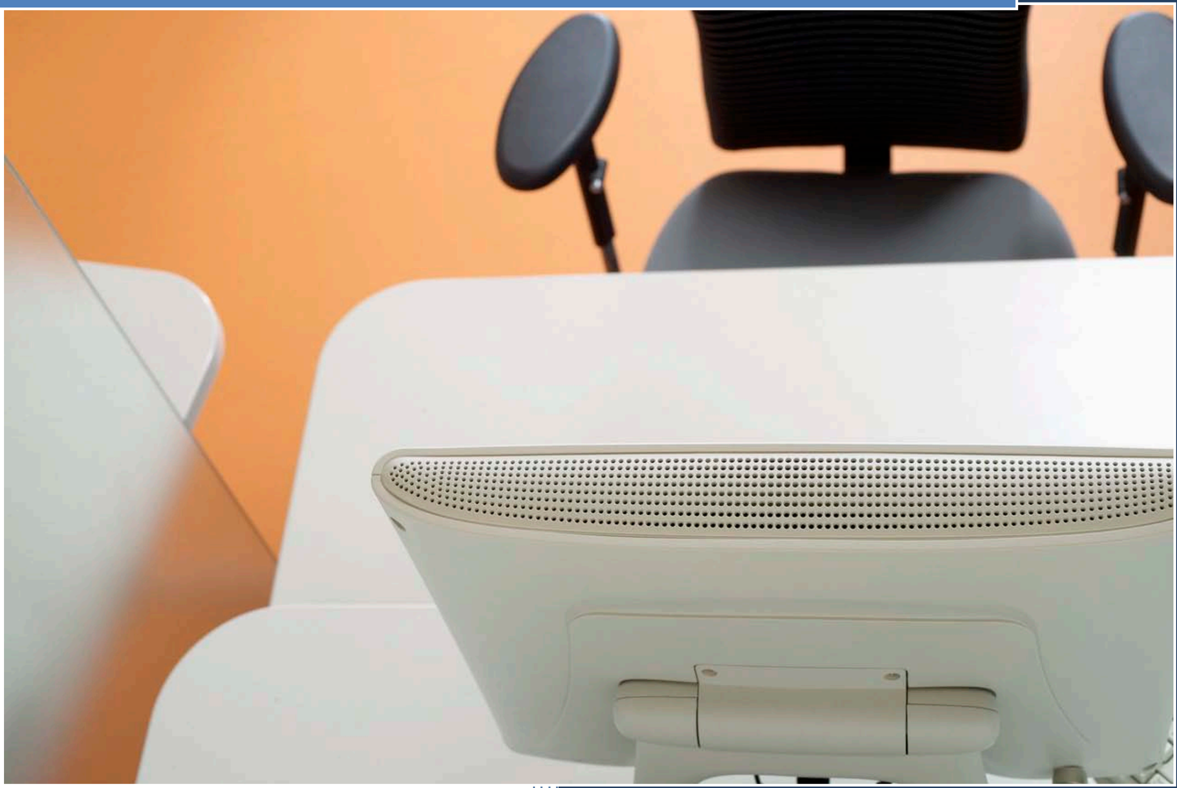
HHS Learning Portal

Human Capital Administrator



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HHS LEARNING PORTAL
HUMAN CAPITAL ADMINISTRATOR

Version 1.5

National Institutes of Health Training Center

National Institutes of Health Training Center, Rockville 20852

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Version Number	***Revision Date***	***Approved By***	***Approved Date***	***Description of Change***
1.0	12/13/2009	NIH LMS Implementation Team	12/13/2009	Initial publication
1.5	08/11/2010	NIH LMS Implementation Team	08/11/2010	Revised to include: - Competency Groups - Updated screen shots - Updated Transcript management - Reorganized content

Please submit any questions or suggestions for changes to LMSSupport@mail.nih.gov.

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HUMAN CAPITAL 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.)

Human Capital Administrator

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

Component	*Example…*
Business rules	NIH offerings do not, by default, require manager approval prior to registration.
Notifications	NIH email notifications include NIH-specific information and logos.
Locations, facilities, and rooms	NIH resources are only available to NIH administrators in the LMS.
User accounts	Only NIH administrators may access and modify the accounts of NIH staff.

NIH has its own domain to ensure that all NIH employees and contractors have access to NIH-specific training resources. Having an NIH domain also prevents users in other domains (other agencies within HHS) from viewing and accessing NIH-specific training resources.

LMS users are unable to see information in domains that are at a higher or equal level in the hierarchy. Their permissions trickle down, which means they can see items in their own domain and sub-domains only. NIH staff can access training in the NIH domain and sub-domains, as well as the HHS Common domain.

The following are all sub-domains of the NIH domain:

- NIH Training Center (NIHTC)
- Clinical Center (CC)
- Center for Information Technology (CIT)
- Office of Research Services (ORS)
- National Institutes of Allergy and Infectious Diseases (NIAID)
- NIH Common

For a graphic representation of the HHS Learning Portal domain structure please refer to Appendix C of this document.

SECURITY ROLES

Security Roles further define the permissions of individual users in a domain. Most of the security roles in the LMS are 'tied' to the domain (e.g., a user assigned the Human Capital Administrator security role at the NIH domain has access to manage NIH components, as well as those in NIH sub-domains).

Every user in the LMS has the security role of Learner. If you are designated as the Manager in someone's Learner Profile, you will automatically have the role of Manager/Supervisor as well.

Domain-Specific Security Roles include:

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

There is one Security Role that is defined by Organization/SAC code instead of the domain – Local Learning Registrar (a.k.a. Local Learning Administrator

(LLA)). This restricts the LLA to performing actions associated with Learners within a specific Institute or Center (IC) only.

HUMAN CAPITAL ADMINISTRATOR ROLE

The LMS Human Capital Administrator role allows users to manage and administer people and certain components within the LMS. The Human Capital Administrator is divided into two separate roles: ‘Human Capital Administrator – People’ and ‘Human Capital Administrator – Orgs & Jobs.’

With the Human Capital Administrator - People role you will be able to:

- View and edit account profiles for learners
- View and edit transcripts for learners
- Add external learning to transcripts
- View enrollments, curricula, certifications, courses, and competencies assigned to learners
- Manage learning plans
- Create, edit, and administer surveys
- View and create multi-rater competency assessments, and approve/reject raters
- Assign training items via prescriptive rules
- Run, export, email, and subscribe to various reports

With the Human Capital Administrator – Orgs & Jobs role you will be able to:

- View internal and external organization information
- Manage job roles, jobs, and job families
- View, edit, and create new competencies and competency groups
- Manage Locations and Facilities
- Manage Learning Plans
- Run, export, email, and subscribe to various reports

This user manual will guide you through the privileges assigned to a Human Capital Administrator, including both of the roles described above.

LMS TERMS AND DEFINITIONS

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

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.

Closing a Competency Gap – A competency gap can be closed by increasing the calculated gap number to zero or higher. Closing the gap can be accomplished by completing or updating a learner self-assessment, or a manager/supervisor assessment, usually after relevant training has been completed or additional experience has been gained.

Competency – A competency is a skill, knowledge, or behavior that can be measured, calculated, acquired, specified, or tested. Examples of competencies include “Java Programming”, “Written Communications”, “Product Knowledge”, and “People Skills”. Assigned competencies “required” and assessed competencies are “held.”

Competency Gap – This is a measure of the learner’s current competency proficiency minus his/her required competency proficiency level. This value indicates how much training, development, and learning is needed in order to make measurable increases to performance.

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.

Curriculum – A predefined set of courses that have been grouped together. A learner must complete all courses to complete the curriculum.

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

Descriptors – Behavioral descriptors are descriptions associated with competency proficiency levels. They are intended to help establish an anchor that raters and viewers can use when assessing the proficiency level of a learner.

Enrollment – An offering that a learner is registered for, but has not yet completed.

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.

Human Capital Administrator

Job Families – A job family is a collection of related jobs.

Job Roles – Roles identify specific skills required to perform a job. Roles can be shared across multiple jobs. Role definitions may include:

- Competencies — competencies required to perform the role (including criticality of the competency and minimum required proficiency)
- Certifications — certifications required to perform the role.
- Curricula — curricula required to perform the role.
- Attachments — additional information about the job role.

Jobs – In the LMS, jobs are listed according to the OPM job series number. A job can be a collection of roles. It can inherits the competencies, certifications, curricula and attachments of the associated roles. Job definitions may include:

- Roles — define the functional responsibilities for the job.
- Next career steps — other jobs that represent likely promotion paths for people who hold the job.
- Attachments — additional information about the job function.

Learning Plan – Learning plans allow learners to keep track of learning offerings and other tasks needed for general development. Every LMS learner has a single learning plan. Learners can set or view the progress of each item in their learning plan. In addition, users with certain privileges (like managers) can also view progress on the learning plan items.

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

Multi-Rater Assessment (MRA) – A multi-rater assessment (MRA) is a method by which a learner’s competencies are assessed by supervisors, peers, subordinates, and customers.

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.

Order – An order is created when an administrator signs another person up for an offering.

Prescriptive Rule – Prescriptive rules are used to dynamically assign goals or learning (offerings, courses, certifications, curricula, etc.) to people as a group. Prescriptive rules are defined to assign the prescribed goals/learning.

Proficiency Level – Proficiency levels represent the scale on which a competency is measured. Examples of the proficiency levels used at NIH include “Fundamental Awareness”, “Novice”, “Intermediate”, “Advanced”, and “Expert”.

Ratee – The employee whose competencies are being rated.

Rater – An individual who is completing a competency assessment of someone else.

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

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.

Security Role – A security role is a set of privileges assigned to a user. A user can be a learner, a manager, an alternate manager, a registrar, an instructor, or an administrator. The permissions granted to a user through a security role apply to the specified domain.

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:

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

Surveys – A survey is a questionnaire that a respondent uses to evaluate a service or provide general feedback.

Transcript – a record or history of training taken by a learner

WORKING WITH LEARNER PROFILES

PEOPLE - INTERNAL

The LMS learner **Profile** contains information about each learner in the system. As a Human Capital Administrator, there are two learner profile fields you may edit without the changes being overwritten by the next automated data feed. These fields are the learner's **E-mail** and the learner's **Manager**.

You may also designate **Alternate Managers** and **Alternate Team Members** through the profile. You may reset a learner's **password** – although with the password reset tool available to learners on the log in page, you should not have to do this. Finally, you may view **Audience Types** and **Subtypes** to which a learner belongs.

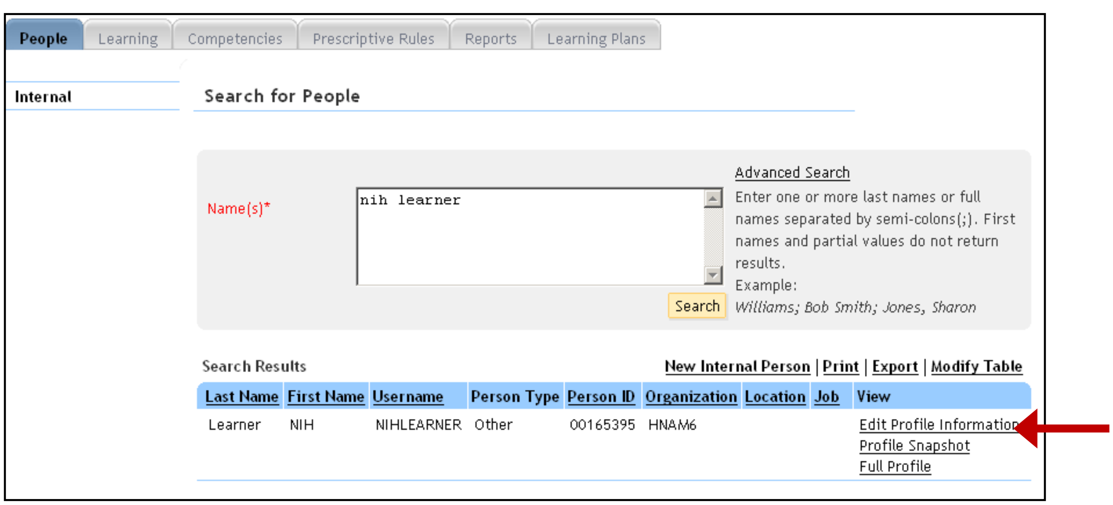
IMPORTANT! Although you may view the security role privileges assigned to a learner, you are NOT authorized to add or delete security role privileges. If you feel it is necessary to change the security role privileges of a learner, you must contact the NIH LMS Team for assistance (LMSSupport@mail.nih.gov).

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

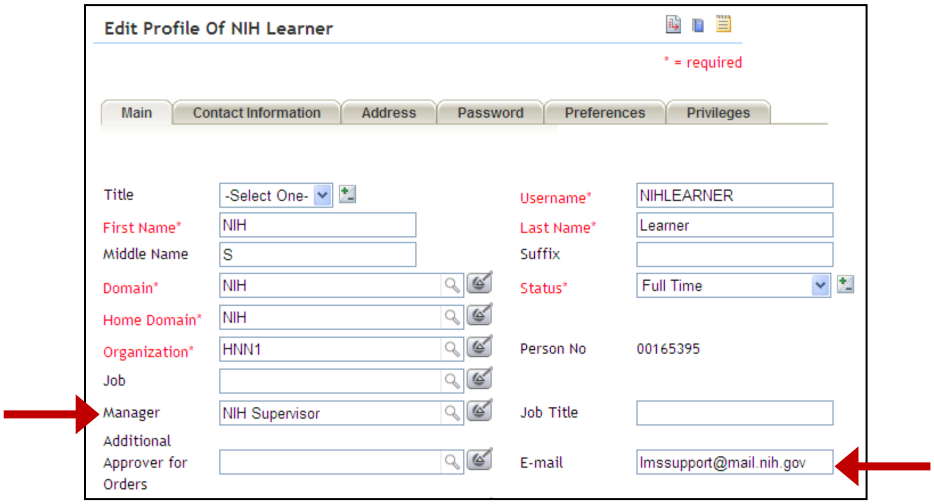
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Enter the learner's name in the search box and click **Search**.

   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 **Edit Profile Information** to the right of the correct learner.

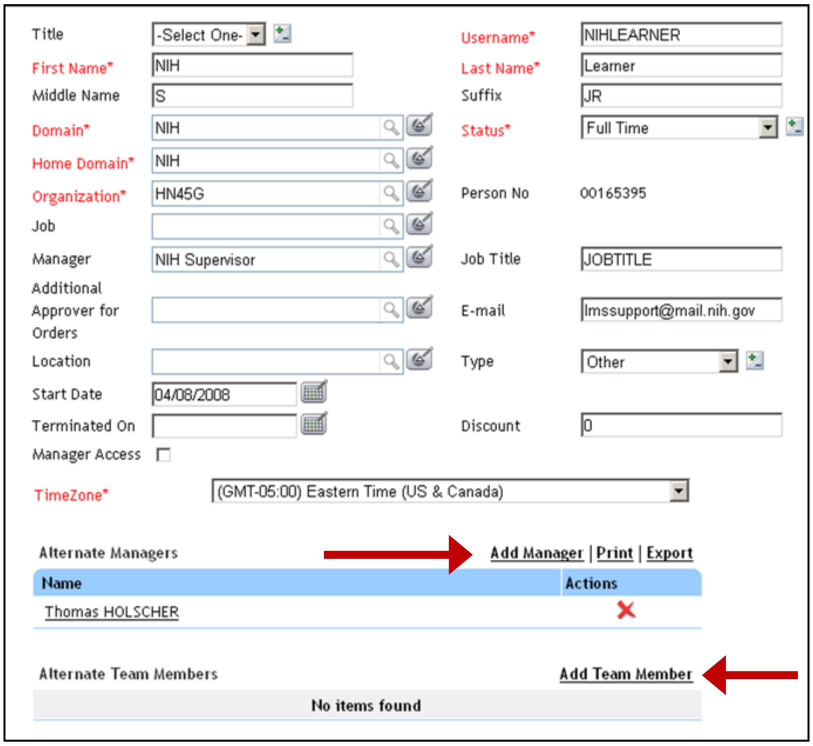


4. The **Main** tab of the learner **Profile** contains the learner's username, organization code, manager name, email address, alternate manager(s) and team members, and other data from the various HR systems data feeds coming in the LMS.
5. You may edit the learner's **E-mail** and/or **Manager** field as needed.
6. Scroll to the bottom of the page and click **Save**.

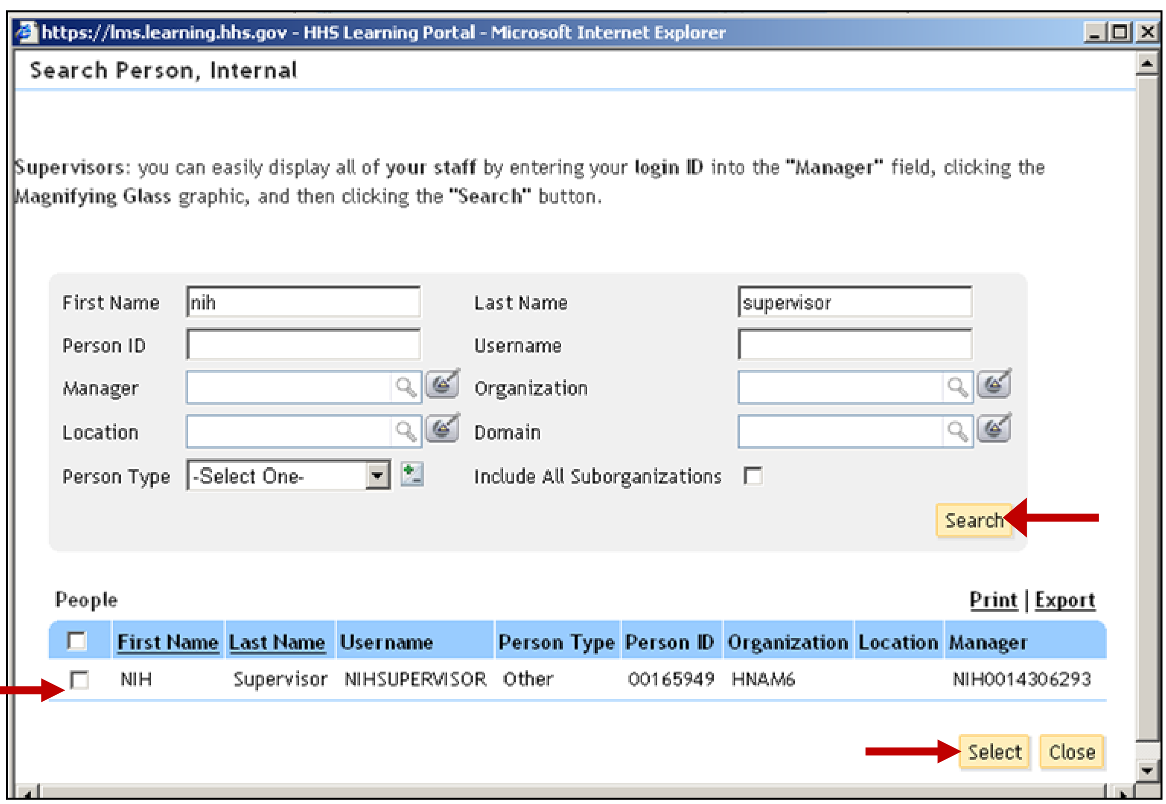


IMPORTANT! Information in the learner **Profile** is populated by data feeds from the Capital HR, NED, and/or Commission Corp databases. If any of information is incorrect, with the exception of e-mail address and manager, it must be corrected in the source system, not the LMS.

7. If appropriate, you may add **Alternate Managers** or **Alternate Team Members** to the learner. Click the appropriate link to add, and a search pop-up window will appear.

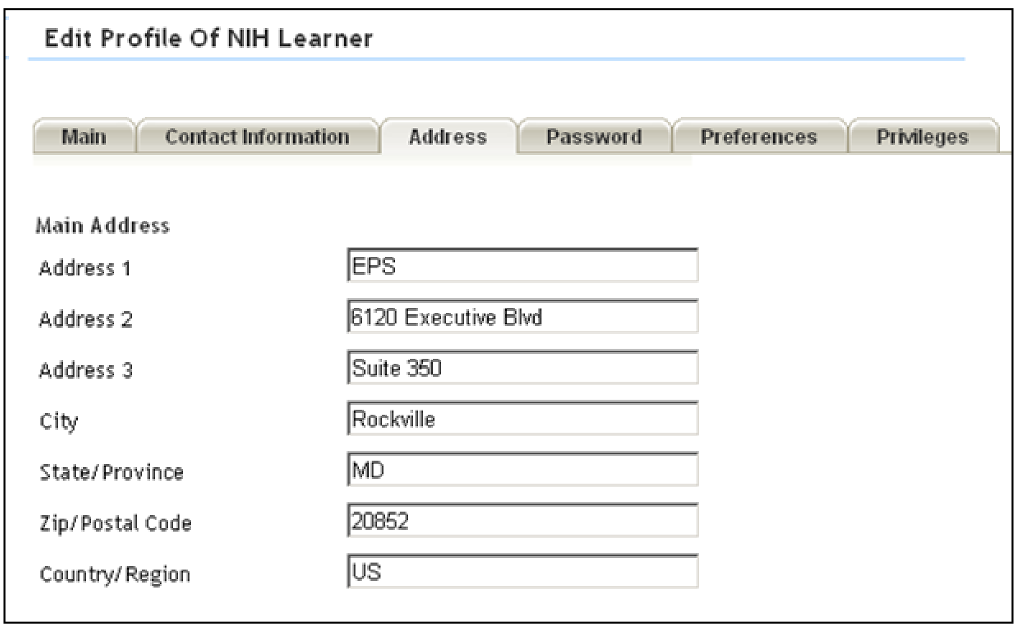


8. In the pop-up window, enter the criteria to find the person you are looking for, and click **Search**.



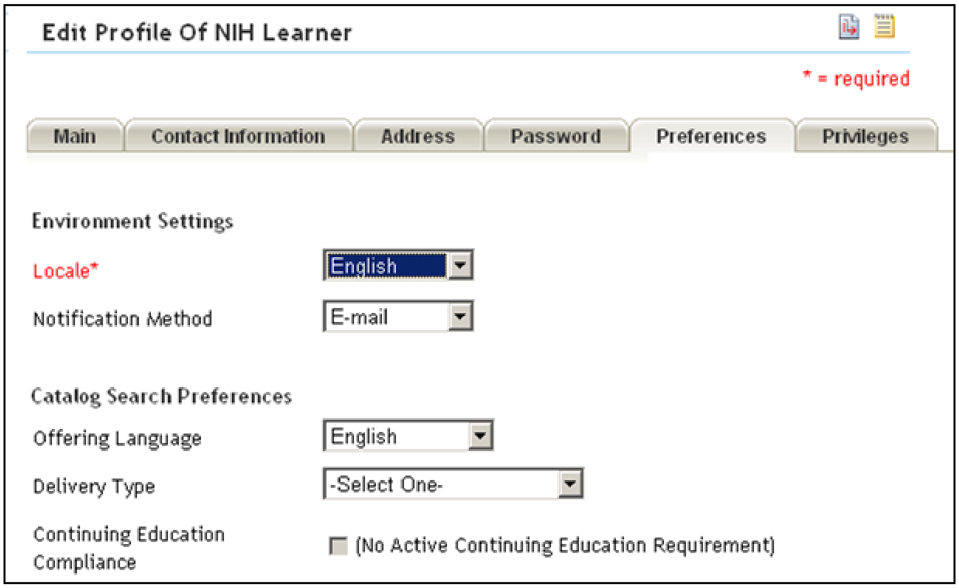
9. Click the checkbox in front of the appropriate person's name, and click **Select**.
10. The pop-up search box will close, and you will be returned to the **Main** profile tab, which now list the name of the person you added. Be sure to scroll to the bottom of the page and click **Save** when you are finished making changes.
11. The **Contact Information** tab offers another way to update the learner's email address.

12. The **Address** tab shows address information on record for the learner.



13. The **Password** tab allows you to reset a learner's password temporarily. It is better to direct learners to the reset password tool on the log in page.

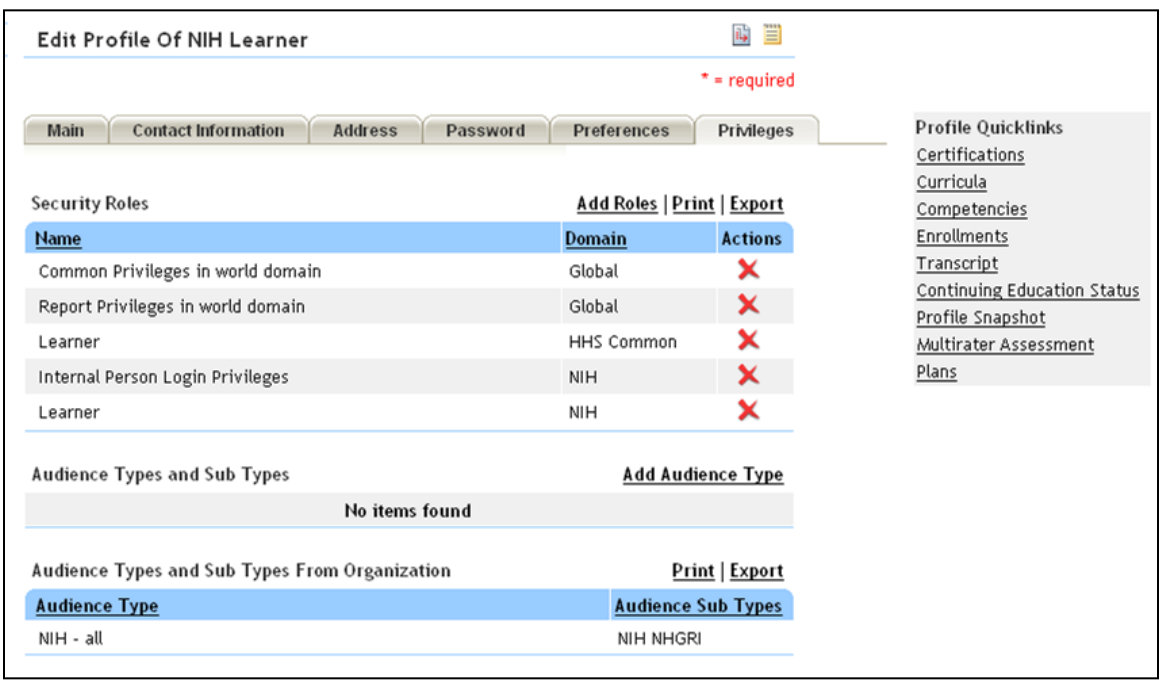
14. The **Preferences** tab allows a few preferences to be set for a learner.



15. The **Privileges** tab shows LMS security roles that have been assigned to the learner.

    IMPORTANT! These roles are audited, and you are NOT authorized to change them. If you feel a security role is incorrect or missing, contact the NIH LMS Team at LMSSupport@mail.nih.gov.

    The **Privileges** tab also allows you to see any audience types to which the learner belongs.



16. Also note the **Profile Quicklinks** in the box to the right of the **Profile**. These links give you quick access to additional information about the learner. These functions are covered elsewhere in this manual.

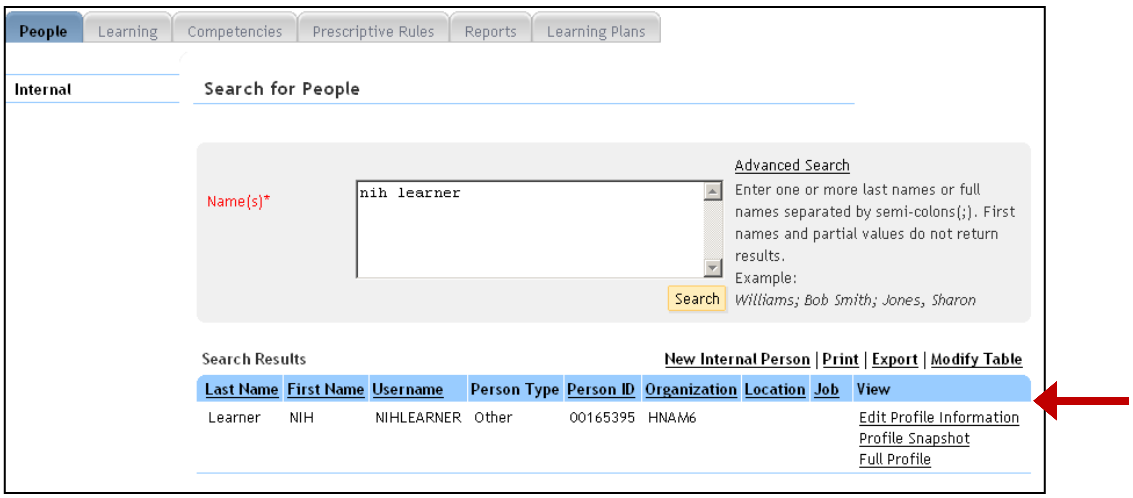
STEP-BY-STEP (RESET A LEARNER'S PASSWORD)

Learners can reset their own passwords using the LMS self-service password reset tool (**Forgot your password?**) on the log in 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. 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.

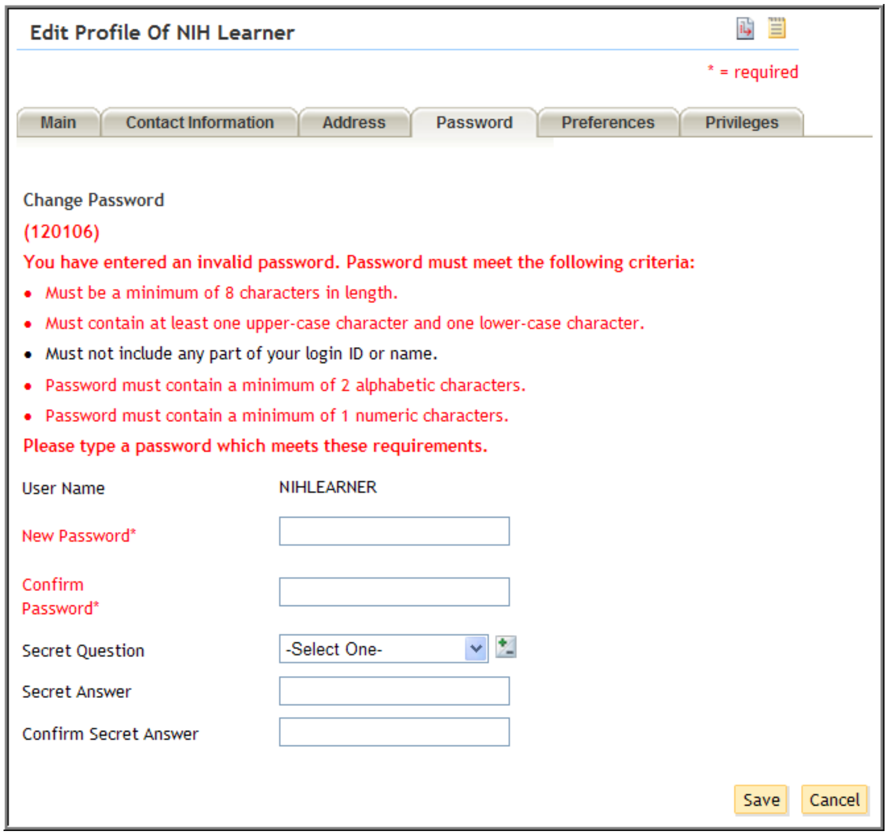
   If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.
3. Select **Edit Profile Information** to the right of the correct learner.



4. While viewing the learner's edit profile screen, click the **Password** tab.

5. Enter a new (temporary) password for the learner in the **New Password** field.

   NOTE: LMS passwords follow strong rules for security. (See password criteria below.)



6. Re-enter the password in the **Confirm Password** field.
7. Leave all other fields blank. (Setting these fields will require the learner to know them.)
8. Click **Save**.

   NOTE: You may be prompted that the password you are trying to set does not meet minimum requirements. Simply adjust your choice of password to meet the requirements stated and try again.

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

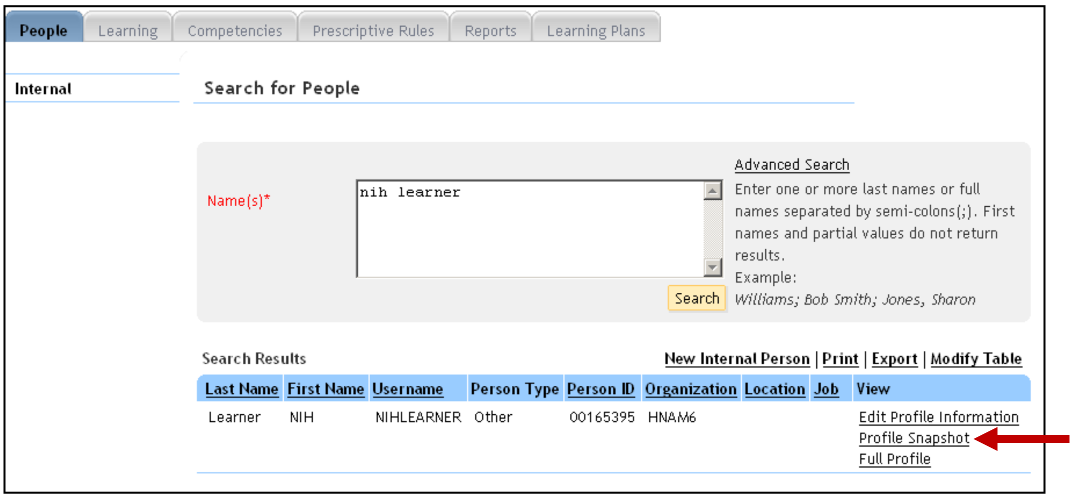
STEP-BY-STEP (VIEW A LEARNER'S PROFILE SNAPSHOT)

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

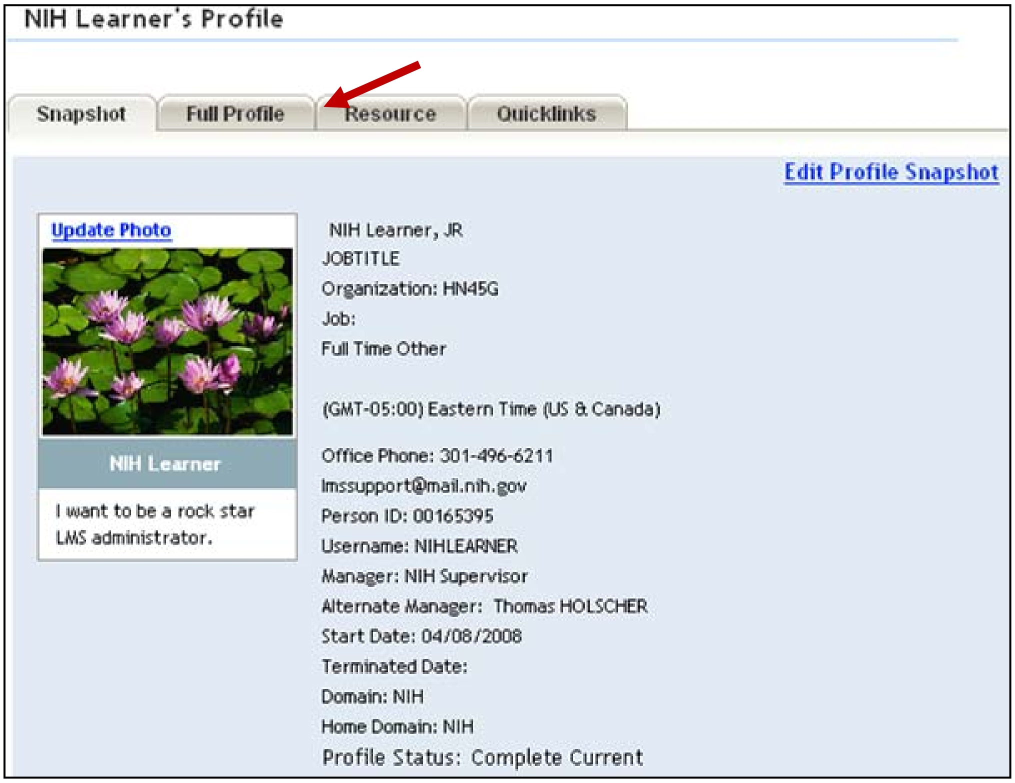
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Enter the learner's name in the search box and click **Search**.

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

   NOTE: 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 **Profile Snapshot** to the right of the correct learner to access the **Snapshot** tab of the learner's profile snapshot. Here you will find a quick view of basic learner information.



4. Click the **Full Profile** tab.

NOTE: To view details about an individual section of the profile, click the **Plus (+)** sign to the left of each section heading. To view details about all sections at once, click the **Expand All** link at the top of the page.:

- **Current Job Information** – includes job type, organization, manager and alternate manager, direct reports and alternate team members, and required and optional job roles (which you may add). (You will learn more about roles later.)
- **Competencies** – lists the top three strengths and top three development needs of the learner.
- **Licenses and Certifications** – any certification earned within the LMS will be listed, and you may also add external certifications the learner has earned.
- **Languages** – lists languages the learner has some experience with, and you may add to this list for the learner as well.

The **Resource** tab will allow you to designate the person as a resource for Training Administrators to assign to a class.

The **Quicklinks** tab contains links to the learner's certifications, curricula, competencies, enrollments, transcripts, continuing education status, profile snapshot, multi-rater assessments, and learning plan.

MANAGING JOBS AND ROLES

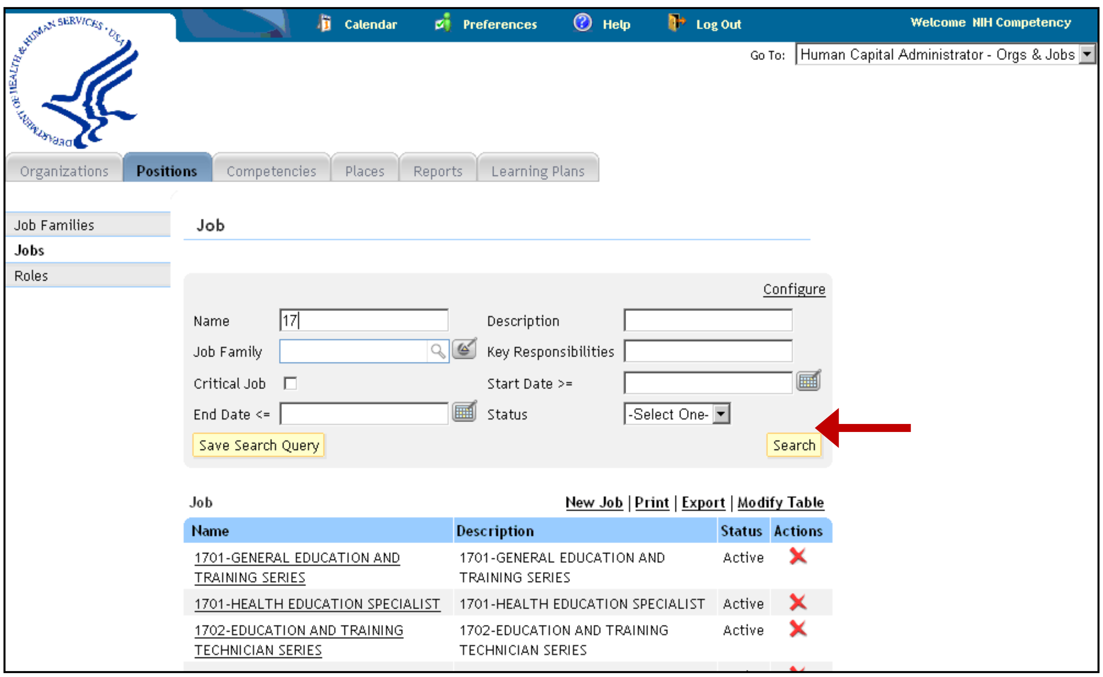
JOBS

In the HHS Learning Portal, jobs are based on OPM job series codes. They are created automatically by the Capital HR and Commissioned Corps data feeds that these systems have with the LMS. As a result, Jobs are never manually created.

IMPORTANT! Jobs can be viewed for informational purposes only. Never create or delete them.

STEP-BY-STEP (VIEW JOBS)

1. Select the **Human Capital Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.
2. Click on the **Positions** tab.
3. Select **Jobs** from the menu on the left.
4. Enter criteria and select **Search**.



IMPORTANT! Do not delete any of the jobs that are listed.

5. Click the **Name** of a job to see details about it.

IMPORTANT! Do not edit any details of a job.

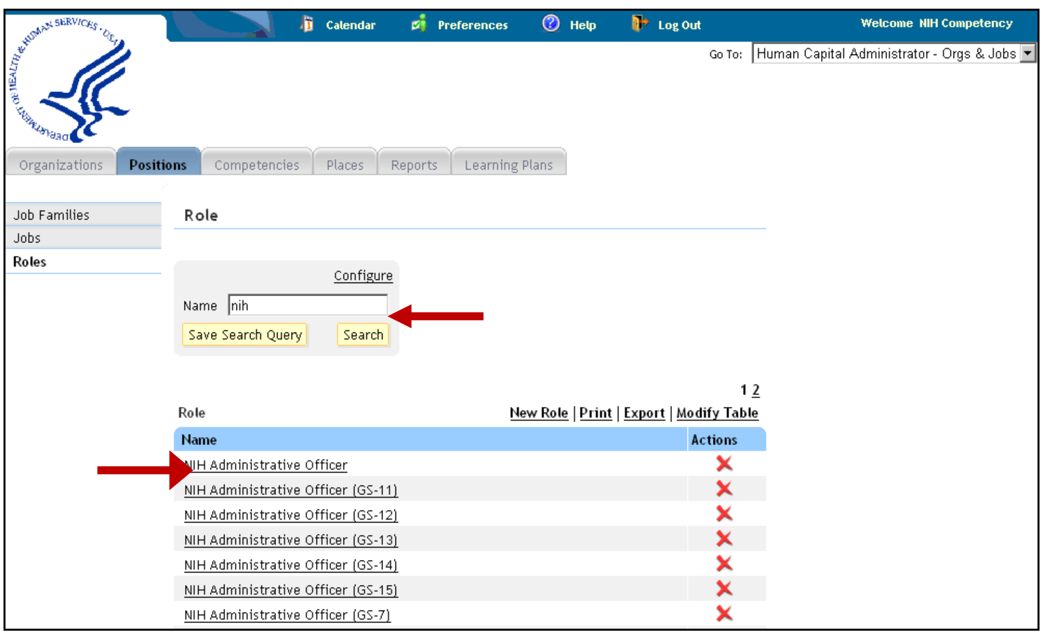
ROLES

Roles may be used to group functional skills needed by groups of people. Competencies, Certifications, Curricula, Attachments, Learning Recommendations, and Continuing Education Requirements can all be added to roles.

Once created, a Role may be assigned to a Learner from the **Current Job Information** section of a Learner's **Full Profile**. This makes everything associated with the Role available to the Learner. When modifications are made to a Role, the change is reflected in the profile of any Learner associated with the modified Role.

STEP-BY-STEP (VIEW A ROLE)

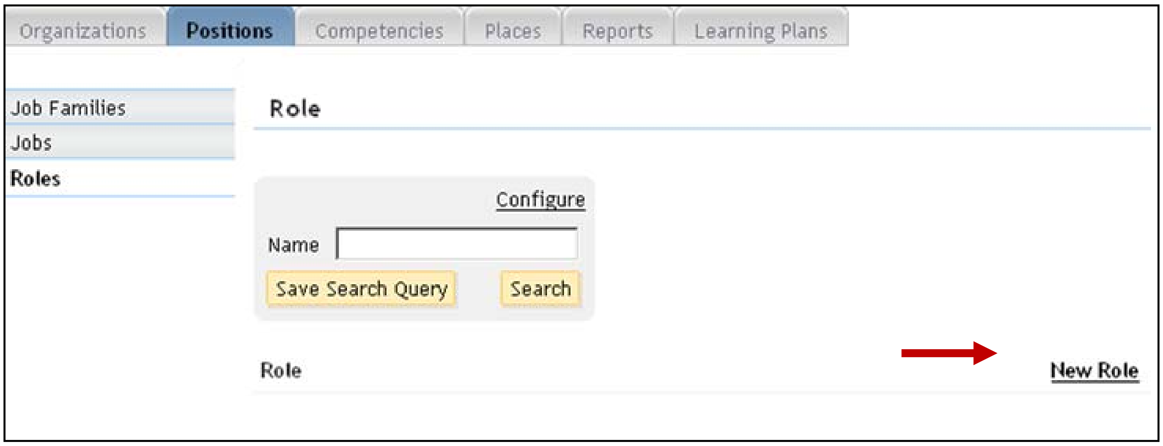
1. Select the **Human Capital Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.
2. Click on the **Positions** tab.
3. Select **Roles** from the menu on the left.
4. Enter criteria and **Search** for roles.
5. Click on the **Name** of a Role to see its details.



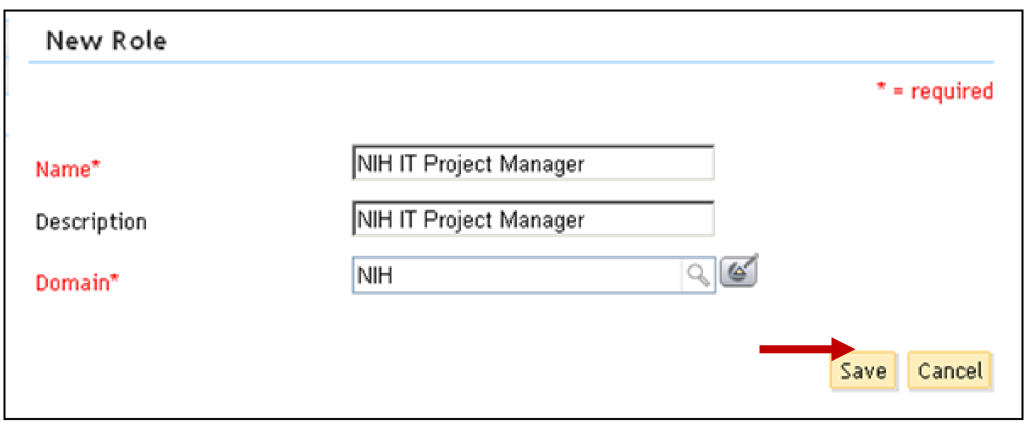
6. On the Roll Details, Main tab, edit any necessary information and click **Save** when you are finished.

STEP-BY-STEP (CREATE A ROLE)

1. Select the **Human Capital Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.
2. Click on the **Positions** tab.
3. Select **Roles** from the menu on the left.
4. Click on **New Role**.



5. On the **New Role** screen, **Name** the new role, add a **Description**, and make sure it is in the NIH **Domain**. Click **Save**.



NOTE: On the **Role Details** screen, you should add yourself as the **Owner** and may designate any common competency, certification, curriculum, etc. that all people with this job role should possess. Click the appropriate **Add** link and follow the prompts to find the exact item you want to add. Be sure to click **Save** when you are finished.

USING COMPETENCIES, SURVEYS & ASSESSMENTS

COMPETENCIES

A competency is a skill, knowledge, or behavior that can be measured, calculated, acquired, specified, or tested. Examples of competencies include “Java Programming”, “Written Communications”, “Product Knowledge”, and “People Skills”. A competency consists of one or more proficiency levels, which represent the scale on which the competency is measured. Examples of proficiency levels used at NIH include “Fundamental Awareness”, “Novice”, “Intermediate”, “Advanced”, and “Expert”.

You may find more information about NIH competencies on the NIH OHR web site at http://hr.od.nih.gov/workingatnih/competencies/default.htm. NIH competencies have already been added to the LMS. You should use the NIH competencies as they have been entered.

Please contact the NIH Competencies Team in the NIH Training Center (http://trainingcenter.nih.gov/contact.html) before deciding to add any additional competencies to the LMS. Because required competency assessment information often has to be reported to the Department and OPM, it is important to maintain standards within NIH to facilitate thorough reporting.

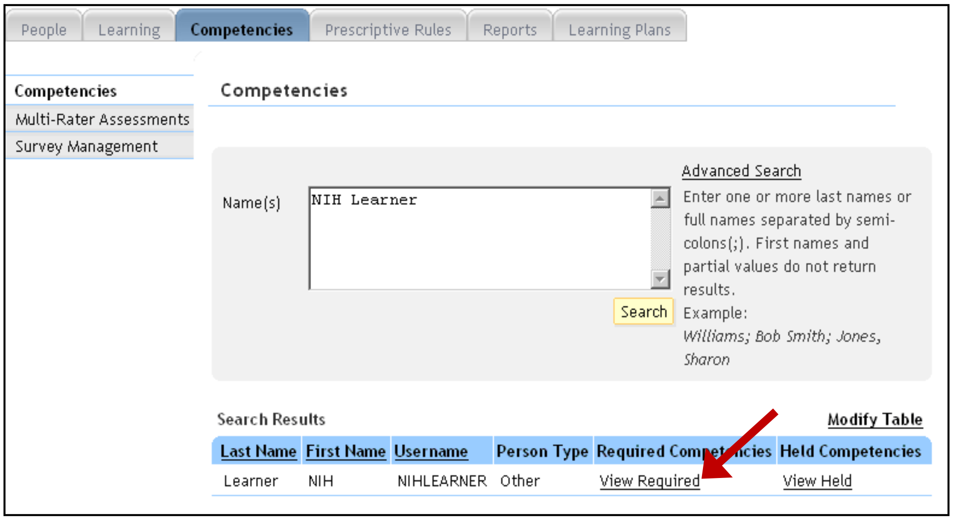
As a Human Capital Administrator, you are able to view a learner’s required and held competencies.

STEP-BY-STEP (VIEW LEARNER COMPETENCIES)

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

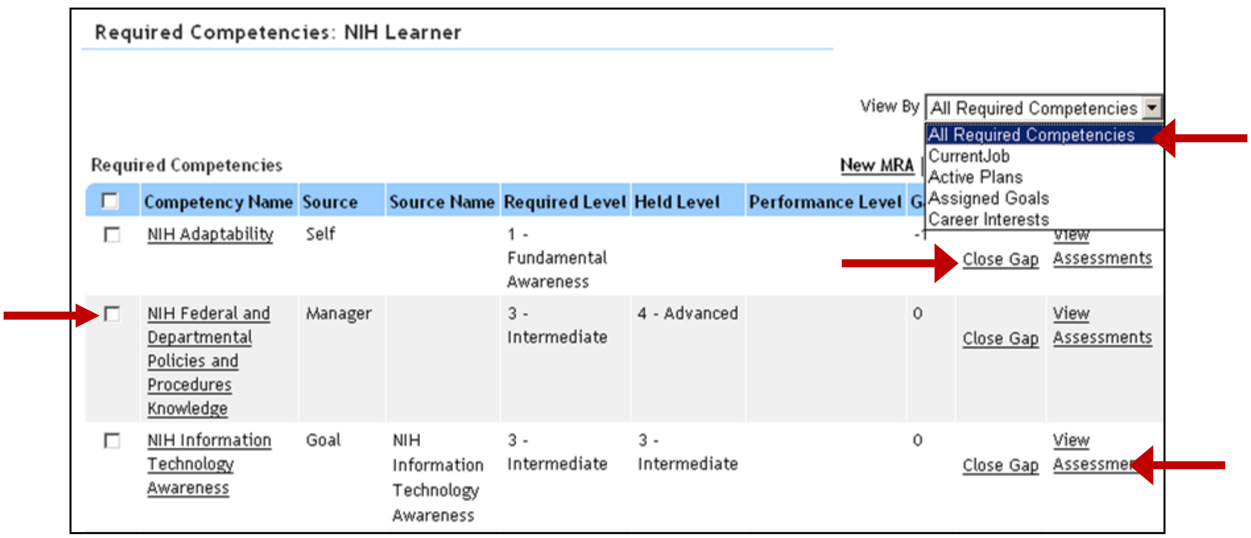
   NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try Advanced Search. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Select the **View Required** link to the right of the correct learner.



NOTE: Clicking **View Held** will give you the same options. **View Required** will list all competencies. **View Held** will only list competencies that have been assessed at least once.

6. You may filter the list of **Required Competencies** using the options in the drop-down **View By** field.



7. Click the **Competency Name** to view details about any competency in the list.

8. The **Source** column indicates how the competency was assigned, and **Required Level**, **Held Level**, and **Gap** are shown as well. Click **Close Gap** for a listing of training offerings related to the competency. As a Human Capital Administrator, you may select any of the listed courses and create an order to register the learner. (Orders are covered later in this manual.)

9. Click **View Assessments** to see the results of any assessments done for a competency.

Competency Assessments: NIH Federal and Departmental Policies and Procedures Knowledge

Competency Name	NIH Federal and Departmental Policies and Procedures Knowledge
Description	Understand and applies knowledge of Federal and Departmental statutes, regulations, policies, and procedures.
Current Assessed Level	4 - Advanced

Past Assessments — Print | Export | Modify Table

Date	Method	Level	In Calculation?	Rating	Comments	Details
12/10/2008	Manager Assessment	3 - Intermediate	No			NIH Supervisor
01/26/2009	Self Assessment	3 - Intermediate	No			NIH Learner
02/02/2009	Manager Assessment	3 - Intermediate	Yes			NIH Supervisor
06/17/2009	Multi-Rater Assessment	5 - Expert	No			See Ratings with Options Turned Off?
06/17/2009	Multi-Rater Assessment	5 - Expert	Yes			See Ratings with Options Turned Off?
10/09/2009	Self Assessment	4 - Advanced	Yes		Testing for comments	NIH Learner

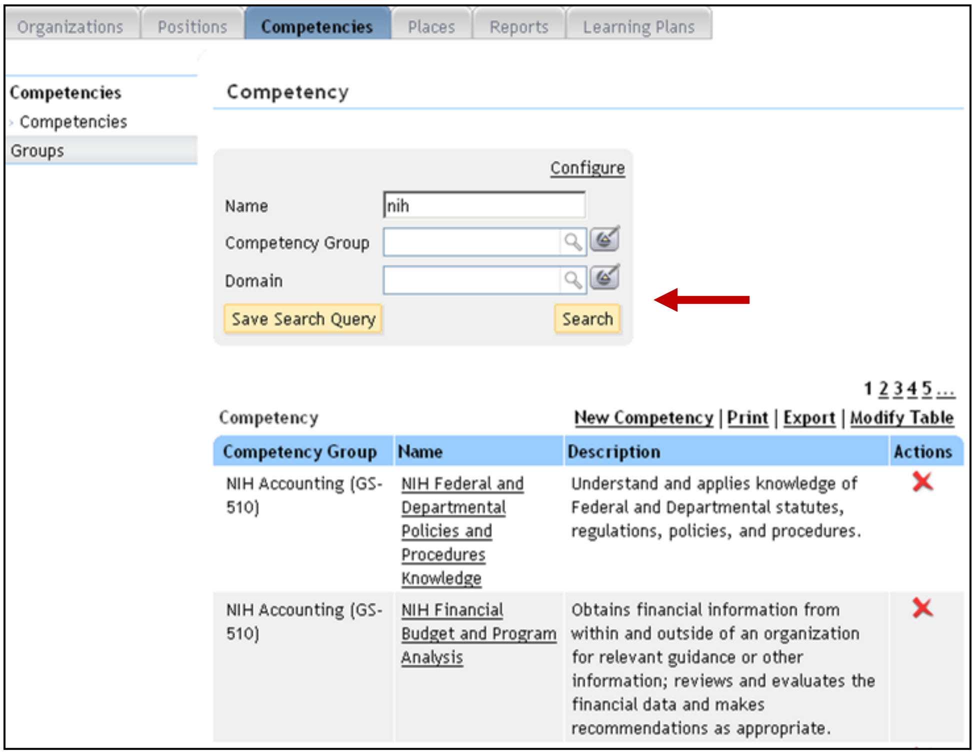
10. The **Competency Assessments** screen lists all assessments made for the competency. It gives the **Date** the assessment occurred, the **Method** (source) of the assessment, the **Level** assessed, whether the rating is **In Calculation**, and any **Comments** that were given.

STEP-BY-STEP (SEARCH FOR AND VIEW COMPETENCY DETAILS)

1. Select the **Human Capital Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.
2. Click on the **Competencies** tab.

Human Capital Administrator

3. From the **Competency** screen, enter the appropriate criteria and click **Search**.



4. Click the **Name** of a competency to view details, such as **Description**, **Proficiency Indicators**, **Descriptors**, **Weights**, **Groups**, and **Attachments**.

   IMPORTANT! You should not edit the details of any competency that you did not create.

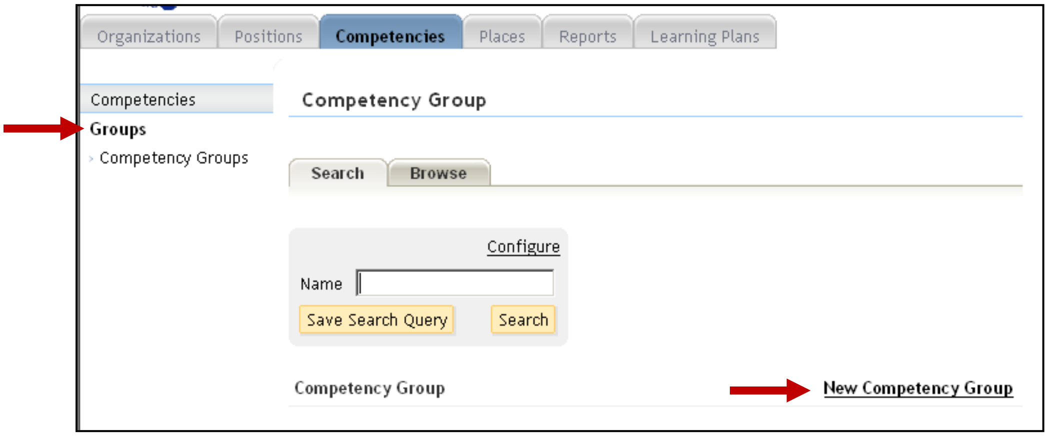
STEP-BY-STEP (CREATE COMPETENCY GROUPS)

Competency Groups can be used to create a set of related competencies that are primarily used to simplify searching.

The NIH Competencies Team at the NIH Training Center has created competency groups in the LMS that correspond to the Competencies Dictionary and the Suggested Competency Models, as found on the NIH Training Center website (http://hr.od.nih.gov/workingatnih/competencies/default.htm).

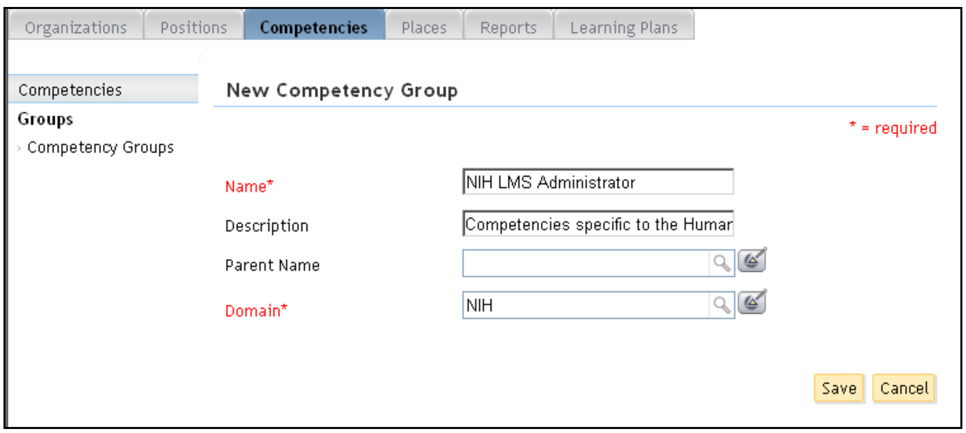
1. Select the **Human Capital Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.
2. Click the **Competencies** tab.

3. Select **Groups** from the menu on the left.



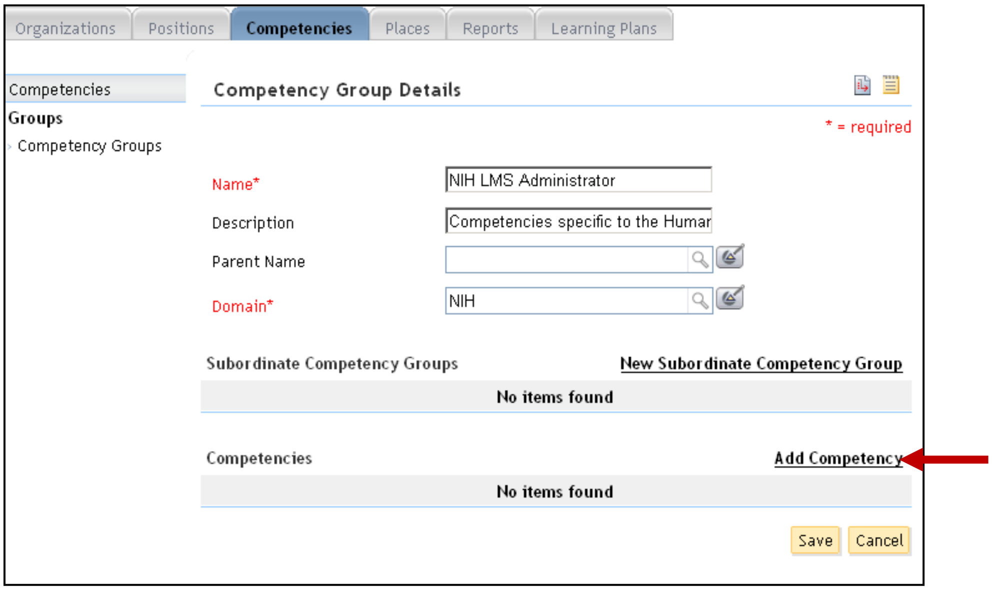
4. Click the **New Competency Group** link.

   NOTE: Search existing competency groups to determine whether your desired grouping already exists before creating a new one.

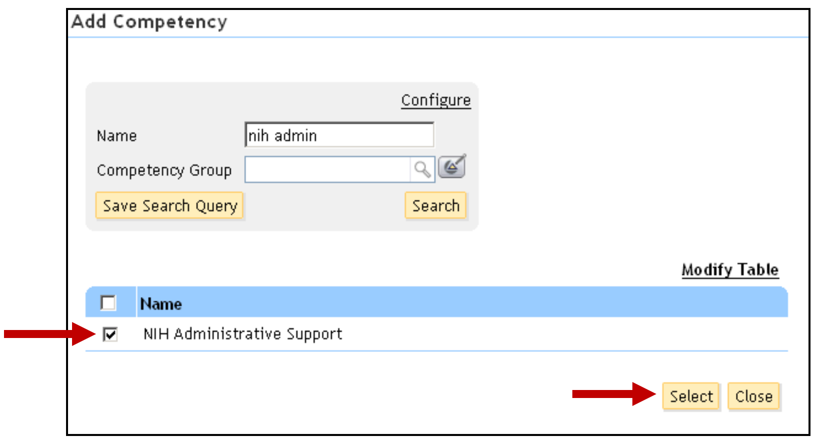


5. In the **Name** field, enter “**NIH**” followed by a descriptive identifier for the group.
6. In the **Description** field, enter a brief explanation of the relationship between the competencies included in the group.
7. In the **Parent Name** field, only enter a value if the new Competency Group will be a sub-set of an existing Competency Group.
8. The **Domain** field defaults to “NIH” and should not be changed.

9. Click **Save**.
10. Click the **Add Competency** link to add competencies to the group.



11. From the **Add Competency** pop-up, search for the competencies to be added to the group.

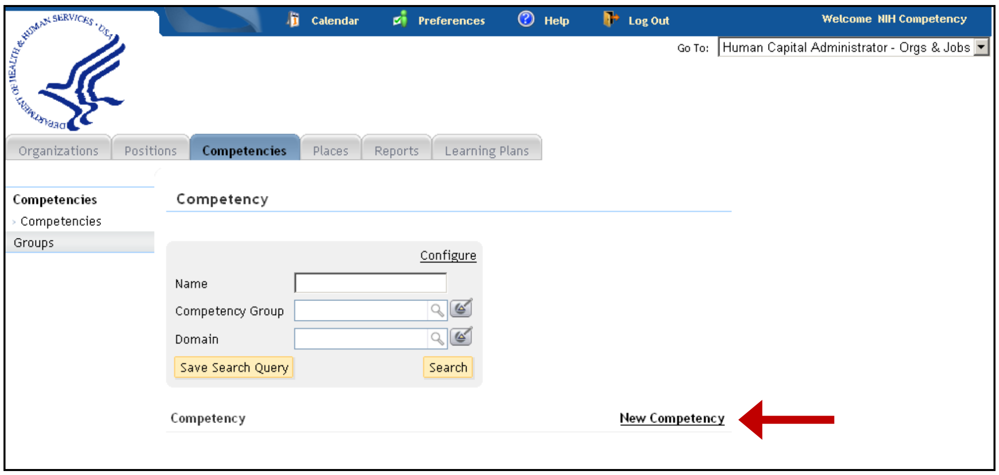


12. Select the check box to the left of the competency to be added to the group.
13. Click **Select**.
14. Repeat Steps 10 through 13 until all desired competencies are added to the group.

STEP-BY-STEP (CREATE A NEW COMPETENCY)

Remember to consult the NIH Competencies Team in the NIH Training Center (http://trainingcenter.nih.gov/contact.html) before deciding to add any additional competencies to the LMS.

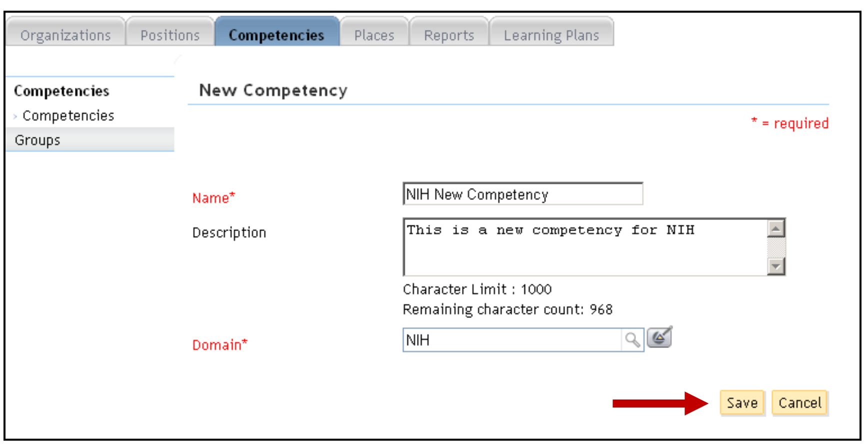
1. Select the **Human Capital Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.
2. Click on the **Competencies** tab.
3. Click the **New Competency** link.



4. Enter a name for the competency in the **Name** field prefaced by "NIH".

   IMPORTANT! When adding a New Competency, the Name field must always start with NIH, and then the IC if the competency is specific to that IC.

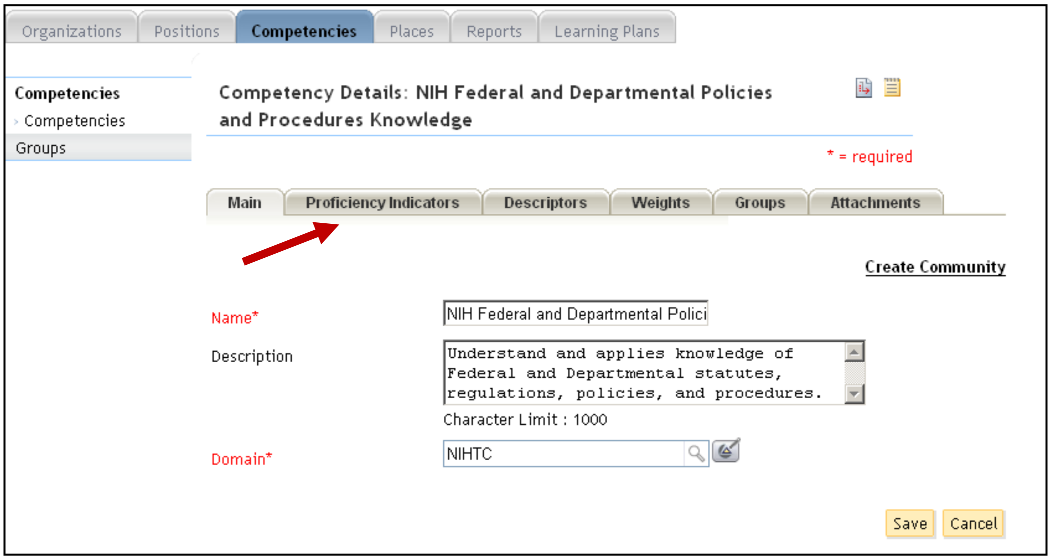
   IMPORTANT! Once a competency is created, it cannot be renamed.



5. In the **Description** field, enter a brief narrative of the competency.
6. From the **Domain** field, select your IC domain if one exists. If you do not have a domain assigned for your IC, then use NIH Common.

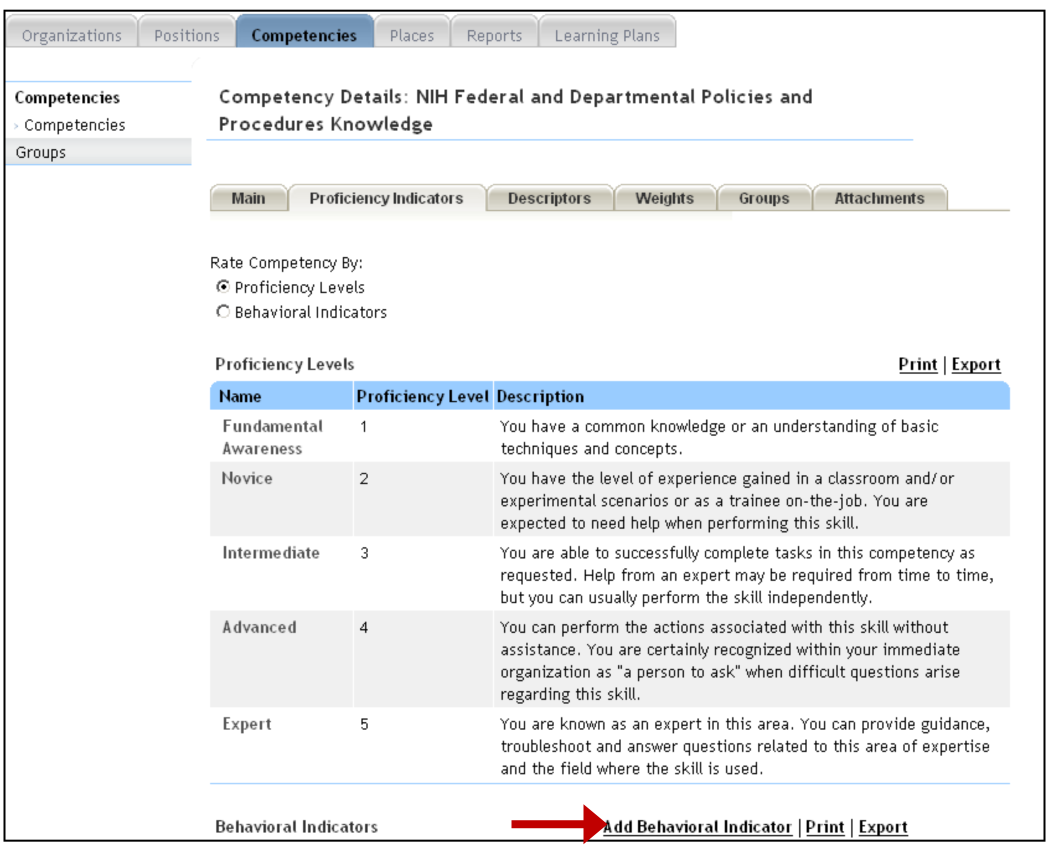
7. Click **Save**.

NOTE: You have saved successfully when you see the Competency Details screen.

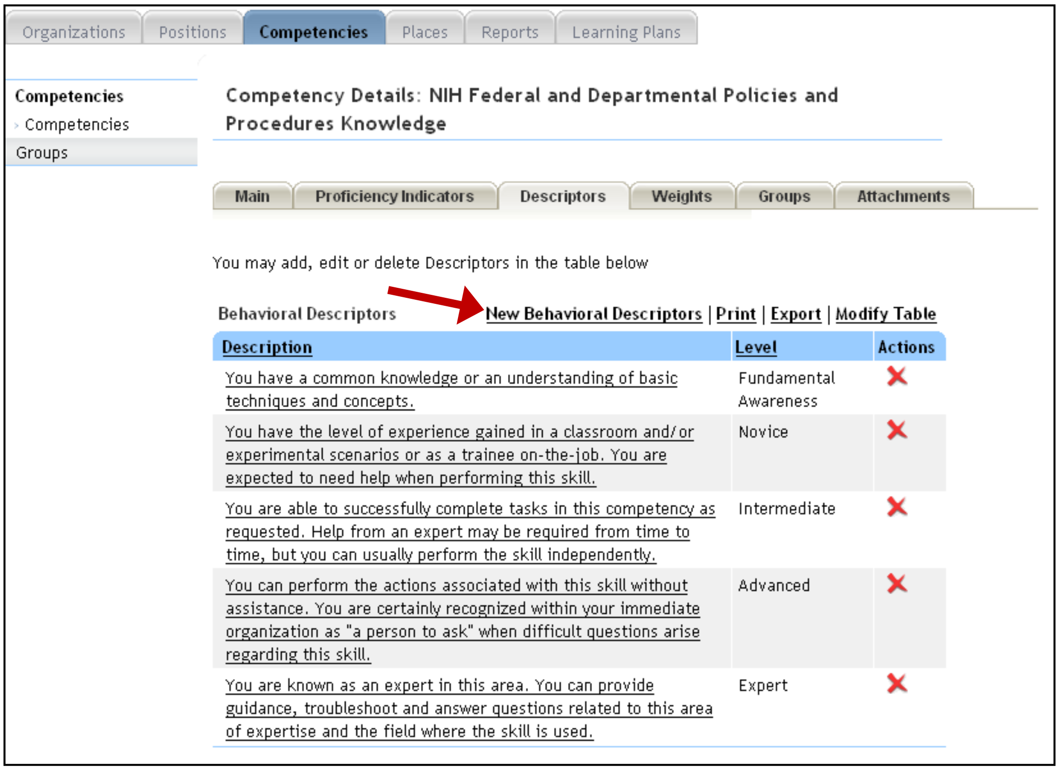


8. Click on the **Proficiency Indicators** tab.

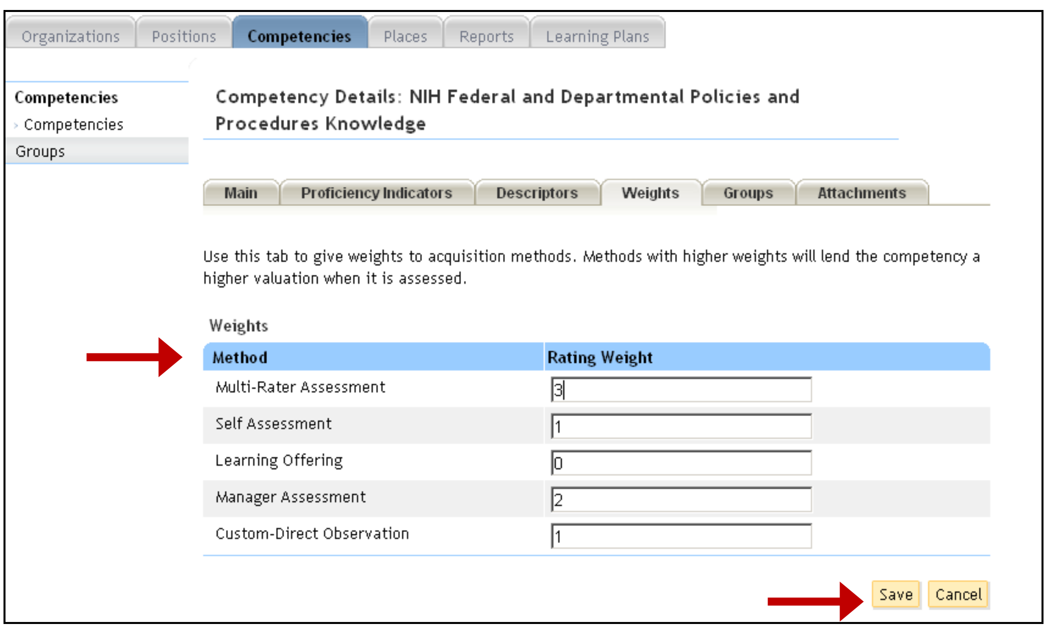
NOTE: Competencies can be rated either by Proficiency Levels or by Behavioral Indicators. Proficiency Levels should match those used by NIH, while Behavioral Indicators can be added by using **Add Behavioral Indicators** at the bottom of the screen.



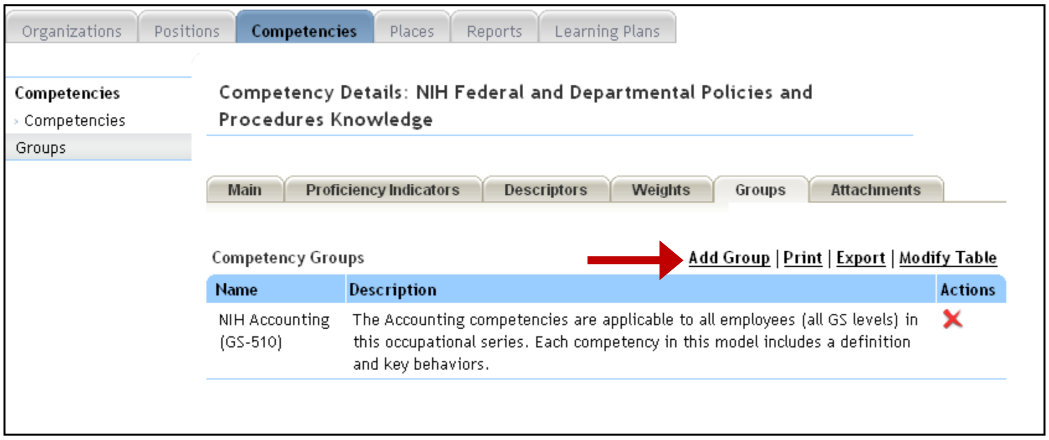
9. Click on the **Descriptors** tab to Add, edit, or delete competency descriptors as needed.



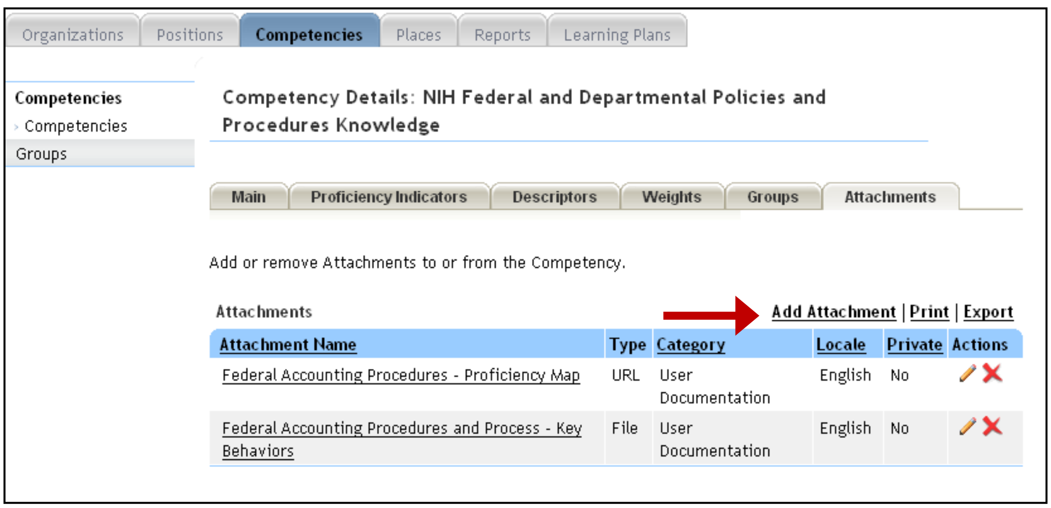
10. Click on the **Weights** tab to adjust the number in the **Rating Weight** field and click **Save**. Weights are used to calculate overall assessed proficiency level.



11. Click on the **Groups** tab, click on the **Add Group** link and select the appropriate group. Competencies may be organized into a group, but the group must be created first.



12. Click on the **Attachments** tab.
13. Click on the **Add Attachment** link to add attachments to a competency. URLs or files can be added to individual competencies, which users will be able to view.



MULTI-RATER ASSESSMENTS

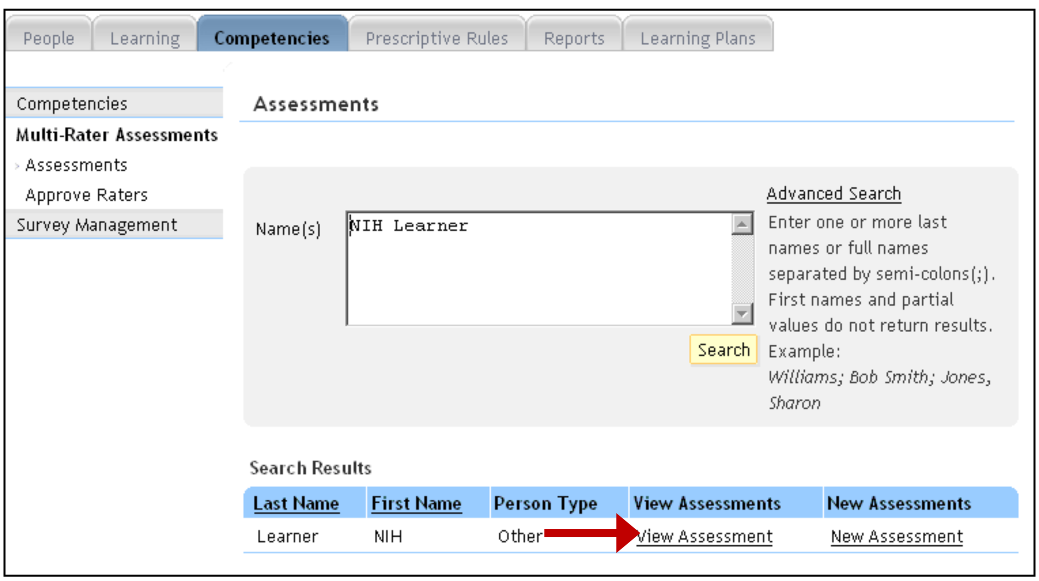
As a Human Capital Administrator, you are able to view a learner's multi-rater competency assessments (current and completed), create new assessments, and approve raters for multi-rater assessments (MRAs).

STEP-BY-STEP (VIEW LEARNER ASSESSMENTS)

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

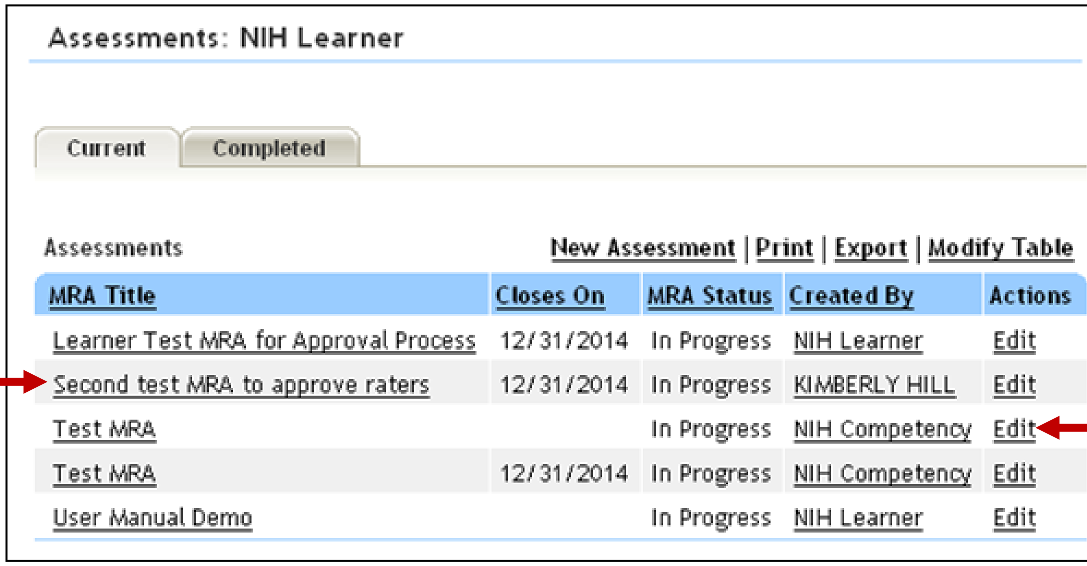
   NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

6. Select **View Assessment** to the right of the correct learner.

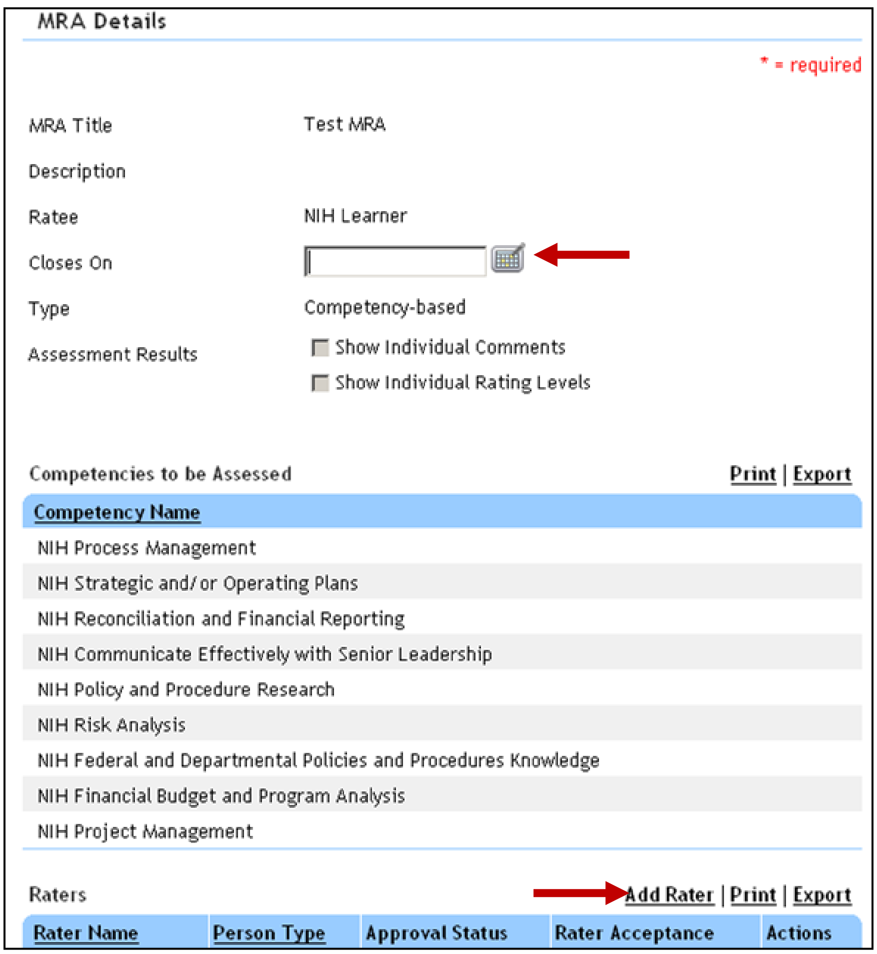


Human Capital Administrator

7. Click on the **MRA Title** or the **Edit** action of any assessment to see assessment details.



NOTE: If it is an assessment you created as an administrator, you will be able to modify the **Closes On** date and /or **Add Raters** from the **MRA Details** screen.

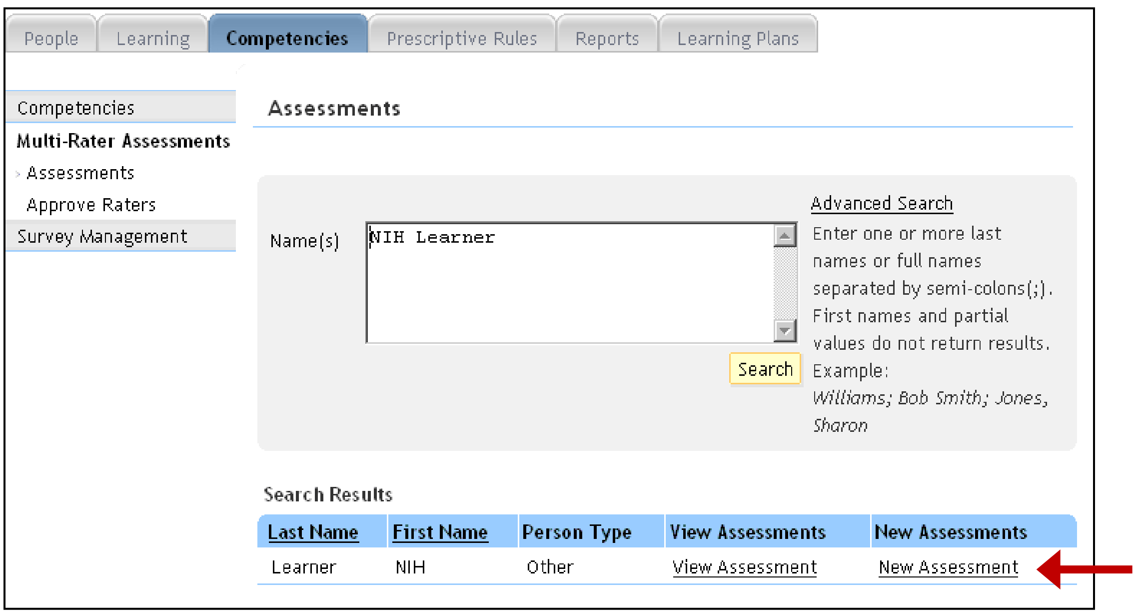


STEP-BY-STEP (CREATE A MULTI-RATER COMPETENCY ASSESSMENT)

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

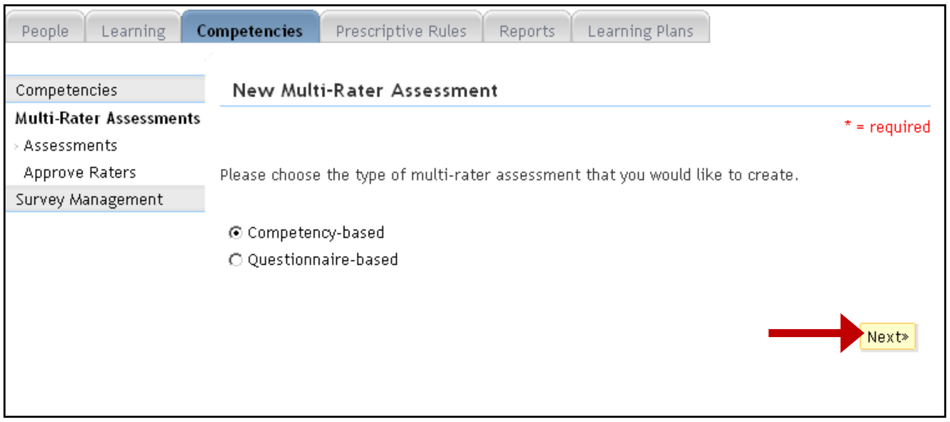
   NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

6. Select **New Assessment** to the right of the correct account.

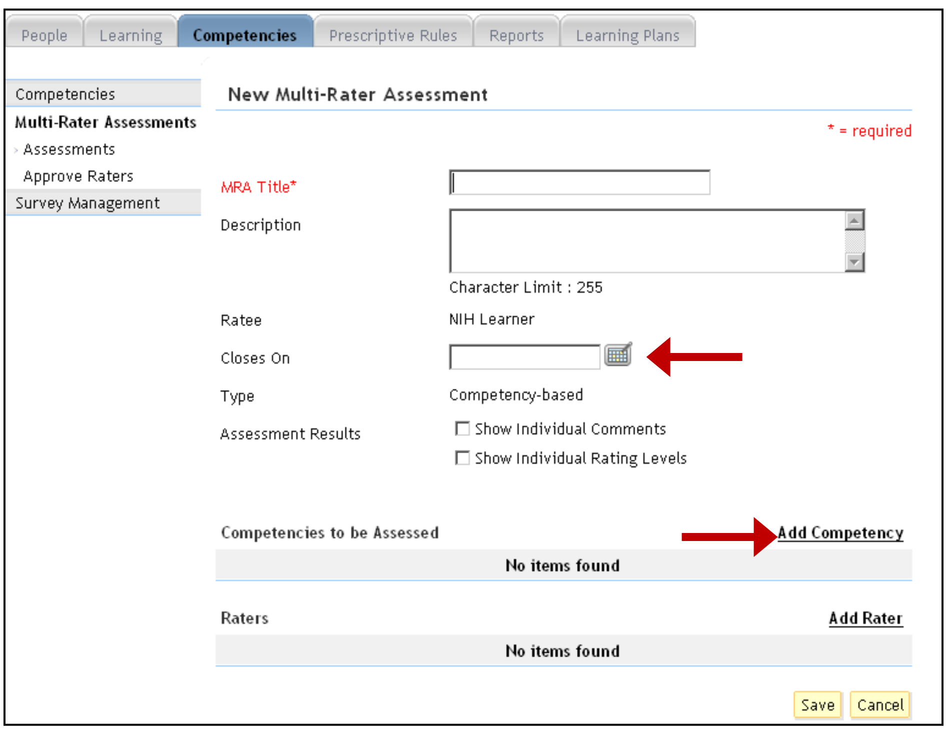


7. Click the Competency-based radio button on the **New Multi-Rater Assessment** screen.

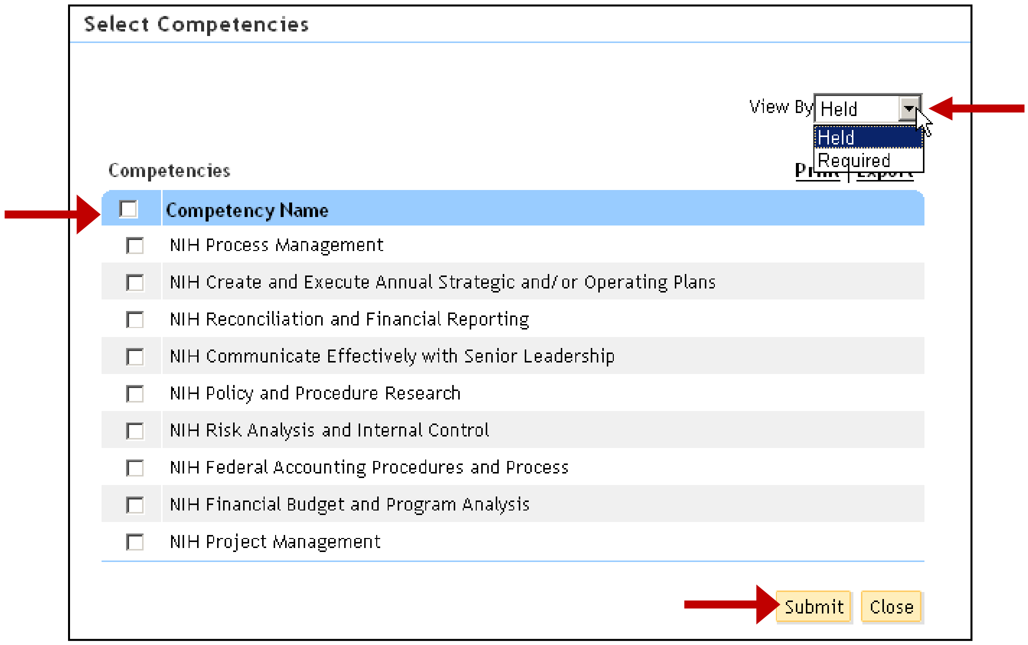
   NOTE: Training Administrators can create a questionnaire to use as a multi-rater assessment. If one exists, choose the Questionnaire-based radio button and follow the prompts to set up the assessment.



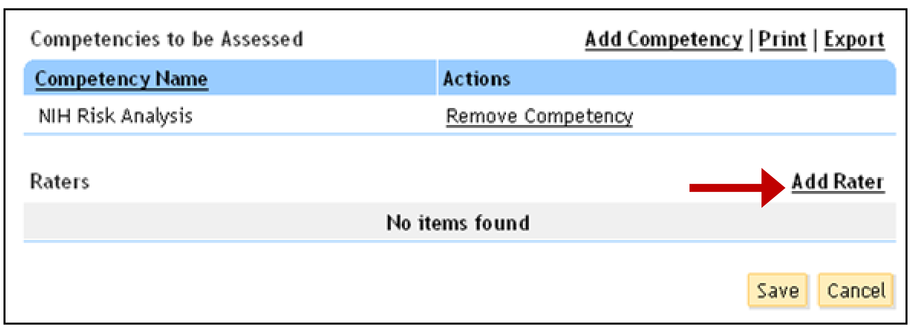
8. Click **Next**.
9. Give the new multi-rater assessment a title in the **MRA Title** field.
10. Add a description in the **Description** field.
11. Set a due date in the **Closes On** field.
12. Indicate whether you want individual comments and rating levels to be visible.
13. Click **Add Competency**.



14. Select all or some of the competencies in the **Select Competencies** pop-up window. You may filter the list of competencies by **Held** or **Required** using the **View By** drop-down menu.
15. When finished, click **Submit**.



16. Next, add raters for the multi-rater assessment by clicking **Add Rater**.

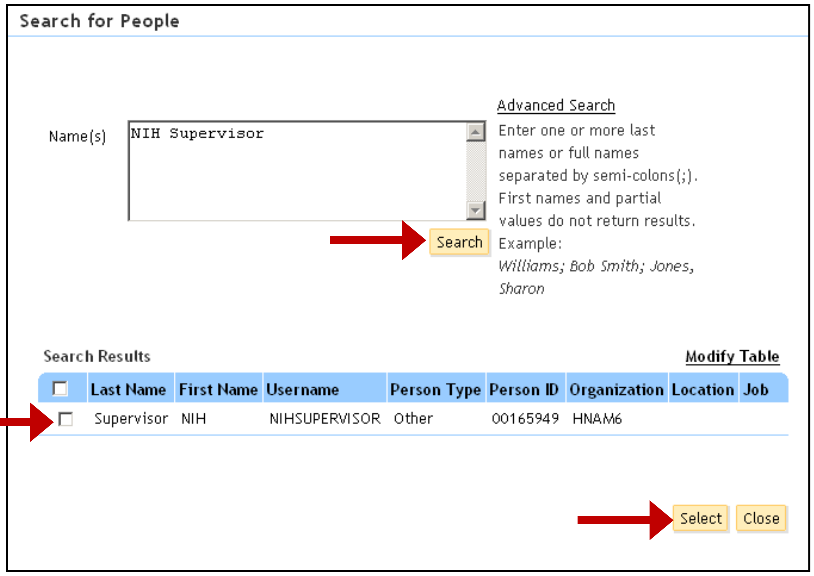


17. Enter the rater's name in the search box and click **Search**.

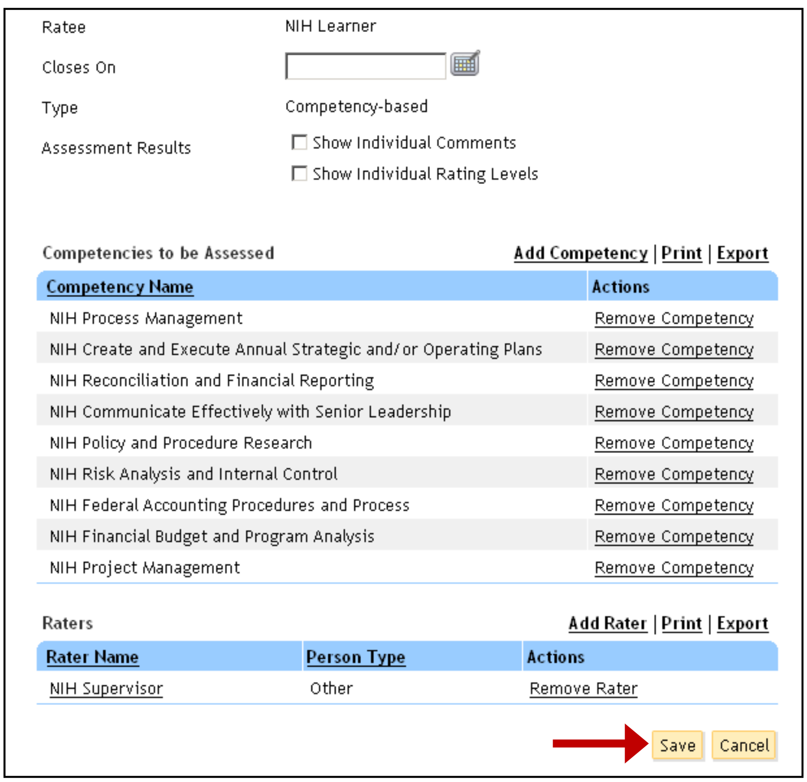
NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

Human Capital Administrator

18. Select the checkbox in front of the desired rater(s) and click **Select**.



19. When you are finished adding competencies and raters, click **Save**.



20. You will be asked to confirm whether you want to submit the assessment for the rater approval.

    NOTE: The LMS does not save drafts. You must complete this entire process in order for the assessment to be saved. If you stop (or timeout) in the middle, you will have to repeat the steps.

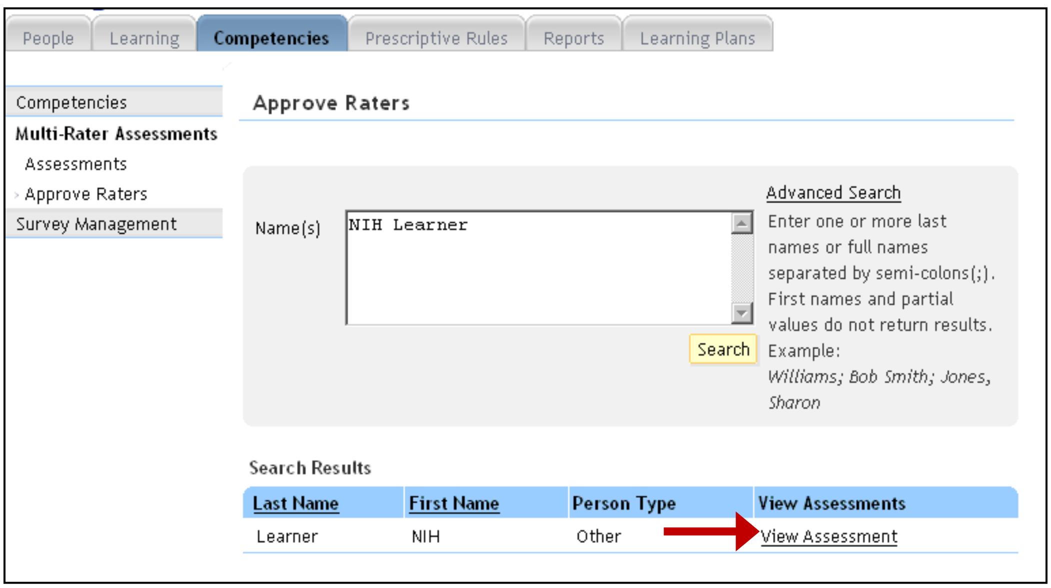
21. Click **Yes**.

STEP-BY-STEP (APPROVE RATERS FOR A MULTI-RATER ASSESSMENT)

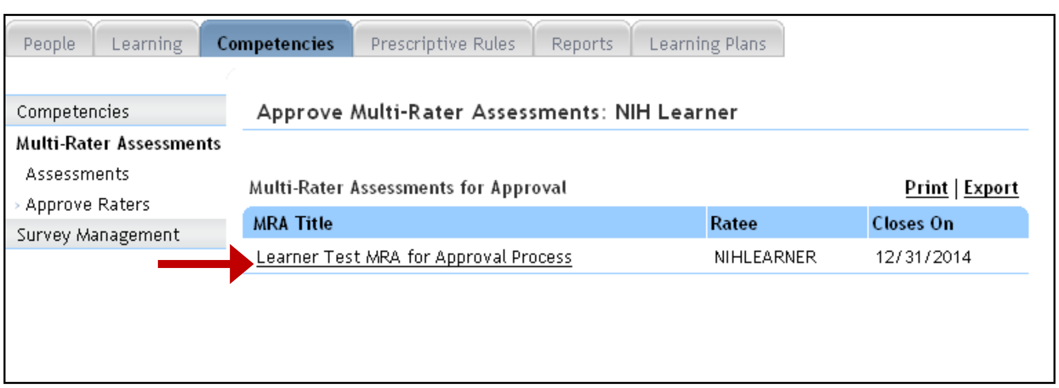
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Competencies** tab
3. Select **Multi-Rater Assessments** from the menu on the left.
4. Select **Approve Raters** from the menu on the left.
5. Enter the learner's name in the search box and 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.

6. Select **View Assessment** to the right of the correct learner.

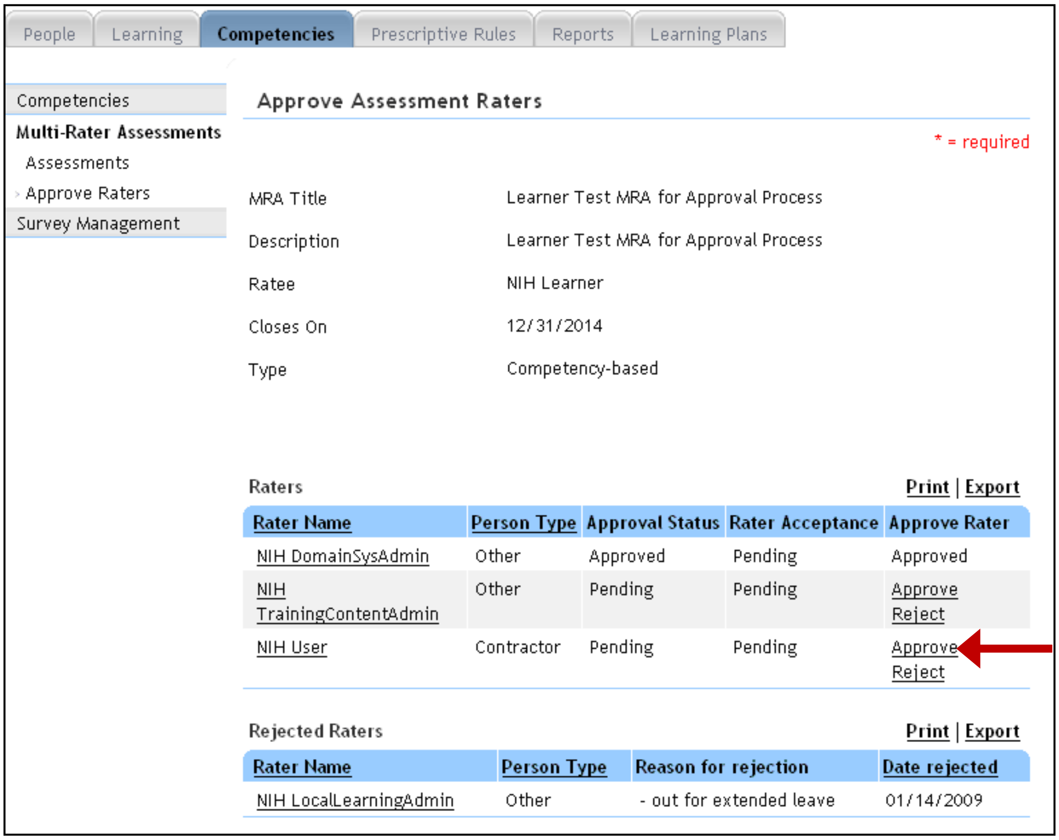


7. Click the **MRA Title** of an assessment to access the **Approve Assessment Raters** screen.



8. Click **Approve** to approve a rater (status will change to approved).

9. Click **Reject** to reject a rater. You will be asked to confirm and provide a reason. The rater will move to the list of rejected raters, with the reason visible.



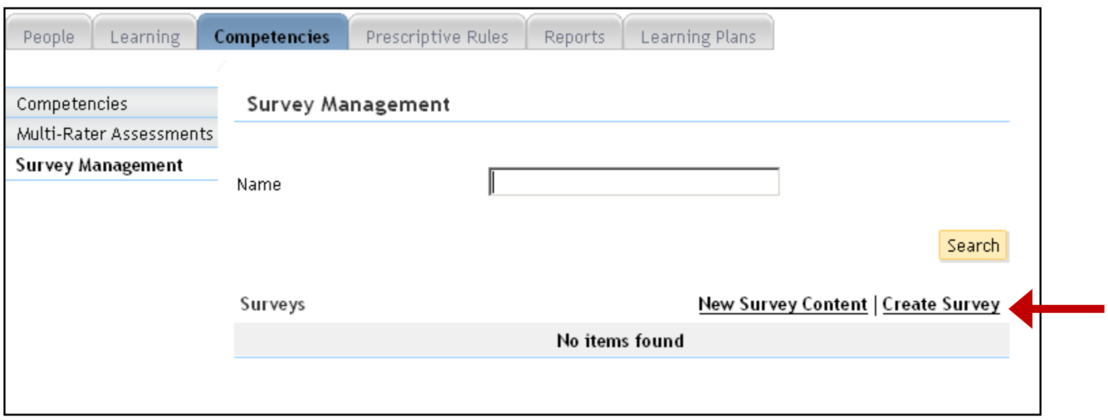
SURVEY MANAGEMENT

As a Human Capital Administrator, you are able to create and manage surveys. The content for the survey must first be created and modified by an LMS Content Administrator.

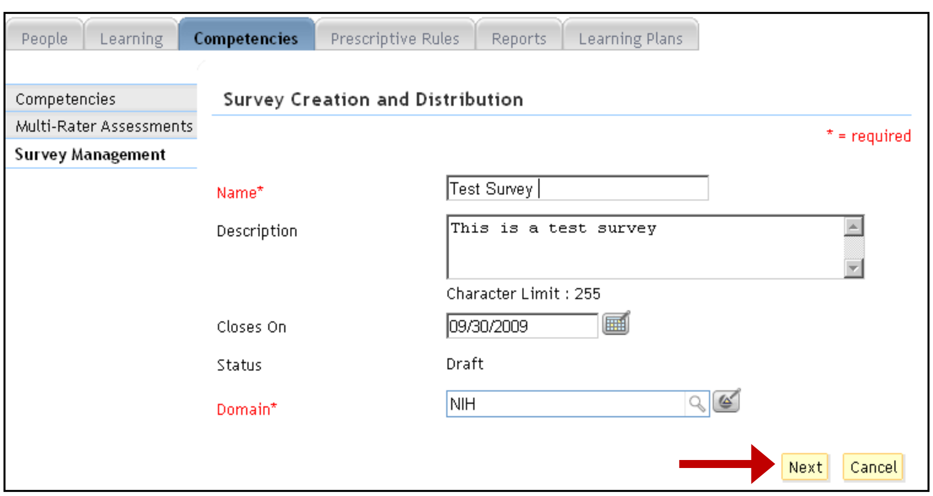
You must assign surveys to potential respondents at the time you distribute it. Designated respondents can then choose to accept or decline the survey.

STEP-BY-STEP (CREATE AND DISTRIBUTE A SURVEY)

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Competencies** tab
3. Select **Survey Management** from the menu on the left.
4. Click **Create Survey**.

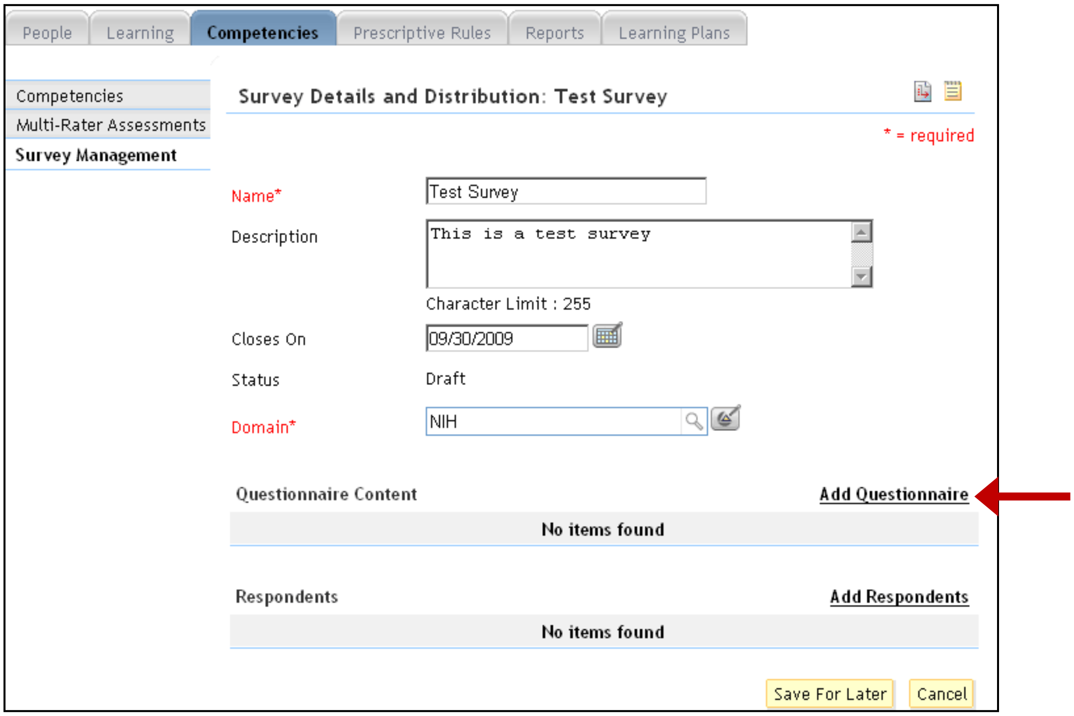


5. Enter the **Name** of the survey and a **Description**.
6. Enter the end date of the survey in the **Closes On** field. The **Domain** should always be NIH.
7. Click **Next**.

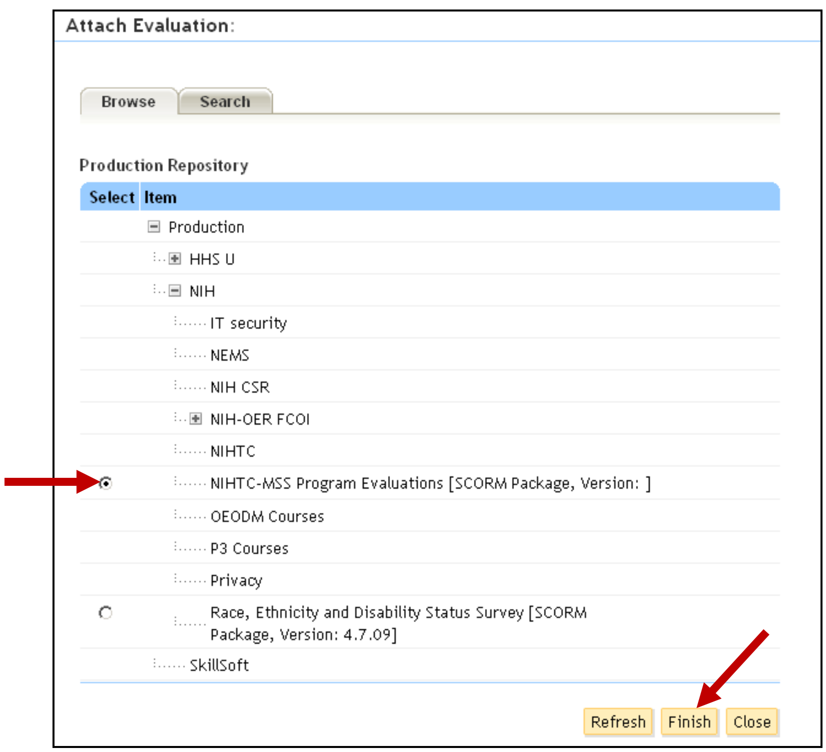


Human Capital Administrator

8. Click **Add Questionnaire**.

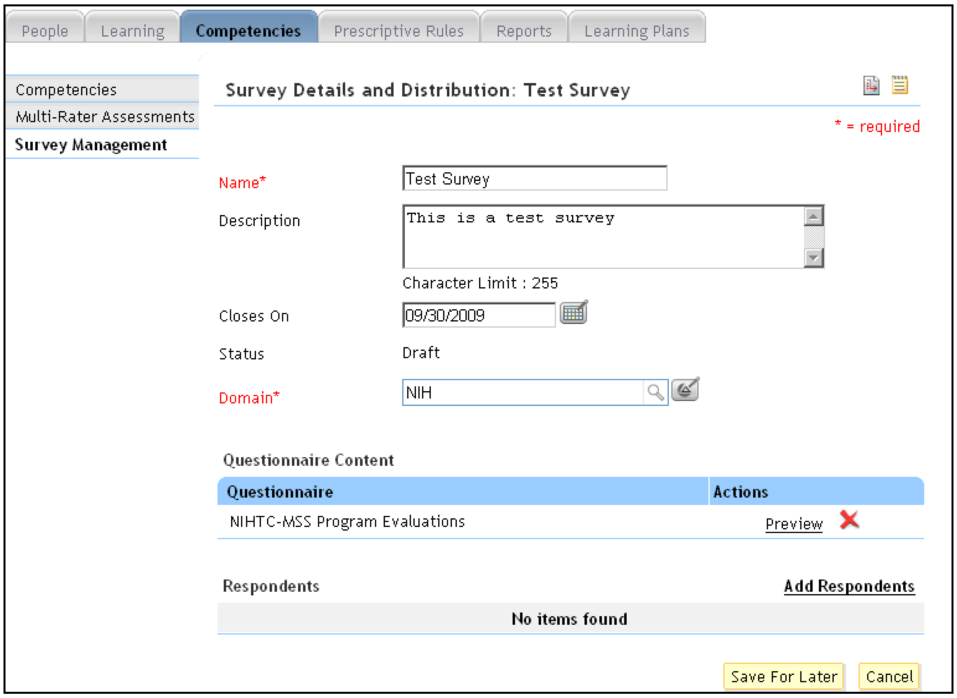


9. From the **Production Repository**, select a questionnaire that has been prepared in advance by a Content Administrator. Those that are available will have a radio button to allow you select them.



10. Click **Finish**.

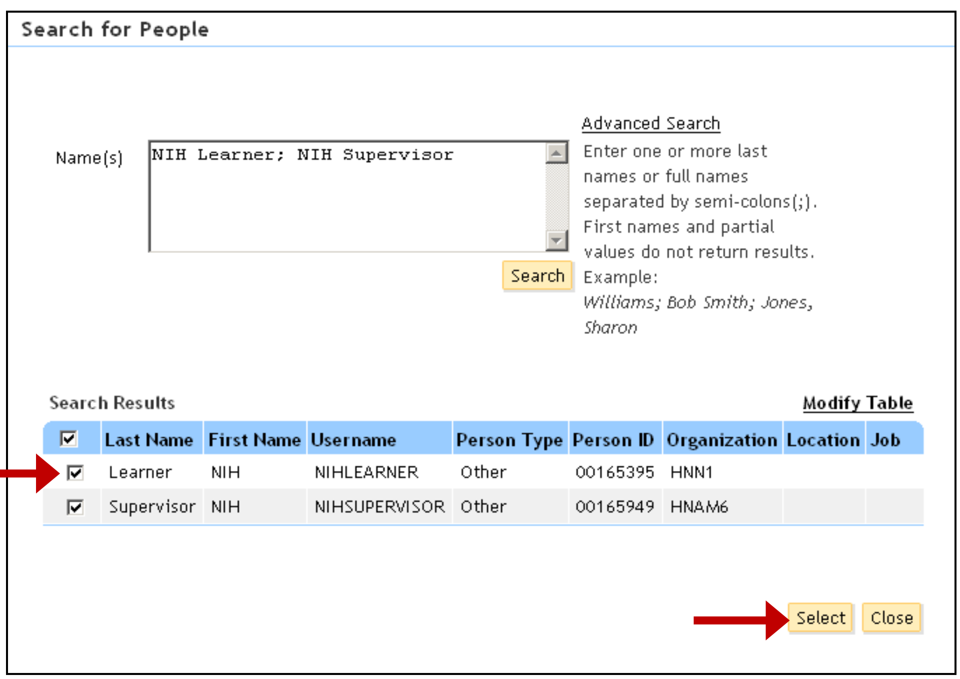
11. Click **Add Respondents** once the questionnaire content is attached to designate the individuals who should respond.



12. Click the **Advanced Search** link.

NOTE: Since you will likely be searching for multiple people with common criteria, such as organization code or manager, the Advanced Search will be more effective than the default Simple search.

13. Select the check box(es) next to the desired respondent(s) in the **Search Results** table, then click **Select**.



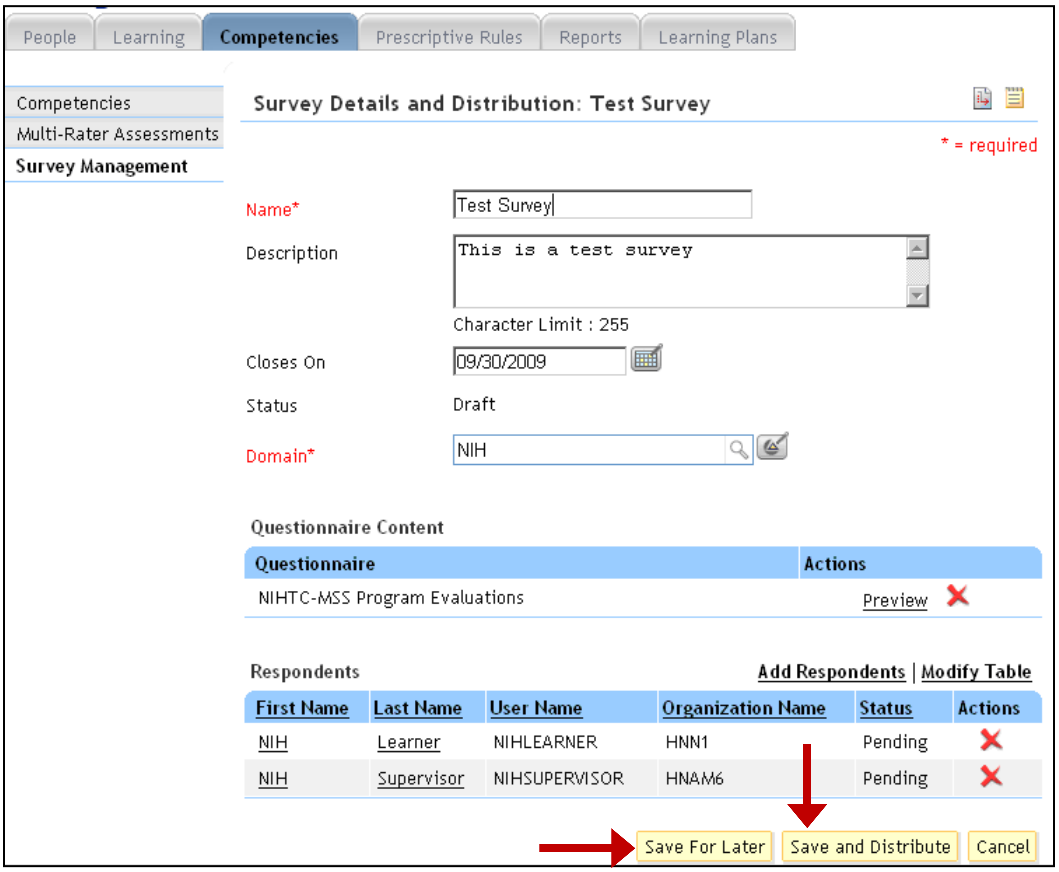
Human Capital Administrator

Once you have the questionnaire and the respondents selected, you are ready to publish the survey.

IMPORTANT! You cannot publish a survey until you have specified both the questionnaire and the respondents for the survey. You should double-check that all respondents are included because you cannot add more respondents to a survey once distributed.

14. Do one of the following:

- Click **Save for Later** – to save the survey in Draft status for future editing.
- Click **Save and Distribute** – to distribute the survey to the selected respondents.

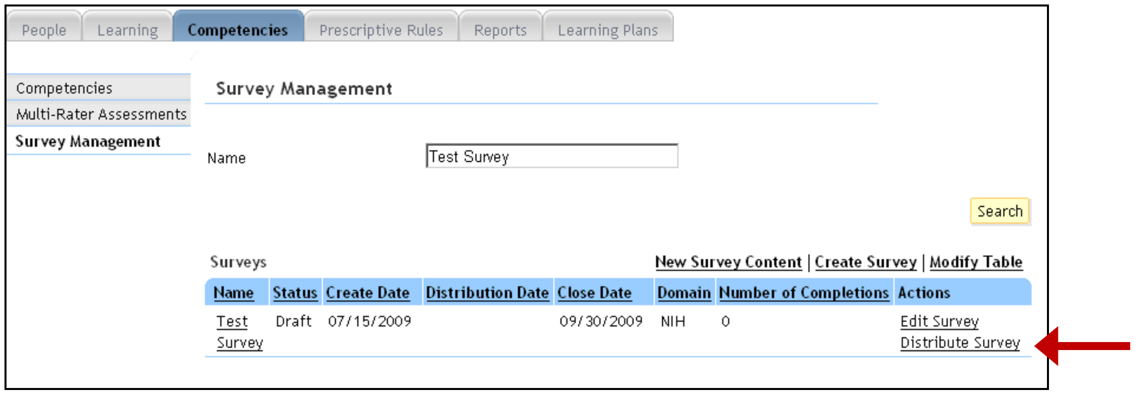


STEP-BY-STEP (VIEW A SURVEY)

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Competencies** tab
3. Select **Survey Management** from the menu on the left.
4. Enter the name of the survey you are looking for and click **Search**.

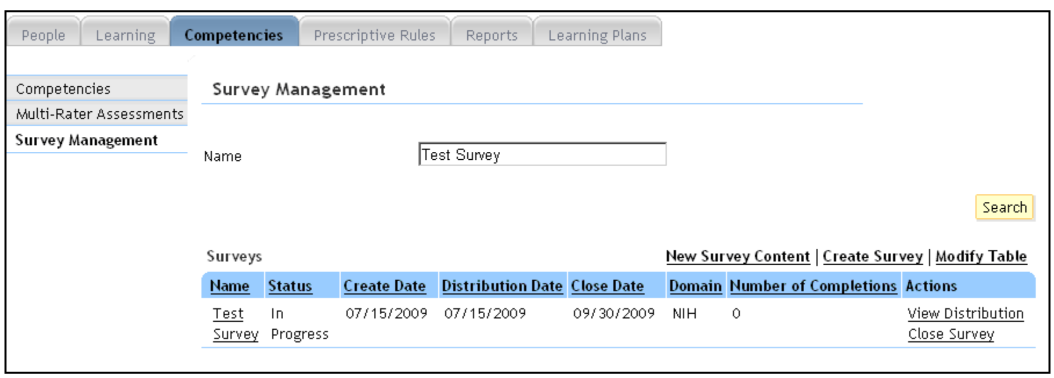
5. Under the **Actions** column, you will see various options, depending on the status of the survey.

   a. **Edit Survey** allows modifications to survey details before distribution.
   b. **Distribute Survey** makes the survey available to respondents.



NOTE: Once you click **OK** from the dialog box that displays, the survey is published and available to respondents. The Status changes from "Draft" to "In Progress".

   c. **View Distribution** allows you to see who received the survey and whether respondents have completed it.
   d. **Close Survey** allows you to end or "close" the survey.



MANAGING LEARNING

The Human Capital Administrator – People Learning tab provides access to learners' enrollments, transcript, certifications and curricula, continuing education credits, and learning plan information.

ENROLLMENTS

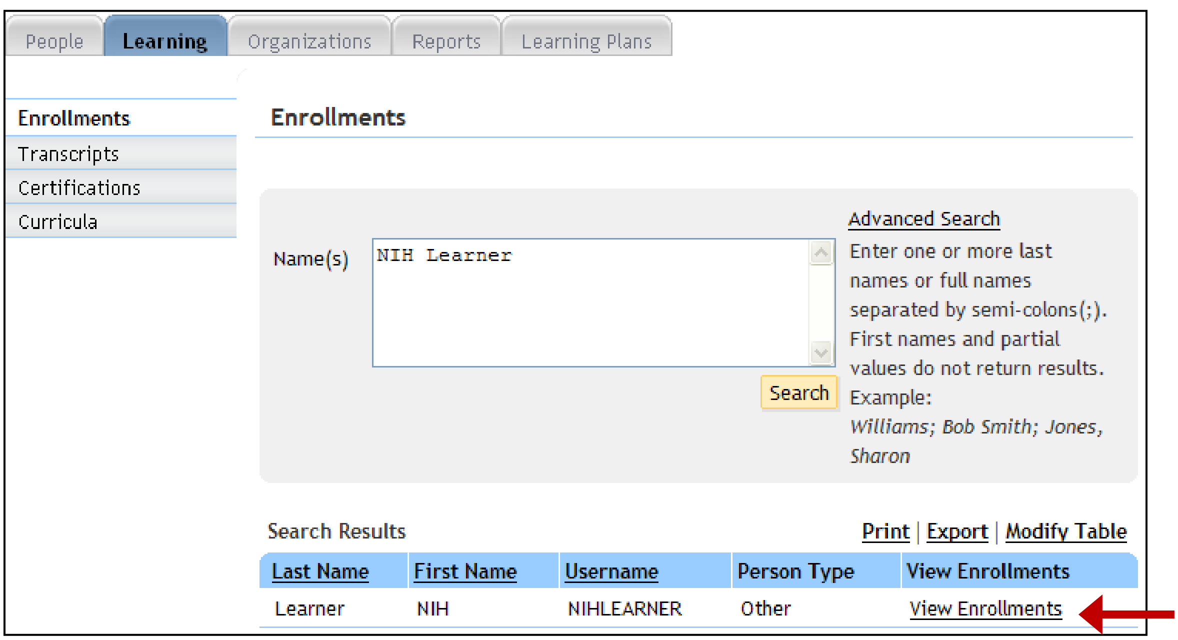
An Enrollment is an offering that a learner is registered for, but has not completed. The following instructions will detail how you can view and manage a learner's enrollments.

STEP-BY-STEP (VIEW AND MANAGE ENROLLMENTS)

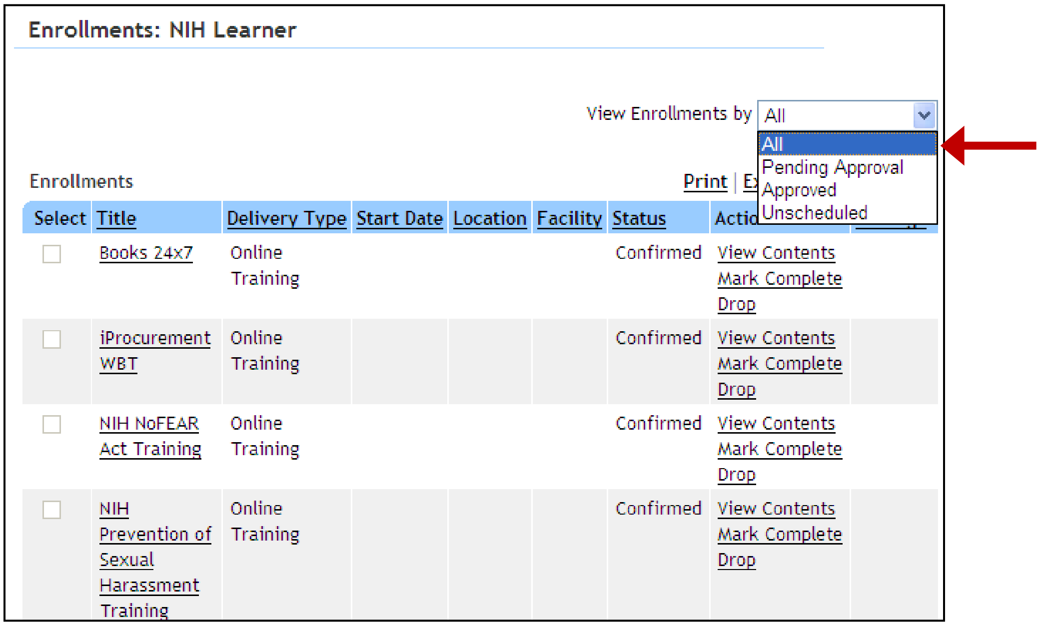
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Select **Enrollments** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

   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 **View Enrollments** to the right of the correct learner.



6. From the **View Enrollments By** drop-down menu, select one of the following to change your view of enrollments: All, Pending Approval, Approved, or Unscheduled.



From this screen, you can verify whether a learner is enrolled in a particular class. Additionally, you may click the linked **Title** of an enrollment to view related details.

From the Actions column of the Enrollments table, you have the following options:

- **View Contents** allows you to view how long a learner has spent in an online course.
- **Mark Complete** allows you to indicate the completion status of a course. This functionality can be used if an online course does not automatically complete successfully. Instructor-led classes should be marked complete by the Training Administrator responsible for the class.

  IMPORTANT! Be very careful using this function. You should have a business process in place to ensure the learner really did complete the course. As an administrator, you are bound to maintain the integrity of the system.

- **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.

TRANSCRIPTS

A transcript is a record of training completed 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. If you have a question about whether something should be appearing on the LMS transcript, contact the NIH LMS Team at LMSSupport@mail.nih.gov.

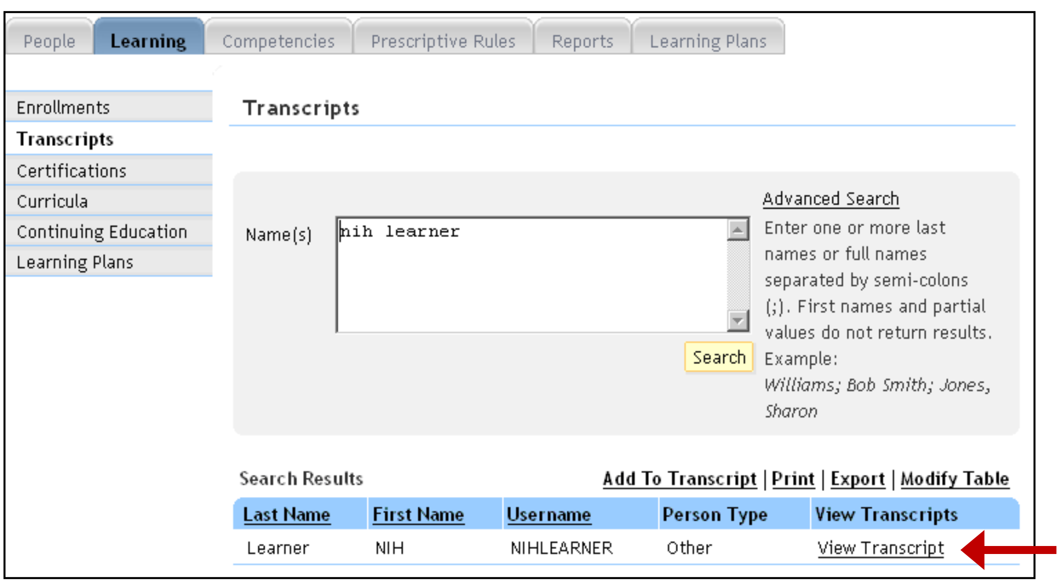
The following instructions will show you how to view, edit, delete, and add learning to a learner's Transcript.

STEP-BY-STEP (VIEW A LEARNER TRANSCRIPT)

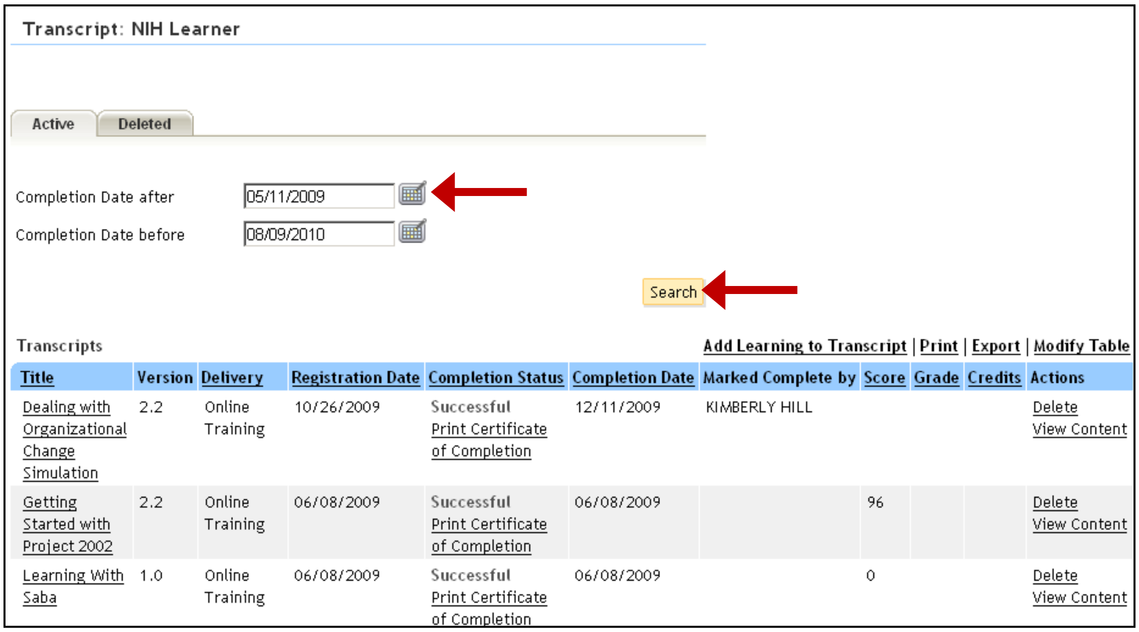
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Click **Transcripts** in the left menu bar.
4. Enter the learner's name in the search field and click **Search**.

   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 **View Transcript** to the right of the correct learner.



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



Transcript: NIH Learner

Active | Deleted

Completion Date after 05/11/2009

Completion Date before 08/09/2010

Search

Transcripts

Add Learning to Transcript | Print | Export | Modify Table

Title	Version	Delivery	Registration Date	Completion Status	Completion Date	Marked Complete by	Score	Grade	Credits	Actions
Dealing with Organizational Change Simulation	2.2	Online Training	10/26/2009	Successful Print Certificate of Completion	12/11/2009	KIMBERLY HILL				Delete View Content
Getting Started with Project 2002	2.2	Online Training	06/08/2009	Successful Print Certificate of Completion	06/08/2009		96			Delete View Content
Learning With Saba	1.0	Online Training	06/08/2009	Successful Print Certificate of Completion	06/08/2009		0			Delete View Content

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

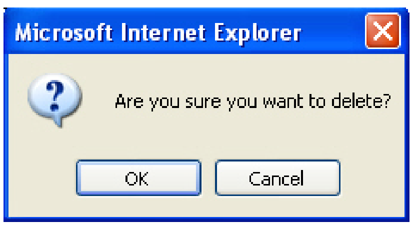
Additional Tips:

- You can view details of a training item by clicking on its title.
- Clicking **View Content** allows you to view details of training items, including time spent in an online course.

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 **Transcripts** in the left menu bar.
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 **View Transcript** to the right of the correct learner.
6. Click **Delete** on the right for the transcript item being deleted.
7. If you are sure this is the item you want to delete, click **OK** from the dialog box. The screen will refresh and deleted transcript items will move to the Deleted tab.



   NOTE: A copy of deleted transcript items are permanently kept on the **Deleted** tab.

STEP-BY-STEP (ADD LEARNING TO A TRANSCRIPT: SINGLE LEARNER)

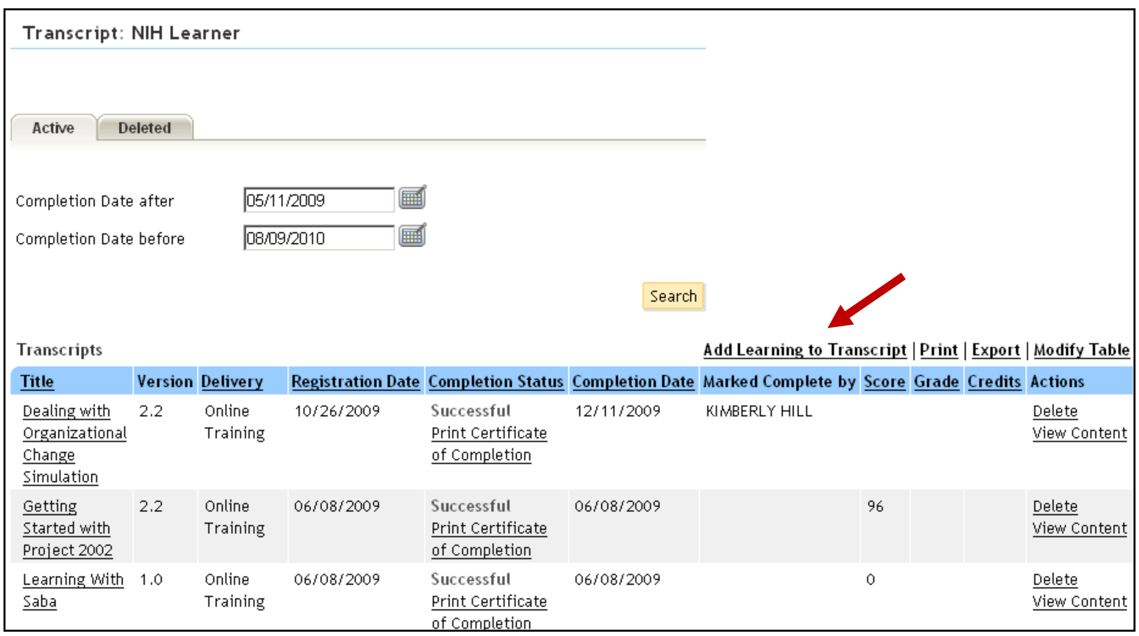
Use this method to add learning to a single learner's transcript.

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 **Transcripts** in the left menu bar.
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.

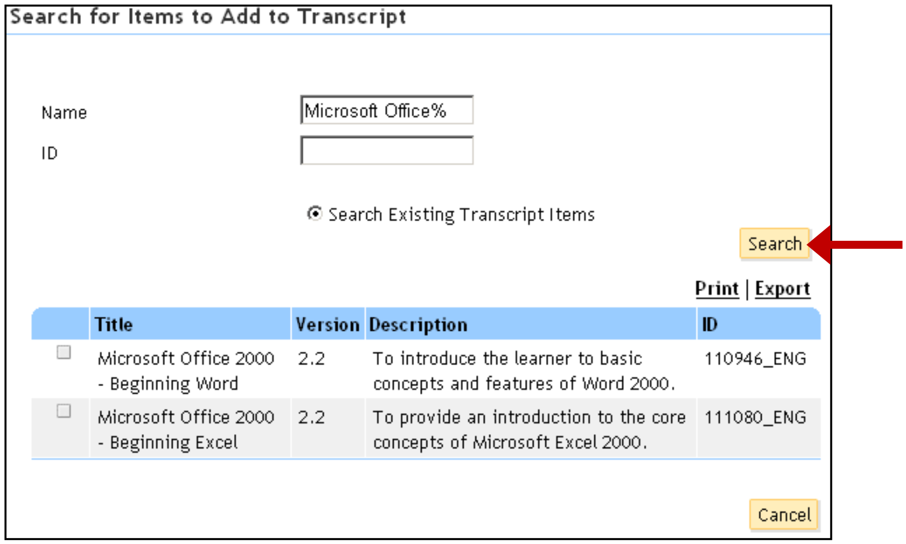
5. Select **View Transcript** to the right of the correct learner.
6. Click **Add Learning to Transcript**.



7. Click the **Use Existing Item** link to add courses to the learner's transcript that already exist on someone else's transcript.

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

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

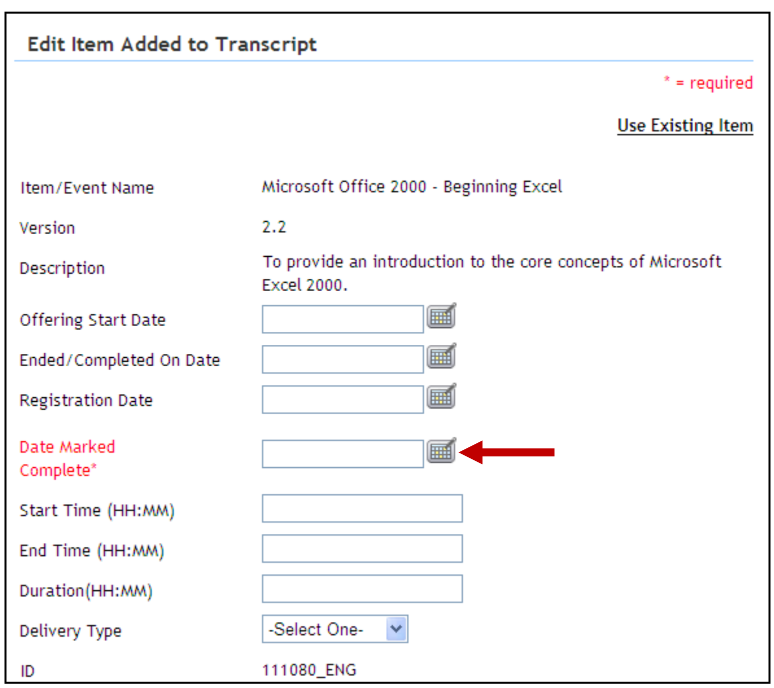


NOTE: Remember that you can use the percent symbol (%) as a wildcard.

9. 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.

10. Enter additional data into all appropriate fields.



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

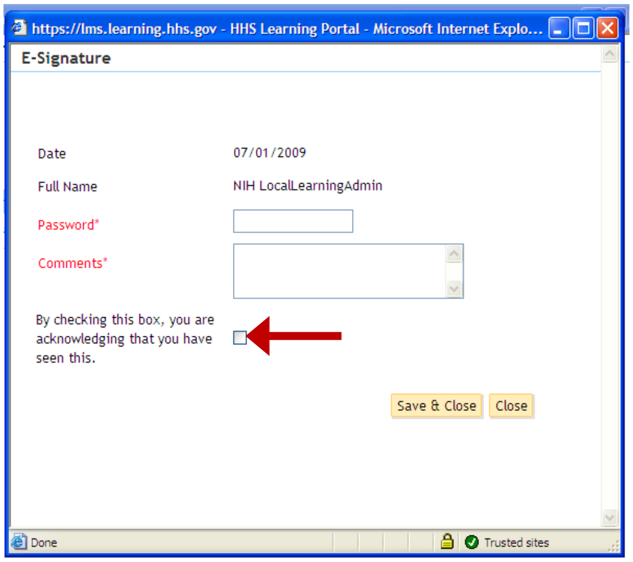
IMPORTANT! All fields in red with an asterisk (*) require data in order to save changes.

11. Enter the learner's score and grade at the bottom of the screen, if applicable.

    NOTE: It's a good idea to delete the "0" that defaults in the Score field so that learners do not becomes concerned about seeing a "0" score on their transcript.

12. After all available course data is entered, click **Save**.

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

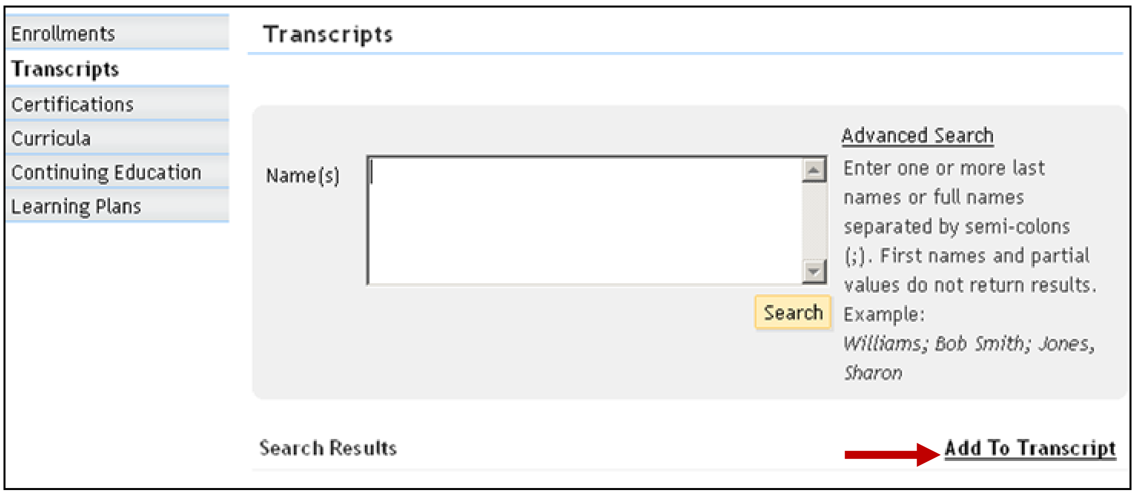


14. Click **Save & Close**.

STEP-BY-STEP (ADD LEARNING TO A TRANSCRIPT: MULTIPLE LEARNERS)

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

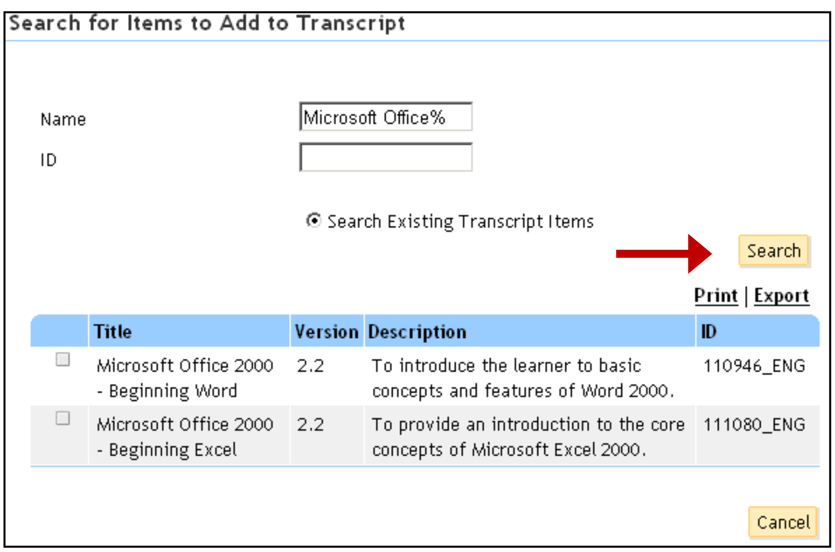
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Click **Transcripts** in the left menu bar.
4. Click **Add To Transcript**.



5. Click the **Use Existing Item** link.

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

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

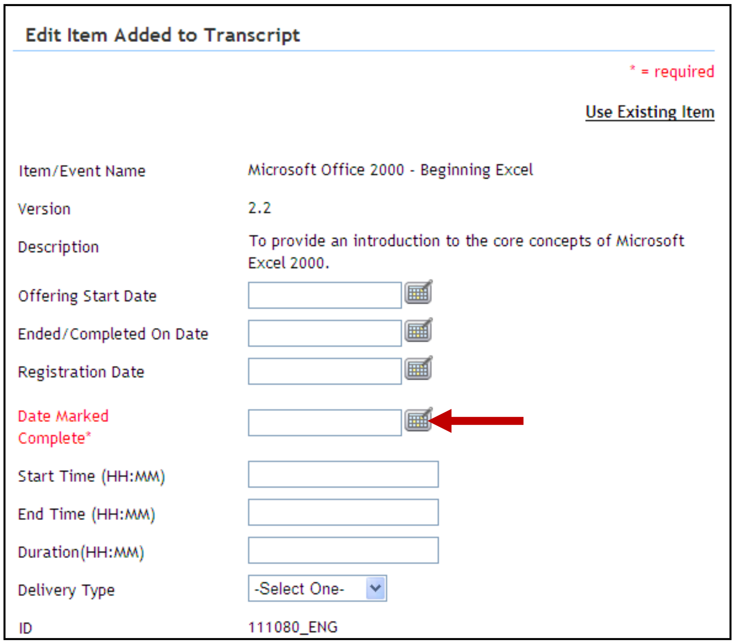


NOTE: Remember that you can use the percent symbol (%) as a wildcard.

7. 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.

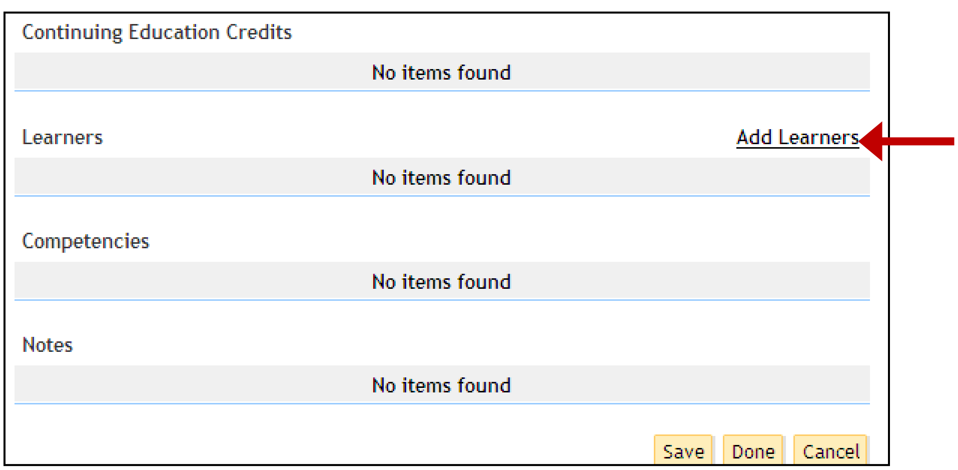
8. Enter additional data into all appropriate fields.



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

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

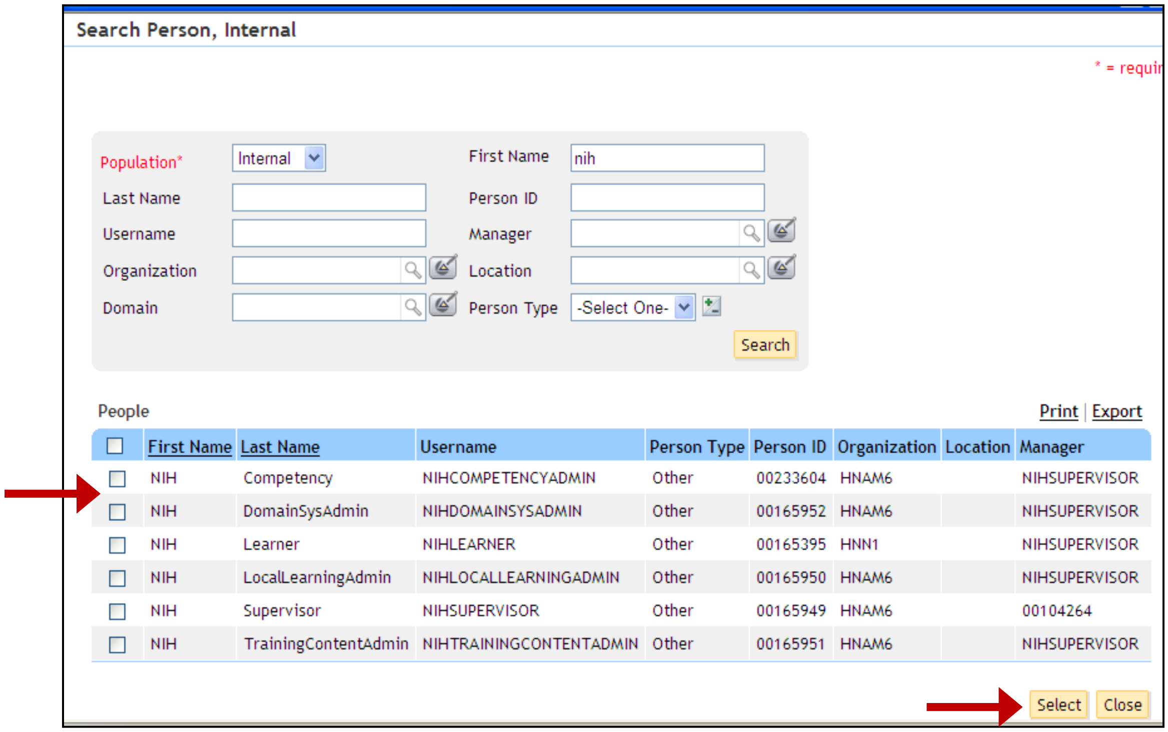
9. Click **Add Learners** found toward the bottom of the **Edit Item Added to Transcript** screen.



10. Enter the criteria to **Search** for one or more learners.

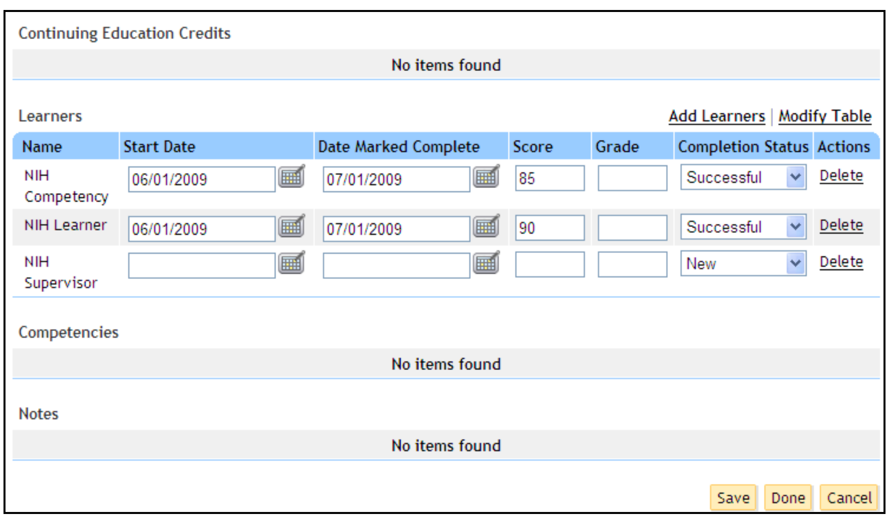
11. Select the box to the left of the name of one or more learners, or click the box in the blue table header to select everyone in the list.

12. Click **Select**.



NOTE: The learner's name now appears at the bottom of the **Add Learning to Transcript** screen.

13. Update the **Start Date**, **Date Marked Complete**, **Score**, **Grade**, and **Completion Status** fields as appropriate.

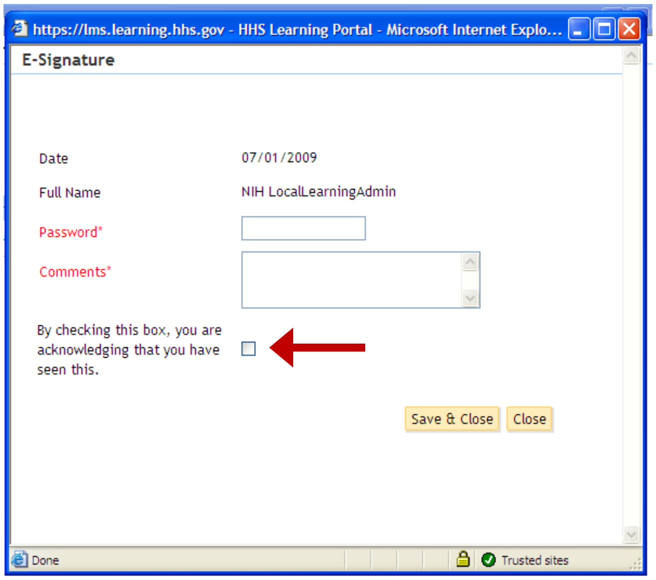


NOTE: It's a good idea to delete the "0" that defaults in the Score field so that learners do not becomes concerned about seeing a "0" score on their transcript.

14. Repeat steps 10 through 13 to add more learners that will receive this item on their transcript.

NOTE: Learners can be deleted by clicking **Delete** in the **Actions** column, to the right of the learner's name.

15. Click **Save** and then **Done**. This will add the transcript item to all of the learners at one time.
16. You will then be asked to complete an e-signature block. Enter your LMS log in password and comments pertaining to why you are adding this record to the transcript. Then select the check box acknowledging that you have seen the e-signature box.



17. Click **Save & Close**.

CERTIFICATIONS

As a Human Capital Administrator, you may view and manage certifications for learners within your organization.

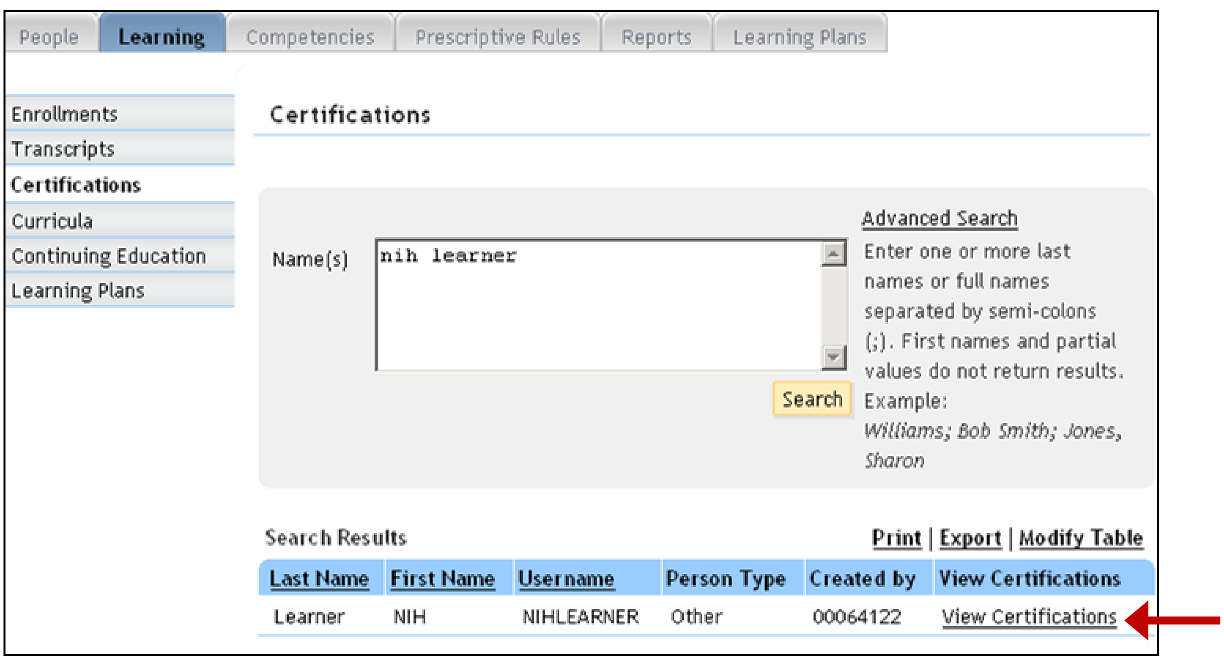
Certification – A predefined set of courses that have been grouped together, with a deadline for completion. Credentials earned by completing the certification may expire on a predetermined date.

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**.

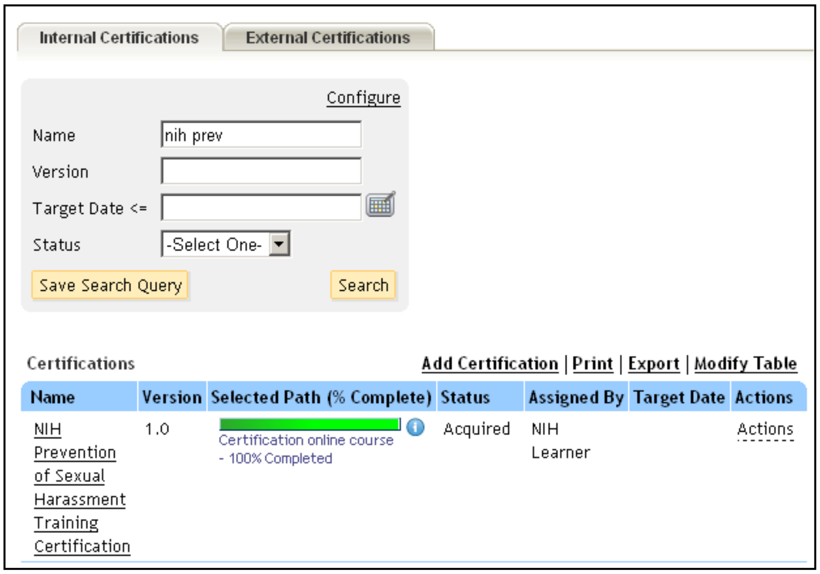
   NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

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



Human Capital Administrator

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



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.

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

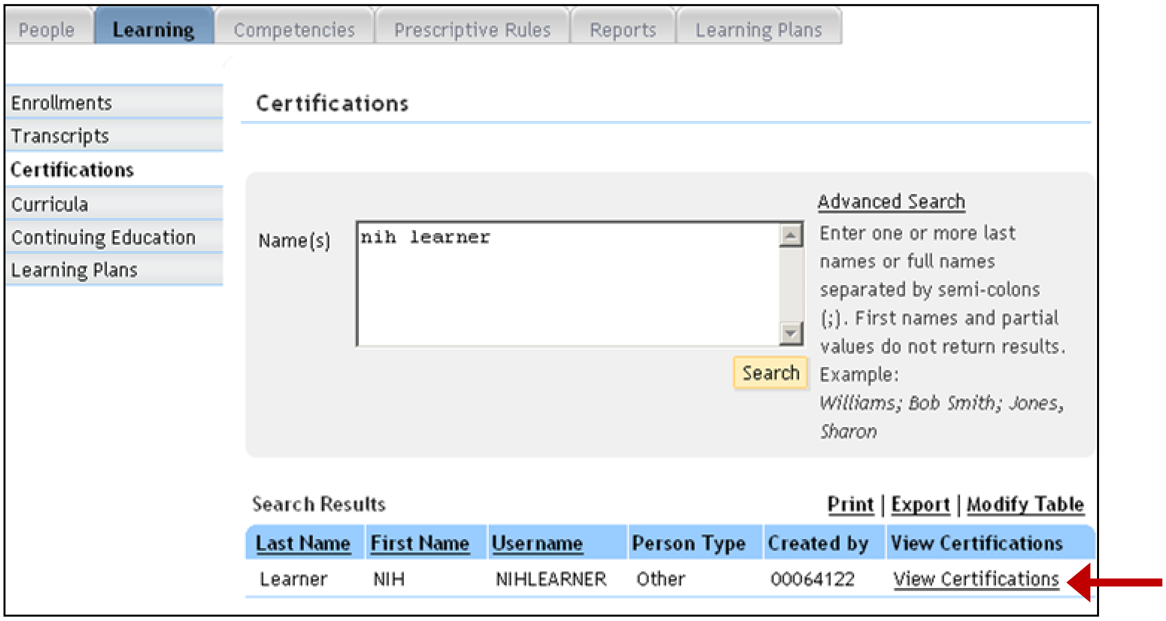
STEP-BY-STEP (GRANT INTERNAL CERTIFICATION)

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

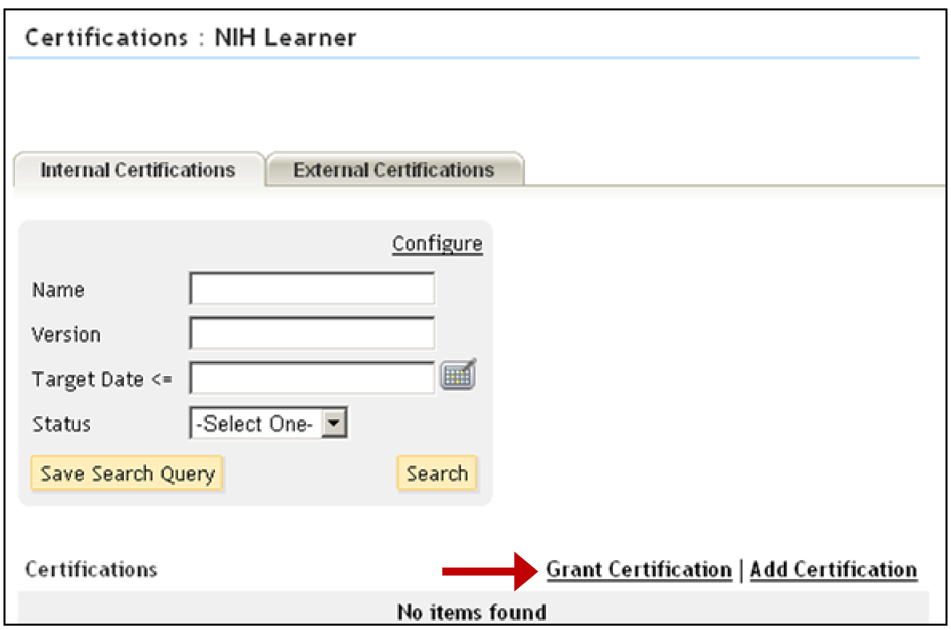
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Select **Certifications** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

   NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

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

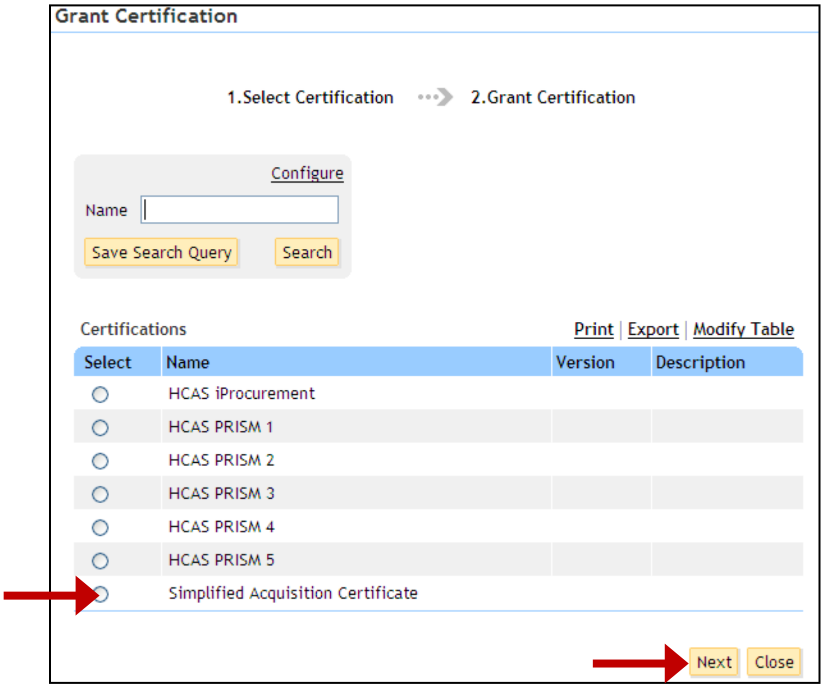


6. Click **Grant Certification**.



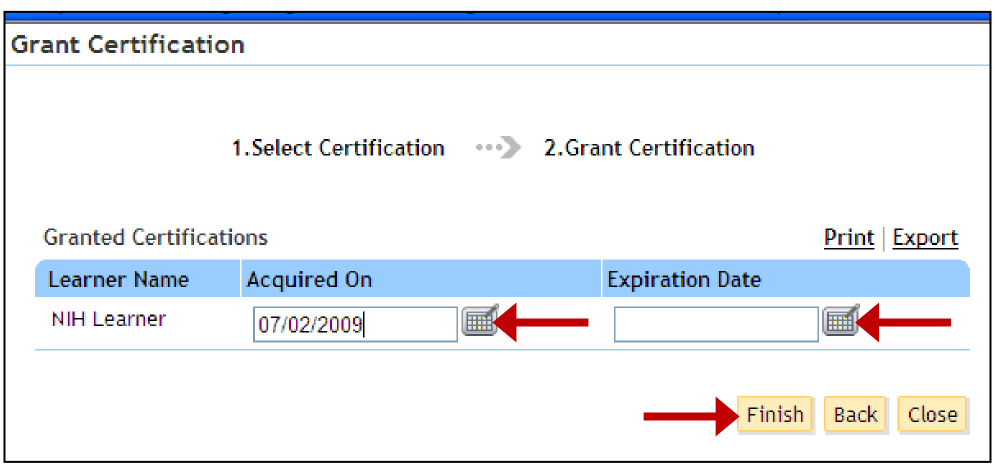
7. Search for the certification you would like to grant.

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

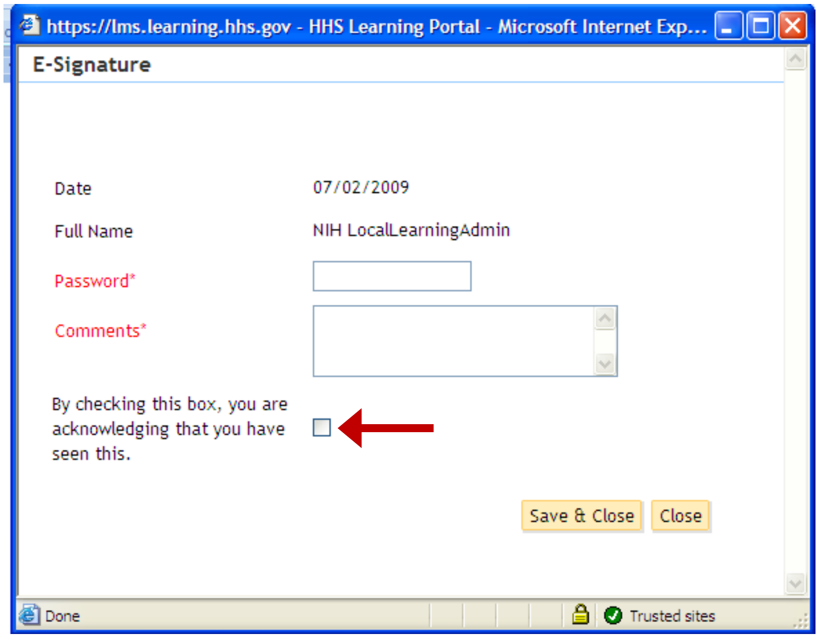


NOTE: If you are granting a certification that has already been assigned to the leaner, you will be asked to confirm that you want to continue with the Grant Certification process.

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



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



11. Click **Save & Close**.

STEP-BY-STEP (ASSIGN INTERNAL CERTIFICATION)

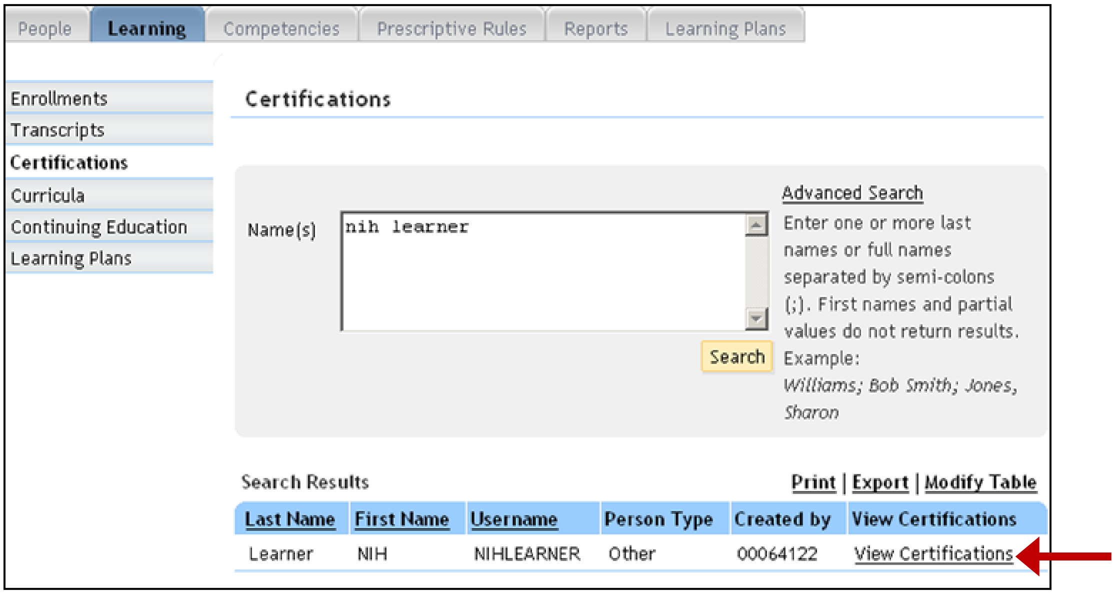
A certification must first be created in the LMS by an LMS Training Administrator before it will be available for you to assign to a learner.

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**.

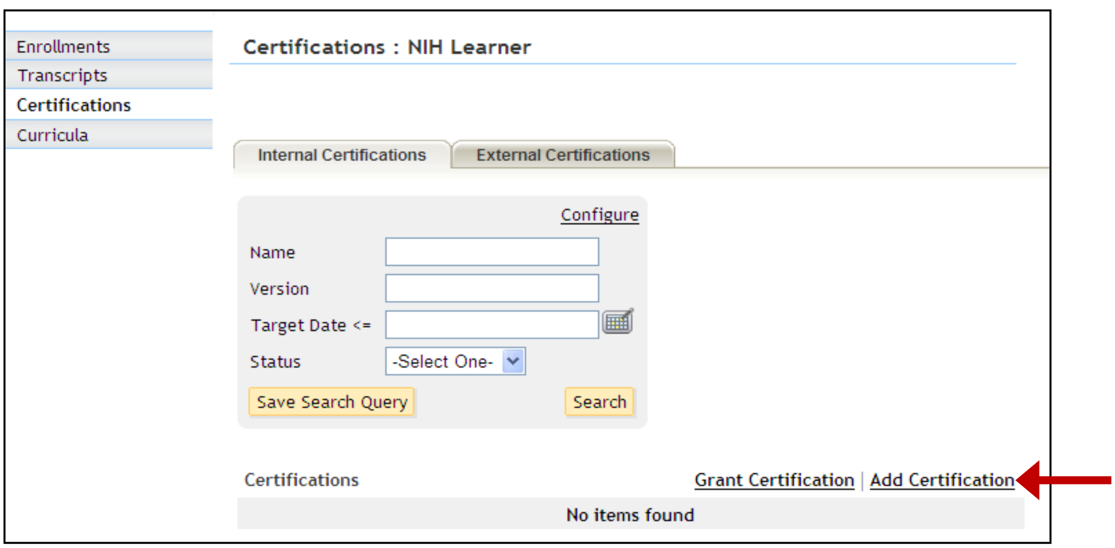
NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

Human Capital Administrator

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

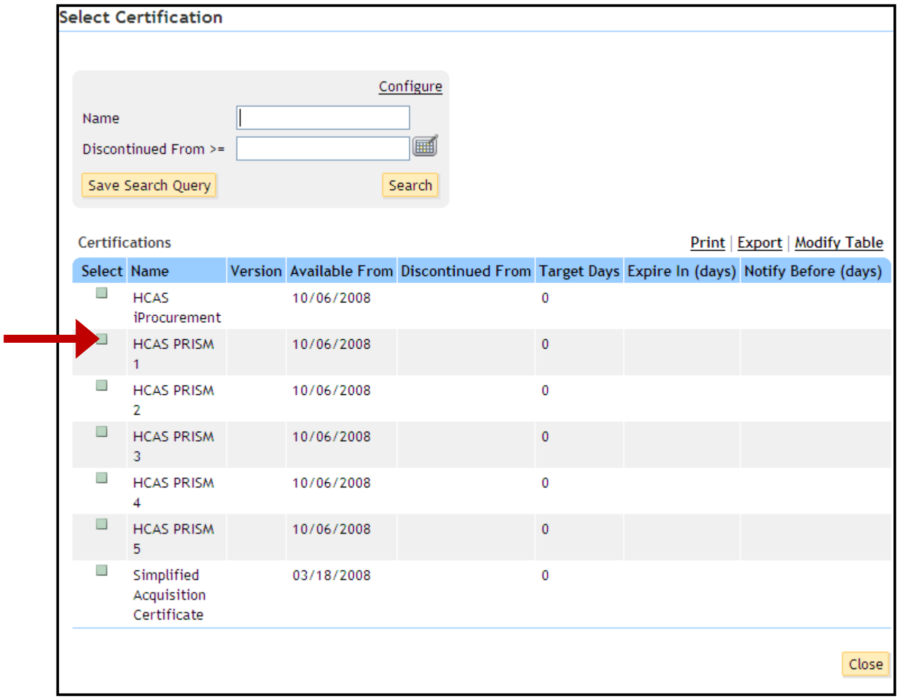


6. Click **Add Certification**.



7. **Search** for the certification you would like to assign.

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



Select	Name	Version	Available From	Discontinued From	Target Days	Expire In (days)	Notify Before (days)
	HCAS iProcurement		10/06/2008		0		
	HCAS PRISM 1		10/06/2008		0		
	HCAS PRISM 2		10/06/2008		0		
	HCAS PRISM 3		10/06/2008		0		
	HCAS PRISM 4		10/06/2008		0		
	HCAS PRISM 5		10/06/2008		0		
	Simplified Acquisition Certificate		03/18/2008		0		

CURRICULA

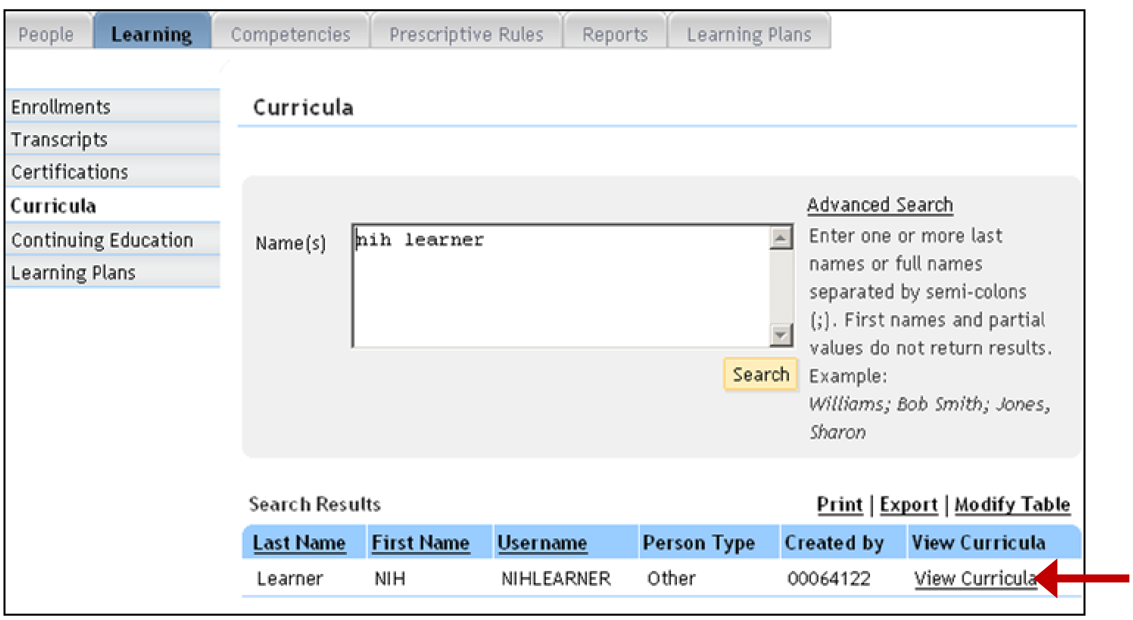
As a Human Capital Administrator, you may view and manage curricula for learners within your organization.

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 CURRICULA)

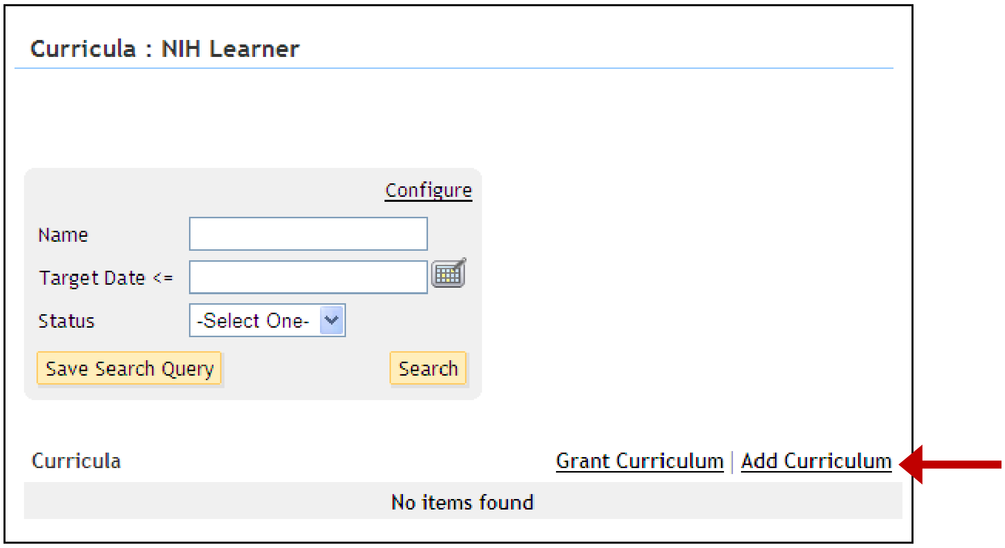
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Select **Curricula** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

   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 learner.



Human Capital 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.



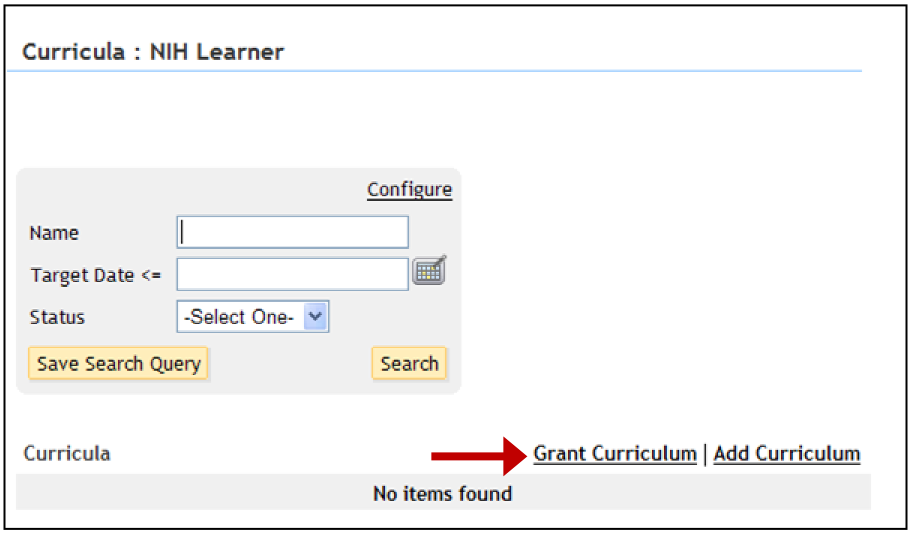
STEP-BY-STEP (GRANT CURRICULUM)

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

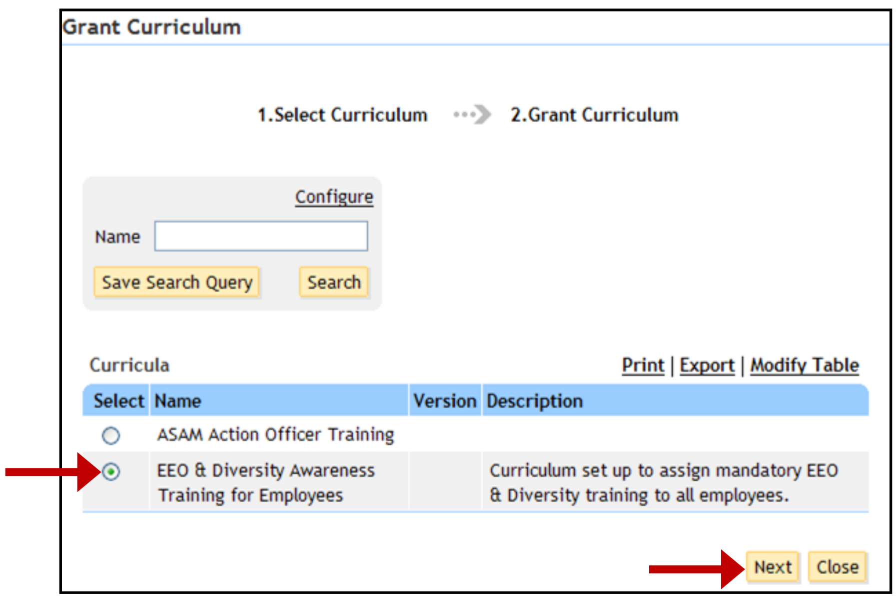
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Select **Curricula** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

   NOTE: See instructions for searching listed to the right of the search box. If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

5. Click **View Curricula** to the right of the correct account.
6. Click **Grant Curriculum**.



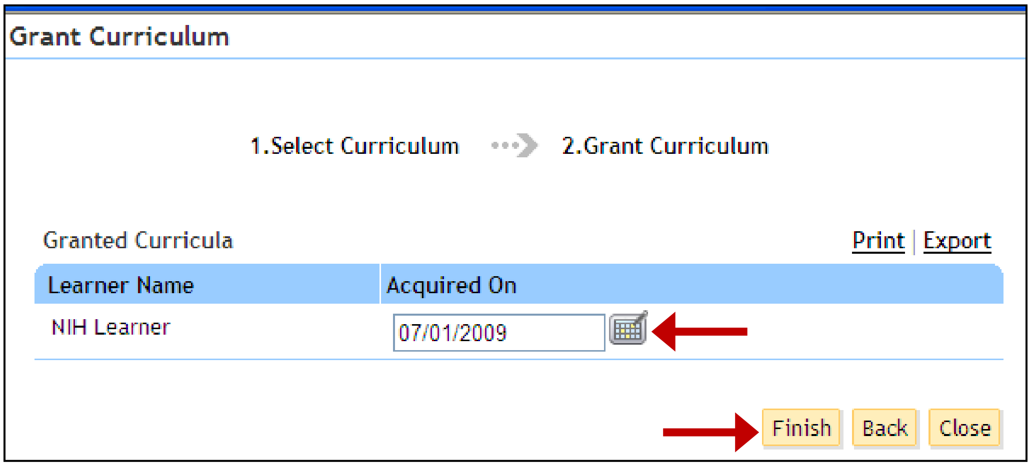
7. Search for the curriculum you would like to grant.
8. Select the radio button in front of the curriculum you would like to grant and click **Next**.



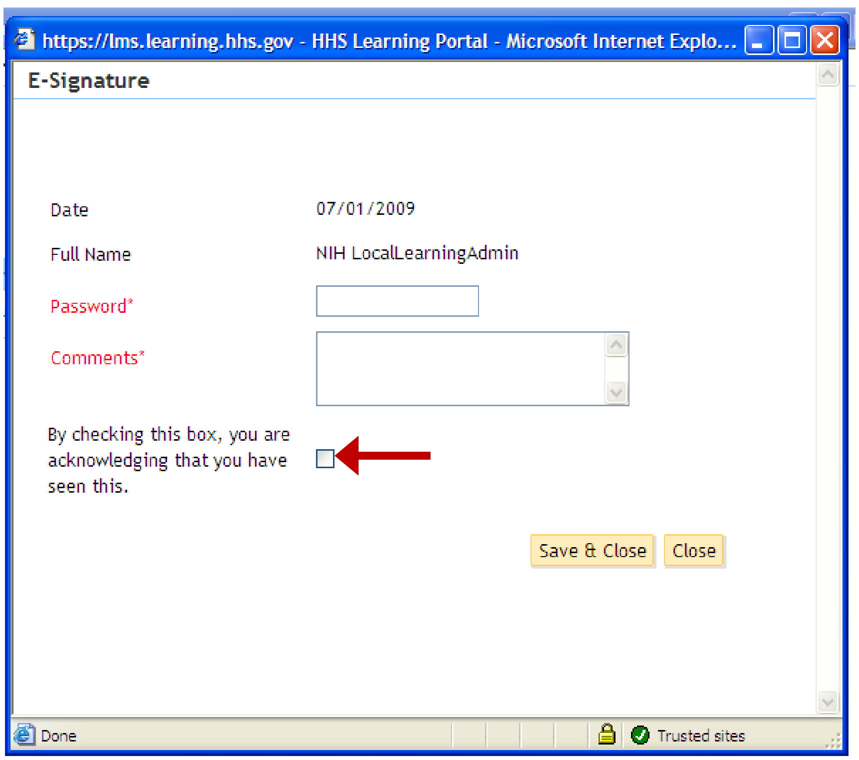
NOTE: If you are granting a curriculum that has already been assigned to the leaner, you will be asked to confirm that you want to continue with the Grant Curriculum process.

Human Capital Administrator

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



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



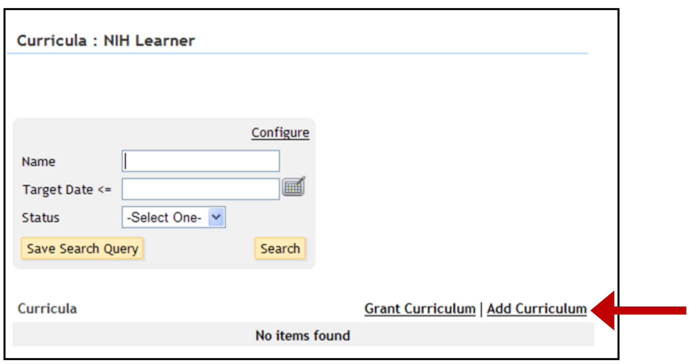
11. Click **Save & Close**.

STEP-BY-STEP (ASSIGN CURRICULUM)

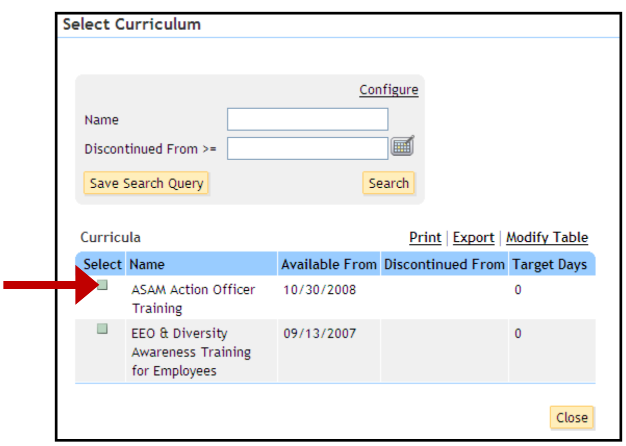
A curriculum must first be created in the LMS by an LMS Training Administrator before it will be available for you to assign to a learner.

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 **Add Curriculum**.



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



CONTINUING EDUCATION

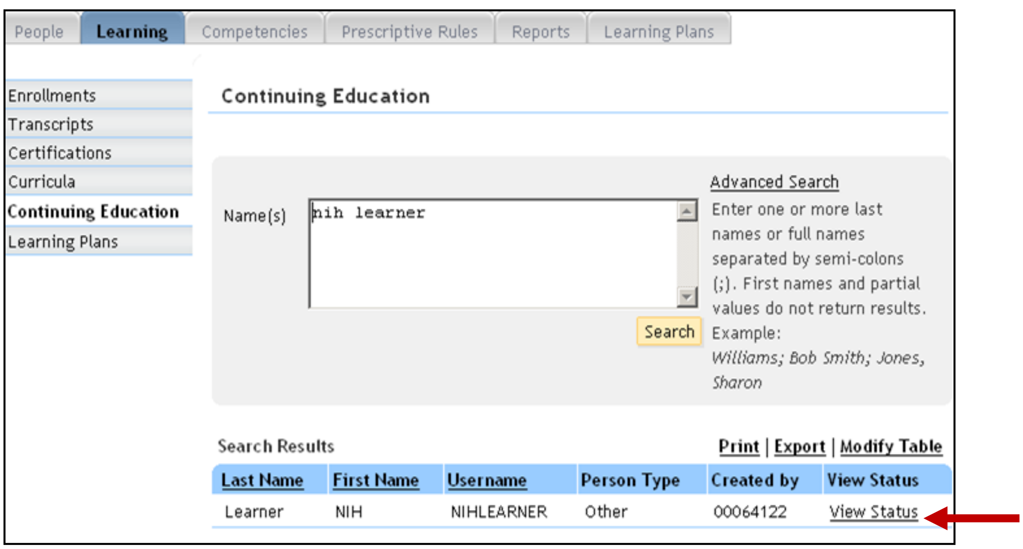
If an LMS Training Administrator has created continuing education Fields of Study and/or Continuing Education Plans in the LMS, a Human Capital Administrator may add the requirements to learners and/or check their progress against requirements. NIH is not yet making frequent use of the Continuing Education credit functionality.

STEP-BY-STEP (VIEW STATUS OF CONTINUING EDUCATION REQUIREMENTS)

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

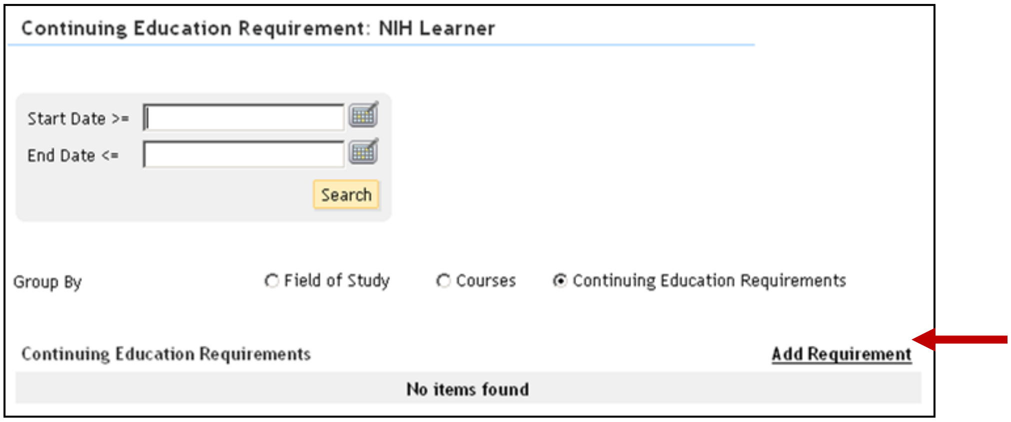
5. Click **View Status** next to the appropriate learner name.



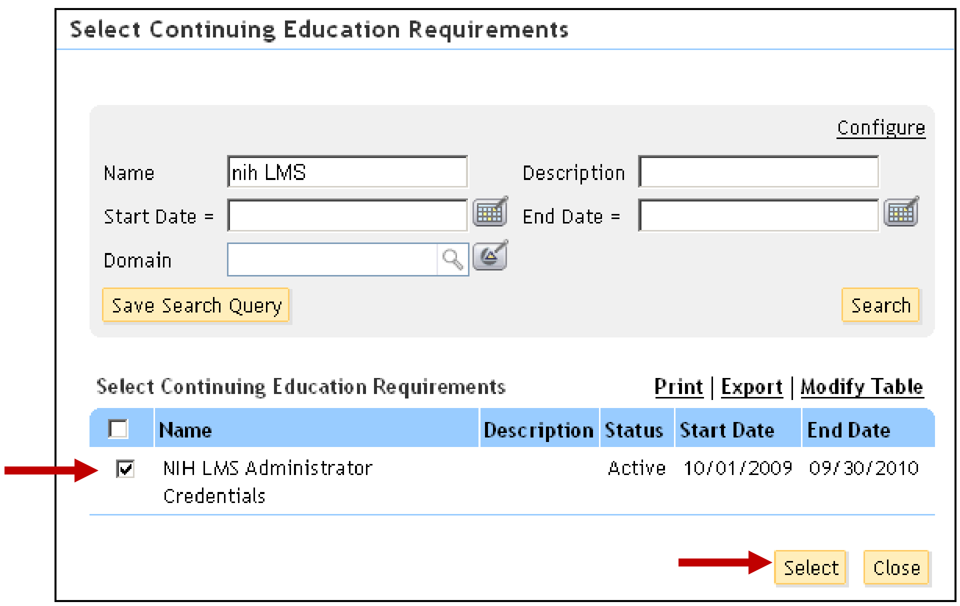
NOTE: If the learner has been assigned any continuing education credit requirements, they will be listed on the Continuing Education Requirement screen with a status indicator.

STEP-BY-STEP (ADD A CONTINUING EDUCATION REQUIREMENT FOR A LEARNER)

1. To add a new continuing education requirement for a Learner, complete the steps from **Step-By-Step (View Statuses of Continuing Education Requirements)** above.
2. Click the **Add Requirement** link.



3. From the **Select Continuing Education Requirements** pop-up, enter search parameters in the fields and click **Search**.



4. Click the check box to the left of the appropriate Continuing Education Requirement.
5. Click **Select** to add the Continuing Education Requirement to the Learner’s profile.

LEARNING PLANS

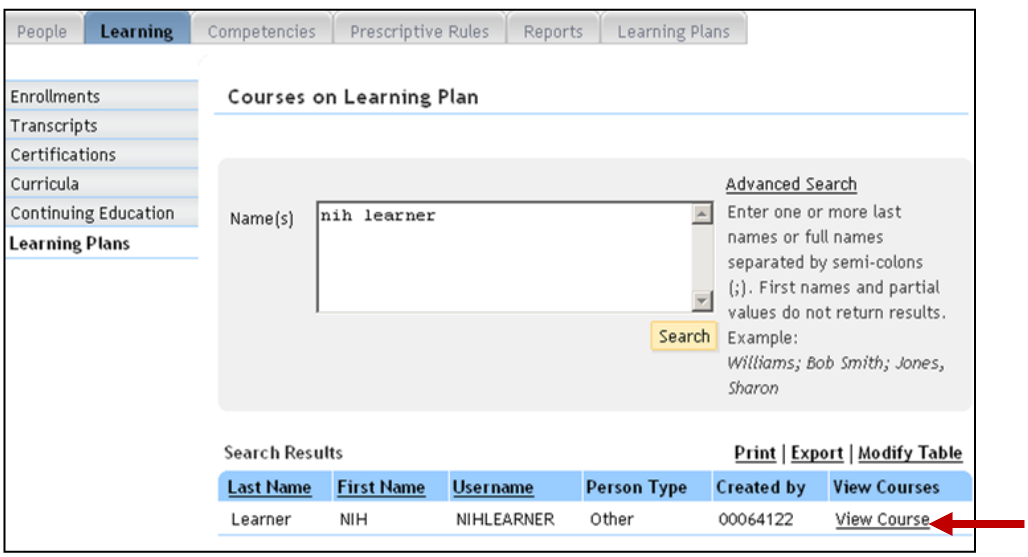
Human Capital Administrators may view and manage the courses on individuals' learning plans. Learning Plan functionality is very limited under the **Learning** tab. If you need to take actions on a learner's learning plan, please access it through the **Learning Plans** tab, which is covered in "Step-By-Step (View/Add to Learning Plans: Method Two)" below.

STEP-BY-STEP (VIEW/ADD TO LEARNING PLANS: METHOD ONE)

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Learning** tab.
3. Select **Learning Plans** 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 Course** next to the appropriate learner name.



NOTE: You will see a list of the courses on the person's learning plan. (You will not see items on the learning plan that are not courses.) You may click the **Title** of a course to see more details about it.

Courses : NIH Learner

Current | Completed

Courses

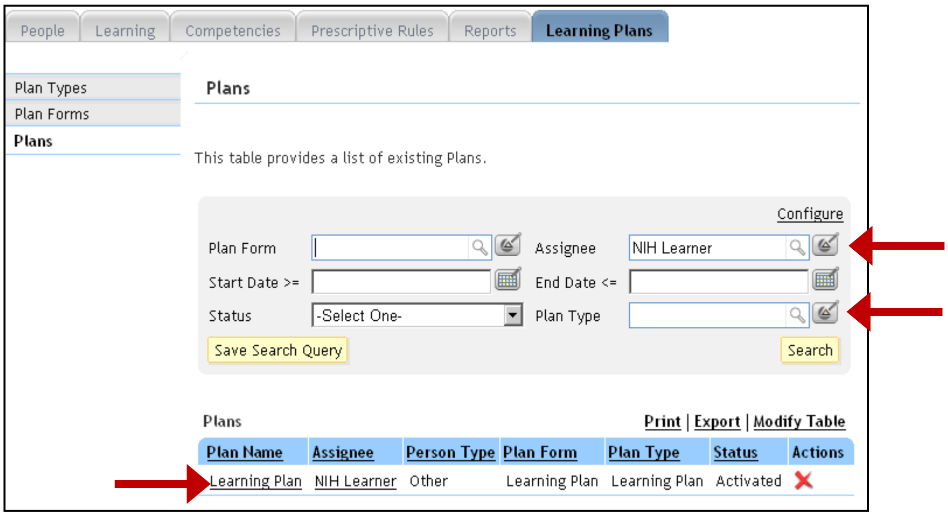
Add Course | Print | Export | Modify Table

Title	Assigned By	Target Date	Status	Related Links	Actions
Learning With Saba	NIH Supervisor	07/23/2009	In Progress	- View Community - Launch - Mark Complete - Add to Plan	Delete
Records Management for Everyone	NIH LocalLearningAdmin	07/31/2009	In Progress	- Launch - Mark Complete - Add to Plan	Delete
Creating and Analyzing an Operating Budget	NIH Learner (more)	09/25/2009	New	- Register - Add to Plan	Delete
Alternative Dispute Resolution (ADR)	Test Prescriptive Rule		In Progress	- Register - Add to Plan	

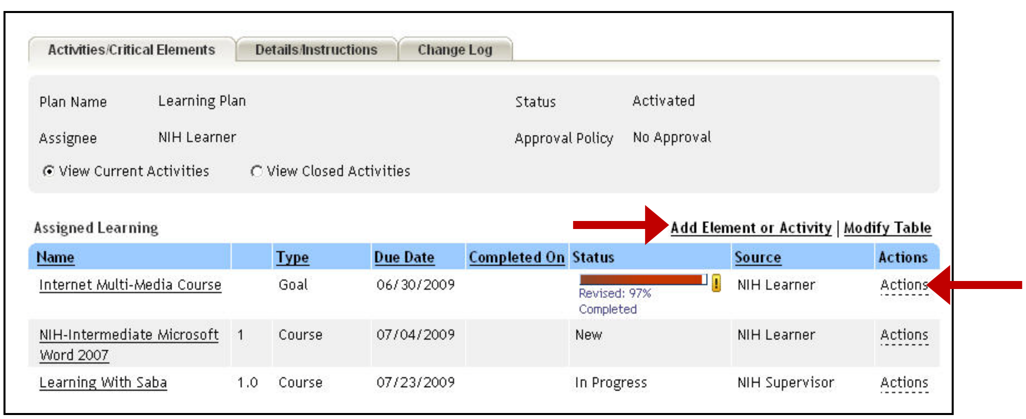
NOTE: Under **Related Links**, you may **View Community** if one is associated with a course, **Launch** to view the learner's progress in the course, **Mark Complete** if necessary, or **Register** the learner for a course.

STEP-BY-STEP (VIEW/ADD TO LEARNING PLANS: METHOD TWO)

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

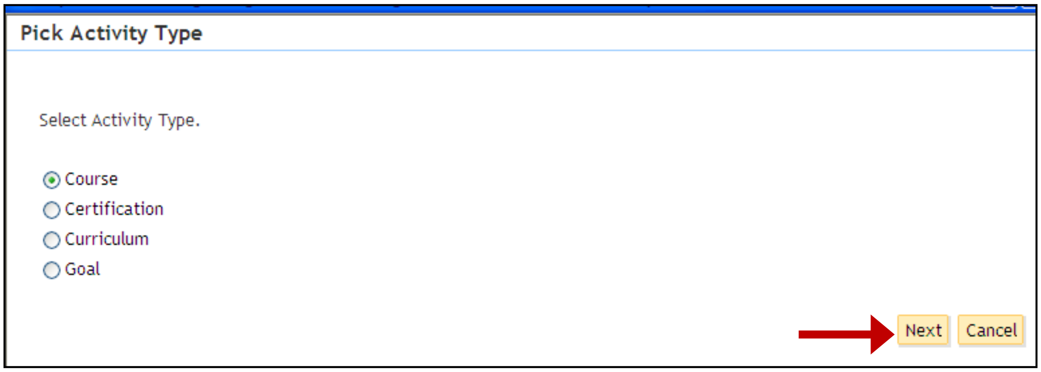


5. Click **Learning Plan** next to learner's name.
6. From the learning plan **Activities/Critical Elements** tab, click the title of any item to access details about it. You can also see what **Type** of item it is, when it is due, and progress made (if applicable). Depending on the type of item, you will be able to take various actions using the pop-up links that appear when you hold your mouse over the **Actions** link to the right of each item.



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

8. Select an **Activity Type**, then click **Next**.



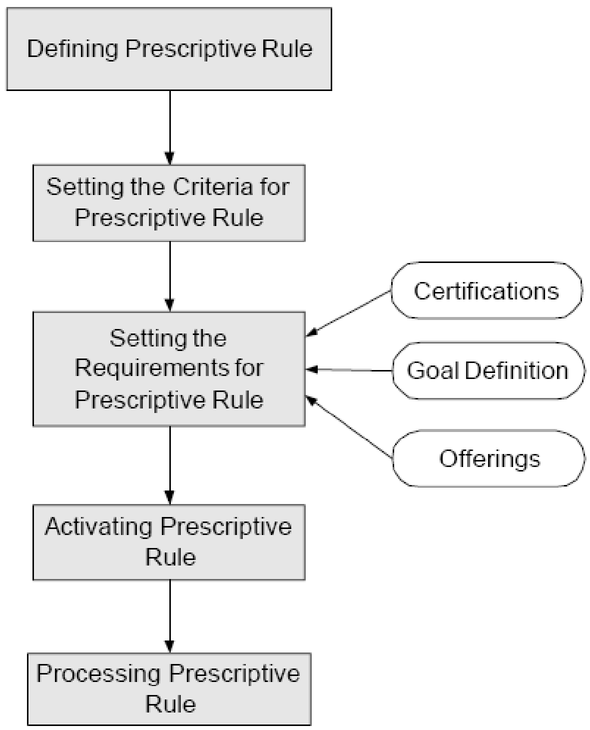
9. Follow the prompts for the type of activity you chose to add the specific learning item you want to add to the learning plan. You will see a confirmation message that the item has been added to the plan. Click **Close** to exit the message pop-up and return to the **Plan Details** screen. You should now see your item added to the activities list.

MANAGING PRESCRIPTIVE RULES

PRESCRIPTIVE RULES

Prescriptive rules are used to automatically assign learning items (offerings, certifications, curricula, competencies, goals, etc.) to people who fulfill specified criteria, such as location, organization code, audience type, job series, job role, competencies, and/or certifications. People qualify for a rule only if they fulfill the member criteria specified in the rule.

Human Capital Administrators can create prescriptive rules. The following diagram depicts the prescriptive rule creation process:



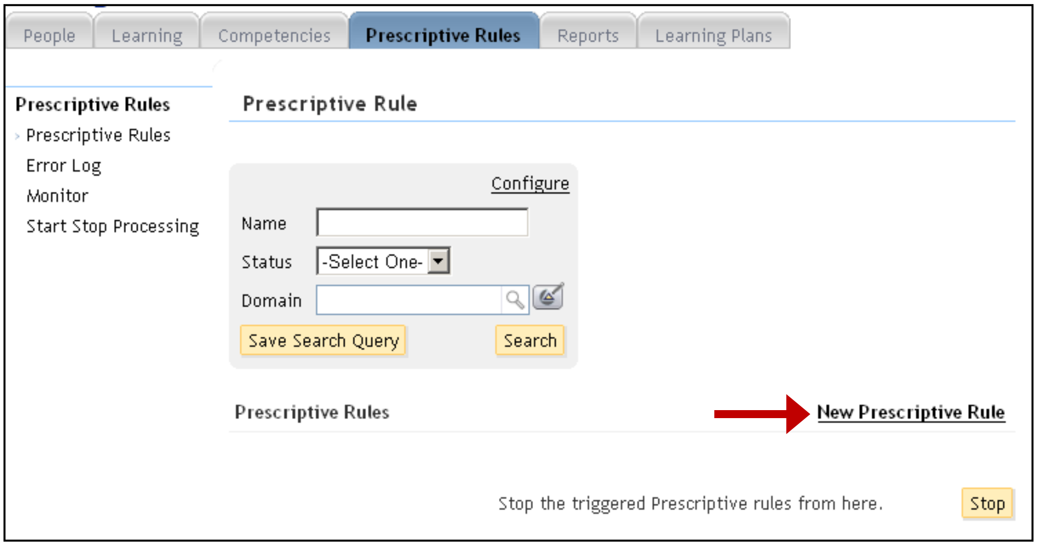
The following points are **VERY IMPORTANT!**

- Do **not** alter other organizations prescriptive rules – only process your own.
- Do **not** use the **Start Stop Processing** menu option.
- Do **not** process a prescriptive rule without conducting thorough testing. Think through the logic of the prescriptive rules very carefully. Before entering into the production portal, test the prescriptive rule in Staging. ONCE A PRESCRIPTIVE RULE RUNS, YOU CANNOT REVERSE OR UNDO IT.

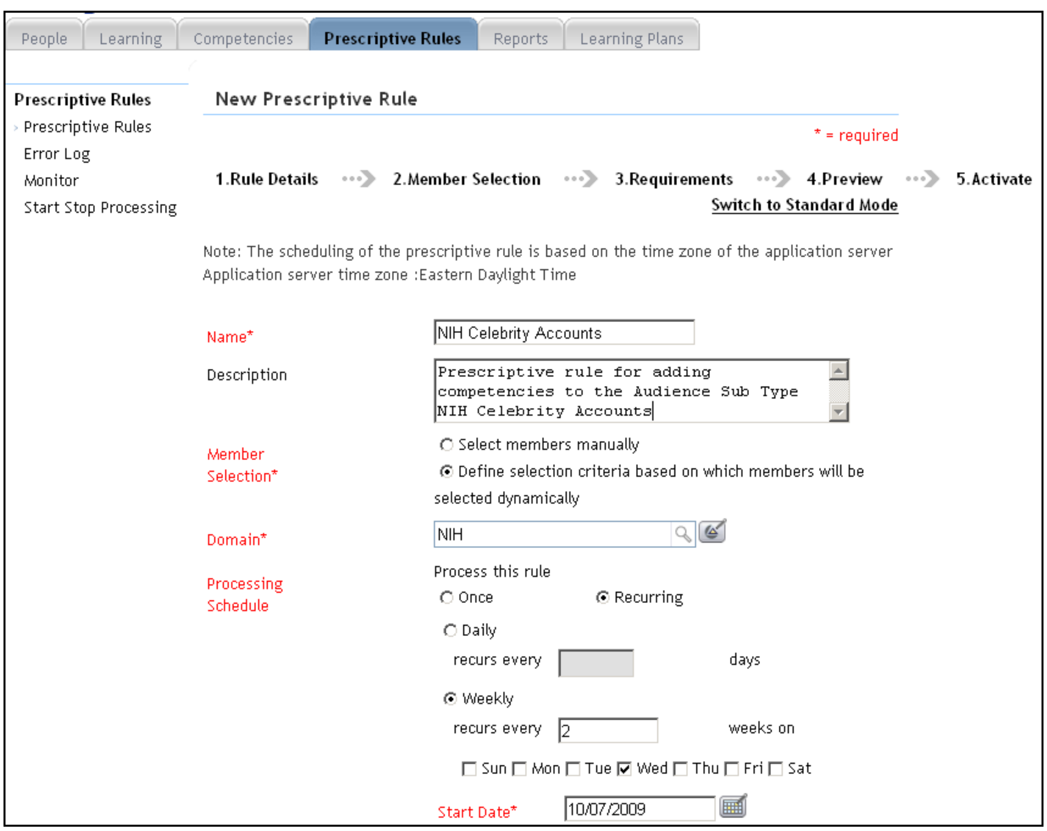
You can view the **Error Log** and **Monitor** list to verify that learning items were properly assigned to the specified members.

STEP-BY-STEP (CREATE A PRESCRIPTIVE RULE)

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Prescriptive Rules** tab.
3. Click on the **New Prescriptive Rule** link.



4. Add a name to the prescriptive rule in the **Name** field.
5. Add a description in the **Description** field.



6. For Member Selection, select the radio button for **Define selection criteria…** based on which members will be selected dynamically.

   NOTE: If you have only a few people to add to the prescriptive rule, you may want to choose **Select members manually**. That option will allow you to specifically name each person.) This selection cannot be changed once the prescriptive rule is saved.

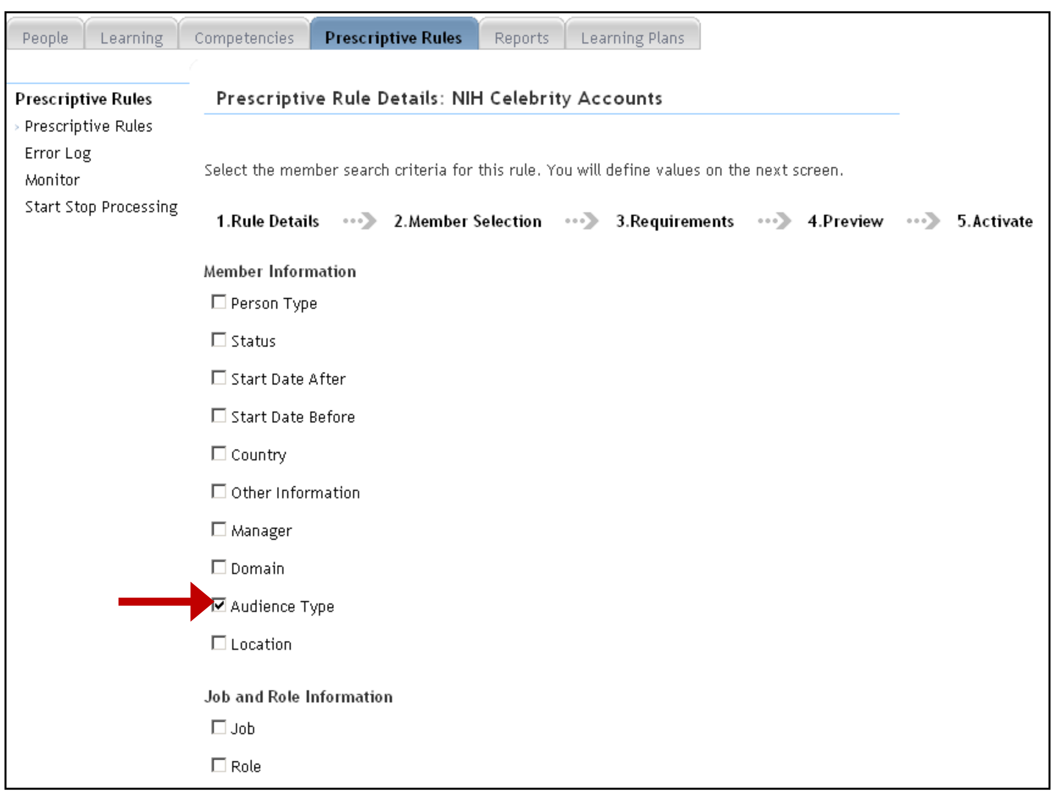
7. Select NIH for the **Domain** field (location of all the people accounts).

8. Set up a processing schedule. Read the options carefully and make sure you know the implications of every selection. If you have any questions, contact the NIH LMS Team at LMSSupport@mail.nih.gov.

9. Go to the next step by clicking **Step 2a: Member Selection**.

10. Select the member search criteria you plan to use for your prescriptive rule.

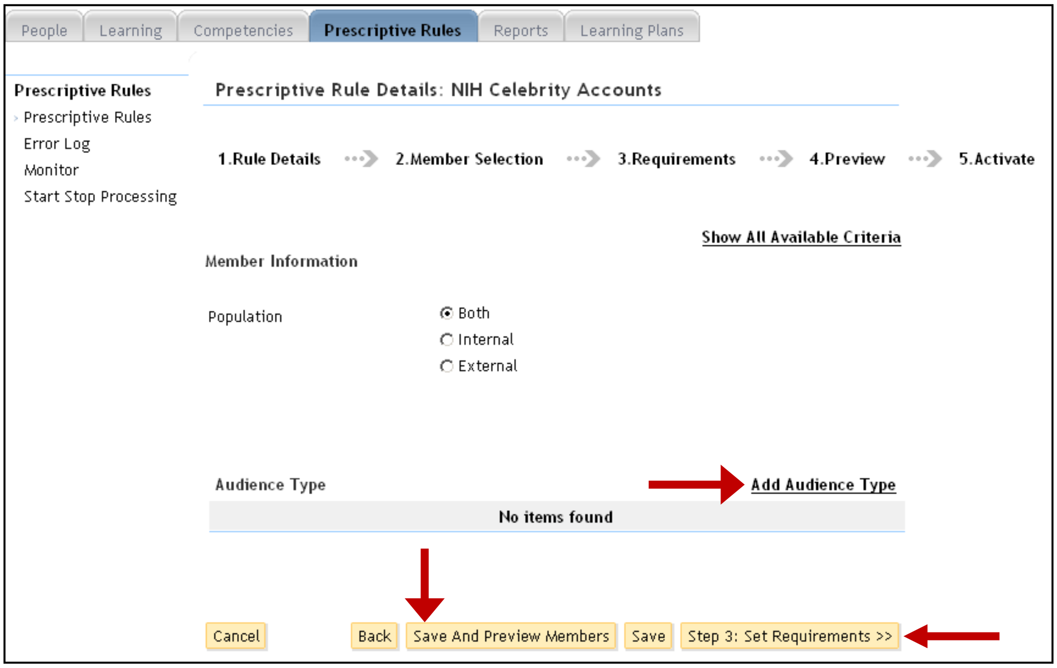
    IMPORTANT! Be careful. This screen is for selecting the criteria you will use to choose people to which the prescriptive rule will be applied. This is NOT for indicating what you will actually assign to people – that step comes later.



11. Move to the next step by clicking **Step 2b: Define Search Criteria** at the bottom of the screen.

12. Enter the details for the criteria that you selected on the previous screen.

    NOTE: If you chose the wrong criteria, select **Show All Available Criteria** to change your selection.

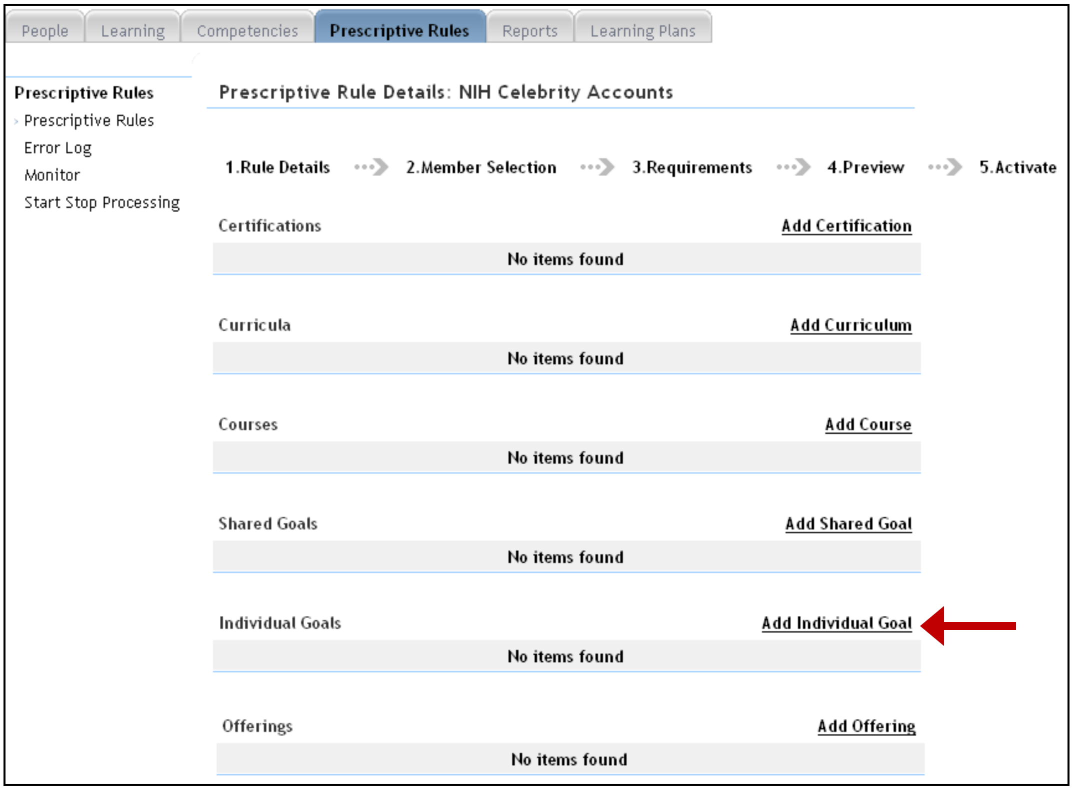


13. Regardless of the criteria you choose, click **Save and Preview Members.** This will display a list of members that fit the member criteria you entered.

    IMPORTANT! DO NOT SKIP THIS STEP. Always preview the members to whom the assignment will be made before you finish and run the prescriptive rule. It is easy to make a mistake that will impact a large number of people in an enterprise system.

14. Click on the **Step 3: Set Requirements** button in the lower left corner when you are SURE your member criteria are set correctly.

15. On the **Requirements** screen, enter the learning items that will be assigned to each of the members that were selected in the previous step. Select the **Add** option for the type of learning item you want to assign and follow the prompts.



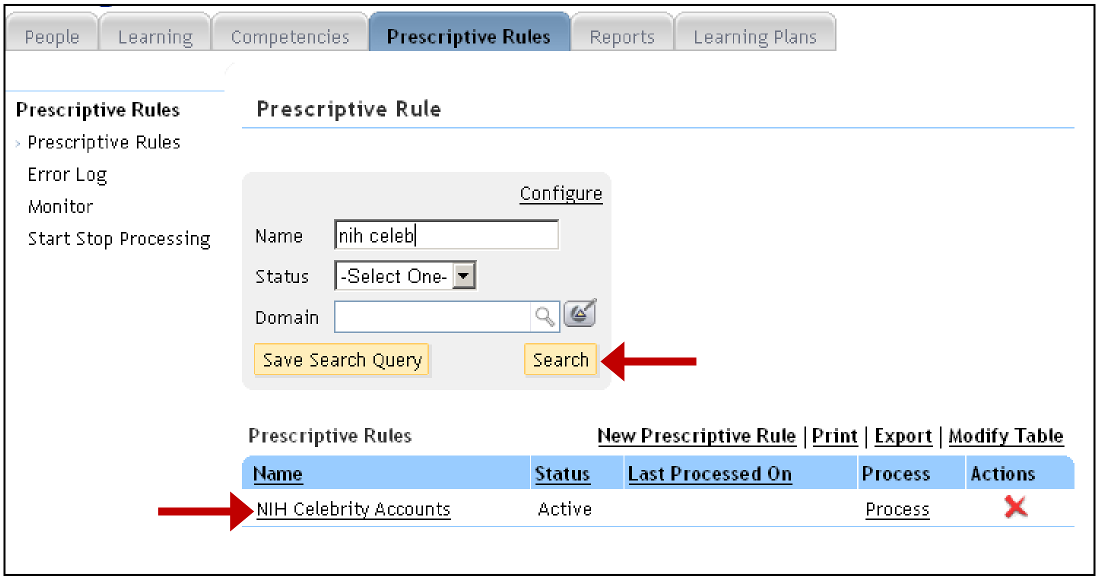
16. Click **Step 4: Preview** at the bottom of the page

17. Review all of the details, and when you are certain everything is correct, click **Step 5: Activate** at the bottom of the page. Choosing this activate button will make the prescriptive rule run according to the settings you entered.

18. Once the screen indicates that the prescriptive rule "is activated successfully," then you may either start again by clicking **New Prescriptive Rule**, or click **Finish**.

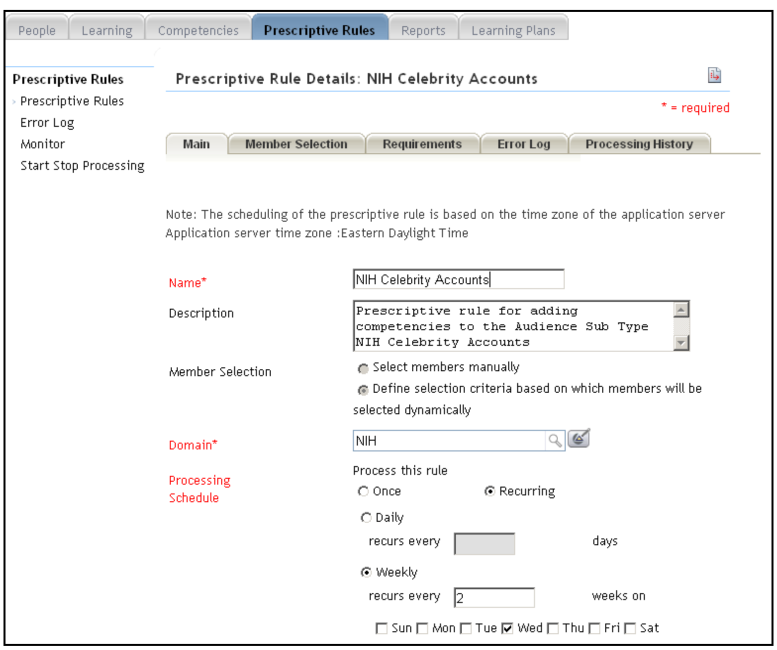
STEP-BY-STEP (VIEW/EDIT A PRESCRIPTIVE RULE)

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Prescriptive Rules** tab.
3. Enter the search criteria and click **Search**.
4. Select the prescriptive rule **Name** that you want to view and edit.

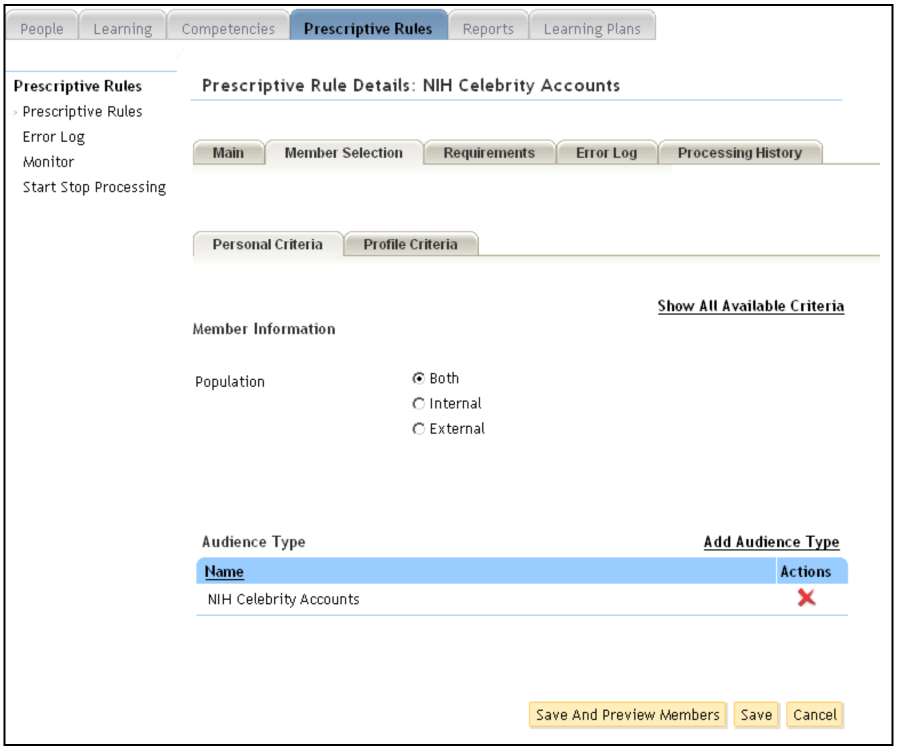


NOTE: Clicking the red X under the **Actions** column will delete the prescriptive rule.

5. Edit the information as on the **Prescriptive Rule Details** screen, **Main** tab as appropriate. The **Main** tab provides the **Name**, **Description**, and **Domain** fields, as well as the information required for the **Processing Schedule**.



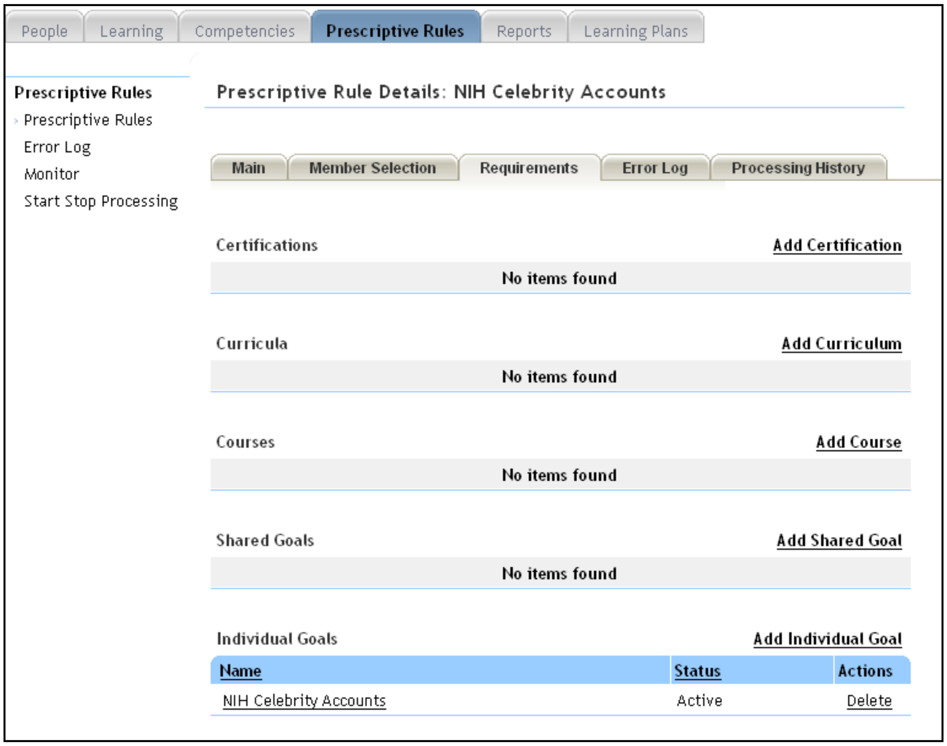
6. Click **Save & Finish Later** or **Save & Add More Information** at the bottom of the page when you are done.
7. Click on the **Member Selection** tab. You will be able to see the member criteria. Edit the member criteria is necessary.



8. Click **Save And Preview Members** at the bottom of the page when you are finished.

   IMPORTANT! ALWAYS preview members when you make any change to the member criteria. Make sure only the people you want included in the prescriptive rule are included.

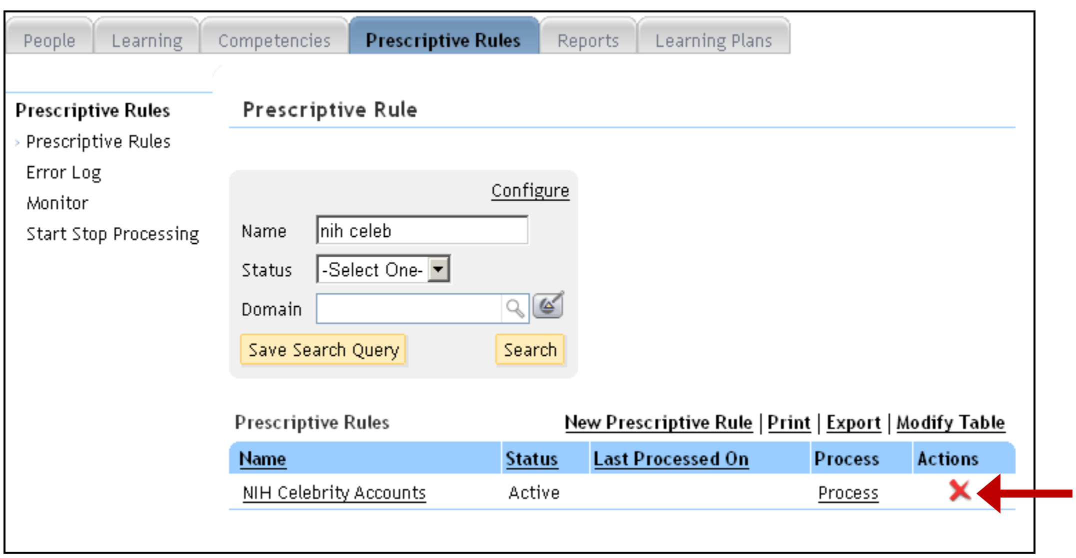
9. Select the **Requirements** tab next and make any changes needed.



10. Click **Save** at the bottom of the page.

11. The **Error Log** tab shows any errors that were encountered during the processing of the prescriptive rule.

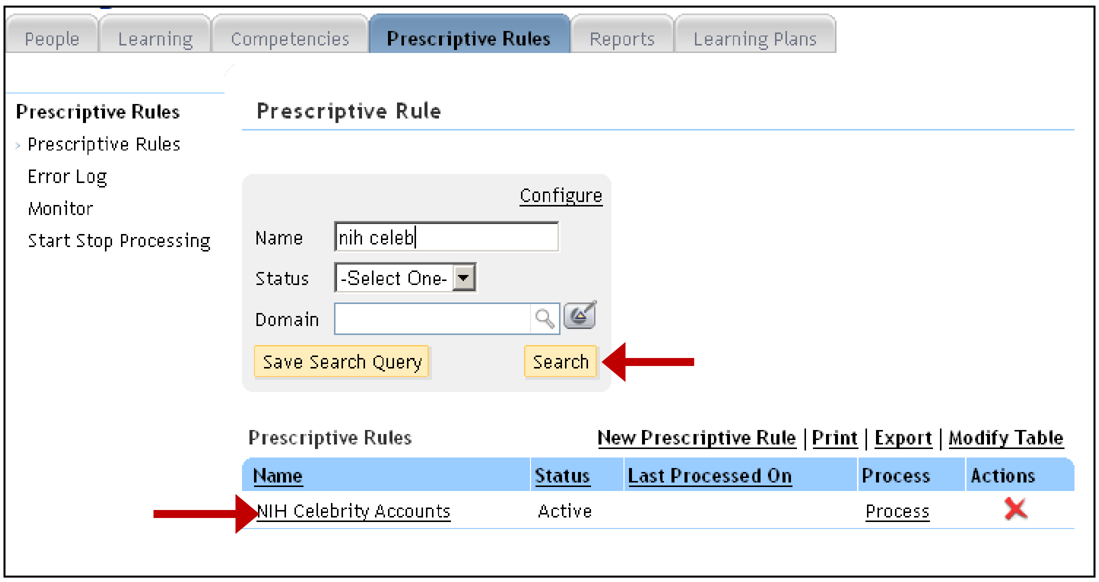
12. The **Processing History** tab shows how many records were updated each time the prescriptive rule was processed. (If the rule has not been processed yet, nothing will be listed.) It will also show the processing status.



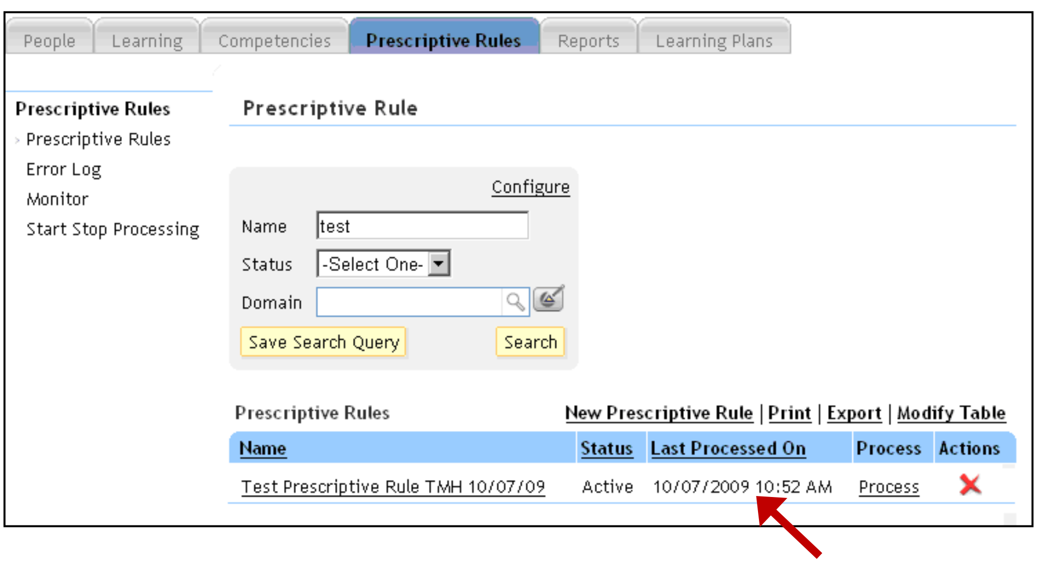
STEP-BY-STEP (PROCESS A PRESCRIPTIVE RULE)

When you are sure the member criteria and requirements are correct, you may want to manually process a prescriptive rule, especially if you did not set it up to run automatically for you.

1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Prescriptive Rules** tab.
3. Enter the search criteria and click **Search**.
4. Select **Process** next to the prescriptive rule you have verified as being correct and want to run.

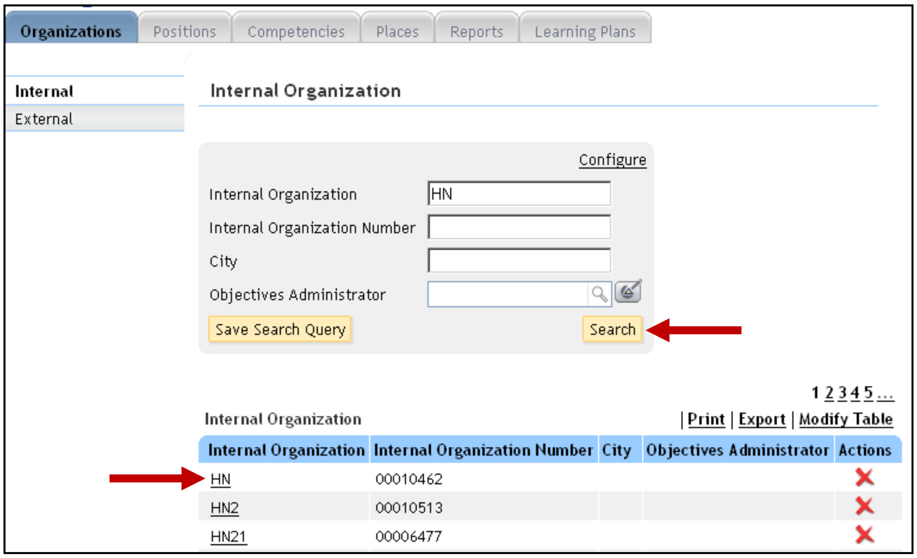


5. After processing the prescriptive rule, the **Last Processed On** column will update.



UNDERSTANDING INTERNAL ORGANIZATIONS

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



You may click the Internal Organization name to see more details and perform the following tasks:

- **Profile** tab:
  - **Create 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** 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.
- **Members** tab: 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. 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.
- Do not use the **Prescriptive Rules** tab for Internal Organizations.

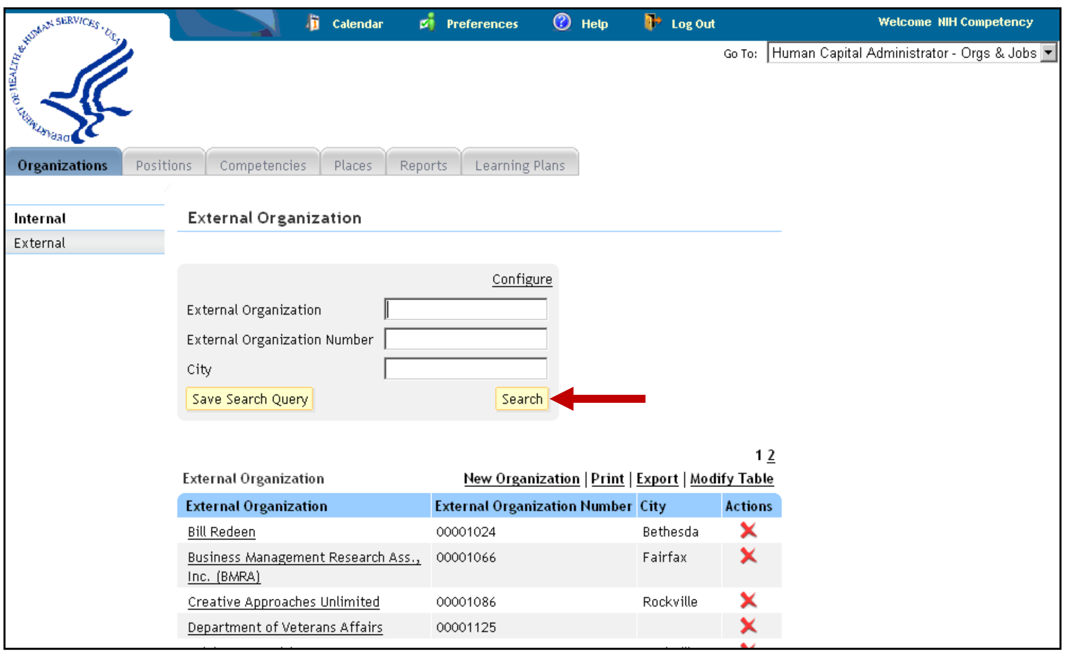
USING EXTERNAL ORGANIZATIONS TO ADD VENDORS

External Organizations are used to set up vendors that can be attached to the courses. New external organizations can be added, but search thoroughly first to avoid adding duplicates.

External organization vendors will eventually be added through an automated data feed that transfers vendors in the NIH Business System (NBS).

STEP-BY-STEP (VIEW EXTERNAL ORGANIZATIONS)

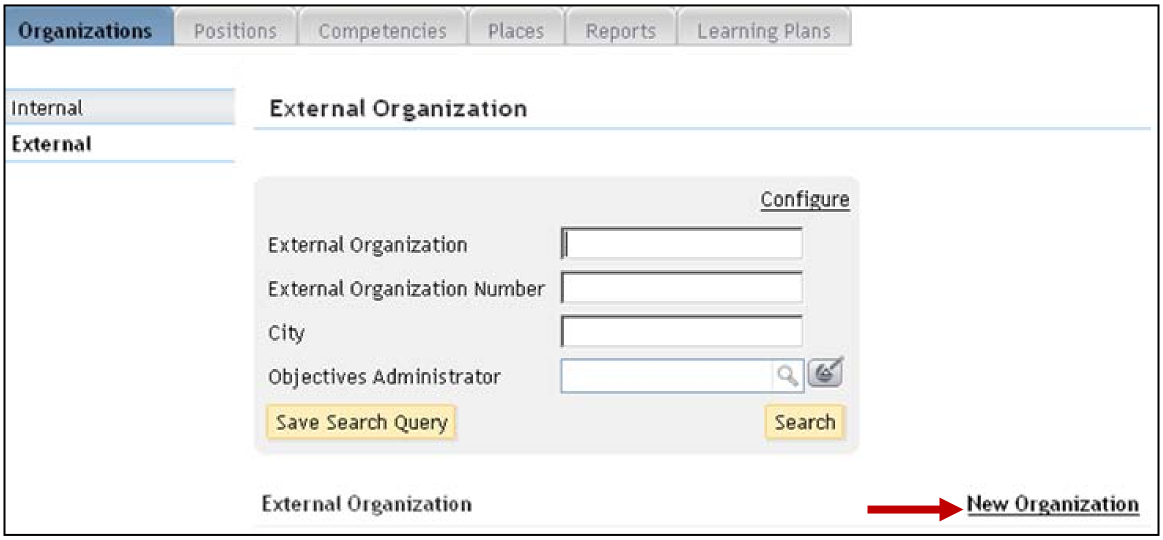
1. Select the **Human Capital Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.
2. Click on the **Organizations** tab.
3. Select **External** from the menu on the left.
4. Search for the vendor you want to view.



5. Click the name of any **External Organization** to see the same detail tabs as are available for Internal Organizations.

STEP-BY-STEP (ADD AN EXTERNAL ORGANIZATION)

1. Select the **Human Capital Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.
2. Click on the **Organizations** tab.
3. Select **External** from the menu on the left.
4. Click **New Organization**.



5. You will see a **New External Organization** screen. Enter all data you have about the external organization, especially the required fields marked with a red asterisk (*).
6. Click **Save** at the bottom of the screen when you are finished to save the external organization in the LMS.

WORKING WITH PLACES

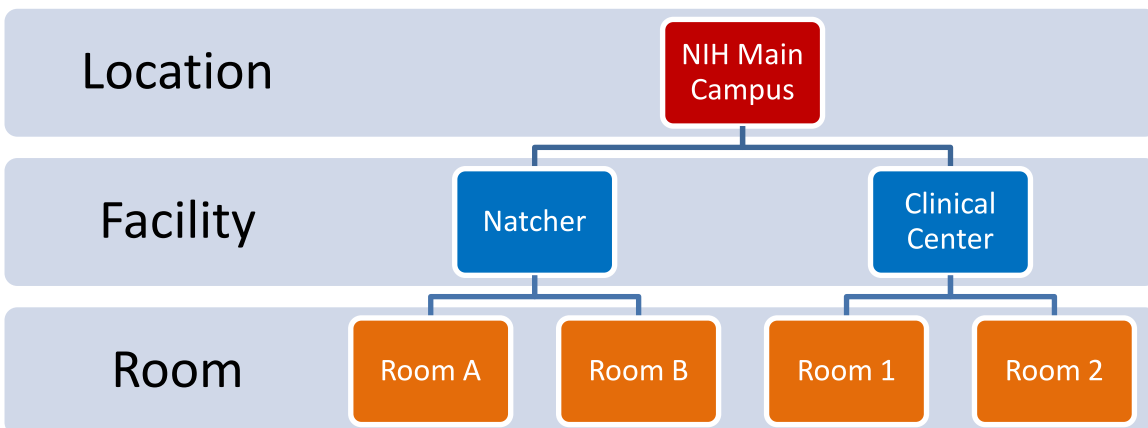
LOCATIONS

Locations are required for instructor-led training, and identify the places where scheduled learning offerings (i.e. classes) are delivered. The locations must be set up in advance, prior to creating and assigning them to scheduled offerings. Please search for and modify existing locations before creating new ones.

Some examples of locations are:

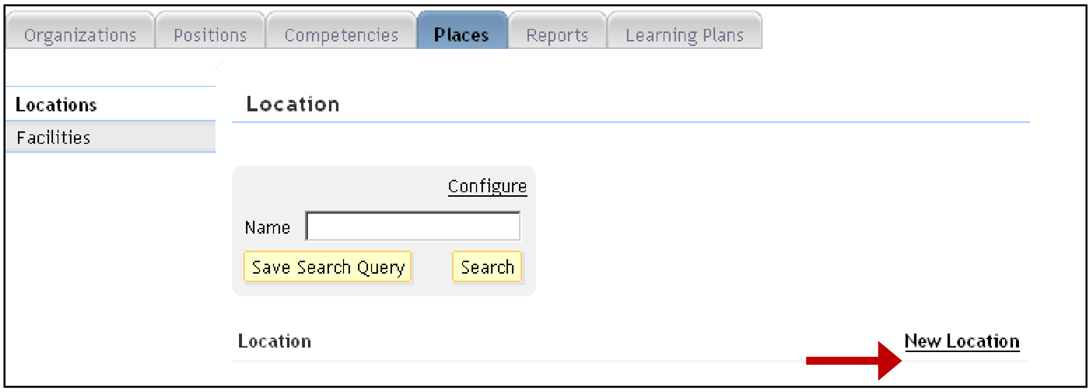
- NIH Training Center
- Center for Information Technology
- Your IC…?

Document the names of the locations, facilities, and rooms that you are using so you can find them later.

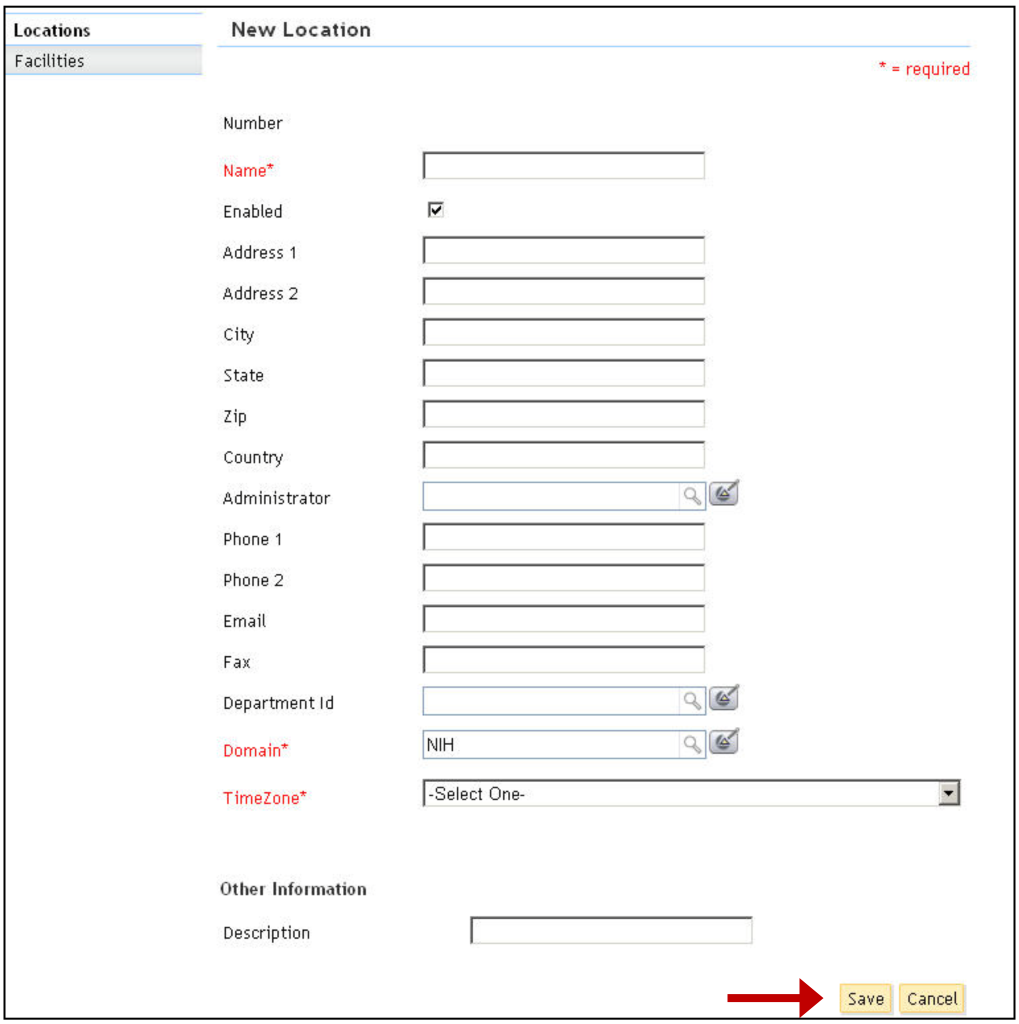


STEP-BY STEP (CREATE A LOCATION)

1. Select the **Human Capital Administrator – Orgs & Jobs** role from the **Go To:** drop-down menu
2. Click the **Places** tab.
3. From the left navigation bar, click the **Locations** link to display the Location page.
4. Click the **New Location** link to display the New Location page.

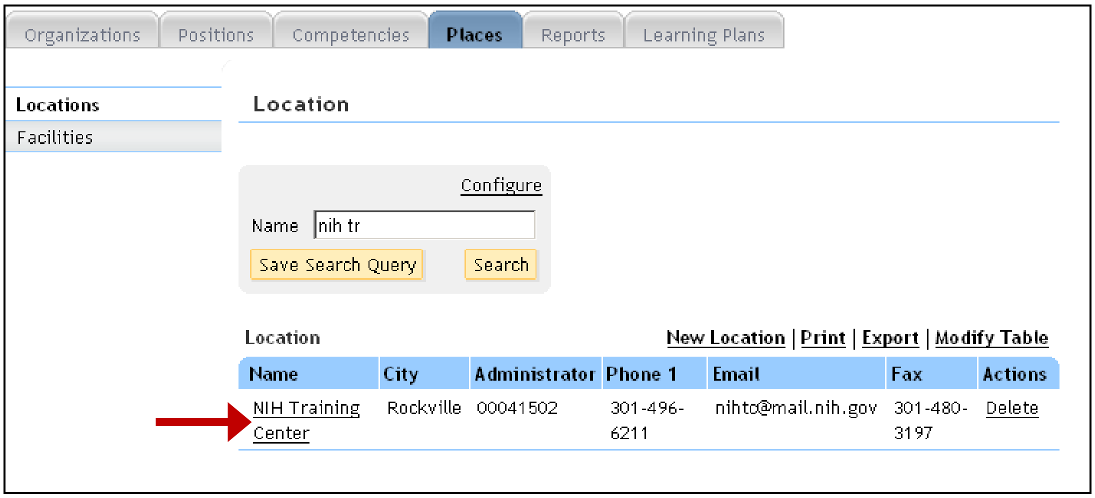


5. Enter as much information as is available for the new location.
6. Verify that the **Domain** field specifies **NIH**.
7. From the bottom of the page, click **Save**.



STEP-BY-STEP (MODIFY A LOCATION)

1. Select the **Human Capital Administrator – Orgs & Jobs** role from the **Go To:** drop-down menu
2. Click the **Places** tab.
3. From the left navigation bar, click the **Locations** link to display the Location page.
4. **Search** for the location you want to modify, and click the name of the location to edit.

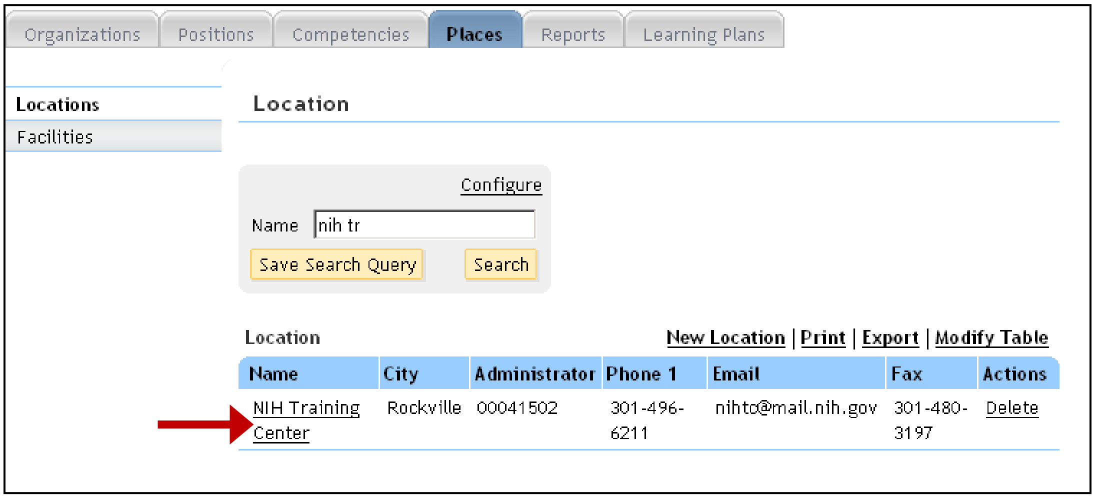


5. Modify the location details as needed.
6. From the bottom of the page, click **Save**.

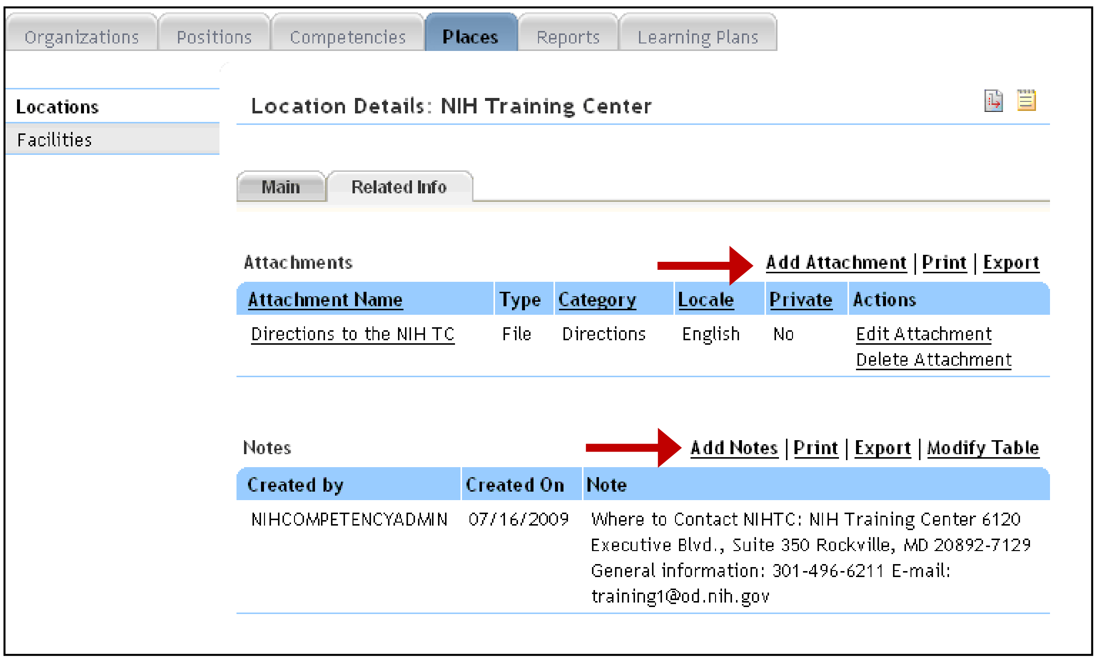
STEP-BY STEP (ADD NOTES AND ATTACHMENTS TO LOCATIONS)

1. Select the **Human Capital Administrator – Orgs & Jobs** role from the **Go To:** drop-down menu
2. Click the **Places** tab.
3. From the left navigation bar, click the **Locations** link to display the Location page.
4. In the **Name** field, type the name of a location for which you want to edit details and click **Search**.

5. Click the name of the location you want to edit.



6. Click the **Related Info** tab.



7. Do one of the following:
    - To add an attachment, click the **Add Attachment** link, complete all fields and click **Save**.
    - To add a note, click the **Add Note** link, complete all fields and click **Save**.

FACILITIES

Facilities are also used in the system to deliver learning in your education services operation and optimize the use of learning resources in your organization. If you wish to define more than one place in the same location, you can use facilities. Facilities are the actual buildings or units used to deliver scheduled offerings associated with a location.

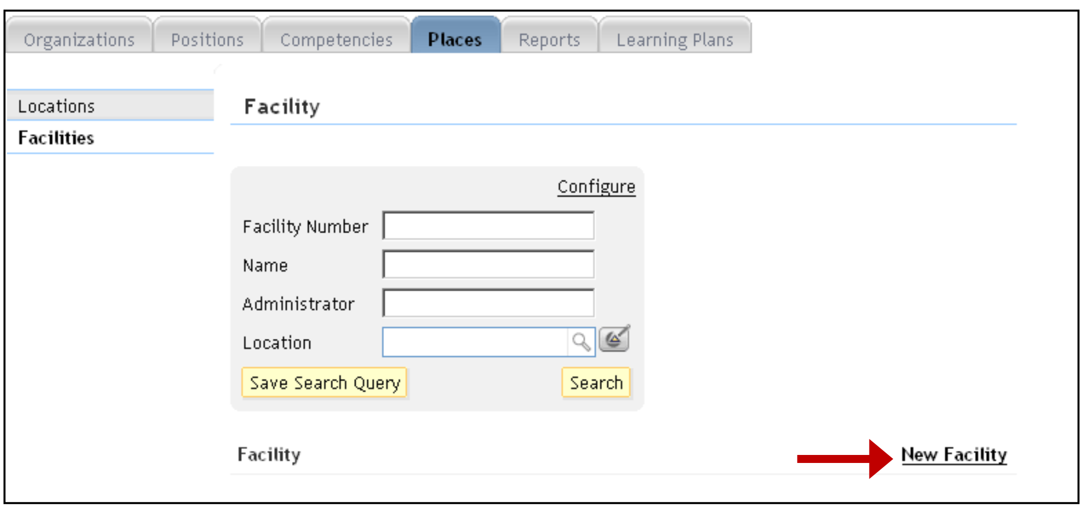
IMPORTANT! You must assign facilities to locations in order to be able to use them.

The facilities must be set up in advance, prior to creating and assigning them to scheduled offerings. Please search for and modify existing facilities before creating new ones.

Document the names of the locations, facilities, and rooms that you are using so you can find them later.

STEP-BY-STEP (CREATE A FACILITIES)

1. Select the **Human Capital Administrator – Orgs & Jobs** role from the **Go To:** drop-down menu.
2. Click the **Places** tab.
3. From the left navigation bar, click the **Facilities** link to display the Facilities page.
4. Click **New Facility** to display the **New Facility** page.

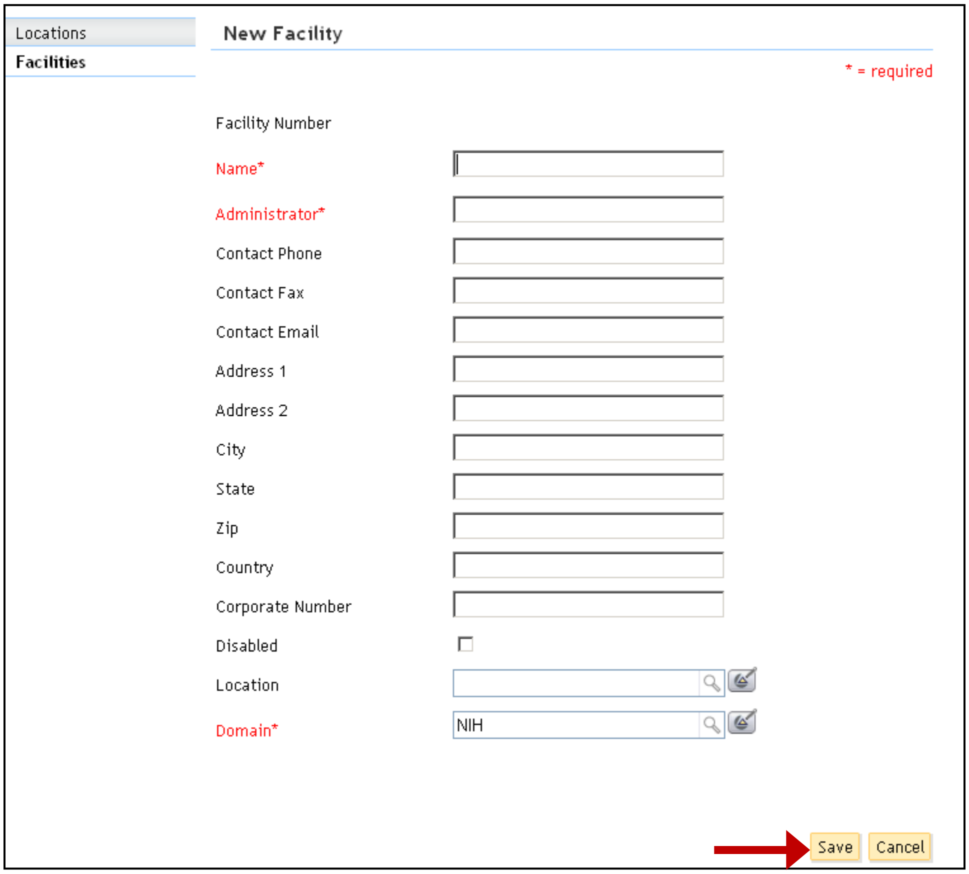


5. Enter as much information as is available for the new facility.

   IMPORTANT! You must select a Location at which this Facility resides in order for the facility to become available for administrators to assign to an offering.

Human Capital Administrator

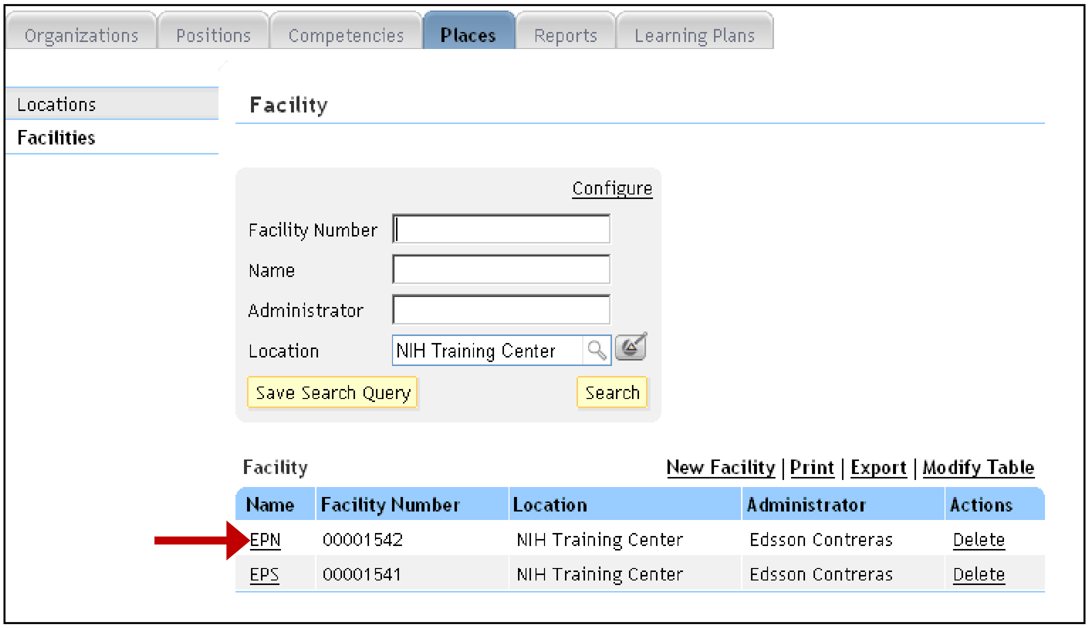
6. From the bottom of the page, click **Save**.



STEP-BY-STEP (MODIFY A FACILITY)

1. Select the **Human Capital Administrator – Orgs & Jobs** role from the **Go To:** drop-down menu
2. Click the **Places** tab.
3. From the left navigation bar, click the **Facilities** link to display the Facility page.
4. In the **Name** field, type the name of a facility for which you want to edit details and click **Search**.

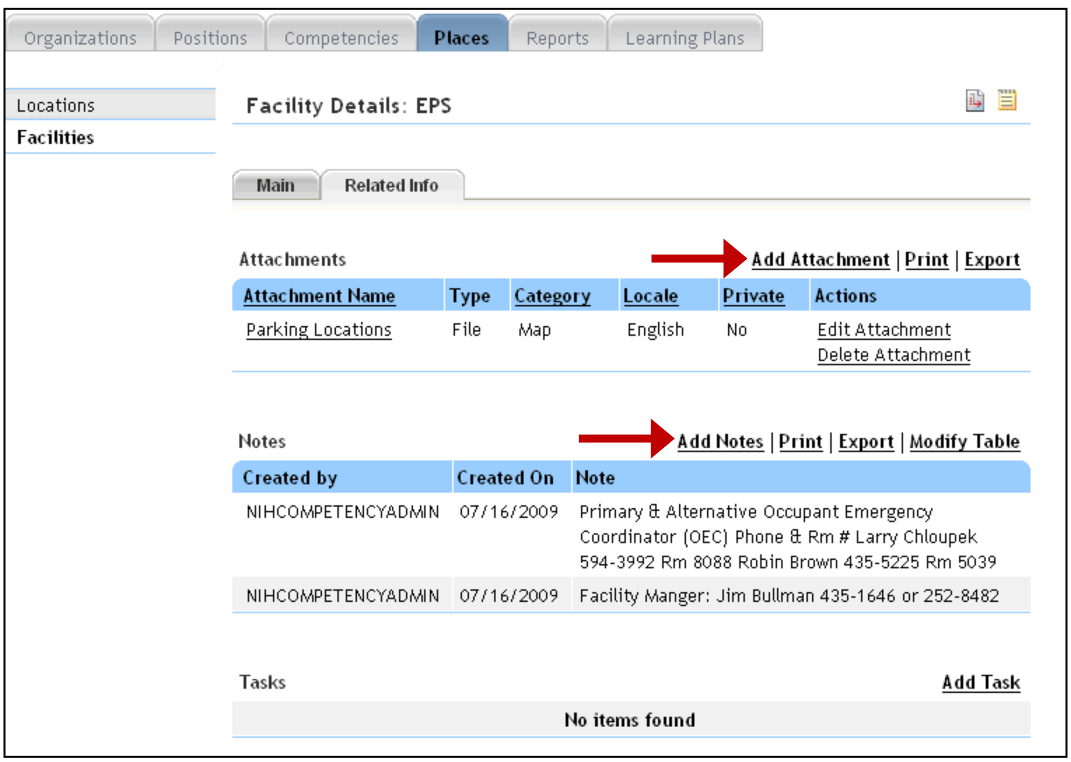
5. Click the name of the facility you want to edit.



6. Modify the facility details as needed and click **Save**.

STEP-BY STEP (ADD NOTES AND ATTACHMENTS TO FACILITIES)

1. Select the **Human Capital Administrator – Org & Jobs** role from the **Go To:** drop-down menu
2. Click the **Places** tab.
3. From the left navigation bar, click the **Facilities** link to display the Facility page.
4. In the **Name** field, type the name of a facility for which you want to add a note or attachment and click **Search**.
5. Click the name of the facility you want to edit.
6. Click the **Related Info** tab.
7. Do one of the following:
   - To add an attachment, click the **Add Attachment** link.
   - To add a note, click the **Add Note** link.



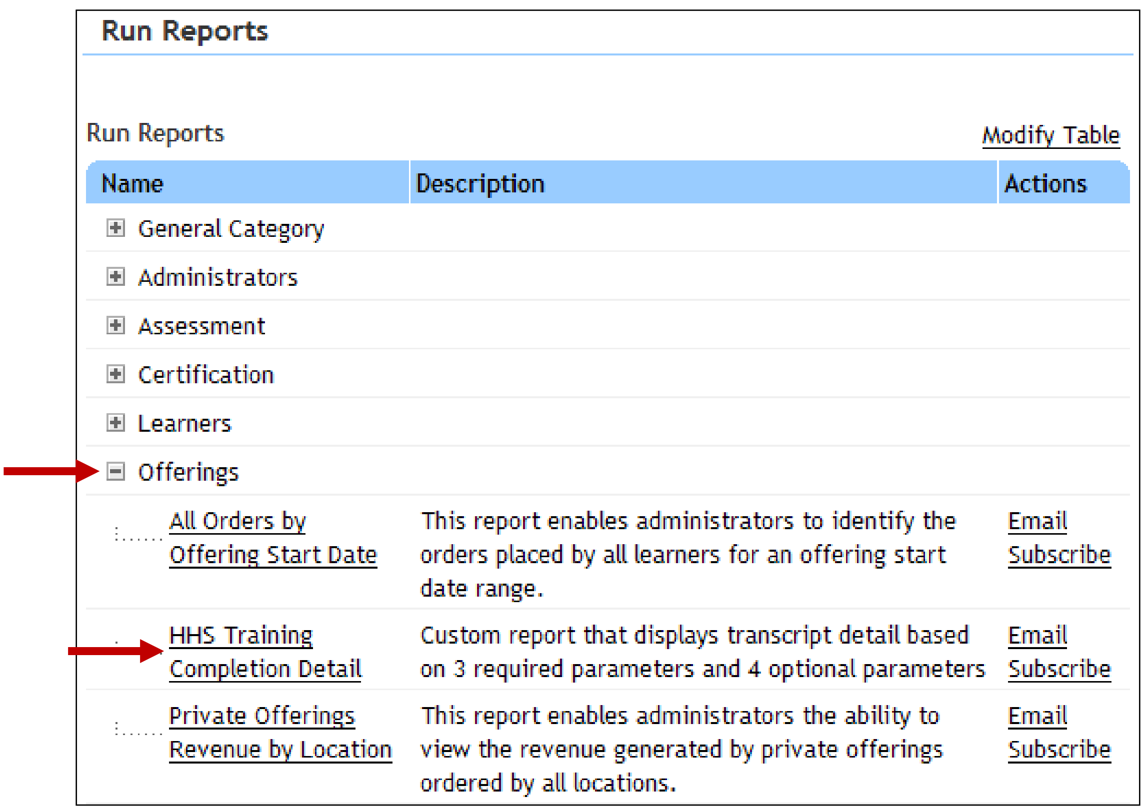
GENERATING REPORTS

REPORTS

A Human Capital 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 Human Capital Administrator – Orgs & Jobs. Below you will find instructions on how to work with reports in the LMS.

STEP-BY-STEP (GENERATE A REPORT)

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



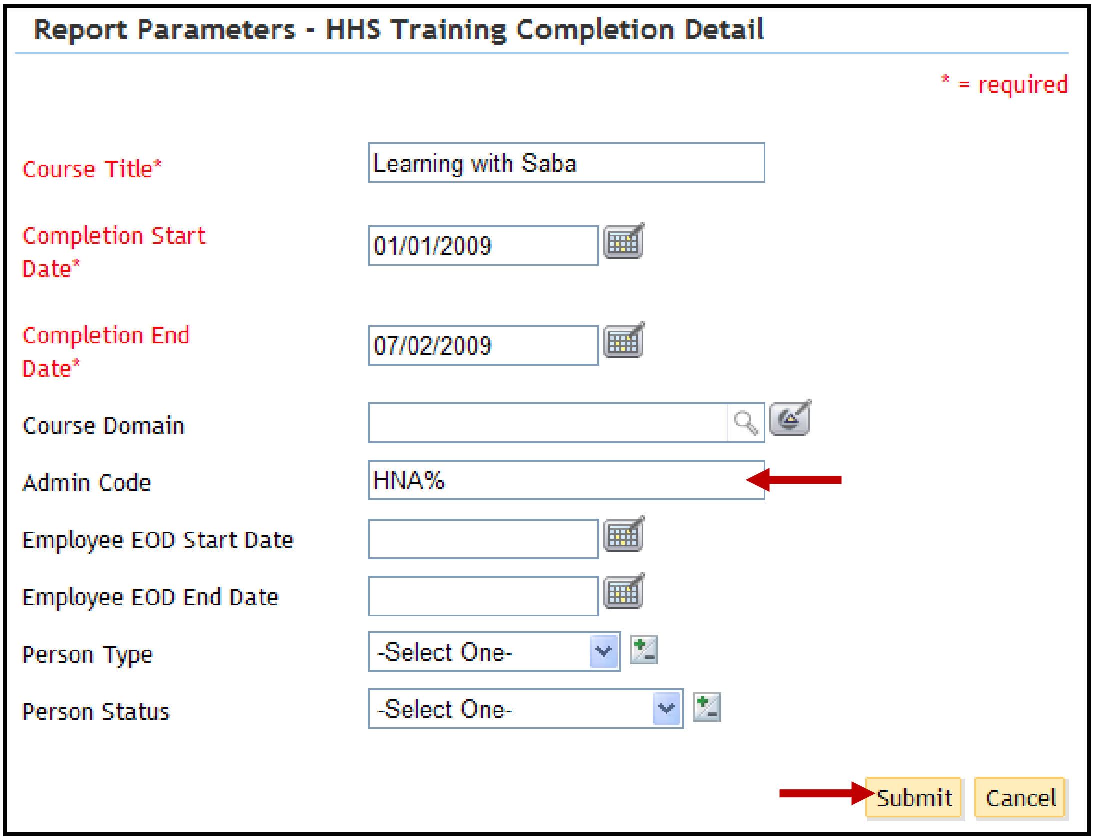
Human Capital Administrator

12. 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.

13. Click **Submit**.



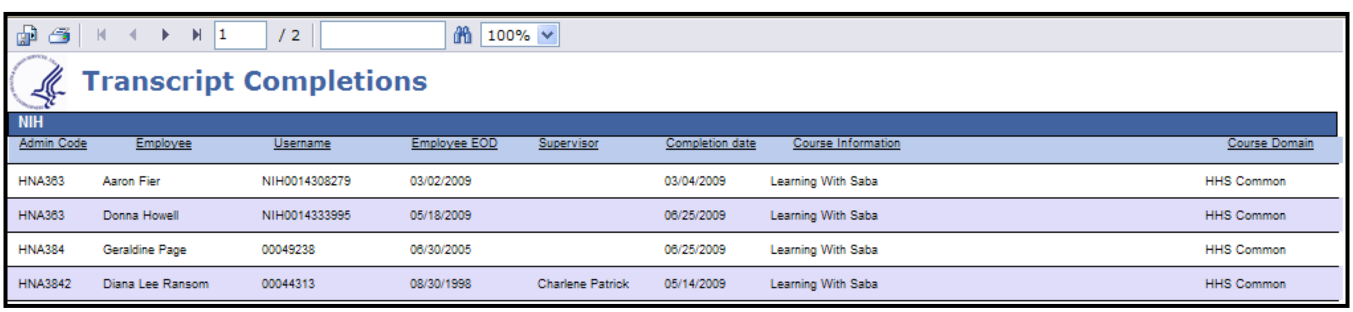
Report Parameters - HHS Training Completion Detail

* = required

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

Submit Cancel

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



1 / 2 100%

Transcript Completions

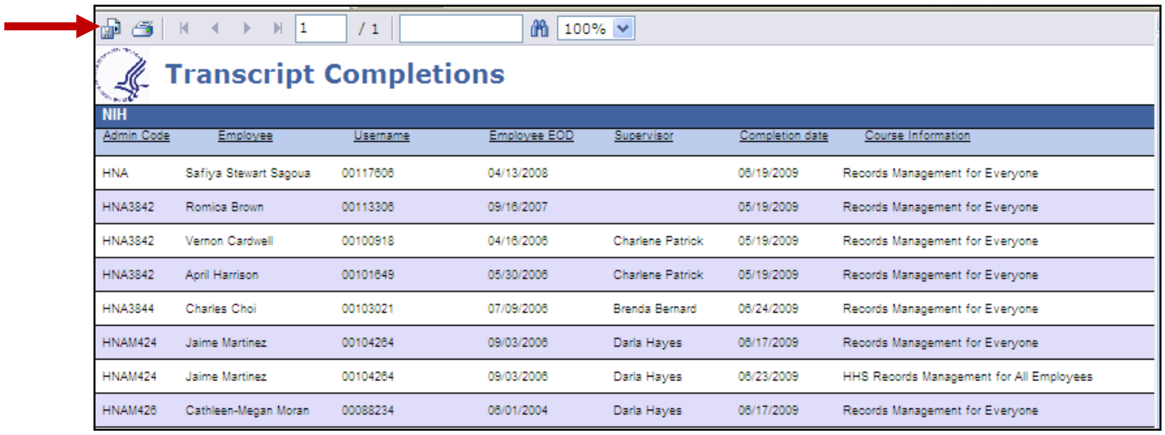
NIH

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

STEP-BY-STEP (EXPORT A REPORT)

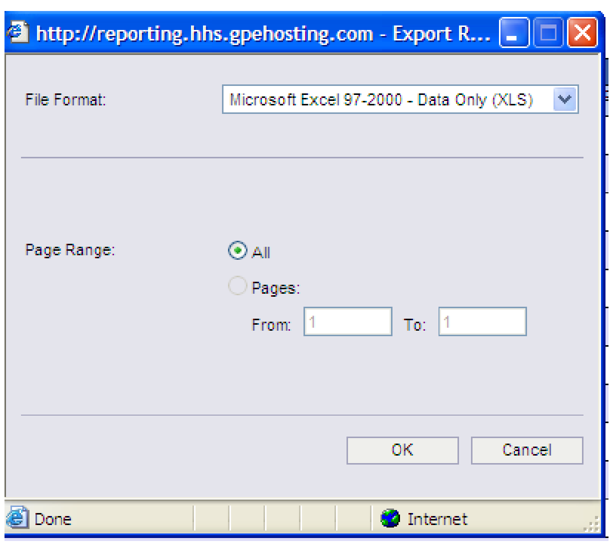
Once a report is generated, it can be exported from the LMS into other file formats. Of these, “Adobe Acrobat – PDF” and “Microsoft Excel 97-2000 – Data Only (XLS)” are the most commonly used.

1. Complete the steps in section **Step-By-Step (Generate a Report)** on page 107 of this guide.
2. Click the **export icon** in the upper left corner of the report.

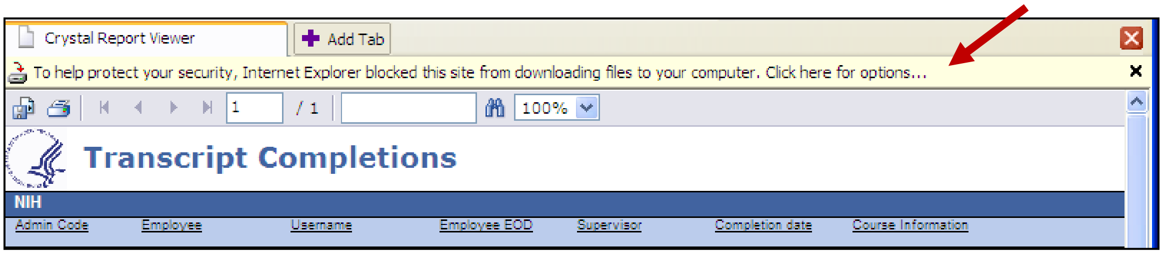


3. Select the **File Format** you want, indicate the **Page Range**, and click **OK**. The following two formats are the most commonly used:
   - The **Adobe Acrobat (PDF)** format will export a report ready for printing.
   - The **Microsoft Excel 97-2000 – Data Only (XLS)** format will export a report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

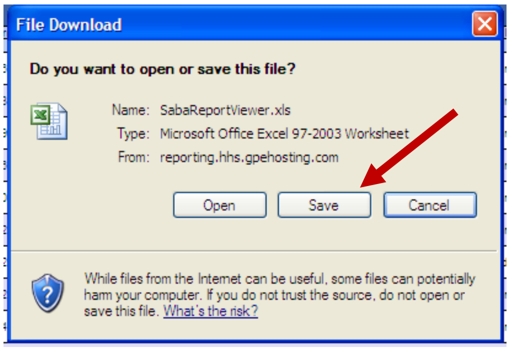
   NOTE: The Page Range option during export is not available for all export formats.



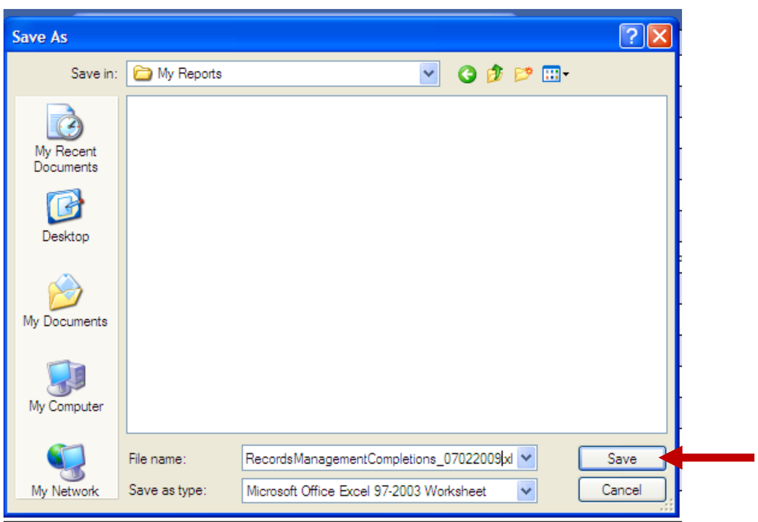
4. You may see the following browser warning. Click the **yellow warning bar** and select **Download File**. Repeat Step 2.



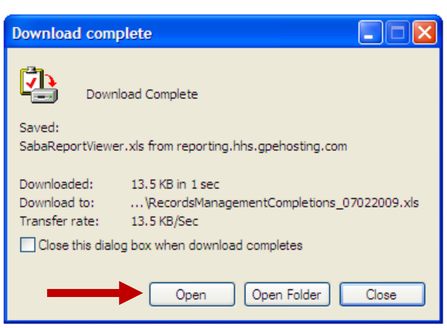
5. You will be prompted to open or save the file. Click **Save**.



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

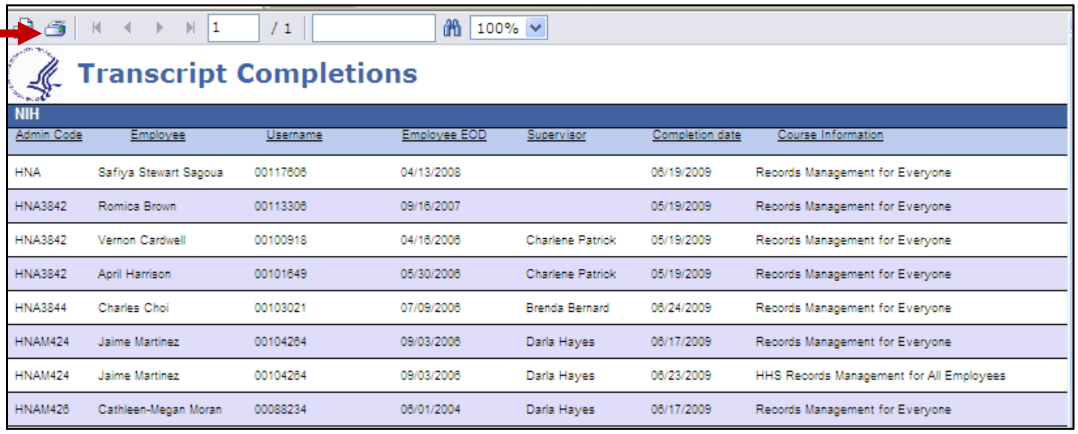


7. You will receive a prompt when the download is complete. Click **Open** to view the report file you just downloaded.



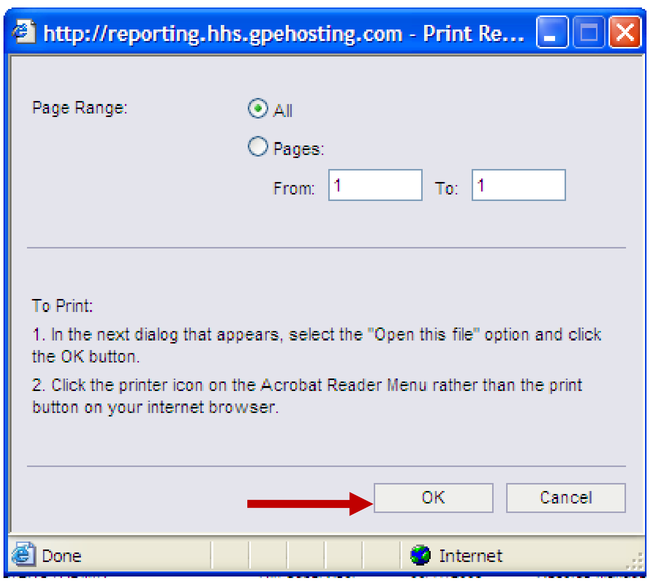
STEP-BY-STEP (PRINT A REPORT)

1. Complete the steps in section **Step-By-Step (Generate a Report)** on page 107 of this guide.
2. Click the **print icon** in the upper left corner of the report.

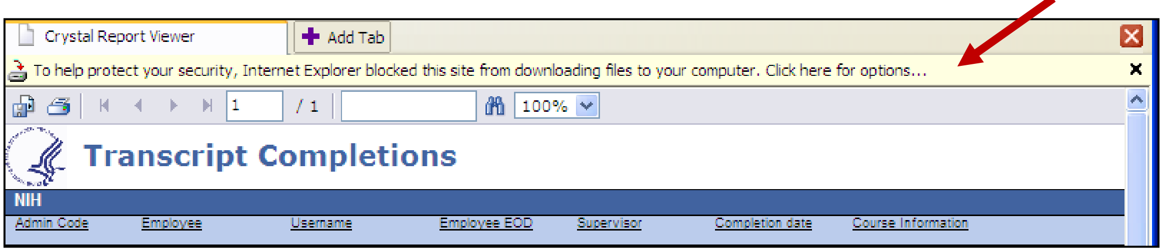


Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information
HNA	Safiya Stewart Sagoua	00117606	04/13/2008		06/19/2009	Records Management for Everyone
HNA3842	Romica Brown	00113306	09/16/2007		05/19/2009	Records Management for Everyone
HNA3842	Vernon Cardwell	00100918	04/16/2006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

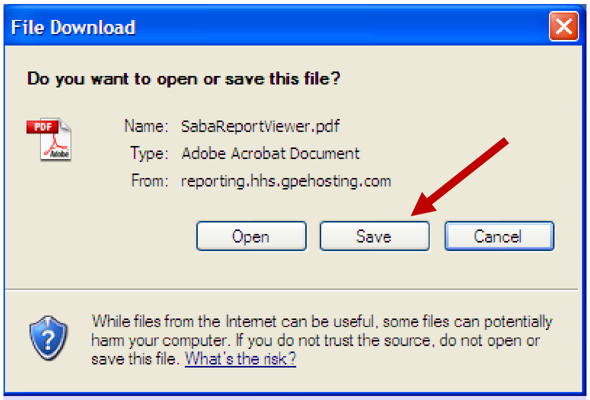
3. Indicate the **Page Range** you want, and click **OK**.



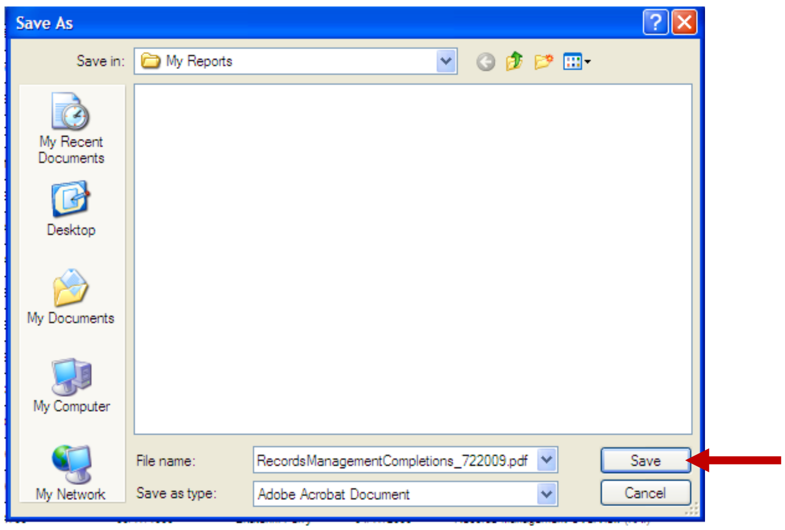
4. You may see the following browser warning. Click the **yellow warning bar** and select **Download File**. Repeat Step 2.



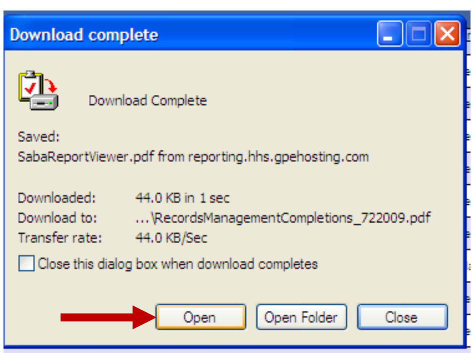
5. You will be prompted to open or save the file. Click **Save**.



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



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

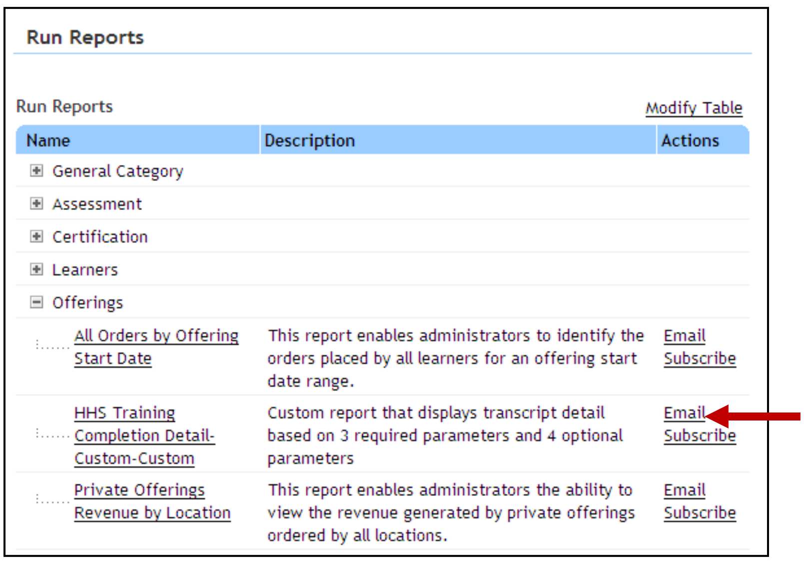


8. Click the **Adobe Reader print icon** to send the report to your printer.

STEP-BY-STEP (EMAIL A REPORT)

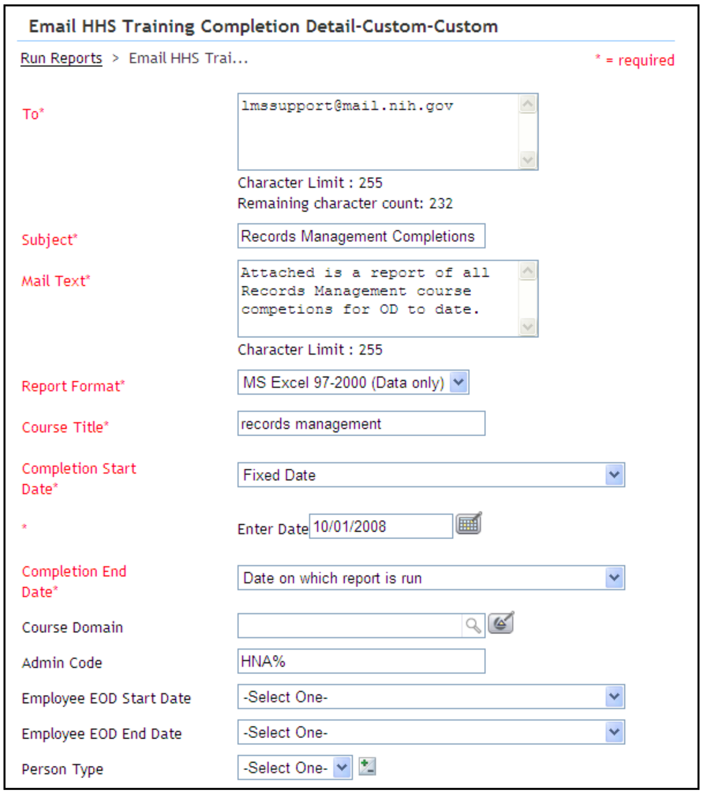
The LMS allows reports to be emailed, on-demand, to any valid email address. Those who receive the email do not need to log on or have access to the LMS in order to view the emailed report.

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.

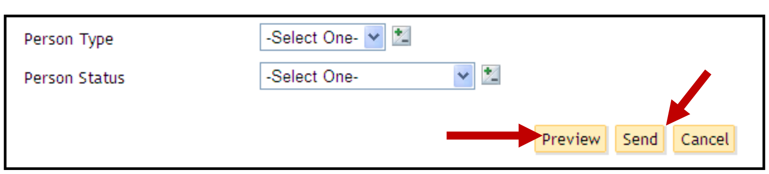


5. Enter one or more recipient email addresses in the **To** field. (Separate multiple emails with either a comma or semi-colon)

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



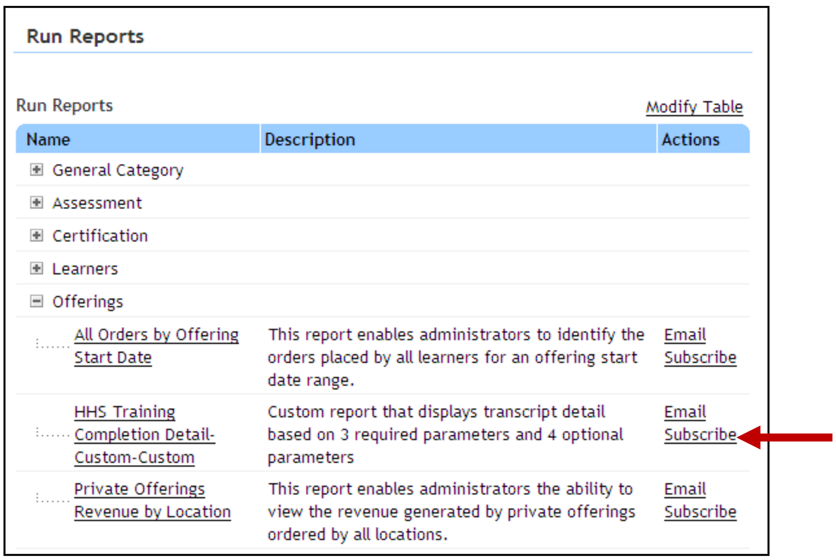
7. Choose a **Report Format** from the drop-down choices.
8. Enter all or part of the **Course Title**.
9. Choose from the following drop-down choices for **Completion Start Date** and **Completion End Date**.
    - Selecting **Date on which report is run** for both start and end date fields, returns only get data gathered for the day the report is generated.
    - Selecting **Number of days before the date on which report is run** for the completion start date and **Date on which report is run** for the completion end date, returns data from the number of days indicated up to the date the report is run.
    - Selecting **Fixed date** for both fields returns data gathered between those two dates only.
10. Enter your IC's **Admin Code** to limit returns to your IC only.
11. Click **Preview** to see the report based with the parameters you entered.
12. Click **Send** to email the report to recipients.



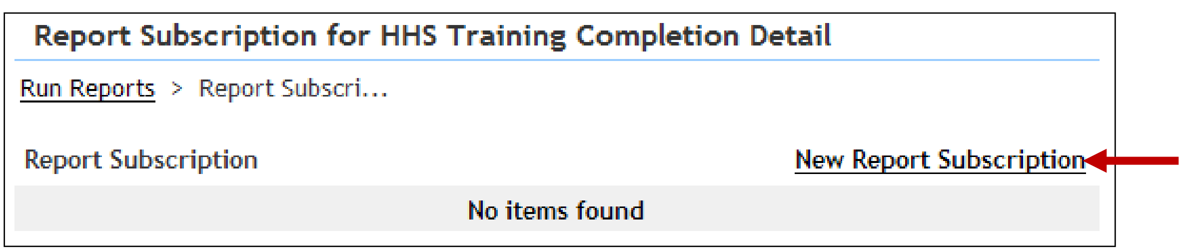
STEP-BY-STEP (SUBSCRIBE TO A REPORT)

Report subscriptions in the LMS allow reports to be emailed at scheduled intervals, to any valid email address. Those who receive the email do not need to log on or have access to the LMS in order to view the emailed report.

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

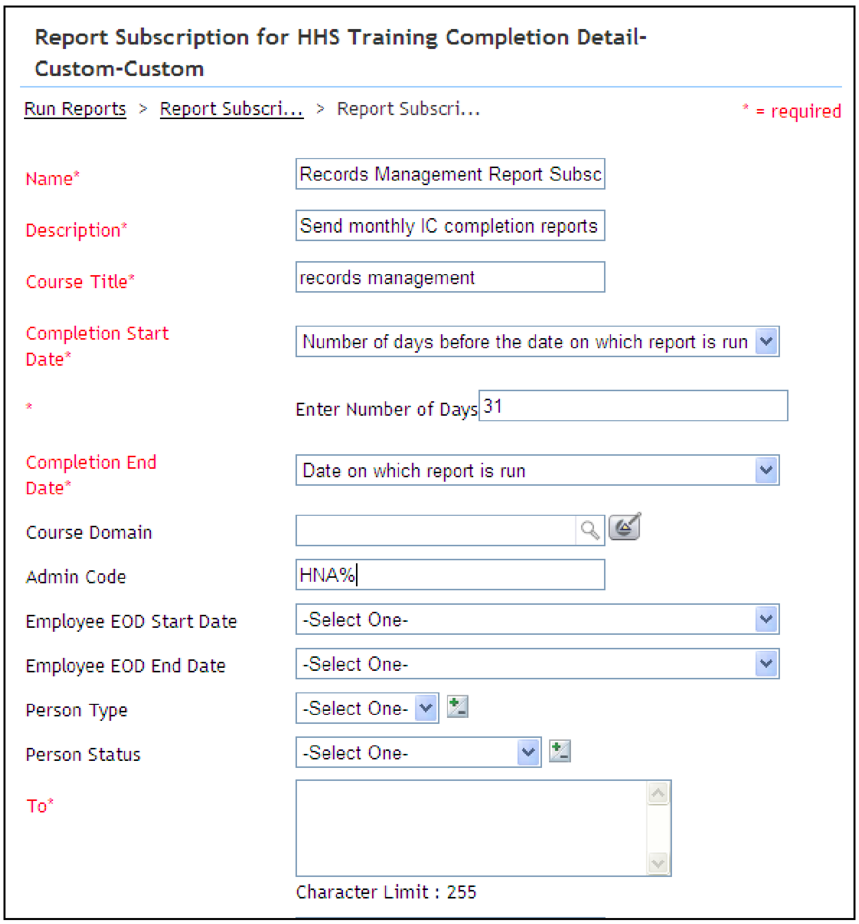


5. Click the **New Report Subscription** link.



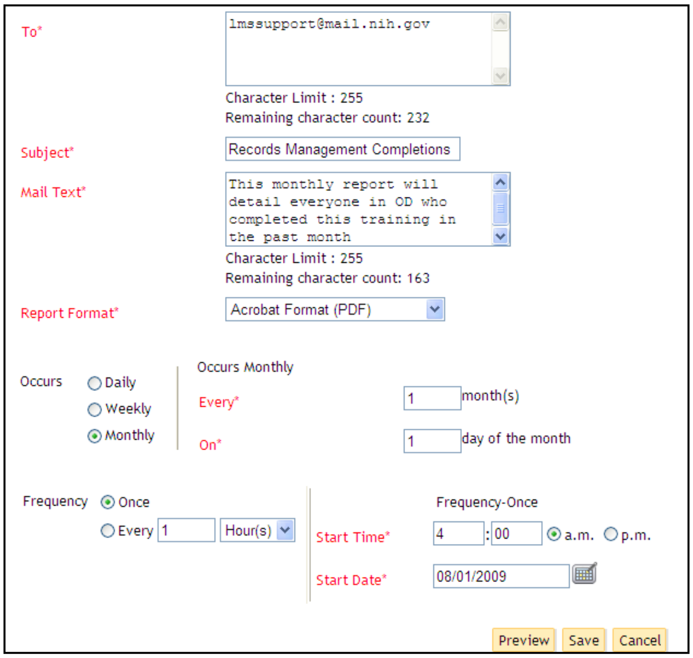
6. Enter a **Name** for the report subscription and a meaningful **Description**.
7. Enter all or part of the **Course Title**.

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



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

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



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

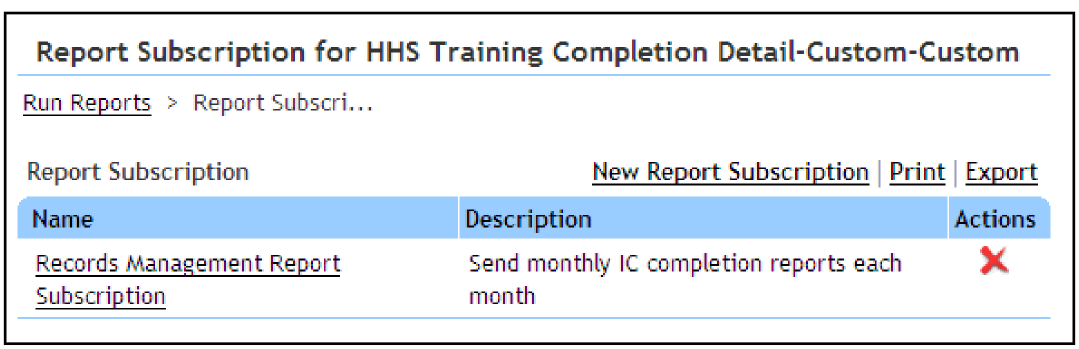
13. Select whether you want the report to email **Daily, Weekly**, or **Monthly**, and indicate the number for each.

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

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

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

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



HELPFUL INFORMATION

LINKS AND RESOURCES

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

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

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

NIH LMS ADMINISTRATOR HELP CONTACTS

Please use the HHS Learning Portal Help Desk contact information about for learners having trouble logging on to the LMS and other technical issues. Feel free to contact the email below if you are having problems performing your Human Capital Administrator tasks in the LMS. This email is maintained by the NIH LMS Team.

LMSSupport@mail.nih.gov

Human Capital Administrator

APPENDIX A – ORGANIZATION CODES

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

HN	All 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

Human Capital Administrator

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	04:30
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
ID*	Unique ID that identifies this entry	User Initials + Completion Date = JM09132008 where user = Jaime Martinez and Completion Date = 09/13/2008
Location	Location where course was taken. It could be a building or a city.	Examples: **Executive Plaza North** or **Rockville**
Marked Complete by	Search for the username of the person entering this	At first your username will display but once the record is saved the

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
	record (yourself).	field will display your name.
Continued Service Agreement Required Indicator (1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Accreditation Indicator (1102)	Indicates that the course has been accredited by an accreditation body.	N => No NA => Non Applicable Y => Yes
Training Accreditation Organization Type (1103)	The name and description of the accreditation organization	**Leave empty** if unknown.
Course ID From Vendor (1105)	The course ID as assigned by the vendor	**Leave empty** if unknown.
EHRI: Training Source Type (1120)	Source of the training which has been completed by the employee.	Foreign Governments and Organizations; Government External; Government Internal; Government State/Local; Non-government
EHRI: Default Training Purpose (1122)	Code representing the purpose of the training completed by the employee	Develop Unavailable skills; Future Staffing Needs; Improve Present Performance; Mandatory Training; New Work Assignment; Program/Mission Change; Retention
EHRI: Default Training Type (1124)	Code for the type of training which has been completed by the employee.	Acquisition; Adult Basic Education; Agency Required Training; Basic Computer Training; etc. ***There are more options available in this drop-down***
EHRI: Training Credit (1126)	Amount of academic credit hours or continued education units earned by the employee for the completed training. This should match either credit hours or CPE hours. This value is used for reporting to EHRI.	If amount of credit is known, input the number. If not available or not applicable input 0.
EHRI: Training Credit Designation Type (1127)	Code for the type of academic credit hours or continued education units earned by the employee for the completed training course.	Continuing Education Units, Graduate Credit; NA; Post Graduate Credit; Undergraduate Credit
EHRI: Training Delivery Type (1129)	Code for the type of training delivery for the training course completed by the employee.	Blended; Conference or Retreat; Correspondence; Instructor Lead; On the Job; Technology based
EHRI: Training Credit Type Code (1131)	Code representing the type of credit hours the employee received for the completed training.	CPEs; Continuing Education Unit; NA; Quarter Hours; Semester Hours
Instructor Competencies (1200)	Description of areas the instructor should be competent in to teach the class.	If don't have any particular information on competencies for the instruction, leave empty.

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Multilingual Course (1201)	List of alternate languages for the course	Input the name of the other language the course was provided in. If not known or if it wasn't delivered in another language, **leave empty**.
Internal or External Course (1202)	Determine if the course is external or internal to the organization	External, Internal
Training Certification Type (1211)	Enter the type of certification earned after completing the course.	If any available enter the name of the certification, if don't know or if no certification was earned, **leave empty**.
Course Development Cost (1220)	The cost for developing the course. This only applies for internally developed courses the Federal Organization sponsored.	If no cost were incurred, **leave empty**.
EHRI: Estimated Training Tuition and Fees Cost (1221)	The cost of the training tuition and fee for training completed by the employee that was paid for by the Federal Government.	Enter the total cost paid for taking the course, if none available or no cost were incurred, input **0**.
EHRI: Training Materials Cost (1222)	Cost to the Government for the training materials used during the training unit completed by the employee. This includes all direct costs associated with purchasing the training materials used by the employee that is in addition to the tuition cost. It can include but is not limited to costs of supplies, cost of equipment, and cost of software used by the student during the training event.	Enter the total cost of training materials, if none available or no cost were incurred, input **0**.
EHRI: Continued Service Agreement Required Indicator(1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Duty Hours (1101)	Number of employee duty hours the employee used to complete the training unit.	Enter the amount of duty hours, if none available or none duty hours were used, input **0**.
EHRI: Training Non Duty Hours (1102)	Number of employee non-duty hours for the completed training course.	Enter the amount of non duty hours, if none available or none duty hours were used, input **0**.
EHRI: Training Per Diem Cost (1103)	Cost of the per diem (meal, lodging, misc. expenses) for training completed by the employee that was paid for by the Federal Government.	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no per diem was allotted, input **0.00**
EHRI: Training Travel Cost (1104)	Cost for the travel, excluding per diem, for training completed by the employee that was paid for by the Federal Government	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no travel cost was allotted, input **0.00**
EHRI: Training Nongovernment Contribution	Cost contributed by the employee or other non-government organizations for the training completed by	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no nongovernment contribution was

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Cost (1105)	the employee.	allotted, input **0.00**
EHRI: Training Travel Indicator (1106)	Indicates if the employee traveled to attend the training course.	Y=Yes N=No, NA=Non Applicable
EHRI: Continued Service Agreement Expiration Date (1230)	The date to which an employee is obligated to remain in service as a stipulation for taking the training course.	If date applicable, enter it in the following format: MM/DD/YYYY. If not applicable or if unknown, enter **NA**.
Continuing Education Credits	If a field of study has been set up in the LMS for continuing education credits, you will be able to select it here.	Choose from availabilities in the LMS
Learners	Specify the learner(s) to whose transcript(s) this item should be recorded	Name, Score, Grade, Completion Status
Competencies	Specify whether any competencies were gained by the completion of the class	Choose from availabilities in the LMS and indicate proficiency level attained

Human Capital Administrator

APPENDIX C – HHS LEARNING PORTAL DOMAIN STRUCTURE