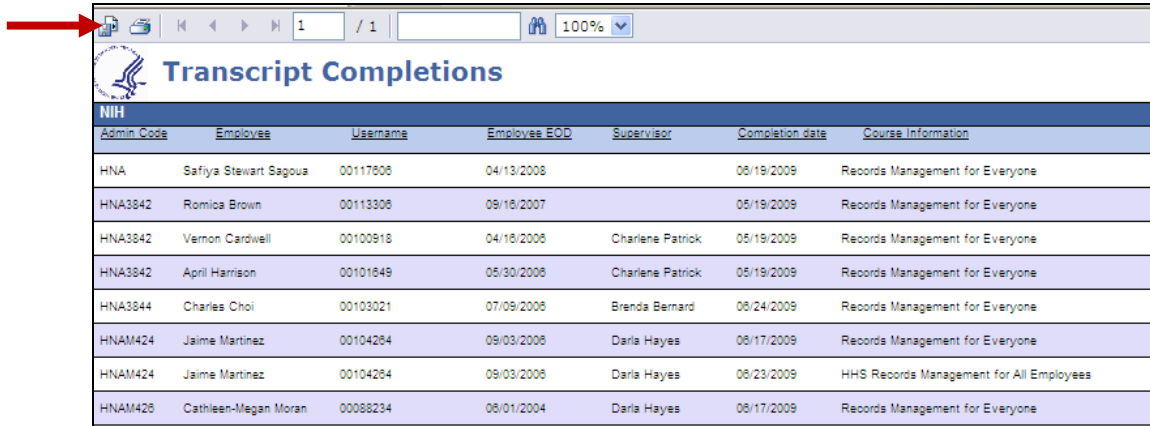
The following is a sample report, based on the parameters above:

NIH Transcript Completions							
Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information	Course Domain
HNA383	Aaron Fier	NIH0014308279	03/02/2009		03/04/2009	Learning With Saba	HHS Common
HNA383	Donna Howell	NIH0014333995	05/18/2009		08/25/2009	Learning With Saba	HHS Common
HNA384	Geraldine Page	00049238	08/30/2005		08/25/2009	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.

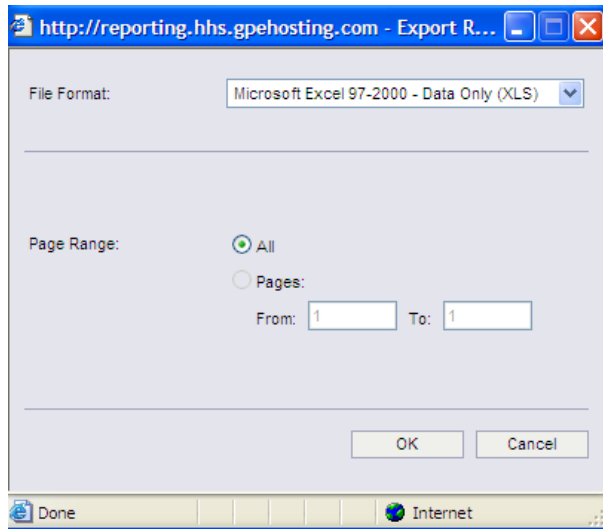
1. Complete the steps in section *Step-By-Step (Generate a Report)* on page 67 of this guide.
2. Click the export icon in the upper left corner of the report.



Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information
HNA	Safiya Stewart Sagoua	00117808	04/13/2008		08/19/2009	Records Management for Everyone
HNA3842	Romica Brown	00113308	09/18/2007		05/19/2009	Records Management for Everyone
HNA3842	Vernon Cardwell	00100918	04/18/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3842	April Harrison	00101849	05/30/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3844	Charles Choi	00103021	07/09/2008	Brenda Bernard	08/24/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104264	09/03/2008	Daria Hayes	08/17/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104264	09/03/2008	Daria Hayes	08/23/2009	HHS Records Management for All Employees
HNAM428	Cathleen-Megan Moran	00088234	08/01/2004	Daria Hayes	08/17/2009	Records Management for Everyone

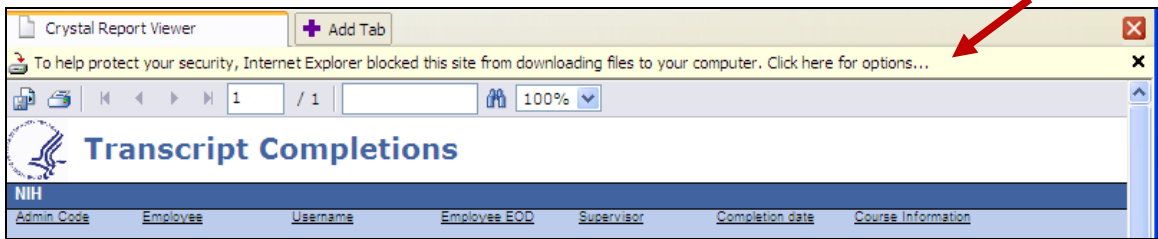
3. Select the **File Format** you want, indicate the **Page Range**, and click **OK**. The following two formats are the most commonly used:
  - The **Adobe Acrobat (PDF)** format will export a report ready for printing.
  - The **Microsoft Excel 97-2000 – Data Only (XLS)** format will export a report 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.

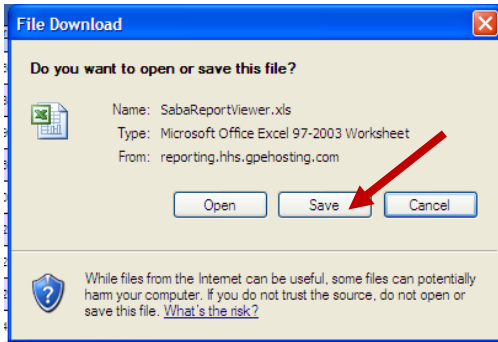


## Local Learning Administrator

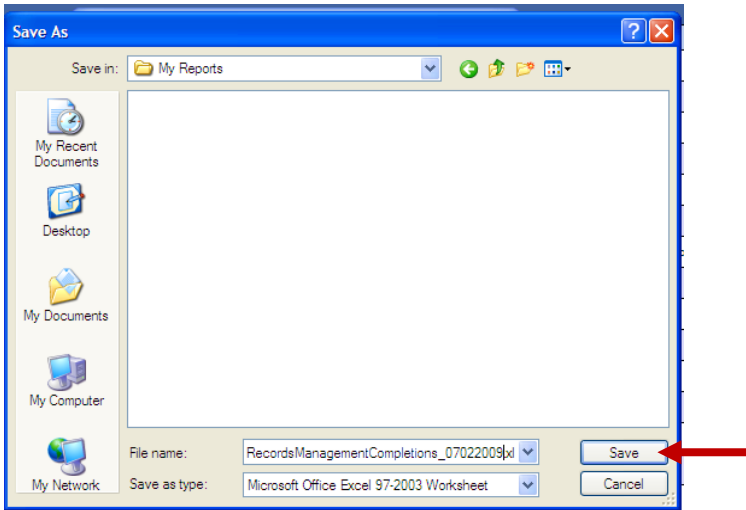
- You may see the following browser warning. Click the yellow warning bar and select **Download File**. Repeat Step 2.



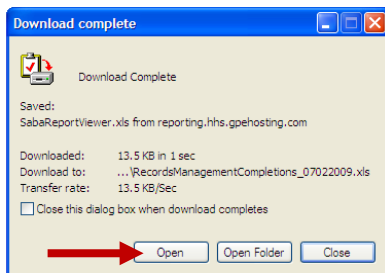
- You will be prompted to open or save the file. Click **Save**.



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



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

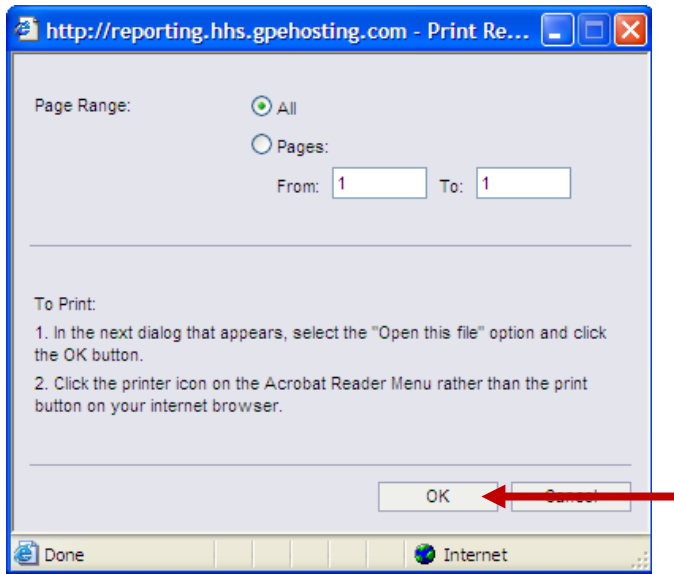


STEP-BY-STEP (PRINT A REPORT)

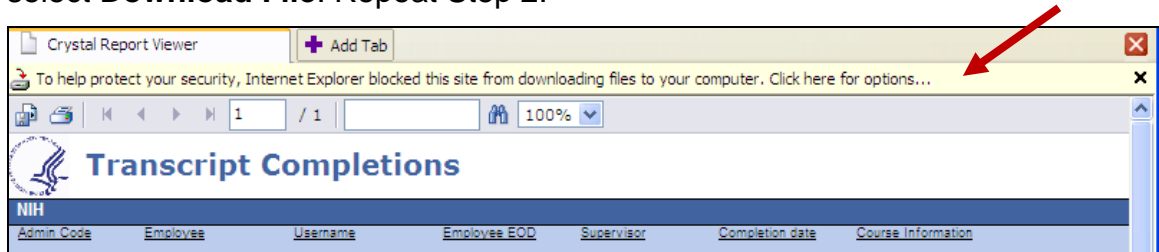
1. Complete the steps in section *Step-By-Step (Generate a Report)* on page 67 of this guide.
2. Click the print icon in the upper left corner of the report.

Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information
HNA	Safiya Stewart Sagous	00117808	04/13/2008		08/19/2009	Records Management for Everyone
HNA3842	Romica Brown	00113308	09/18/2007		05/19/2009	Records Management for Everyone
HNA3842	Vernon Cardwell	00100918	04/18/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3842	April Harrison	00101849	05/30/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3844	Charles Choi	00103021	07/09/2008	Brenda Bernard	08/24/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104264	09/03/2008	Darla Hayes	08/17/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104264	09/03/2008	Darla Hayes	08/23/2009	HHS Records Management for All Employees
HNAM428	Cathleen-Megan Moran	00088234	08/01/2004	Darla Hayes	08/17/2009	Records Management for Everyone

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

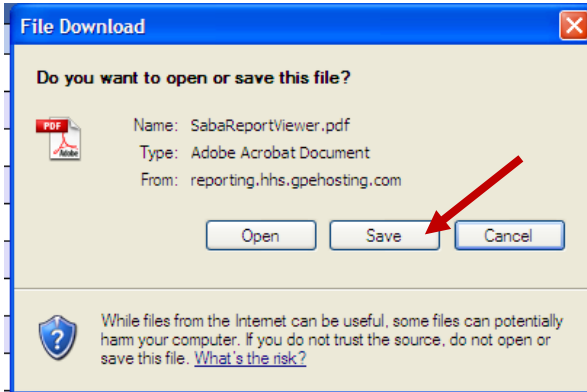


4. You may see the following browser warning. Click the yellow warning bar and select **Download File**. Repeat Step 2.

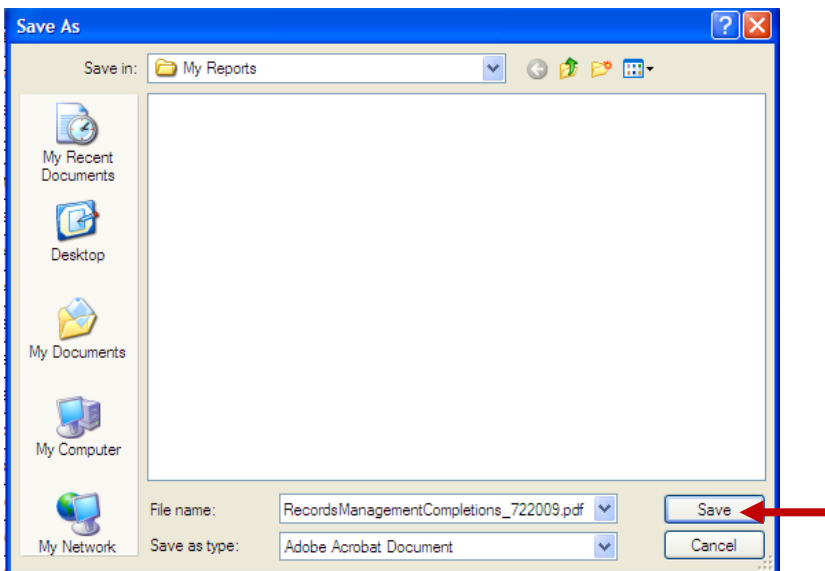


## Local Learning Administrator

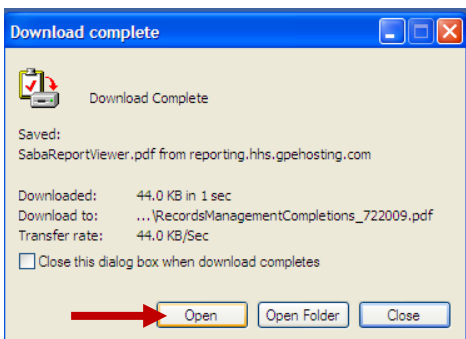
5. You will be prompted to open or save the file. Click **Save**.



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		<a href="#">Modify Table</a>
Name	Description	Actions
<input checked="" type="checkbox"/> General Category		
<input checked="" type="checkbox"/> Assessment		
<input checked="" type="checkbox"/> Certification		
<input checked="" type="checkbox"/> Learners		
<input checked="" type="checkbox"/> Offerings		
..... <a href="#">All Orders by Offering Start Date</a>	This report enables administrators to identify the orders placed by all learners for an offering start date range.	<a href="#">Email</a> <a href="#">Subscribe</a>
..... <a href="#">HHS Training Completion Detail-Custom-Custom</a>	Custom report that displays transcript detail based on 3 required parameters and 4 optional parameters	<a href="#">Email</a> ← <a href="#">Subscribe</a>
..... <a href="#">Private Offerings Revenue by Location</a>	This report enables administrators the ability to view the revenue generated by private offerings ordered by all locations.	<a href="#">Email</a> <a href="#">Subscribe</a>

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

## Local Learning Administrator

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

Email HHS Training Completion Detail-Custom-Custom

Run Reports > Email HHS Trai... \* = required

To\* lmsupport@mail.nih.gov  
Character Limit : 255  
Remaining character count: 232

Subject\* Records Management Completions

Mail Text\* Attached is a report of all Records Management course completions for OD to date.  
Character Limit : 255

Report Format\* MS Excel 97-2000 (Data only)

Course Title\* records management

Completion Start Date\* Fixed Date  
\* Enter Date 10/01/2008

Completion End Date\* Date on which report is run

Course Domain

Admin Code HNA%

Employee EOD Start Date -Select One-

Employee EOD End Date -Select One-

Person Type -Select One-

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.

Person Type -Select One-

Person Status -Select One-

Preview Send Cancel

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.

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

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

**Report Subscription for HHS Training Completion Detail**

[Run Reports](#) > Report Subscri...

Report Subscription [New Report Subscription](#)

No items found

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

## Local Learning Administrator

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.

**Report Subscription for HHS Training Completion Detail-  
Custom-Custom**

[Run Reports](#) > [Report Subscri...](#) > Report Subscri... \* = required

Name*	<input type="text" value="Records Management Report Subsc"/>
Description*	<input type="text" value="Send monthly IC completion reports"/>
Course Title*	<input type="text" value="records management"/>
Completion Start Date*	Number of days before the date on which report is run ▼
*	Enter Number of Days <input type="text" value="31"/>
Completion End Date*	Date on which report is run ▼
Course Domain	<input type="text"/> 🔍 🗑️
Admin Code	<input type="text" value="HNA%"/>
Employee EOD Start Date	-Select One- ▼
Employee EOD End Date	-Select One- ▼
Person Type	-Select One- ▼ 🗑️
Person Status	-Select One- ▼ 🗑️
To*	<input type="text"/>

Character Limit : 255

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.

Report Subscription for HHS Training Completion Detail-Custom-Custom		
<a href="#">Run Reports</a> > Report Subscri...		
Report Subscription		<a href="#">New Report Subscription</a>   <a href="#">Print</a>   <a href="#">Export</a>
Name	Description	Actions
<a href="#">Records Management Report Subscription</a>	Send monthly IC completion reports each month	X



## 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  
[DHSHelp@gpworldwide.com](mailto:DHSHelp@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 any 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](mailto:hillk@mail.nih.gov)
- Carlye Fuller  
NIHTC, [fullerc@mail.nih.gov](mailto:fullerc@mail.nih.gov)
- Jaime Martinez  
HR SAID, [martinezja@mail.nih.gov](mailto:martinezja@mail.nih.gov)
- Brian Hughes  
NIHTC, [hughesba@mail.nih.gov](mailto:hughesba@mail.nih.gov)
- Tom Holscher  
NIHTC, [holschertm@mail.nih.gov](mailto:holschertm@mail.nih.gov)





## APPENDIX A – ORGANIZATION CODES

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

HNAI 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: <b>Executive Plaza North</b> or <b>Rockville</b>
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	<b>Leave empty</b> if unknown.
Course ID From Vendor (1105)	The course ID as assigned by the vendor	<b>Leave empty</b> 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.  <b><i>There are more options available in this drop-down</i></b>
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, <b>leave empty.</b>
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, <b>leave empty.</b>

**Local Learning Administrator**

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, <b>leave empty</b> .
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 <b>0</b> .
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 <b>0</b> .
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 <b>0</b> .
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 <b>0</b> .
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 <b>0.00</b>
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 <b>0.00</b>

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 <b>0.00</b>
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 <b>NA</b> .
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

