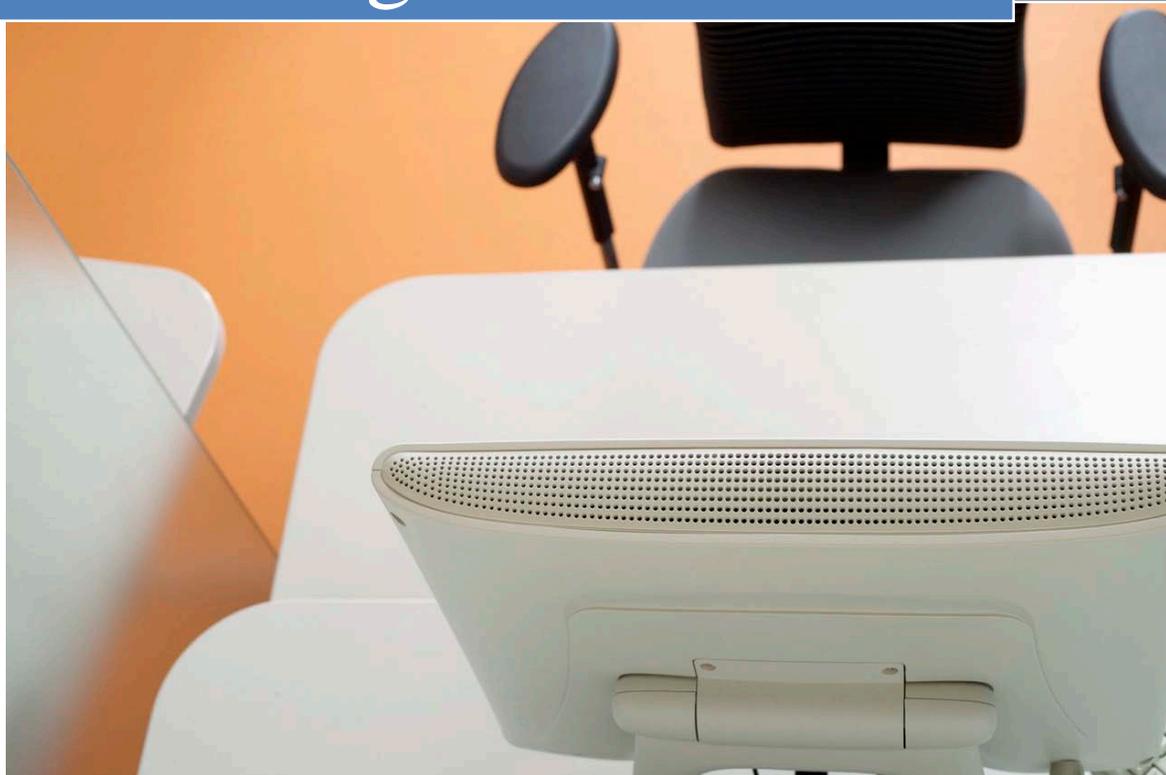


HHS Learning Portal

Training Administrator



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

HHS LEARNING PORTAL TRAINING ADMINISTRATOR

Version 1.0



National Institutes of Health Training Center

National Institutes of Health Training Center, Rockville 20852

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

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TRAINING 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.)

Training Administrator

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

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

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

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

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

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

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

SECURITY ROLES

Security Roles further define the permissions of individual users in a domain. Most of the security roles in the LMS are ‘tied’ to the domain (e.g., a user assigned the Training Administrator security role at the NIH domain has permission to manage NIH courses, as well as everything in NIH sub-domains).

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

Domain-Specific Security Roles include:

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

Training Administrator

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

TRAINING ADMINISTRATOR ROLE

The LMS Training Administrator role is for those who manage courses, offerings, resources, certifications, and curricula. With Training Administrator privileges you will be able to do the following:

- Create/edit locations, facilities, rooms, equipment, and inventory items
- Create/edit courses
- Create/edit offerings
- Create/edit catalog categories
- Manage a roster
- Manage learning requests
- Register learners for offerings
- Place orders for multiple learners
- Create/edit audience types
- View enrollments, curricula, certifications and/or courses assigned to others
- View and edit transcripts for other learners
- Add external learning to transcripts
- Create/edit certifications and curricula
- Generate various reports

This user manual will guide you through the process of using the privileges assigned to you as a Training Administrator.

LMS TERMS AND DEFINITIONS

Audience Types – Audience Types are used to group learners in the system. Similarly, Audience Sub-Types allow for further grouping of learners within an Audience Type. These groups can then be used to control access to learning offerings in the LMS by associating audience types and subtypes at the course level; attaching audience types with seat percentages at the delivery type level; and specifying seat numbers for audience subtypes at the offering level.

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

Facility – A facility is the actual building at a specific location. An example would be Building 31, which is part of the NIH Main Campus location.

Room – A room is a designated space, such as a conference room, classroom, or auditorium, found within a specific facility. An example would be Conference Room A in Building 31.

Course – A course is organized training with planned objectives for learners to complete. Courses may be offered using a variety of delivery types and may have multiple offerings.

Offering – An offering is the specific date and time a course will be presented to learners. In most cases, offerings are limited to specific dates, times, locations, facilities, and rooms. The exception would be self-paced courses, such as online training, where the offering is available to the learner at any time. Offerings are often referred to as classes.

Session Template – A session template is a general format used to show the learner when a course is being offered. Session templates should contain the day and time the offering will be held. Examples of session templates are:

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

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

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

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

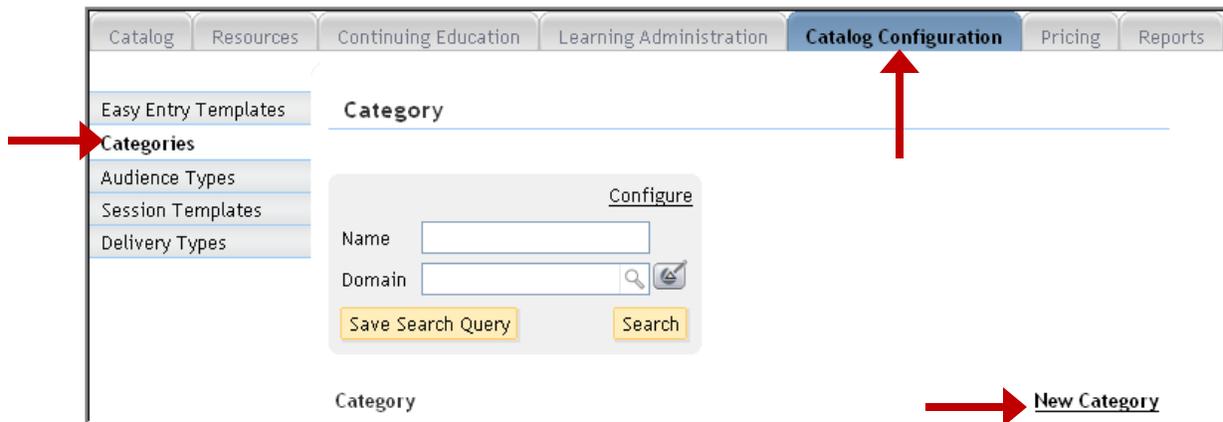
CATALOG CONFIGURATION

CATEGORIES

Categories are used to group courses so that learners can find them easily when searching the catalog by category. Most categories have already been created. Search the existing categories first before creating a new one.

STEP-BY STEP (CREATING CATEGORIES)

1. Select the **Training Administrator** role from the **Go To:** drop-down menu
2. Click the **Catalog Configuration** tab.
3. From the left navigation bar, click the **Categories** link to display the *Category* page.
4. Click the **New Category** link to display the *New Category* page.



5. In the **Name** field, enter the name of your category.
6. In the **Description** field, enter a brief explanation of the category. (optional)
7. From the **Parent Category** field, select the category under which you want your category to appear in the catalog (e.g., "1 – NIH Courses")

Training Administrator

8. Click **Save**.

Category Details: LMS Training  

* = required

Name*

Description

Disable Category

Parent Category  

Domain NIH

Owner  [Add Owner](#)

No items found



9. Once the Category has been saved, you can add an Owner for the category by clicking the **Add Owner** link and searching for the person that will manage this category.

NOTE: You may disable a category at any time by clicking the **Disable Category** checkbox.

STEP-BY STEP (DELETING CATEGORIES)

1. Search to locate the Category that you want to delete.
2. From the *Actions* column, click the **Delete** link.
3. From the popup window, click **OK**.

The screenshot shows a web interface for managing categories. At the top, there is a search form with fields for 'Name' (containing 'LMS Training') and 'Domain'. Below the search form are buttons for 'Save Search Query' and 'Search'. To the right of the search form is a 'Configure' link. Below the search form is a table with the following structure:

Category				New Category	Print	Export	Modify Table
Name	Description	Domain	Actions				
LMS Training	Category for all LMS Training	NIH	Delete				

A red arrow points to the 'Delete' link in the 'Actions' column of the table.

IMPORTANT! It is recommended that you disable categories that you don't wish to use rather than delete them. Other courses that you are unaware of may use the category.

MANAGING RESOURCES

LOCATIONS

Locations are used in the system primarily to deliver learning in your education services operation and optimize the use of learning resources in your organization. Use locations to define places where scheduled offerings are delivered and where resources are located.

Locations are required for instructor-led training, and identify the places where scheduled learning offerings (i.e. classes) are delivered. Locations must be assigned to all instructor-led scheduled offerings. 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.

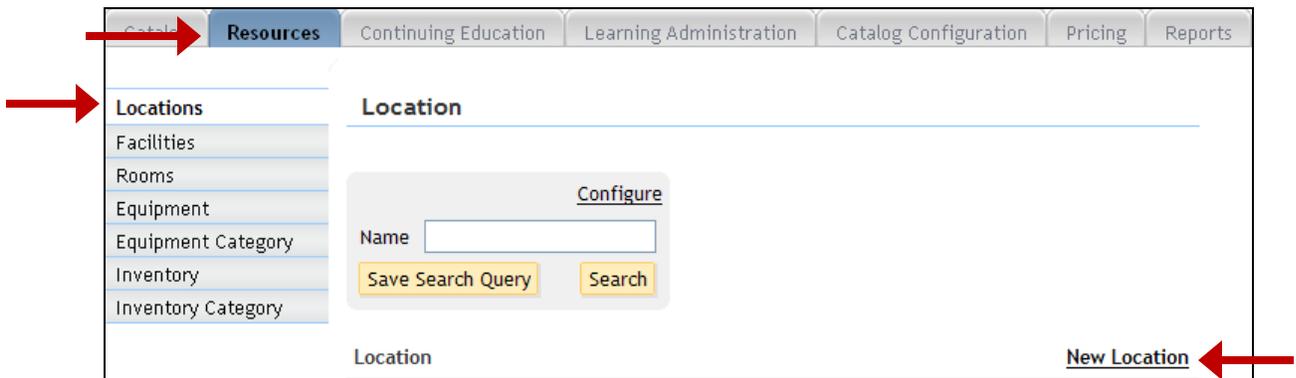
Some examples of locations are:

- 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 (CREATING LOCATIONS)

4. Select the **Training Administrator** role from the **Go To:** drop-down menu
5. Click the **Resources** tab.
6. From the left navigation bar, click the **Locations** link to display the Location page.
7. Click the **New Location** link to display the New Location page.



8. Enter as much information as is available for the new location.
9. Verify that the **Domain** field specifies **NIH**.

Training Administrator

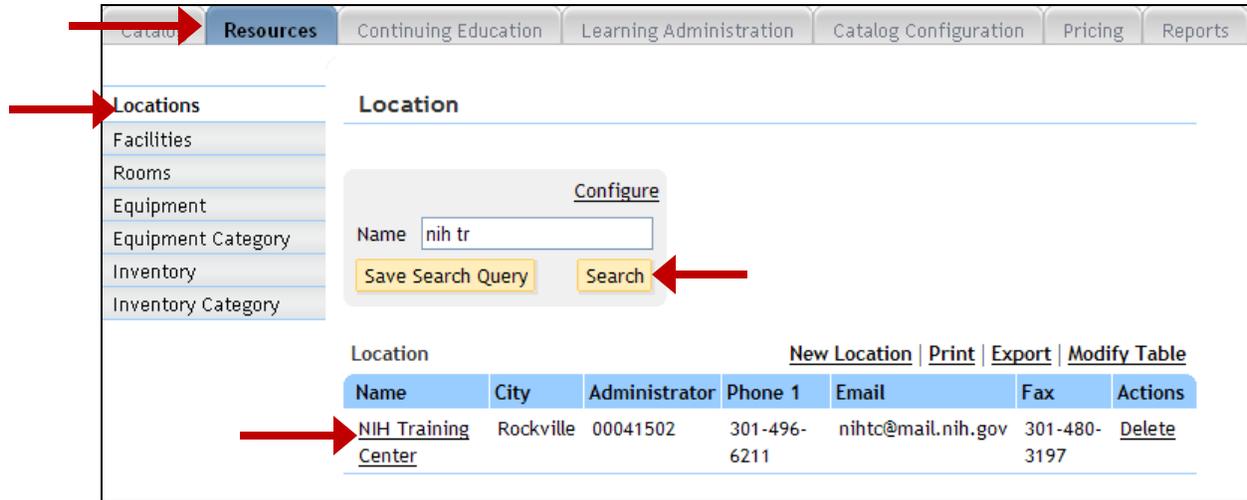
10. From the bottom of the page, click **Save**.

Locations	New Location	
Facilities		* = required
Rooms	Number	
Equipment	Name*	NIH Training Center
Equipment Category	Enabled	<input checked="" type="checkbox"/>
Inventory	Address 1	6120 Executive Drive
Inventory Category	Address 2	
	City	Rockville
	State	Maryland
	Zip	20852
	Country	USA
	Administrator	<input type="text"/>  
	Phone 1	301-496-6211
	Phone 2	<input type="text"/>
	Email	<input type="text"/>
	Fax	<input type="text"/>
	Department Id	<input type="text"/>  
	Domain*	NIH  
	TimeZone*	(GMT-05:00) Eastern Time (US & Canada) 
	Other Information	
	Description	NIH Training Center
		 

NOTE: From this screen, you may also uncheck the **Enabled** check box to disable the location. You can enable the location again at a later date by selecting the **Enabled** check box.

STEP-BY-STEP (MODIFYING LOCATIONS)

1. Select the **Training Administrator** role from the **Go To:** drop-down menu
2. Click the **Resources** 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. From the *Name* column of the *Location* search results table, click the name of the location you want to edit.
6. Modify the location details as needed.
7. From the bottom of the page, click **Save**.

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

1. Select the **Training Administrator** role from the **Go To:** drop-down menu
2. Click the **Resources** 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. From the *Name* column of the *Location* search results table, click the name of the location you want to edit.

Training Administrator

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

Location Details: NIH Training Center

Main | **Related Info**

Attachments [Add Attachment](#) | [Print](#) | [Export](#)

Attachment Name	Type	Category	Locale	Private	Actions
Direction to NIHTC	File	Directions	English	No	Edit Attachment Delete Attachment

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

Created by	Created On	Note
NIHCOMPETENCYADMIN	07/16/2009	Where to Contact NIHTC: NIH Training Center 6120 Executive Blvd., Suite 350 Rockville, MD 20892-7129 General information: 301-496-6211 E-mail: training1@od.nih.gov

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**. **IMPORTANT!** Notes are permanent and cannot be deleted.

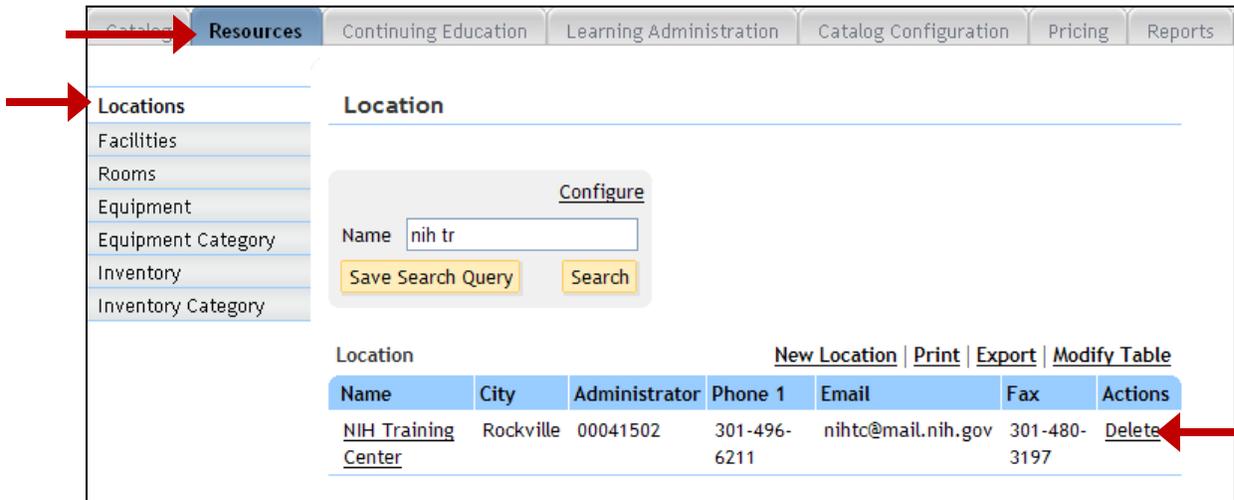
8. Click the **Main** tab.

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

STEP-BY-STEP (DELETING LOCATIONS)

IMPORTANT! You should only delete Locations that you created.

1. Select the **Training Administrator** role from the **Go To:** drop-down menu
2. Click the **Resources** 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. From the *Actions* column of the *Location* search results table, click the **Delete** link next to the location you want to permanently remove from the system.

NOTE: Locations that have classroom training associated with them cannot be deleted.

6. From the confirmation dialog box that opens, click **OK**.

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. In this case, 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.

Facilities are the actual buildings within a location. The facilities contain the rooms that will be used to hold the training classes. The facilities must be set up in advance, prior to creating and assigning them to scheduled offerings.

IMPORTANT! Please search for and modify existing facilities before creating new ones.

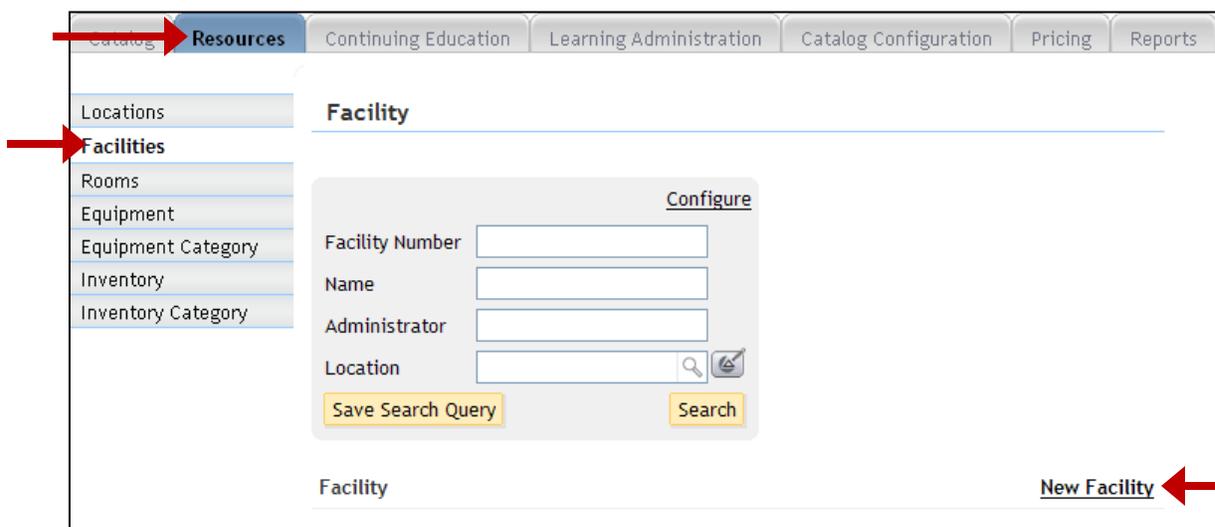
Some examples of Facilities are:

- EPS
- EPN

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

STEP-BY-STEP (CREATING FACILITIES)

1. Select the **Training Administrator** role from the **Go To:** drop-down menu.
2. Click the **Resources** tab.
3. From the left navigation bar, click the **Facilities** link to display the *Facilities* page.



4. Click the **New Facility** link to display the *New Facility* page.

Training Administrator

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.

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

The screenshot shows the 'New Facility' form in the Training Administrator interface. The form is titled 'New Facility' and is located under the 'Resources' tab. The form includes the following fields:

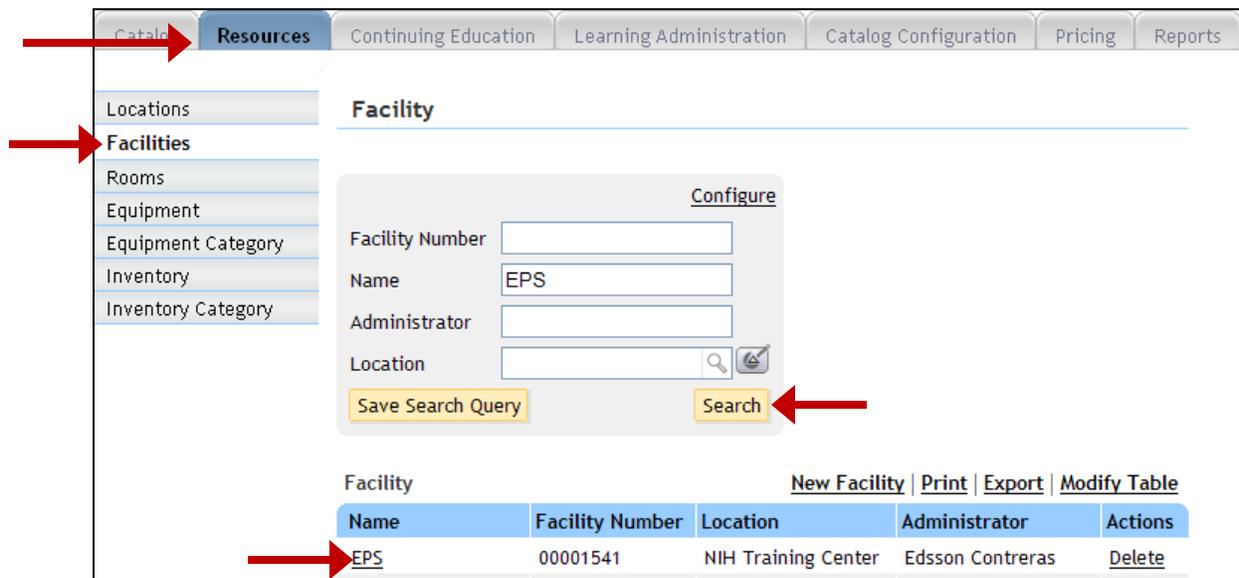
- Facility Number
- Name* (required): Executive Plaza South (EPS)
- Administrator*: John Doe
- Contact Phone: 301-496-6211
- Contact Fax
- Contact Email
- Address 1: 6120 Executive Blvd.
- Address 2
- City: Rockville
- State: Maryland
- Zip: 20852
- Country: US
- Corporate Number
- Disabled: (A red arrow points to this checkbox.)
- Location: EXECUTIVE BLVD (A search icon and a refresh icon are visible next to the input field.)
- Domain*: NIH (A search icon and a refresh icon are visible next to the input field.)

At the bottom right of the form, there are two buttons: 'Save' and 'Cancel'. A red arrow points to the 'Save' button.

NOTE: From this screen, you may also check the **Disabled** check box to disable the location. You can enable the location again at a later date by un-checking the **Disabled** check box.

STEP-BY-STEP (MODIFYING FACILITIES)

1. Select the **Training Administrator** role from the **Go To:** drop-down menu
2. Click the **Resources** 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. From the *Name* column of the *Facility* search results table, click the name of the facility you want to edit.
6. Modify the facility details as needed.
7. From the bottom of the page, click **Save**.

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

1. Select the **Training Administrator** role from the **Go To:** drop-down menu
2. Click the **Resources** 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 location for which you want to add a note or attachment and click **Search**.
5. From the *Name* column of the *Facility* search results table, click the name of the facility you want to edit.
6. Click the **Related Info** tab.

Training Administrator

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**.

8. Click the **Main** tab.

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

The screenshot displays the 'Facility Details: EPS' page. At the top, there are navigation tabs: 'Resources' (highlighted with a red arrow), 'Continuing Education', 'Learning Administration', 'Catalog Configuration', 'Pricing', and 'Reports'. On the left is a sidebar menu with items: 'Locations', 'Facilities' (highlighted with a red arrow), 'Rooms', 'Equipment', 'Equipment Category', 'Inventory', and 'Inventory Category'. The main content area has a title 'Facility Details: EPS' and two tabs: 'Main' (selected) and 'Related Info'. Below the tabs are three sections: 'Attachments', 'Notes', and 'Tasks'. The 'Attachments' section has a table with columns: Attachment Name, Type, Category, Locale, Private, and Actions. A red arrow points to the 'Add Attachment' link above the table. The 'Notes' section has a table with columns: Created by, Created On, and Note. A red arrow points to the 'Add Notes' link above the table. The 'Tasks' section shows 'No items found' and an 'Add Task' link.

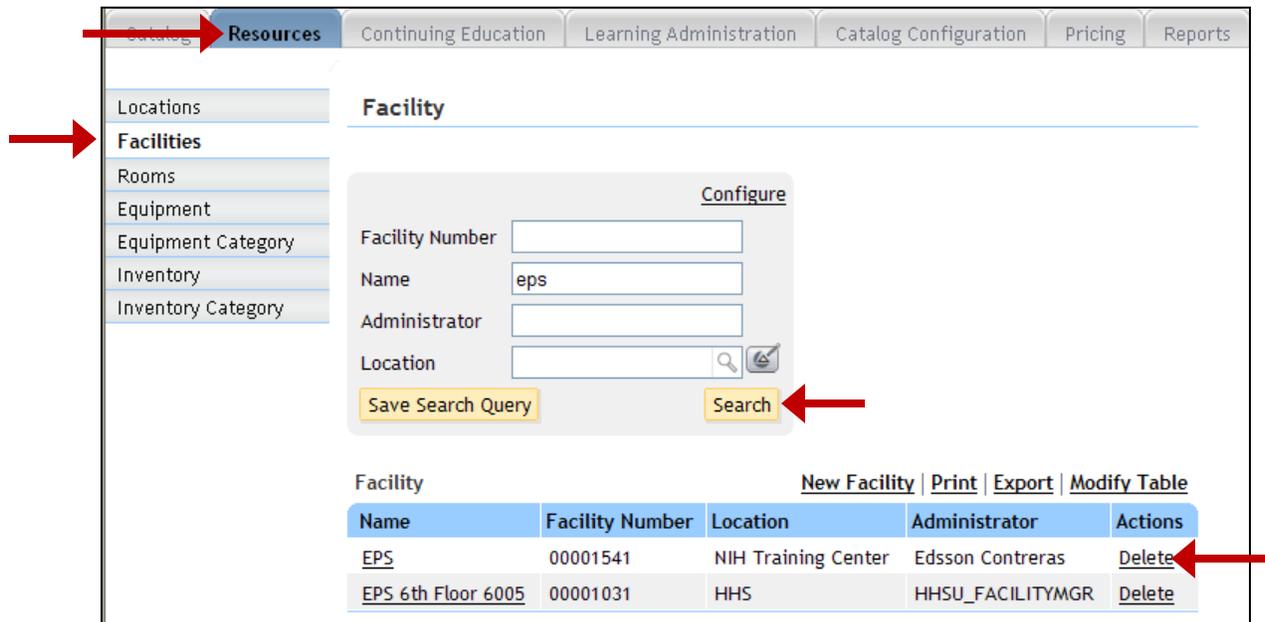
Attachment Name	Type	Category	Locale	Private	Actions
Parking Locations	File	Map	English	No	Edit Attachment Delete Attachment

Created by	Created On	Note
NIHCOMPETENCYADMIN	07/16/2009	Primary & Alternative Occupant Emergency Coordinator (OEC) Phone & Rm # Larry Chloupek 594-3992 Rm 8088 Robin Brown 435-5225 Rm 5039
NIHCOMPETENCYADMIN	07/16/2009	Facility Manger: Jim Bullman 435-1646 or 252-8482

STEP-BY-STEP (DELETING FACILITIES)

IMPORTANT! You should only delete Facilities that you created.

1. Select the **Training Administrator** role from the **Go To:** drop-down menu.
2. Click the **Resources** 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 location for which you want to edit details and click **Search**.
5. From the *Actions* column of the *Location* search results table, click the **Delete** link next to the facility you want to permanently remove from the system.
6. From the confirmation dialog box that opens, click **OK**.

ROOMS

Rooms are one of the learning resources used to deliver learning in your education services operation. Rooms are always associated with a facility. You assign rooms as resources to instructor-led offerings.

Eligible rooms for an offering are determined by the location of the offering. When you assign a room to an offering you can specify additional reservation information for the room. Rooms must be set up prior to assigning them to scheduled offerings.

IMPORTANT! Please search for and modify existing rooms before creating new ones.

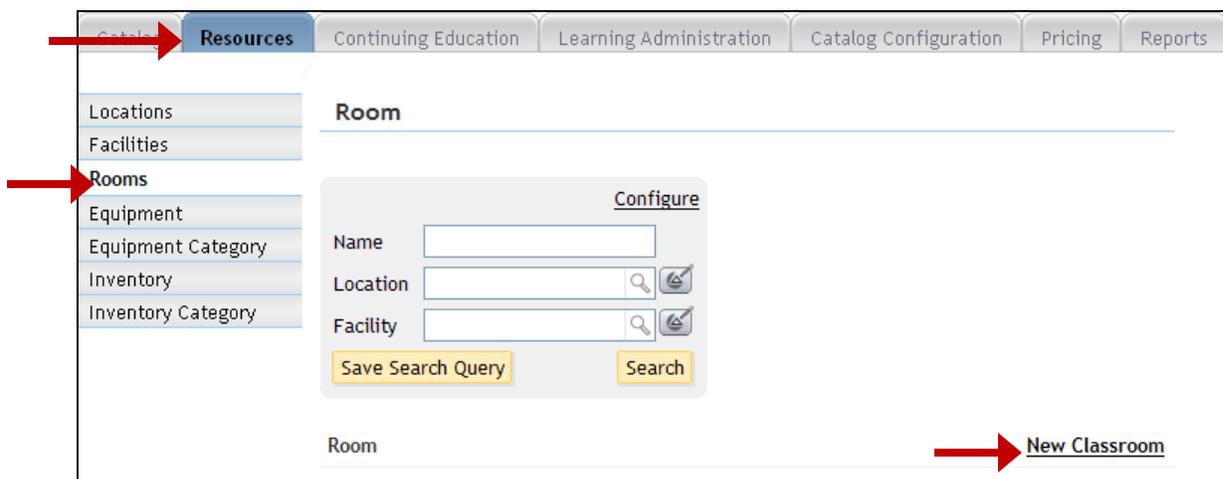
Some examples of rooms are:

- Suite 350 conference room
- Classroom 1
- Classroom 2

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

STEP-BY-STEP (CREATING ROOMS)

1. Select the **Training Administrator** role in the **Go To:** drop-down menu.
2. Click the **Resources** tab.
3. From the left navigation bar, click the **Rooms** link to display the *Room* page.
4. Click the **New Classroom** link to display the *New Room* page.



5. Enter as much information as is available for the new room.
6. Verify that the **Domain** field specifies **NIH**.

Training Administrator

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

The screenshot shows the 'New Room' form in the Training Administrator interface. The form is titled 'New Room' and is located under the 'Resources' tab. The form includes the following fields:

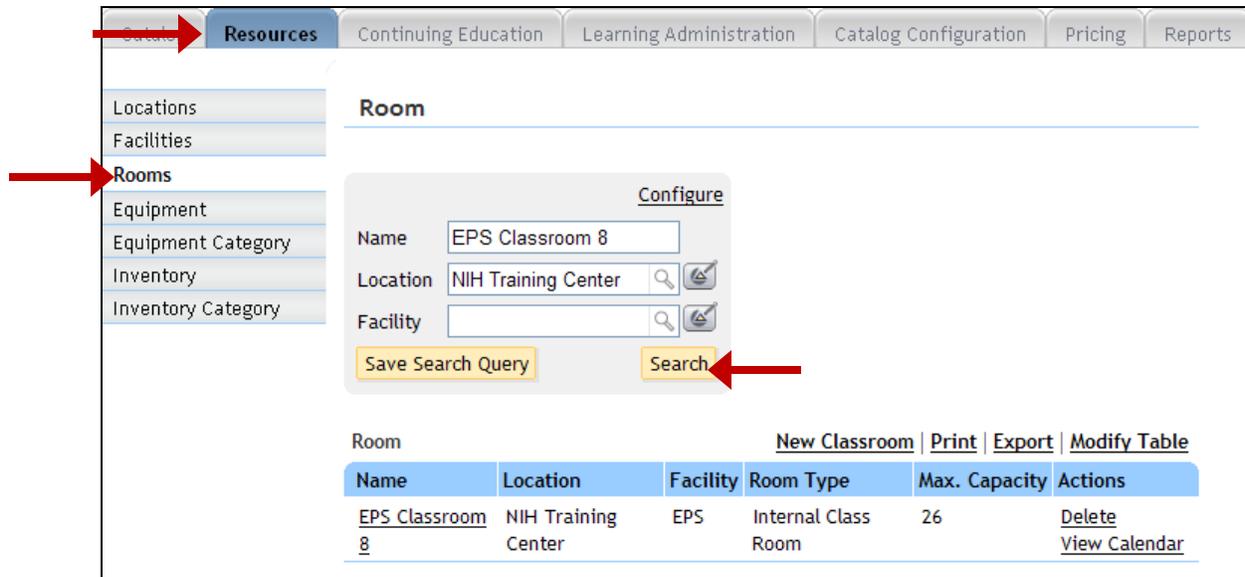
- Name* (Classroom 8)
- Room ID
- Max. Capacity* (30)
- Location* (NIH Training Center)
- Disable (checkbox, indicated by a red arrow)
- Administrator
- Room Type* (Internal Class Room)
- Facility (EPS)
- Technical Support Contact
- Domain* (NIH)

Other Information fields include Description and Amenities. The form also includes 'Save' and 'Cancel' buttons at the bottom right, with a red arrow pointing to the 'Save' button. A legend indicates that '*' denotes required fields.

NOTE: From this screen, you may also check the **Disabled** check box to disable the room. You can enable the room again at a later date by un-checking the **Disabled** check box.

STEP-BY-STEP (MODIFYING ROOMS)

1. Select the **Training Administrator** role from the **Go To:** drop-down menu
2. Click the **Resources** tab.



3. From the left navigation bar, click the **Rooms** link to display the *Room* page.
4. In the **Name** field, type the name of a room for which you want to edit details and click **Search**.
5. From the *Name* column of the *Room* search results table, click the name of the room you want to edit.
6. Modify the room details as needed.
7. From the bottom of the page, click **Save**.

STEP-BY STEP (ADDING NOTES AND ATTACHMENTS TO ROOMS)

1. Select the **Training Administrator** role from the **Go To:** drop-down menu.
2. Click the **Resources** tab.
3. From the left navigation bar, click the **Rooms** link to display the *Room* page.
4. In the **Name** field, type the name of a room for which you want to add a note or attachment and click **Search**.
5. From the *Name* column of the *Room* search results table, click the name of the room 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**.

Training Administrator

- Click the **Main** tab.
- From the bottom of the page, click **Save**.

Resources Continuing Education Learning Administration Catalog Configuration Pricing Reports

Locations
Facilities
Rooms
Equipment
Equipment Category
Inventory
Inventory Category

Room Details: EPS Classroom 8

Main Related Info Schedule

Attachments [Add Attachment](#) [Print](#) [Export](#)

Attachment Name	Type	Category	Locale	Private	Actions
Classroom 8 Setup Requirements	File	Setup	English	No	Edit Attachment Delete Attachment

Notes [Add Notes](#)

No items found

Tasks [Add Task](#)

No items found

STEP-BY-STEP (DELETING ROOMS)

IMPORTANT! You should only delete Rooms that you created.

- Select the **Training Administrator** role from the **Go To:** drop-down menu.
- Click the **Resources** tab.

Resources Continuing Education Learning Administration Catalog Configuration Pricing Reports

Locations
Facilities
Rooms
Equipment
Equipment Category
Inventory
Inventory Category

Room

[Configure](#)

Name

Location [Search](#) [Clear](#)

Facility [Search](#) [Clear](#)

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

Room [New Classroom](#) [Print](#) [Export](#) [Modify Table](#)

Name	Location	Facility	Room Type	Max. Capacity	Actions
EPS Classroom 8	NIH Training Center	EPS	Internal Class Room	26	Delete View Calendar

- From the left navigation bar, click the **Rooms** link to display the *Room* page.
- In the **Name** field, type the name of a room for which you want to edit details and click **Search**.

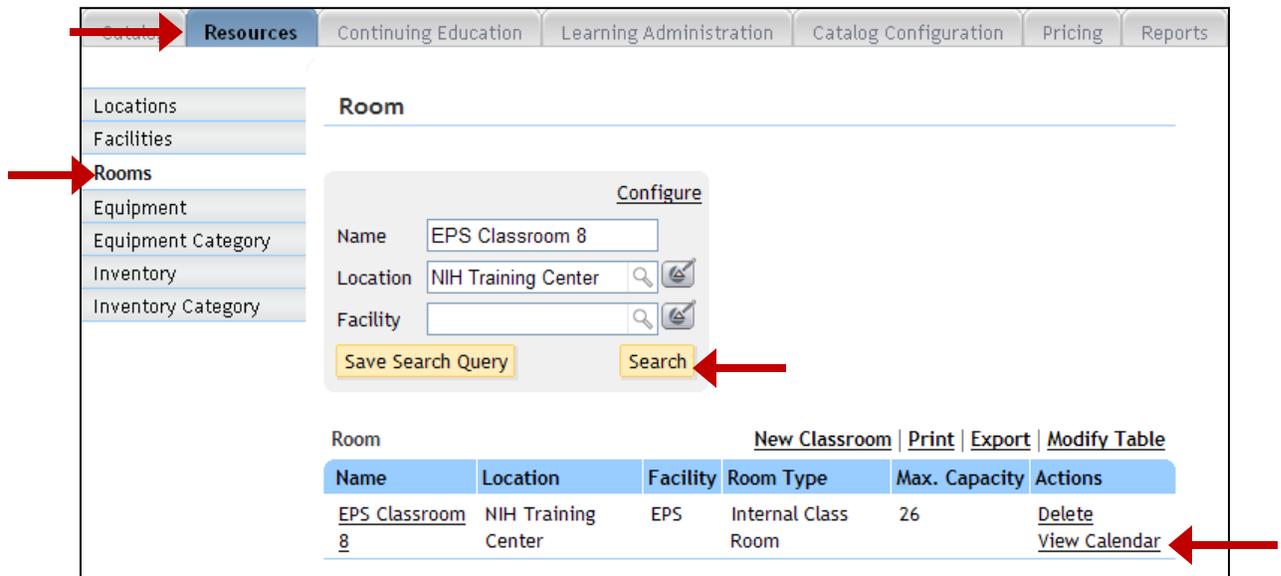
- From the *Actions* column of the *Room* search results table, click the **Delete** link next to the room you want to permanently remove from the system.
- From the confirmation dialog box that opens, click **OK**.

STEP-BY-STEP (VIEWING ROOM AVAILABILITY)

NOTE: The inclusion of location, facility, and room information in the LMS is for the purpose of communicating class location to Learners.

IMPORTANT! Designating a Room in the LMS does NOT reserve your room through NIH Events Management or the room owner. You will still need to reserve your resource as required outside of the LMS.

- Select the **Training Administrator** role from the **Go To:** drop-down menu.
- Click the **Resources** tab.
- From the left navigation bar, click the **Rooms** link to display the *Room* page.
- In the **Name** field, type the name of a room for which you want to view availability and click **Search**.



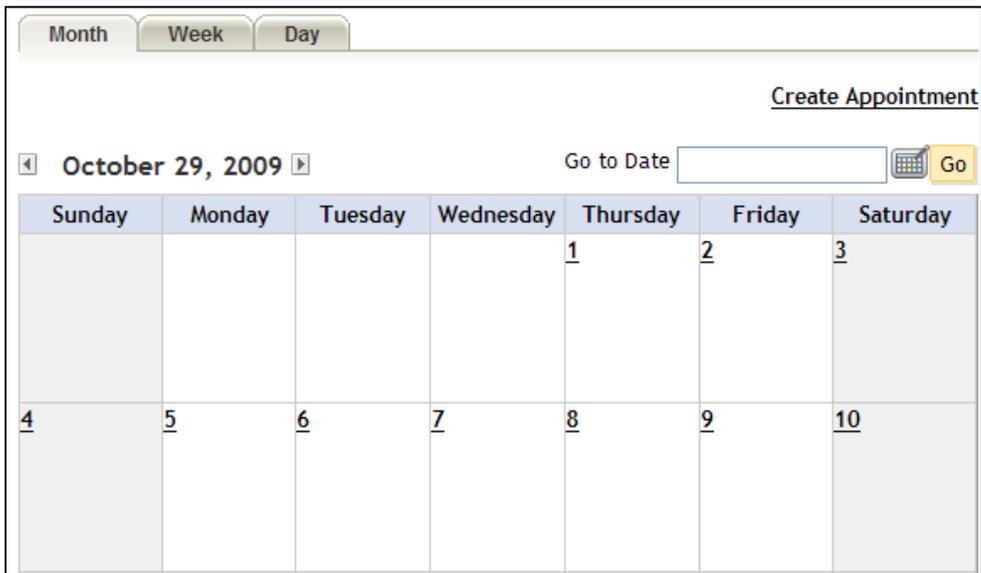
- From the *Name* column of the *Room* search results table, click the name of the room for which you want to view availability.

NOTE: Alternately, you can view the room's schedule in a calendar format by clicking the **View Calendar** link in the *Actions* column.

- Click the **Schedule** tab to view the dates on which a room is scheduled for use for both offerings and other manually entered appointments.

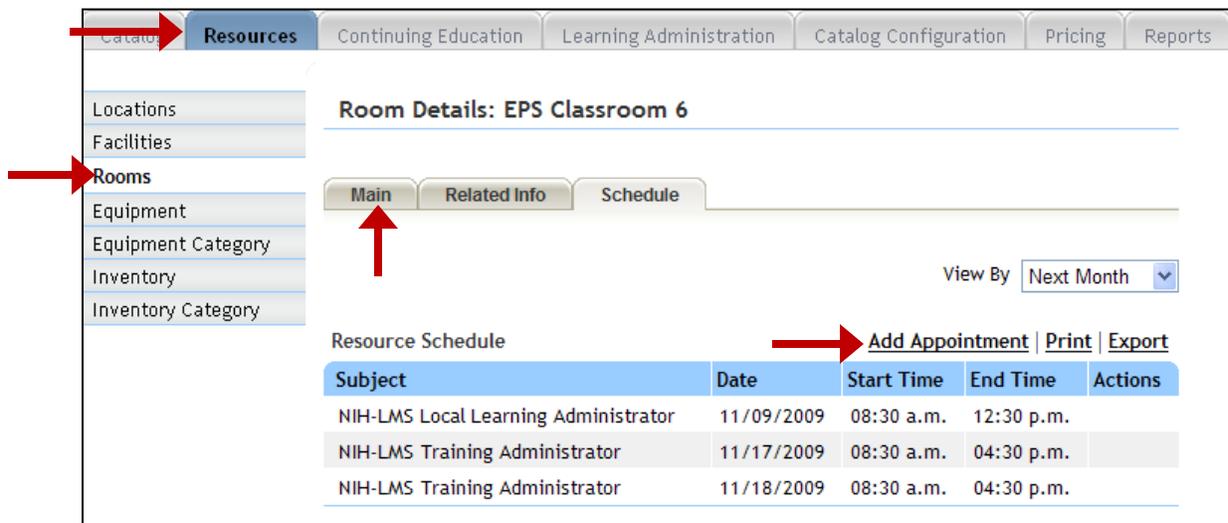
Training Administrator

- You may toggle views by clicking the Month, Week, and Day tabs at the top of the screen.



Optional

If you want to...	Then...
Filter the view of room reservations	From the View By drop-down menu, select a pre-defined view
Manually add a room reservation (not tied to a scheduled offering)	Click the Add Appointment link, enter the appointment data, then click Save .



- Click the **Main** tab.
- From the bottom of the page, click **Save**.

AUDIENCE TYPES

Audience Types are used in the LMS 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.

An NIH-all Audience Type, as well as IC-specific Audience Sub Types, already exist in the LMS. You may, however, wish to create an Audience Sub Type of a different grouping that will be used to aid with the registration of Learners.

To create an Audience Sub Type, perform the following:

1. Select the **Training Administrator** role from the **Go To:** drop-down menu.
2. Click the **Catalog Configuration** tab.
3. From the left navigation bar, click the **Audience Types** link to display the **Audience Type** page.

4. Click the **New Audience Sub Type** link.

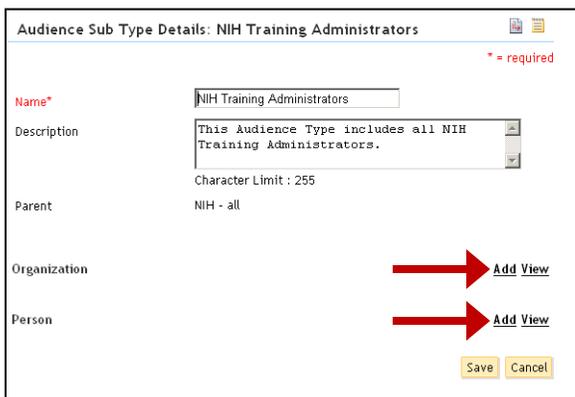
5. In the **Name** field, Type “**NIH**” + a concise, descriptive name for the new Audience Sub Type.
6. In the **Description** field, enter a description of what this Audience Sub Type is being used to group.

Training Administrator

7. In the **Parent** field, enter the name of the Audience (or Sub) Type under which the new Audience Sub Type should fall.

IMPORTANT! Any newly created NIH Audience Types must be Sub Types of at least the NIH-all Audience Type, although they may also be created under an existing NIH Audience Sub Type.

8. Click **Save**.



Audience Sub Type Details: NIH Training Administrators

* = required

Name* NIH Training Administrators

Description This Audience Type includes all NIH Training Administrators.
Character Limit : 255

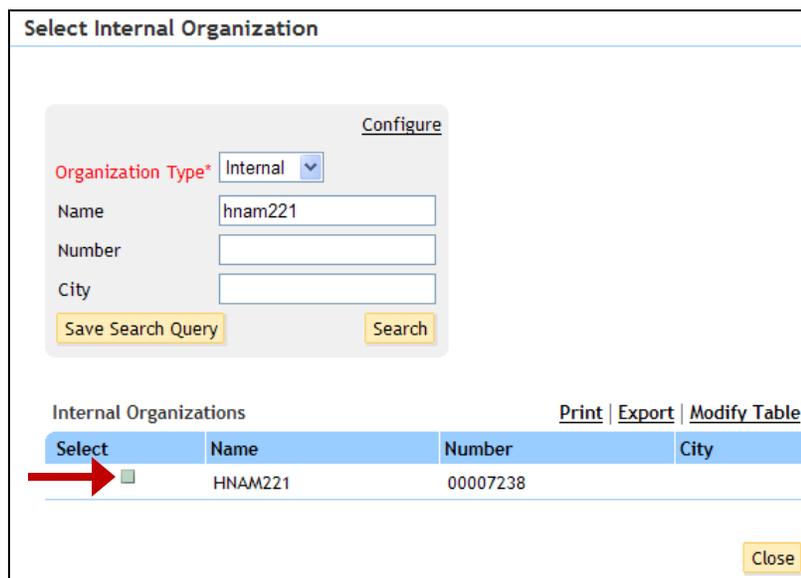
Parent NIH - all

Organization Add View

Person Add View

Save Cancel

9. To add all users associated with a specific Organization /SAC code, perform the following:
 - a. Click the **Add** link to the right of the *Organization* heading.



Select Internal Organization

Configure

Organization Type* Internal

Name hnam221

Number

City

Save Search Query Search

Internal Organizations [Print](#) | [Export](#) | [Modify Table](#)

Select	Name	Number	City
<input checked="" type="checkbox"/>	HNAM221	00007238	

Close

- b. Enter search criteria to locate the desired organization and click **Search**.
- c. From the *Select* column of the *Internal Organizations* search results table, click the **check box** next to the desired organization.

NOTE: You can verify that the organization/SAC code was successfully added by clicking the **View** link to the right of the Organization heading and the clicking **Search**.

10. To add users individually, perform the following:

- a. Click the **Add** link to the right of the *Person* heading.

Search Person, Internal * = required

Supervisors: you can easily display all of your staff by entering your login ID into the "Manager" field, clicking the Magnifying Glass graphic, and then clicking the "Search" button.

Population* First Name
Last Name Person ID
Username Manager
Organization Location
Domain Person Type
Include All Suborganizations

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

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNAME6		NIHSUPERVISOR

- b. Enter search criteria to locate the desired individuals and click **Search**.
- c. From the *Select* column of the *People* search results table, click the **check box(es)** next to the desired people, or click the check box in the column header to select all people returned in the *People* search results.
- d. Click **Select**.

NOTE: You can verify that the people were successfully added by clicking the **View** link to the right of the *Person* heading and then clicking **Search**.

SESSION TEMPLATES

A Session Template defines a period of time that can be used to schedule learning offerings. It defines the number of sessions, the length of each session, and the days of the week and times when each session of the offering will be held.

Each Session Template consists of one or more sessions, grouped by weeks. Each session consists of a day of the week, and a start and end time. To accommodate breaks and meal times, a day can be divided into multiple sessions. The total hours for a Session Template are calculated automatically, based on the number of sessions in the template and the length of each session.

Weekly Session Templates are for use with scheduled offerings that are held on the same days of the week over multiple weeks. For weekly Session Templates, you specify the duration of the Session Templates in number of weeks. You then add sessions by specifying start date, start time, and end time for each session. Each session you add is replicated in the template over the specified duration of the template.

All Session Templates are NIH-specific and their names are prefaced with “NIH”.

IMPORTANT! Please modify existing Session Templates before creating new ones.

Name requirements:

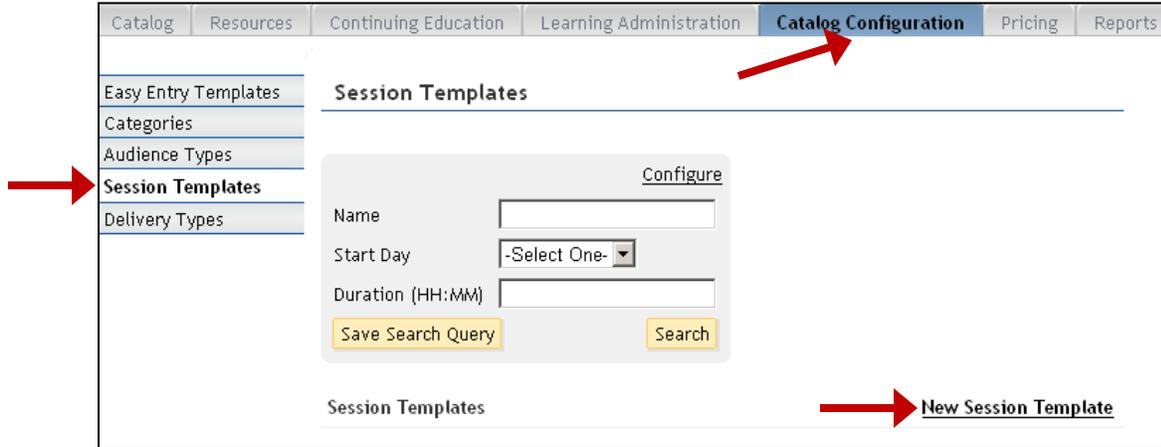
- Begins with “NIH”
- 3-letter day codes (Mon, Tue, Wed, Thu, ...)
- Hyphenated time (8:30-3, 9-12, 10-11:30, ...)

Session Template examples:

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

STEP-BY-STEP (CREATING A SESSION TEMPLATE)

1. Select the **Training Administrator** role from the **Go To:** drop-down menu.
2. Click the **Catalog Configuration** tab.
3. From the left navigation bar, click the **Session Templates** link to display the **Session Templates** page.

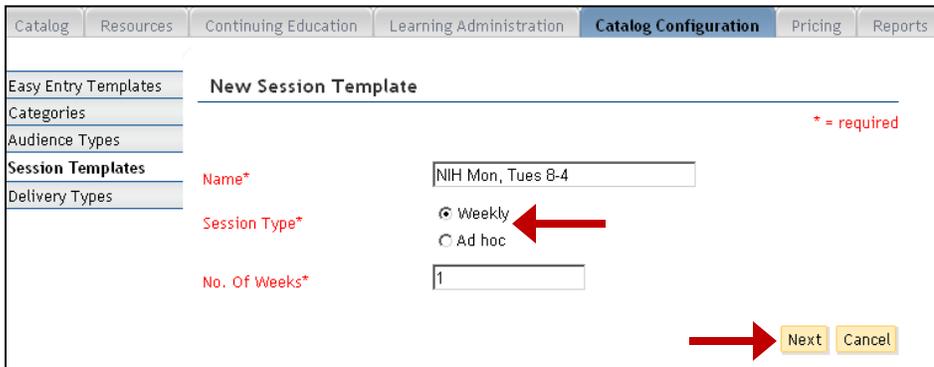


4. Click the **New Session Template** link to display the *New Session Template* page.
5. In the **Name** field, enter a name for the session template.
6. Select the **Weekly** Session Type radio button to define the type of template you want to create.

NOTE: If you want to create a new session template that will only be used once, then select the **Ad Hoc** radio button instead.

7. In the **No. Of Weeks** field, enter the number of weeks for which sessions associated with this template will be held.

NOTE: The **No. Of Weeks** field does not apply when the **Ad hoc** session type is selected.



8. Click **Next** to begin adding sessions to the new session template.
9. Click the **Add Session** link to open the **Add Sessions** window.

- From the **Session Day** drop-down menu, select the day of the week on which the session will be held.
- In the **Start Time (HH:MM)** and **End Time (HH:MM)** fields, enter the start and end times for the session.

Add Session * = required

Session Day*

Start Time (HH:MM)* : a.m. p.m.

End Time (HH:MM)* : a.m. p.m.

- Click **Save** to add the session.

NOTE: The session is listed at the bottom of the New Session Template and has been replicated for each week specified in the No. Of Weeks field.

TIP: You may edit the details of a session by clicking the session name. You may delete a session by clicking the **Delete** icon in the *Actions* column.

- To add more sessions to the template, repeat Steps 9 – 12 above.

- Click **Close** to return to the *New Session Template* page.

Catalog Resources Continuing Education Learning Administration **Catalog Configuration** Pricing Reports

Easy Entry Templates **New Session Template**

Categories

Audience Types

Session Templates

Delivery Types

Name*

Domain*

Session Type Weekly

Sessions

Number of Sessions 2

Total Duration 16 Hours 0 Mins

Session [Add Session](#) | [Print](#) | [Export](#) | [Modify Table](#)

Week	Session	Day	Start Time	End Time	Actions
1	<u>1</u>	Monday	8:00 AM	4:00 PM	Delete
1	<u>2</u>	Tuesday	8:00 AM	4:00 PM	Delete

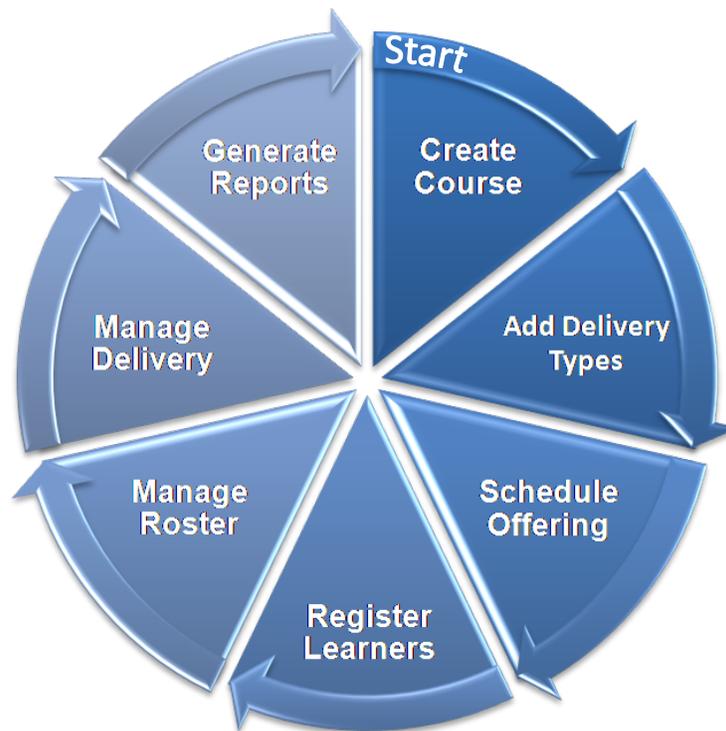
- Once all sessions are added, click **Save** to finish the Session Template creation.

MANAGING COURSES

COURSE MANAGEMENT LIFECYCLE

Course management in the LMS (whether it's a course that will be delivered as an instructor-led, web-based, seminar, or any other type of offering), requires that a Training Administrator perform a standard series of tasks during the course's lifecycle. Each of these steps is essential to properly creating and managing learning events (also known as classes or "offerings") in the system.

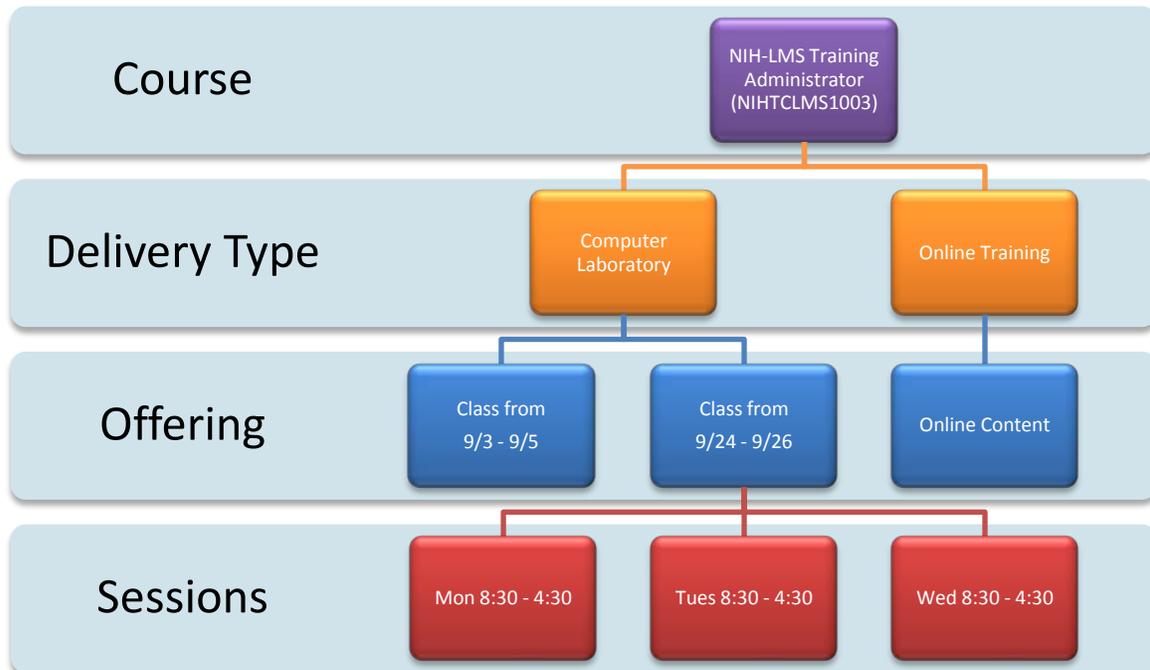
The following figure depicts the Course Management lifecycle at a high level:



A course is the highest level in the learning hierarchy. It represents a topic of study that can be delivered in various formats across multiple instances.

THE LEARNING HIERARCHY

Each learning event that is managed in the LMS is part of a structured series of hierarchical components. It is this hierarchy that allows us to manage aspects of how a topic of study will be delivered—or communicated—to learners, at varying levels of granularity.



The **COURSE**, as the broadest component, resides at the top of the hierarchy and is used to manage information that is common to all Delivery Types and Offerings (or learning events) associated with this topic of study.

DELIVERY TYPES are added by the Training Administrator once a Course is created. The Delivery Type is a sub-component of the course, and is used to manage information that is common to all instances of a specific type of delivery or communication method. Instructor-Led classes, for example, may have different information associated with them than Web Casts do for the same Course (e.g., all instructor-led classes for a particular course are a total of 16 hours in duration, whereas all Web Casts associated with this Course are a total of 2 hours in duration).

IMPORTANT! Each Course must have *at least* one Delivery Type in order for you to set-up a class for which students may register. Courses may have multiple unique Delivery Type assigned, however, each Delivery Type may only be assigned once (e.g., no Course may have 2 Instructor-Led Delivery Types assigned, but it may have one each of multiple Delivery Types assigned.)

Training Administrator

OFFERINGS, or what we traditionally think of as classes, are then created in association with their respective Delivery Type(s). They are used to manage information that is specific to a particular learning event for which learners may enroll. Each Offering, for example, may have different start and end dates, or may be held in different classrooms.

SESSIONS, which are grouped together in the Session Template, are used by the LMS to define the start and end times for each day of an Offering. In some cases, an Offering may only have one Session in the Session Template because it is only a one-day class. A multi-day class, however, would have multiple Sessions included in the Session Template; one Session for each day that a Learner is expected to attend the class. A Monday, Wednesday, and Friday Offering, for example, will have a separate Session defined for Monday, Wednesday, and Friday. Those three Sessions together make up the Session Template.

ENTERPRISE HUMAN RESOURCE INFORMATION (EHRI) DATA

When creating a new course, EHRI data must be recorded in the Other Information section. Any field in this section prefaced with “EHRI:” is required information; however, because the necessary information may not be available at the moment the course is created, these fields are not marked as required in the system. Doing so would prevent you from saving your new course unless all fields are complete.

Any EHRI field not completed during course creation should be completed as soon as the information becomes available.

What is EHRI Data?

- Enterprise Human Resources Integration is a President's Management Agenda requirement that is tracked by OPM.
- The LMS transmits this data to OPM on a bi-weekly basis.
- Training Administrators are responsible for making sure this requirement is met.
- Empty or incorrectly completed EHRI fields will be recorded as “errors” by OPM, and may cause result in NIH being deemed non-compliant with the PMA requirement.
- More information on EHRI may be found at <http://www.opm.gov/egov/e-gov/EHRI/>

TIP: Refer to Appendix B of this document for more detailed information about entering EHRI field data.

COURSE SETUP

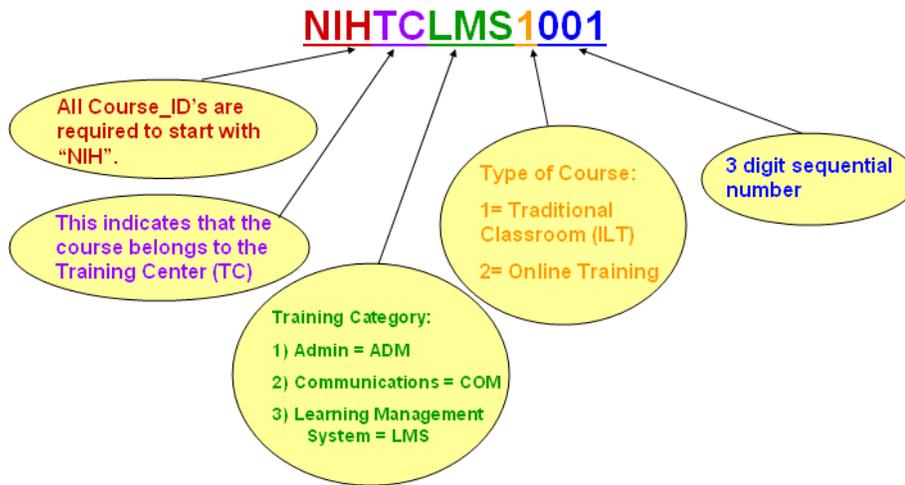
STEP-BY-STEP (DEFINING A COURSE ID)

As part of the course creation process, you will need to generate a unique Course ID that will be entered during the course creation process.

Please take note of the following:

- All Course ID's are required to start with "NIH".
- Course ID's are entered manually by the Training Administrator creating the course.
- They should follow a standardized, structured sequence that is defined by your organization.
- Course ID's are a valuable tool that help learners locate a particular course's offerings in the LMS.

The following graphic depicts the standardized structure of a sample NIH Training Center Course ID:



STEP-BY-STEP (CREATING A COURSE)

You can create courses by clicking the **New Course** link on the *Course* page. Creating a course involves entering data into required fields on the *New Course* page and then saving the data.

1. Select the **Training Administrator** role in the **Go To:** drop-down menu.
2. From the left navigation bar, click the **Courses** link to display the *Course* page.

Training Administrator

3. Click the **New Course** link to display the *New Course* page.

The screenshot shows the 'Course' page in the Training Administrator. The left sidebar has 'Courses' selected. The main area contains a 'Course' form with the following fields: Title, ID, Domain, and Audience Type/Sub Type. There are search icons for the Domain and Audience Type/Sub Type fields. A 'Save Search Query' button is located below the Audience Type/Sub Type field. A 'Search' button is at the bottom right of the form. At the bottom right of the page, there are links for 'New Course' and 'Quick Course', with a red arrow pointing to 'New Course'.

4. Enter the core required information for creating the course.

The screenshot shows the 'New Course' page in the Training Administrator. The left sidebar has 'New Course' selected. The main area contains a 'New Course' form with the following fields: Title*, ID*, Version, Domain* (with 'NIH' entered), Abstract, Description, Available From* (with '10/29/2009' entered), Discontinued From, Display for Call Center, Display for Learner, Currency (with 'US Dollars' selected), Price (with '0' entered), and Multi-Currency Pricing options. A red asterisk indicates required fields. The Multi-Currency Pricing section has three radio button options: 'This Course is available only in the currency selected above.', 'This Course is available in the currency selected above and default currency, US Dollars.', and 'This Course is available in all the active currencies in the system. Note: Prices are only calculated for currencies that have exchange rates defined in the system.'

Training Administrator

5. Enter information as available in the *Other Information* section of the page.

NOTE: Although the EHRI fields listed on this screen are not required by the system, it is the responsibility of the Training Administrator to ensure that these fields contain EHRI accepted values.

Other Information	
Continued Service Agreement Required Indicator (1231)	<input type="text"/>
EHRI: Training Accreditation Indicator (1102)	<input type="text" value="-Select One-"/>
Training Accreditation Organization Type (1103)	<input type="text"/>
Course ID From Vendor (1105)	<input type="text"/>
EHRI: Training Source Type (1120)	<input type="text" value="-Select One-"/>
EHRI: Default Training Purpose (1122)	<input type="text" value="-Select One-"/>
EHRI: Default Training Type (1124)	<input type="text" value="-Select One-"/>
EHRI: Training Credit (1126)	<input type="text"/>
EHRI: Training Credit Designation Type (1127)	<input type="text" value="-Select One-"/>
EHRI: Training Delivery Type (1129)	<input type="text" value="-Select One-"/>
EHRI: Training Credit Type Code (1131)	<input type="text" value="-Select One-"/>
Instructor Competencies (1200)	<input type="text"/>
Multilingual Course (1201)	<input type="text"/>
Internal or External Course (1202)	<input type="text" value="-Select One-"/>
Training Certification Type (1211)	<input type="text"/>
Course Development Cost (1220)	<input type="text"/>

IMPORTANT! Please refer to Appendix B of this document for detailed information about accepted EHRI field values.

6. Click **Save**.

Training Administrator

STEP-BY-STEP (LOCATING A COURSE AFTER CREATION)

1. Select the **Training Administrator** role in the **Go To:** drop-down menu.
2. From the left navigation bar, click the **Courses** link to display the *Course* page.

The screenshot displays the 'Course' configuration page in the Training Administrator interface. The top navigation bar includes 'Catalog', 'Resources', 'Continuing Education', 'Learning Administration', 'Catalog Configuration', 'Pricing', and 'Reports'. The left navigation bar has 'Offerings', 'Courses', 'Import', 'Package', 'Learning Requests', and 'Interest List'. The main content area shows a 'Course' configuration form with fields for 'Title' (NIH-LMS Train), 'ID', 'Domain', and 'Audience Type/Sub Type'. A 'Search' button is highlighted with a red arrow. Below the form is a table of search results for 'Courses'.

Title	Version	ID	New Offering
NIH-LMS Training Administrator	1	NIHTCLMS1003	New Offering

3. Enter criteria that will be used to locate the Course.
TIP: When searching for a Course, the **Title** and Course **ID** fields are most commonly used by Training Administrators.
4. Click **Search**.
5. Do one of the following:
 - From the *Title* column of the *Courses* search results table, click the course title link to view and edit Course details.
 - From the *New Offering* column of the *Courses* search results table, click the **New Offering** link to create a new Offering of this Course.

STEP-BY STEP (ADDING AN OWNER TO A COURSE)

Once a course is created and saved to the LMS, an owner should be designated at the course-level. This helps other administrators identify a point of contact that is responsible for the course, since the person who manages it in the LMS may—or may not—be the person responsible for ownership of the content of the course itself.

1. Locate the course to which an Owner will be added. See *Step-By-Step (Locating a Course after Creation)* of this guide for more information.
2. From the course's *Main* tab, scroll down to the *Owner* section and click the **Add Owner** link to open the *Search Person, Internal* window.

The screenshot shows a course configuration interface with three main sections: 'Content Modules', 'Owner', and 'Audience Type / Audience Sub Type'. Each section has a 'No items found' message and a corresponding 'Add' link. A red arrow points to the 'Add Owner' link in the Owner section.

3. Using the **Search Person, Internal** window, locate and select a person in the system that will be identified as the Course's owner.

The screenshot shows the 'Search Person, Internal' window. It has search criteria fields for First Name (emp), Last Name (01), Person ID, Username (emp01), Manager, Organization, Location, Domain, and Person Type (-Select One-). A Search button is at the bottom right. Below the search criteria is a table of search results with columns: First Name, Last Name, Username, Person Type, Person ID, Organization, Location, Manager. A red arrow points to the checkbox in the first row, and another red arrow points to the Select button.

	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	Emp	01	EMP01	Federal	00259072	HHS		

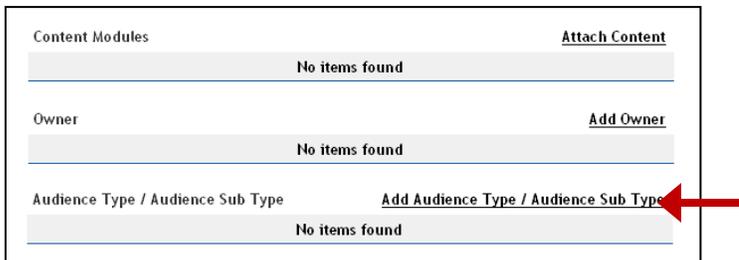
4. Click **Select**.

ADDING ADDITIONAL INFORMATION TO A COURSE

STEP-BY STEP (ADDING AN AUDIENCE TYPE TO A COURSE - OPTIONAL)

Once a course is created and saved to the LMS, Audience Types may be added at the course-level.

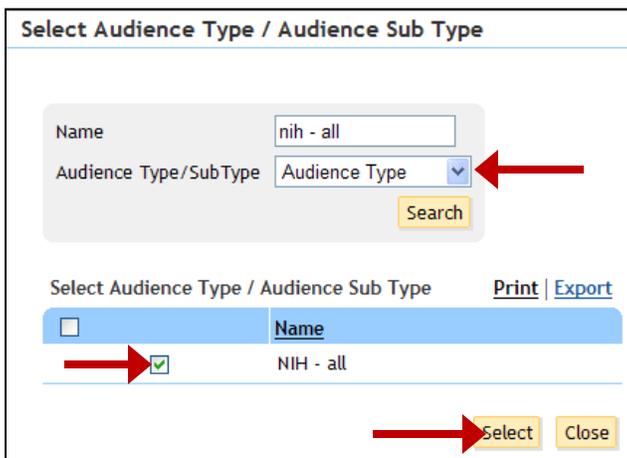
1. Locate the course to which an Audience Type or Sub-Type will be added. See *Step-By-Step (Locating a Course after Creation)* of this guide for more information.
2. From the course's *Main* tab, scroll down to the *Audience Type/Audience Sub Type* section and click the **Add Audience Type/Audience Sub Type** link to open the *Select Audience Type/Audience Sub Type* window.



3. In the **Name** field, enter all or part of an Audience Type/Audience Sub Type name.

NOTE: All NIH Audience Types used in offerings will be sub types of the NIH – all audience type.

4. From the **Audience Type/Audience Sub Type** drop-down menu, select **Audience Type**.
5. Click **Select**.



6. From the *Select Audience Type /Audience Sub Type* search results, select **NIH – all**.

Training Administrator

7. Click **Select**.

Content Modules		Attach Content
No items found		
Owner		Add Owner
Name	Actions	
Brian HUGHES	Delete	
Audience Type / Audience Sub Type		Add Audience Type / Audience Sub Type
Audience Type / Audience Sub Type	Action	
NIH - all	Delete	

8. You may also delete the audience type by clicking the Delete link.

STEP-BY STEP (ADD A NOTE OR ATTACHMENT - OPTIONAL)

1. From the *Course Details* page, click the **Related Info** tab.

TIP: See *Step-By-Step (Locating a Course after Creation)* of this guide for more information.

The screenshot shows the 'Course Details' page for 'NIH-LMS Training Administrator, #NIHTCLMS1003'. The 'Related Info' tab is selected, showing a table of attachments and a list of notes. Red arrows highlight the 'Catalog' tab, the 'Related Info' tab, the 'Add Attachment' link, and the 'Add Notes' link.

Attachment Name	Type	Category	Locale	Private	Actions
Abstract for LMS Training Administrator	File	Abstract	English	No	Edit Attachment Delete Attachment

Created by	Created On	Notes
00122138	07/13/2009	The administrator responsible for managing this course is Training Administrator 01.

2. From the **Related info** tab, do one of the following:

- To add an attachment, click on the **Add Attachment** link, complete all required fields, and click **Save**.

The screenshot shows a form titled "New Attachment". It has a legend in the top right corner stating "* = required". The form contains the following fields: "Attachment Name*" (text input), "Type*" (radio buttons for "URL" and "File", with a "Browse..." button next to the "File" option), "Category*" (dropdown menu with "-Select One-" and a plus icon), "Locale*" (dropdown menu with "English"), and "Is Private" (checkbox). At the bottom right, there are "Save" and "Close" buttons, with a red arrow pointing to the "Save" button.

- To add a note, click on the **Add Notes** link, complete all required fields, and click **Save**.

The screenshot shows a form titled "New Note". It has a legend in the top right corner stating "* = required". The form contains the following fields: "Category*" (dropdown menu with "-Select One-" and a plus icon) and "Notes*" (text area). At the bottom right, there are "Save" and "Close" buttons, with a red arrow pointing to the "Save" button.

IMPORTANT! Notes are permanent and cannot be deleted.

STEP-BY-STEP (ADDING CATEGORIES TO A COURSE)

You can facilitate Learner Searches by adding Categories to a Course. Most importantly, they are used to build the "Browse Catalog" structure that learners may use to locate a Course in the LMS.

Categories offer the following:

- Organization of courses under broad headings (i.e.: Mandatory Training).
- A simplified browsing structure for locating courses.
- Multiple access points to a single course since each course may fall under multiple categories.

To add categories to a course, perform the following:

1. From the *Course Details* page, click the **Related Info** tab.

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

Training Administrator

- Click the **Add Category** link to add a category to a course.

Select Category

Category Name

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

<input type="checkbox"/>	Category Name	Description
<input checked="" type="checkbox"/>	1 - NIH Courses > Mandatory Training	For general NIH mandatory courses

- In the **Category Name** field, type the name of a category under which you want the course to display.
- Click **Search**.
- IMPORTANT!** Pressing the **[Enter]** key on your keyboard does not return any results. You must click **Search**.
- In the **Categories** search results table, click the **check box** next to the desired category.
- Click **Select**.

Category		Add Category Print Export Modify Table
Name	Description	Actions
Mandatory Training	For general NIH mandatory courses	Delete
NIH Training Center	for courses offered by the NIH Training Center	Delete
Competency		Add Competency
No items found		
Catalog Prerequisites		Add Prerequisites
No items found		
Equivalentents		Add Equivalentents
No items found		

STEP-BY-STEP (ADDING KEYWORDS TO A COURSE)

You can facilitate Learner Searches by adding Keywords to a course. Most importantly, they are used to build the “Browse Catalog” structure that learners may use to locate a course in the LMS.

Keywords offer the following:

- “Tag” courses with words (e.g., topics, acronyms, organizations name, etc.) that users may associate with a course but may not be included in the course title or description.
- Flexible catalog searching.

To add Keywords to a Course, perform the following:

1. From the *Course Details* page, click the **Related Info** tab.

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

2. Click the **Add Keyword** link to add a keyword to a Course.

3. Do one of the following:

- In the **Name** field, enter a keyword and click **Search** to locate an existing keyword.

The screenshot shows the 'Select Keywords' window. At the top, there is a 'Name:' field containing 'LMS' and a 'Search Course' field with a search icon. A 'Search' button is located to the right. Below this is a table with the following content:

Keywords		Create Keywords Print Export Modify Table
<input checked="" type="checkbox"/>	Add Keyword	
<input checked="" type="checkbox"/>	LMS	
<input type="checkbox"/>	LMS REGISTRARS	

Red arrows point to the checked checkbox for 'LMS' and the 'Select' button at the bottom right.

- In the **Search Course** field, enter the title of a course and click **Search** to locate all keywords already tied to a specific course.

The screenshot shows the 'Select Keywords' window. The 'Search Course' field contains 'NIH-LMS Training Administra'. A 'Search' button is located to the right. Below this is a table with the following content:

Keywords		Create Keywords Print Export Modify Table
<input type="checkbox"/>	Add Keyword	
<input type="checkbox"/>	nihtc	

Red arrows point to the checkbox for 'nihtc' and the 'Select' button at the bottom right.

Optional:

If you determine that the keyword for which you're looking does not already exist in the LMS, you may add it to the system without interrupting the process for adding keywords to a course.

1. From the **Select Keywords** window, click the **Create Keywords** link to open the **Add Keywords** window.

The screenshot shows the 'Add Keywords' window. It has a 'Keyword:*' label and a text input field containing 'Training Administrator'. An 'Add' button is to the right of the input field. At the bottom, there are 'Back' and 'Close' buttons. A red asterisk with the text '* = required' is in the top right corner.

Training Administrator

- In the **Keyword** field, enter the word(s) that you want to add to the LMS as keywords.
- Click **Add** to save the new keyword to the LMS and automatically add it as a keyword to the course.

Keywords		Add Keyword Print Export
Name		Actions
nihtc		Delete
Training Administrator		Delete
Evaluation		Add Evaluation
No items found		

STEP-BY-STEP (ADDING COMPETENCIES TO A COURSE)

- From the *Course Details* page, click the **Related Info** tab.

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

Category		Add Category Print Export Modify Table
Name	Description	Actions
Mandatory Training	For general NIH mandatory courses	Delete
NIH Training Center	for courses offered by the NIH Training Center	Delete
Competency		Add Competency
No items found		
Catalog Prerequisites		Add Prerequisites
No items found		
Equivalents		Add Equivalents
No items found		

- Click the **Add Competency** link to open the **Select Competency** window.

3. Do one of the following:

- In the **Name** field, type the name of a competency and click **Search**.
- In the **Competency Group** field, type the name of a competency group and click **Search**.

Select Competency

Configure

Name

Competency Group

Save Search Query Search

Competencies Modify Table

Select	Competency Group	Name
<input checked="" type="checkbox"/>	NIH Leadership and Management	NIH Coaching

Close

4. In the **Competencies** search results table, click the check box next to the **Competency Group/Name** to select the competency and open the *Competency Detail* window.

Competency Detail: NIH Coaching

* = required

Competency Name **NIH Coaching**

Minimum Proficiency Level*

Attachments Print | Export

Attachment Name	Type	Category	Locale	Private
Coaching - Key Behaviors.doc	File	User Documentation	English	No
Coaching - Proficiency Map	URL	User Documentation	English	No

Save Back Close

5. From the **Minimum Proficiency Level** drop-down menu, select a minimum proficiency level for this competency. This proficiency level reflects the level towards which the coursework will help a learner work.

Level	Description
1	Fundamental Awareness
2	Novice
3	Intermediate
4	Advanced
5	Expert

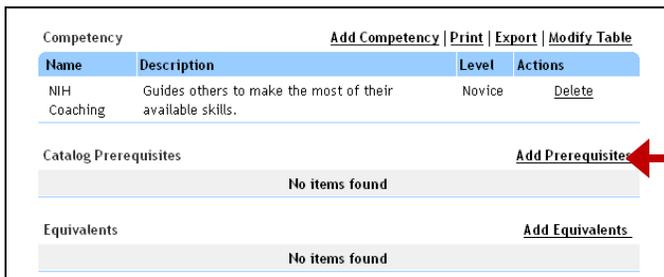
Training Administrator

STEP-BY-STEP (ADDING PREREQUISITES TO A COURSE)

1. From the *Course Details* page, click the **Related Info** tab.

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

2. Click the **Add Prerequisites** link to open the *Select Course Prerequisites* window.



Competency [Add Competency](#) | [Print](#) | [Export](#) | [Modify Table](#)

Name	Description	Level	Actions
NIH Coaching	Guides others to make the most of their available skills.	Novice	Delete

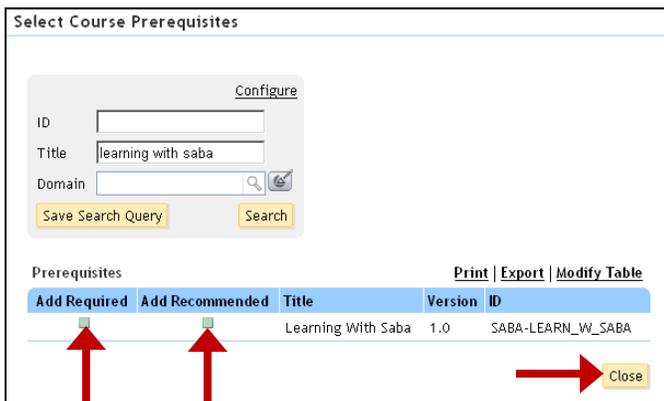
Catalog Prerequisites [Add Prerequisites](#)

No items found

Equivalents [Add Equivalents](#)

No items found

3. In the **Title** field, enter the name of the course to be designated as the prerequisite.
4. Click **Search**.



Select Course Prerequisites

[Configure](#)

ID:

Title:

Domain:

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

Add Required	Add Recommended	Title	Version	ID
<input type="checkbox"/>	<input type="checkbox"/>	Learning With Saba	1.0	SABA-LEARN_W_SABA

5. Click the check box to indicate that the prerequisite is either **Required** or **Recommended** for learners. This will return you to the course's *Related Info* tab.

STEP-BY-STEP (ADDING EQUIVALENTS TO A COURSE)

- From the *Course Details* page, click the **Related Info** tab.

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

- Click the **Add Equivalents** link to open the *Select Course Equivalents* window.

The screenshot shows the 'Course Details' page with several sections: 'Catalog Prerequisites', 'Equivalents', 'Keywords', and 'Evaluation'. The 'Add Equivalents' link is highlighted with a red arrow.

Title	Version	ID	Required/Recommended	Actions
Learning With Saba	1.0	SABA-LEARN_W_SABA	Required	Delete

Equivalents [Add Equivalents](#)

No items found

Name	Actions
nihtc	Delete
Training Administrator	Delete

Evaluation [Add Evaluation](#)

No items found

- In the **Title** field, enter the course title of an equivalent course.
- Click **Search**.
- From the **Equivalents** search results table, click the check boxes next to the courses to be designated as equivalents.

The screenshot shows the 'Select Equivalents' window with a search form and a table of results. The 'Add These Equivalents' button is highlighted with a red arrow.

Search Form:

ID:

Title: %no fear%

Domain:

Buttons: Save Search Query, Search

<input type="checkbox"/>	Title	Version	ID
<input type="checkbox"/>	EEO & Whistleblower Protection in the Workplace-No FEAR Act CMS Course	1.0	CMS-NO FEAR ACT
<input checked="" type="checkbox"/>	NIH Notification and Federal Employee Anti-discrimination and Retaliation (No Fear) Act		NIHOEODM 2207
<input checked="" type="checkbox"/>	NIH OEODM NC Quarterly No Fear Act		NIHOEODM2218
<input checked="" type="checkbox"/>	NIH OEODM NC Quarterly No Fear Act		NIH OEODM2218
<input checked="" type="checkbox"/>	The No FEAR Act	2.2	FGOV_01_A01_BS_ENUS

[Add These Equivalents](#)

- Click **Add These Equivalents**.

Training Administrator

Optional:

At this point, you have the option to Group or Ungroup equivalents. By Grouping equivalents, you're designating that the completion of multiple courses is the same as completing the one course for which the equivalents are being set. You may change this at any time by Ungrouping them.

1. From the **Group or Ungroup Existing Equivalents** table, select the check boxes next to the courses to be grouped as an equivalent.

Select Equivalents

Configure

ID

Title

Domain

Equivalents		Print	Export	Modify Table
<input type="checkbox"/>	Title	Version	ID	
<input type="checkbox"/>	EEO & Whistleblower Protection in the Workplace-No FEAR Act CMS Course	1.0	CMS-NO FEAR ACT	
<input checked="" type="checkbox"/>	NIH Notification and Federal Employee Anti-discrimination and Retaliation (No Fear) Act		NIHOEODM2207	
<input checked="" type="checkbox"/>	NIH OEODM NC Quarterly No Fear Act		NIHOEODM2218	
<input checked="" type="checkbox"/>	NIH OEODM NC Quarterly No Fear Act		NIH OEODM2218	
<input checked="" type="checkbox"/>	The No FEAR Act	2.2	FGOV_01_A01_BS_ENUS	

Group or Ungroup Existing Equivalents		Print	Export	Modify Table
<input type="checkbox"/>	Name	Actions		
<input type="checkbox"/>	NIH Notification and Federal Employee Anti-discrimination and Retaliation (No Fear) Act	Delete		
<input type="checkbox"/>	NIH OEODM NC Quarterly No Fear Act	Delete		
<input type="checkbox"/>	NIH OEODM NC Quarterly No Fear Act	Delete		
<input type="checkbox"/>	The No FEAR Act	Delete		

2. Click **Group**.

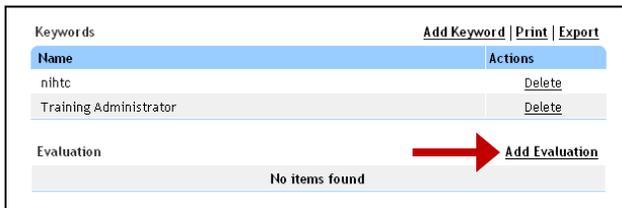
3. Click **Close**.

STEP-BY-STEP (ADDING AN EVALUATION TO A COURSE)

1. From the *Course Details* page, click the **Related Info** tab.

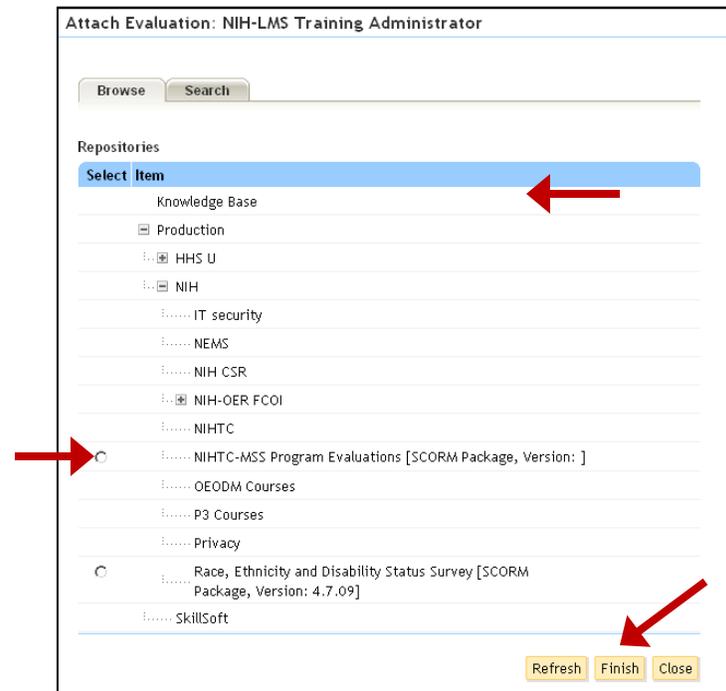
TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

2. Click the **Add Evaluation** link to open the *Attach Evaluation* window.



3. From the *Browse* tab, click the **Plus Sign (+)** expand the groups of available evaluation content.

TIP: If you know the name of the evaluation, you may search for it using the *Search* tab.



4. Select the radio button to the left of the desired evaluation content.
5. Click **Finish**.

Training Administrator

STEP-BY-STEP (ADDING CONTINUING EDUCATION CREDITS TO A COURSE)

1. From the *Course Details* page, click the **Related Info** tab.

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

2. Click the **Add Field of Study** link to open the *Add Credits by Field of Study* window.

Evaluation		Print Export
Module	Evaluation Status	Actions
NIHTC-MSS Program Evaluations	Published	Delete

Continuing Education Credit		Add Field of Study Print Export Modify Table	
Field of Study	Description	Default Credits	Actions
MD Brd Vet Med Examiners	Programs certified for continuing education credit by the Maryland State Board of Veterinary Medical Examiners	2	Edit Credits Delete Credits
Total Credits:		2	

3. In the **Field of Study** field, enter the name of a field of study.
4. In the **Default Credits** field, enter the number of credits that this course should assign to learners when completed.

Add Credits by Field of Study

Field of Study*

Default Credits*

Instructor Credits

Credits by Job Roles Add Job Role

Job	Credits	Actions
NIH NIA Health Science Administrator (GS-15)	3	Edit Delete

Learners who do not have any associated role receive default credits.

Save Close

Optional:

Before saving, you have the option of assigning a Job Role to the continuing education credits being added to the course. This is particularly beneficial if Learners of a specific job role should receive a different number of continuing education credits than the number designated as the course' default. Any Learner who does not have the specified job role assigned to their Person Profile in the LMS will receive the default credits designated in the **Default Credits** field.

1. Click the **Add Job Role** link.
2. In the **Job Role** field, enter the name of a job role.
3. In the **Credits** field, enter the number of credits that should be granted in association with the specified Job Role.
4. Click **Save** to return to the *Add Credits by Field of Study* window.
5. Click **Save**.

ADDING LEARNER INFORMATION TO A COURSE

From the *Learner Info* tab of the course, you may specify the following:

- Languages for Courses
- Approval Policies for Courses
- Registration Policies for Courses
- Completion Policies for Courses

SPECIFYING LANGUAGES FOR COURSES

The available languages for all courses are specified on the *Learner Info* tab at the course level. The **Add Language** link can be used to add a list of languages in which courses will be provided. A language for a specific offering is set on the *Main* tab at the Course level.

SPECIFYING APPROVAL POLICIES FOR COURSES

Select the appropriate setting for **Manager Approval Required to Register** to override the business rules specifying whether or not manager approval and/or additional approval is required before a learner can register for an Offering. If you choose to override the business rule setting for manager approval and additional approval for a course or delivery type, then the override settings will affect only the learning offerings created for that course. For example, if the manager approval business rule is enabled and you wish to disable it for a particular course or delivery type, manager approval for only the learning offerings created for that course will be disabled. Manager approval for learning offerings of other courses will remain enabled.

SPECIFYING REGISTRATION POLICIES FOR COURSES

Select the appropriate value to override the domain setting that indicates whether internal learners can register for different offerings of the same course. For example, if recurring registration is currently allowed for internal learners (as specified by the course setting), select **Recurring Registration Not Allowed** to disallow it for learning offerings of this course.

SPECIFYING COMPLETION POLICIES FOR COURSES

You can choose to override the business rule that specifies how various offerings of a course or delivery type can be marked complete. Select from the following options:

- **Do you want to override Completion Policy set at Delivery Mode level.** by selecting the check box for **Learner can mark complete** to allow learners to mark their offerings complete. Select the check box **Manager can mark complete** if you want to allow managers to mark their team's offerings complete.
- **Change Completion Status** automatically after specified number of days to the specified status, if the offering has not been manually marked completed. If you want to automatically change the offering status, enter the number of days after which the system will mark the offering complete and specify the completion status for the course offerings.

STEP-BY STEP (REQUIRE MANAGER APPROVAL FOR A COURSE)

1. From the *Course Details* page, click the **Learner Info** tab.

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

2. Select the **Manager Approval Required to Register** radio button.
3. Click **Save**.

STEP-BY STEP (ALLOW RECURRING REGISTRATION FOR A COURSE)

1. From the *Course Details* page, click the **Learner Info** tab.

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

2. Select the **Recurring Registration Allowed** radio button.
3. Click **Save**.

STEP-BY-STEP (CREATING A NEW COURSE VERSION)

1. From the *Course Details* page, click the **Main** tab. (Default)

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

2. Scroll to the bottom of the screen and click **Create New Version**.



The screenshot shows a form with the following elements:

- Text: "Continued Service Agreement Required Indicator (1231)"
- Text input field: "NA"
- Buttons: "View All Offerings", "Create New Version", "Save", and "Cancel".
- A red arrow points to the "Create New Version" button.

3. Enter the new version number and the date from which the course will be available. (Both are required to save a new version.)
4. Select any other options you would like to take effect when the new version is created.
5. Click **Done**.

DELIVERY TYPES

Delivery Types represent the various methods by which a course's content will be delivered. When a Delivery Type is associated with a course, it inherits the basic properties of that course. These properties remain the same regardless of the method by which the course content is delivered (e.g., course description, vendor, course owner, etc.)

Each Delivery Type can have an unlimited number of learning offerings associated with it. The information you specify for the specific Delivery Type is inherited by all learning offerings created for that delivery method (e.g., all offerings associated with the Instructor Led Delivery Type for a specific course will be 8 hours in duration).

At this level, you may also define a list of resources that can be associated with all offerings of a specific delivery type, in addition to information on scheduling policies, such as audience type, price, and drop policy.

Delivery types fall into three categories:

- Self-Paced— delivered through the LMS as online content
- Scheduled—have a time and location associated with them
- Physical—materials used to deliver training (e.g., manuals, CDs, DVDs, etc.)

A course may have multiple Delivery Types but cannot have a duplicate delivery type. Choose a delivery type that best fits the course you are offering.

IMPORTANT! If the existing delivery types do not apply to the type of offering that you plan to deliver, please contact the NIH Implementation Team for assistance.

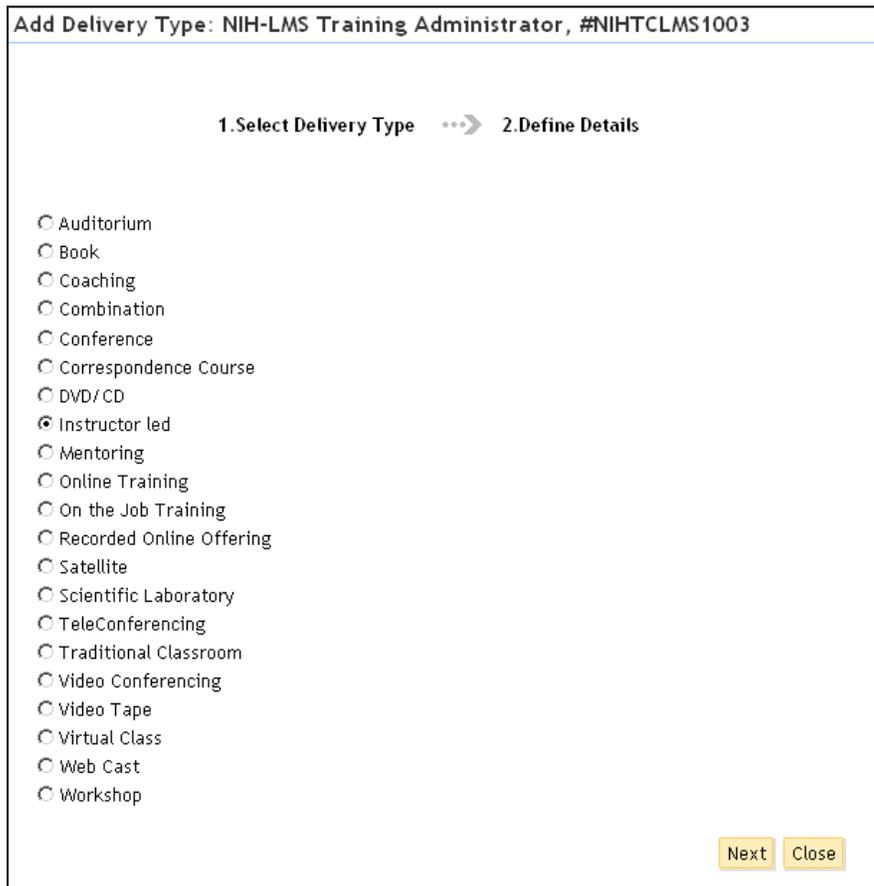
Training Administrator

STEP-BY STEP (ADD A DELIVERY TYPE TO A COURSE)

1. From the *Course Details* page, click the **Delivery Type** tab.

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.

2. Click the **Add Delivery Type** link to open the *Add Delivery Type* window.



Add Delivery Type: NIH-LMS Training Administrator, #NIHTCLMS1003

1. Select Delivery Type → 2. Define Details

- Auditorium
- Book
- Coaching
- Combination
- 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

Next Close

3. Select the **radio button** to the left of the desired Delivery Type.

Training Administrator

8. Enter as much information as possible in all non-required fields.

TIP: The non-required fields that display will vary based on the individual Delivery Type. Some information will be pre-populated based on what is defined at the Course level.

IMPORTANT! Entering a price in the **Delivery Price** field will supersede the price specified at the Course level. If the Offerings associated with this Delivery Type are free of charge, then enter "0" in this field.

9. Click **Finish** to return to the *Course Details* page where you can view a list of all Delivery Types associated with the Course.

Course Details: NIH-LMS Training Administrator, #NIHTCLMS1003  

* = required

[Main](#) [Related Info](#) [Learner Info](#) [Delivery Types](#)

Delivery Types [Add Delivery Type](#) | [Print](#) | [Export](#)

Delivery Types	New Offering
Delivery Mode Details: Computer Laboratory	New Computer Laboratory Offering
Delivery Mode Details: Instructor led	New Instructor led Offering

STEP-BY STEP (MODIFY THE DELIVERY TYPE OF A COURSE)

1. From the *Course Details* page, click the **Delivery Type** tab.

TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.
2. Click the delivery type's name to open the **Delivery Mode Details** page.

Computer Laboratory Delivery Mode Details: NIH-LMS
 Training Administrator, #NIHTCLMS1003, NIHTCLMS1002

* = required

Main Related Info Resources Learner Info

Title **NIH-LMS Training Administrator**

ID
NIHTCLMS1003 NIHTCLMS1002

Domain*  

Description

 Character Limit : 255

Course Description
 This 2 day class will introduce Training Administrators to the Learning Management System (also known as the HHS Learning Portal) while preparing them to create courses for the learning catalog, schedule classes and manage instructor-led training. This class will also provide an overview of the Content Administrator role of creating online training, loading it into the LMS content server and making it available for the end-user. This course will provide hands-on exercises in the LMS. Audience: People designated as an LMS Training Administrator are required to take this course.

Duration (HH:MM)*

Available From 

Discontinued From 

3. If desired, edit information on the Main Tab.

NOTE: These settings are identical to the ones at the course level but can be set up to reflect differences between delivery types.
4. Make all necessary changes and click **Save**.
5. If desired, edit information on the **Related Info** Tab.

NOTE: Attachments, Notes, Evaluations, and Continuing Education Credits can be added here as described in the Course Creation section of this user manual.
6. If desired, edit information on the **Resources** Tab.

NOTE: For detailed instructions for adding resources to a course's Delivery Type, please see *Step-By-Step (Adding Resources to a Delivery Type)* in this guide.

Training Administrator

STEP-BY-STEP (ADDING RESOURCES TO A DELIVERY TYPE)

1. From the *Course Details* page, click the **Delivery Type** tab.
TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.
2. Click the name of the delivery type to enter the *Delivery Mode Details* page.
3. Click the **Resource** tab.
4. Click the **Add Resource** link to open the *Add Resources* window.

Add Resources NIH-LMS Training Administrator, # NIHTCLMS1003, #00013218

* = required

Resource Type* Room

Purpose* Customer Site Classroom

Quantity* 1

Resource* EPS Classroom 9

For the selected resource, ignore any scheduling conflict

Save Close

5. Select a resource types from the **Resource Type** drop-down menu (e.g., Equipment, Inventory, Person, or Room).
6. Select a purpose from the **Purpose** drop-down menu.
7. In the **Quantity** field, enter the number of items you want to add.
8. In the **Resource** field, enter a resource name or click the **Resource** pick list to locate the desired resource.
9. Click **Save** to return to the *Resources* tab.

Catalog Resources Continuing Education Learning Administration Catalog Configuration Pricing Reports

Offerings Computer Laboratory Delivery Mode Details: NIH-LMS Training Administrator, #NIHTCLMS1003, NIHTCLMS1002

Offerings

Courses

Import

Package

Learning Requests

Interest List

Main Related Info Resources Learner Info

Resources Add Resource | Print | Export | Modify Table

Description	Resource Type	Quantity	Assigned	Rate	Actions
Customer Site Classroom	Classroom	1	EPS Classroom 9	0.00 USD	Delete

MANAGING OFFERINGS

OFFERING SETUP

Offerings, which are also known as classes or learning events, are individual instances of Delivery Types. Just as Delivery Types inherit details from the parent Course, Offerings inherit details from the parent Delivery Type.

There are two places from which you can create a new offering:

- The **Delivery Type** tab of a specific Course
- The **New Offering** link on the *Offerings* search page.

STEP-BY STEP (CREATING AN OFFERING - FROM THE OFFERINGS SEARCH PAGE)

1. From the left navigation bar, click the **Offerings** link to display the *Offerings* page.

The screenshot displays the 'Offerings' search page. At the top, a navigation bar includes 'Catalog', 'Resources', 'Continuing Education', 'Learning Administration', 'Catalog Configuration', 'Pricing', and 'Reports'. The 'Catalog' tab is active. On the left, a sidebar lists 'Offerings', 'Courses', 'Import', 'Package', 'Learning Requests', and 'Interest List', with 'Offerings' selected. The main area is titled 'Offerings' and contains search filters: 'Offering Type' (radio buttons for 'Public Offerings' and 'Private Offerings'), 'Title', 'ID', 'Domain', 'Audience Type', 'Start Date >=', 'End Date <=', 'Course ID', 'Language', and 'Delivery' (a dropdown menu). There are 'Save Search Query' and 'Search' buttons. At the bottom right, a red arrow points to the 'New Offering' link.

Training Administrator

- From the *Offerings* page, click the **New Offering** link below the offerings Search button to display the *Create New Offering* wizard.

The screenshot shows the 'Create New Offering' wizard in the LMS. The 'Catalog' tab is selected. The 'Offerings' menu is open, and 'Create New Offering' is highlighted. The wizard shows '1. Select Offering Type' and '2. Define Offering' steps. The 'Based on Course*' field contains 'NIH-LMS Training Administrator'. The 'Delivery Type*' dropdown menu is open, showing 'Computer Laboratory' selected. Red arrows point to the 'Catalog' tab, the 'Offerings' menu, the 'Delivery Type*' dropdown, and the 'Next' button.

- In the **Based on Course** field, enter the name of the Course for which you want to create a new Offering.
- From the **Delivery Type** drop-down menu, select the appropriate delivery method for the Offering being created.
- Click **Next**.
- Proceed to Step 3 in *Step-By-Step (Creating an Offering – From the Delivery Type Tab)* instructions below.

STEP-BY STEP (CREATING AN OFFERING - FROM THE DELIVERY TYPE TAB)

These steps are specific to creating an Instructor-Led Training because it is the Delivery Type most commonly used by NIH Training Administrators. While the basic steps for creating an Offering for one of the other Delivery Types are the same, please note that the fields used by each Delivery Type will differ (e.g., The Online Training Delivery Type does not include fields for *Min Count* and *Max Count* for its offerings because the number of registrations for an online training is unlimited).

- From the *Course Details* page, click the **Delivery Type** tab.
TIP: For more information about finding a course in the LMS as an administrator, please see *Step-By-Step (Locating a Course after Creation)* in this guide.
- In the *New Offering* column of the *Delivery Types* table, click the **New** offering link to open the *New offering* page (e.g., the **New** offering link for an instructor-led offering will appear in the table as “New Instructor-Led Offering”).

New Instructor led Offering

1. Select Offering Type >>> 2. Define Offering

Title	NIH-LMS Training Administrator
Course ID	NIHTCLMS1003
ID	00013216
Domain*	<input type="text" value="NIHTC"/>
Description	<div style="border: 1px solid gray; height: 30px; width: 100%;"></div> Character Limit : 1000
Course Description	
Delivery Mode Description	This course covers all Training Administrator related tasks in the LMS.
Start Date*	<input type="text" value="07/27/2009"/>
End Date	
Duration (HH:MM)*	<input type="text" value="16:00"/>
Session Template*	<input type="text" value="NIH Mon-Tue 8:30-4:30"/>
Display for Call Center	<input checked="" type="checkbox"/>
Display for Learner	<input checked="" type="checkbox"/>
Test	<input type="checkbox"/>
Base Price	435 (Inherited from Delivery Mode)
Currency	<input type="text" value="US Dollars"/>
Offering Price	<input type="text"/>

3. In the **Domain** field, verify that the correct domain is specified and that it is the same domain that is also specified for the Course and Delivery Type.
4. In the **Start Date** field, enter the date on which the offering is scheduled to begin.
5. In the **Duration** field, verify that the designated duration for the offering is correct.
6. Click the **Pencil** icon to the right of the **Session Template** field to open the *Select Session Template* window.
7. Search for Session templates that best fit the offering's duration.

TIP: In the **Name** field of the *Select Session Template* window, enter **"NIH"** to locate all available NIH Session Templates.

Training Administrator

8. Select the radio button of a session template and do one of the following:
- Click **Select And Close** to return to the *New* offering page.
 - Click **Select And Modify** to adjust the details of the session template for this specific offering. For more information about modifying a Session Template, please see *Step-by-Step (Creating a Session Template)* in this guide.

Multi-Currency Pricing	<input checked="" type="radio"/> This Offering is available only in inherited currencies and currency selected above. <input type="radio"/> This Offering is available in inherited currencies, the currency selected above and default currency, US Dollars. <input type="radio"/> This Offering is available in all the active currencies in the system. Note: Prices are only calculated for currencies that have exchange rates defined in the system.
Training Units	<input type="text"/>
Language*	<input type="text" value="English"/>  
Location*	<input type="text" value="NIH Training Center"/>  
Facility	<input type="text" value="EPS"/>  
Min Count*	<input type="text" value="10"/>
Max Count*	<input type="text" value="16"/>
Max In Wait List*	<input type="text" value="10"/>
Student Count	<input type="text"/>
Students Waitlisted	<input type="text"/>
Vendor	<input type="text" value="NIH Training Center"/>  
Customer Service Representative	<input type="text" value="Brian HUGHES"/>  
Stop Auto-Promotion Date	<input type="text"/> 
Open Enrollment Date	<input type="text"/> 
Open Enrollment For All Audience Types Date	<input type="text"/> 
Enrollment Closes Before	<input type="text"/> 
Offering Reminder before Start Date (days)	<input type="text"/>
Offering Completion Reminder after End Date (days)	<input type="text"/>

9. In the **Language** field, enter **English**.
10. In the **Location** field, enter the location at which the class will be conducted.
11. In the **Min Count** field, enter the minimum number of students required for the class to be held.
12. In the **Max Count** field, enter the maximum number of students that can register and attend this class.
13. In the **Max in Waitlist** field, enter the maximum number of students who can be 'waitlisted' for registration in case a confirmed student cancels their registration.
14. Enter as much information as possible in all non-required fields.
15. Scroll to the bottom of the page and click **Finish**.

STEP-BY STEP (LOCATING AN OFFERING AFTER CREATION)

1. Select the **Training Administrator** role in the **Go To:** drop-down menu.
2. From the left navigation bar, click the **Offerings** link, if necessary, to display the *Offerings* page.

Computer Laboratory Offering

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

Title	<input type="text"/>	ID	<input type="text"/>
Start Date >=	<input type="text" value="10/01/2009"/>	End Date <=	<input type="text"/>
Enrollment Closes Before <=	<input type="text"/>	Open Enrollment Date >=	<input type="text"/>
Language	<input type="text"/>	Domain	<input type="text"/>
Audience Type	<input type="text"/>	Status	-Select One-
Location	<input type="text"/>	Course ID	<input type="text"/>
Delivery	Computer Laboratory		

Offerings [New Offering](#) | [Print](#) | [Export](#) | [Modify Table](#)

Roster	Title	Version	ID	Course ID	Start Date	End Date	Facility	Location	Language	Status
Roster	NIH-LMS Human Capital Administrator	1	00015912	NIHTCLMS1005	11/12/2009	11/13/2009	EPS	NIH Training Center	English	Open - Normal
Roster	NIH-LMS Human Capital Administrator	1	00015913	NIHTCLMS1005	12/17/2009	12/18/2009	EPS	NIH Training Center	English	Open - Normal

3. Enter criteria that will be used to locate the Offering.

TIP: When searching for an Offering, the **Title**, **Start Date** and **End Date** fields are most commonly used by Training Administrators.

If you include the delivery type in your criteria, you will be able to see the offering status and have one click access to the roster of classroom-based training.
4. Click **Search**.
5. From the *Title* column of the *Offerings* search results table, click the offering title link to view and edit Offering details.

Training Administrator

STEP-BY STEP (COPY AN OFFERING)

1. From the *Offering Details* page, scroll to the bottom of the page and click **Copy**.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

Copy Offering: NIH-LMS Training Administrator

1. Specify number of Copies → 2. Define Details

Title NIH-LMS Training Administrator

Offering ID NIHTCLMS1003

Number of Copies*

Next Close

2. In the **Number of Copies** field, enter the number of copies you want to create and click **Next**.

Copy Offering: NIH-LMS Training Administrator

1. Specify number of Copies → 2. Define Details

Copies

ID*	Start Date*	Session Template*	Location*	Facility
00013219	08/03/2009	NIH Mon-Tue 8:30-4:30	NIH Training	EPN
00013220	08/10/2009	NIH Mon-Tue 8:30-4:30	NIH Training	EPS

Back Finish Close

TIP: In Steps 3 through 6 below, you may quickly apply the same information to all Offerings in a column by entering the information in the column heading and then clicking the downward pointing arrow.

3. In the **Start Date** column of the *Copies* table, enter the date on which each Offering will begin.
4. In the **Session Template** column of the *Copies* table, enter the name of a session template that applies to each Offering.
5. In the **Location** column of the *Copies* table, enter the name of a Location at which each Offering will be held.
6. In the **Facility** column of the *Copies* table, enter the Facility at which each Offering will be held.

7. Click **Finish** to open the successful copy dialog box.



8. Click **Ok** to return to the *Offering Details* page of the Offering you copied.
9. From the left navigation bar, click the **Offerings** link to display the *Offerings* page.
10. Search to locate the Offering 'copies' you just created.
11. From the *Title* column of the *Offerings* search results table, click the title of a 'copied' Offering.
12. Modify each copied Offering as needed.

STEP-BY STEP (CANCEL AN OFFERING)

1. From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

Learning Details: NIH-LMS Training Administrator	
Offering Information	
ID	00013219
Instructor	
Delivery Type	Instructor led
Offering Type	Public
Language	English
Location	<u>NIH Training Center</u>
Sessions	<u>NIH Mon-Tue 8:30-4:30</u>
Start Date	08/03/2009
End Date	08/04/2009
Status	 <u>Open - Normal</u>

Training Administrator

- Click the **Open – Normal** link.

Offering Status

* = required

After an offering has been cancelled or delivered, its status cannot be changed again.

Offering	00013219
Current Status	Open - Normal
Change Status to	<input type="radio"/> Delivered
	Delivery Date <input type="text"/> 
	<input type="checkbox"/> Create Learning Request for Waitlisted Learner
	<input checked="" type="radio"/> Cancelled
	<input type="checkbox"/> Create Learning Request for Enrolled Learner

- Select the **Cancelled** radio button
- Click **Save** to return to the *Learning Details* page.
- Verify that the Offering Status now appears listed as **Cancelled – Normal**.

Learning Details: NIH-LMS Training Administrator

Offering Information	
ID	00013219
Instructor	
Delivery Type	Instructor led
Offering Type	Public
Language	English
Location	<u>NIH Training Center</u>
Sessions	<u>NIH Mon-Tue 8:30-4:30</u>
Start Date	08/03/2009
End Date	08/04/2009
Status	<u>Cancelled - Normal</u>

STEP-BY STEP (CHANGING WHETHER AN OFFERING IS VISIBLE IN THE CATALOG)

6. Navigate to the *Offering Details* page of the Offering you want to hide or display in the catalog.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

Instructor led Offering Details: NIH-LMS Training Administrator, # NIHTCLMS1003, #00013219

* = required
Bold = Audited

Main Related Info Resources Learner Info

[Create Community](#)

Title **NIH-LMS Training Administrator**

Course ID NIHTCLMS1003

ID 00013219

Domain* NIHTC Edit

Description
 Character Limit : 1000

Course Description

Delivery Mode Description This course covers all Training Administrator related tasks in the LMS.

Start Date * 08/03/2009

End Date 08/04/2009

Duration (HH:MM)* 16:00

Session Template* NIH Mon-Tue 8:30-4:30

Display for Call Center ←

Display for Learner ←

Test

7. Do one of the following:

- Uncheck the **Display for Call Center Learner** when hiding the offering for Learners.
- Check the **Display for Call Center Learner** when displaying the offering for Learners.

8. Do one of the following:

- **Uncheck** the **Display for Learner** when hiding the offering for Learners.
- **Check** the **Display for Learner** when displaying the offering for Learners.

IMPORTANT! The **Display for Learner** and **Display for Call Center Learner** check boxes should either both be checked, or both be unchecked.

9. Scroll to the bottom of the page and click **Save**.

ADDING RELATED INFORMATION TO AN OFFERING

Once an Offering is created, you may add additional information to the Offering.

STEP-BY-STEP (ADD ATTACHMENTS TO AN OFFERING)

1. From the *Offering Details* page, click the **Related Info** tab.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

2. Click the **Add Attachments** link to open the *New Attachment* window.

New Attachment

* = required

Attachment Name*

Type* URL File

Category*

Locale*

Is Private

3. In the **Attachment Name** field, enter a descriptive title for your attachment.

4. Choose one of the following for the Type of attachment:

- URL – enter the URL in the **URL** field.
- File – click **Browse** to locate the file you want to attach.

5. Select a category from the **Category** drop-down menu.

6. Click **Save** to return to the *Related Info* tab.

Catalog Resources Continuing Education Learning Administration Catalog Configuration Pricing Reports

Offerings Computer Laboratory Offering Details: NIH-LMS Human Capital Administrator, # NIHTCLMS1005, #00015912

Main Related Info Resources Learner Info

Attachments [Add Attachment](#) | [Print](#) | [Export](#)

Attachment Name	Type	Category	Locale	Private	Actions
Parking Map	File	Map	English	No	Edit Attachment Delete Attachment

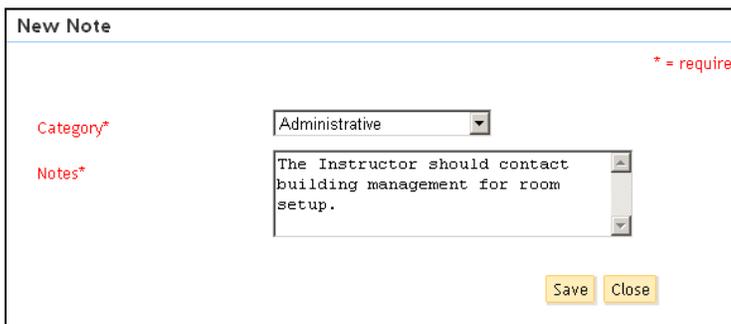
Training Administrator

STEP-BY-STEP (ADD NOTES TO AN OFFERING)

1. From the *Offering Details* page, click the **Related Info** tab.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

2. Click the **Add Note** link to open the *New Note* window.



New Note

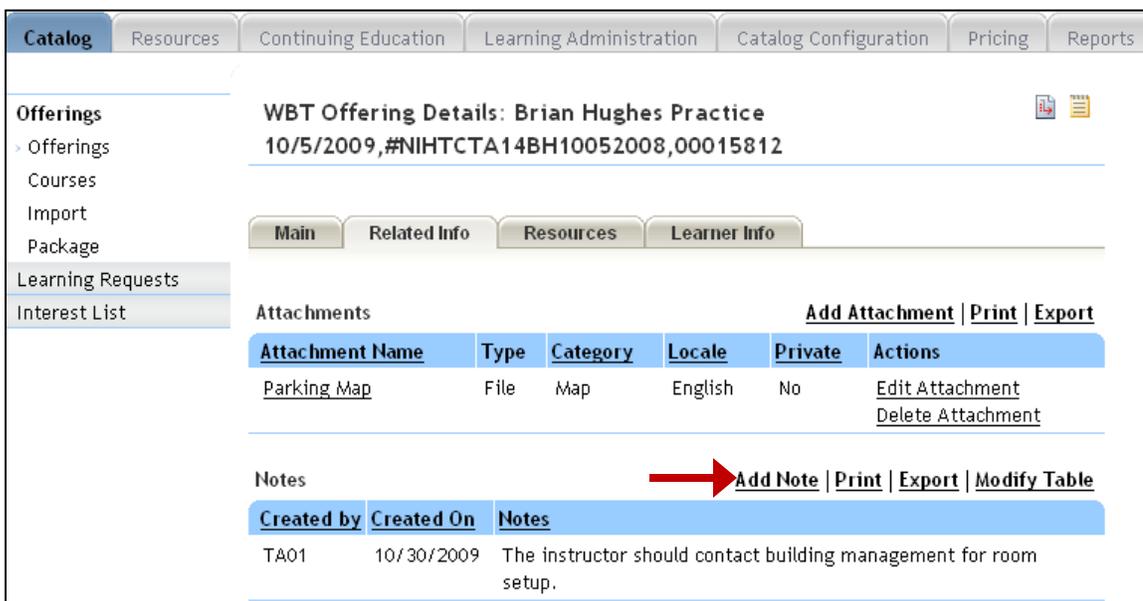
* = required

Category* Administrative

Notes* The Instructor should contact building management for room setup.

Save Close

3. Select a category from the **Category** drop-down menu.
4. In the **Notes** field, enter the body of the note.
5. Click **Save** to return to the *Related Info* tab.



Catalog Resources Continuing Education Learning Administration Catalog Configuration Pricing Reports

Offerings WB T Offering Details: Brian Hughes Practice

Offerings 10/5/2009, #NIHTCTA14BH10052008, 00015812

Courses

Import

Package

Learning Requests

Interest List

Main Related Info Resources Learner Info

Attachments Add Attachment | Print | Export

Attachment Name	Type	Category	Locale	Private	Actions
Parking Map	File	Map	English	No	Edit Attachment Delete Attachment

Notes Add Note | Print | Export | Modify Table

Created by	Created On	Notes
TA01	10/30/2009	The instructor should contact building management for room setup.

ADDING RESOURCES TO AN OFFERING

These steps are specific to adding a Room resource because it is the Resource type most commonly used by NIH Training Administrators. While the basic steps for adding any Resource are the same, please note that the fields used by each Resource type will vary slightly.

STEP-BY-STEP (ADDING RESOURCES TO AN OFFERING)

- From the *Offering Details* page, click the **Resources** tab.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.
- Click the **Add Resource** link to open the *Add Resources* window.

- Select a resource types from the **Resource Type** drop-down menu (e.g., Equipment, Inventory, Person, or Room).
- Select a purpose from the **Purpose** drop-down menu.
- In the **Quantity** field, enter the number of items you want to add.
- In the **Resource** field, enter a resource name or click the **Resource** pick list to locate the desired resource.
- Click **Save** to return to the *Resource* tab.

Purpose	Resource Type	Quantity	Resource ID	Resource Name	Qualification Level	Rate	Actions
Internal Classroom	Room	1	00003040	EPS Classroom 4		0.00 USD	View/Edit Delete View Calendar

ADDING LEARNER INFORMATION TO AN OFFERING

STEP-BY-STEP (ADD A DROP POLICY TO AN OFFERING)

1. From the *Offering Details* page, click the **Learner Info** tab.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

2. Click the **Add Drop Policy** link to open the *Add New Drop Policy* window.

Add New Drop Policy * = required

Select Charge Type* Percentage Flat Rate

Drop Charge* %

Day(s) before event starts* (enter negative value to apply drop policy after start of event)

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

3. Choose a **Select Charge Type**:

- Percentage—a variable price, calculated in proportion to the cost of the class
- Flat Rate—a price that remains constant regardless of the cost of the class

4. In the **Drop Charge** field, enter a number representing either the **Percentage** or **Flat Rate**, as selected in Step 3 above.

5. In the **Day(s) Before Event Starts** field, enter a whole number representing the number of days before a training that the Drop Policy will go into effect.

6. Click **Save** to return to the *Learner Info* tab.

Delivery Mode Level Drop Policies		
No items found		
Drop Policy		Add Drop Policy Print Export Modify Table
<u>Late Charge</u>	<u>For cancellations up to</u>	<u>Actions</u>
10%	14 day(s) before event starts	Delete

STEP-BY-STEP (ADD SEATS PER AUDIENCE TYPE TO AN OFFERING)

To limit registration into an Offering to a specified group of individuals, you may add Audience Types or Audience Sub Types to the Offering. Doing so means that only the Learners included in the Audience/Audience Sub Types will be able to see the Offering in the Course Catalog and register for it.

IMPORTANT! In order to specify seats per Audience Type at the Offering level, the Audience Type(s) and Audience Sub Type(s) must also be added at the Course level. Failure to do so will prevent you from being able to add seats for them at the Offering level.

To add seats per Audience Type, or Audience Sub Type, to an Offering, perform the following:

1. From the *Offering Details* page, click the **Learner Info** tab.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

Drop Policy		Add Drop Policy
No items found		
Seats per Audience Type or Audience Sub Type		Add Audience Type or Audience Sub Type 
No items found		
Price List		Add Price List Print Export Modify Table
Price List	Aud Type	Base Price in \$ Actions
Master Price List	Global	435(Inherited From Delivery Mode)

2. Click the **Add Audience Type or Audience Sub Type** link to open the *Audience Type Details* window.

NOTE: Specific Audience Types, and Audience Sub Types, will only be available from the *Audience Type Details* window if they have already been added to the Course. For more information about adding Audience Types to a Course in the LMS as an administrator, please see *Step-By Step (Adding An Audience Type to a Course - Optional)* in this guide.

Seats per Audience Type or Audience Sub Type		Add Audience Type or Audience Sub Type Print Export
Audience Type or Audience Sub Type	Max number of Seats	Actions
NIH - all	10	

Training Administrator

3. In the *Select* column of the *Audience Types or Audience Sub Types selected* table, select the **check box** of the Audience Type or Audience Sub Type from which you want to assign seats to the Offering.

NOTE: This does not assign the seats, but specifies the Audience (or Sub) Type from which you will be assigning the seats.

4. From the *Seats per Audience Type or Audience Sub Type* section of the *Learner Info* tab, click the Audience (or Sub) Type link that you added in Step 3 to open the *Seats within Audience Type or Audience Sub Type* window.
5. In the **Max number of Seats** field, enter the maximum number of seats available in the Offering and click **Update**. This allocates the total number of seats for the parent Audience Type.

IMPORTANT! The **Max number of Seats** field is based on the current number of available seats in the Offering. If the max number of Learners for the class is 16 and 2 Learners are already registered, then you can only allot 14 remaining, open seats to an Audience (or Sub) Type.

6. From the *Seats per Audience Type or Audience Sub Type* section of the *Learner Info* tab, click the Audience (or Sub) Type link that you added in Step 3 to open the *Seats within Audience Type or Audience Sub Type* window again.
7. In the **Number of Seats** field, enter the number of seats you want to allocate to the Audience (or Sub) Type you'll select in the next Step (e.g., Four of 14 available seats may be allocated to a particular Audience Type).
8. From the *Audience Sub Type* table, select the **check box** to the left of the Audience (or Sub) Type to which you want to allocate the number of seats specified in Step 7.

Seats per Audience Type or Audience Sub Type	Add Audience Type or Audience Sub Type Print Export	
Audience Type or Audience Sub Type	Max number of Seats	Actions
NIH - all	5	
NIH - all >> NIH OD - Office of Budget	5	Delete

MANAGING ROSTERS

STEP-BY STEP (ADD A LEARNER TO A ROSTER)

1. From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

The screenshot shows the 'Content Modules' section of the LMS. At the top, there are links for 'Change Status', 'Attach Content', and 'Modify Table'. Below this is a table with columns: Module, Path 1, Path 2, Status, Sign Off, Mastery Score, Content Status, Attempts on Content, and Actions. The first row shows 'Sessions' with 'Required' checked, 'Required' unchecked, and 'Enabled'. Below the table, there is an 'Owner' section with links for 'Add Owner' and 'Modify Table'. A table lists the owner 'Brian HUGHES' with 'Inherited From' as 'Course' and 'Actions' as 'Delete'. At the bottom, there are several buttons: 'Copy', 'Create New Offering', 'Roster' (highlighted with a red arrow), 'View Broadcast Offerings', 'New Broadcast Offering', 'Save', and 'Cancel'.

2. Click the **Add Learner** link to open the *Search for People* window.

The screenshot shows the 'Roster Information' page. At the top, there are tabs for 'Offering Details', 'Roster', 'Attendance', and 'Results'. The 'Roster' tab is active. Below the tabs, there is a 'Roster Information' section with the following details: 'Roster' (0 of 2 seats full), 'Waitlisted' (1 of 2 seats waitlisted), and 'On Demand Notification' with a 'Send' link. To the right, there is a 'View by Registration Status' dropdown menu set to 'Confirmed'. Below this, there is a 'Learners' section with the text 'No Learners have been registered for this Offering' and a red arrow pointing to an 'Add Learner' link. At the bottom right, there is a 'Cancel' button.

3. Enter search criteria for the Learner that will be added to the roster of this Offering and click **Search**.

Training Administrator

- In the *Select* column of the *People* search results table, select the Learner that will be added to the roster of this Offering.

Search for People * = require

Person Type* First Name

Last Name Person ID

Username Manager

Organization Location

Domain Person Type

People

Select	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="radio"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNN1		NIHSUPERVISOR
<input type="radio"/>	NIH	LocalLearningAdmin	NIHLOCALLEARNINGADMIN	Other	00165950	HNAM6		NIHSUPERVISOR

- Click **Select** to view the Registration Confirmation for that Learner.

Registration Confirmation Printer Friendly Version

Order Contact: NIH Learner

Billed To: HNN1

Order Status:

Order Number: 00339841

Order Items

Title	Learners	Delivery Type	Status	Class Date	Session Template	Location	Facility	Actions	Price
NIH-LMS Training Administrator	NIH Learner	Instructor led	Confirmed	07/27/2009	NIH Mon-Tue 8:30-4:30	NIH Training Center	EPS	Notes	435.00 USD

Order Total 435.00 USD
Discount 0.00 USD
Total 435.00 USD

- Click **Close** to return to the Offering roster.

View by Registration Status All

Learners Add Learner | Print | Export | Modify Table

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	NIH - all	00339841	Confirmed	Approval Not Required	Confirmed	Notes

Cancel

STEP-BY STEP (SUBSTITUTE A LEARNER)

- From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

View by Registration Status All

Learners Add Learner | Print | Export | Modify Table

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	NIH - all	00339841	Confirmed	Approval Not Required	Confirmed	Notes

Cancel

- From the *First Name* column of the *Learners* table, click the Learner's first name link to open the *Substitute Learner* window.

Search for [Substitute Learner](#)

Person Type* Internal First Name

Last Name Person ID

Username Manager

Organization Location

Domain Person Type -Select One-

Search

People Print | Export | Modify Table

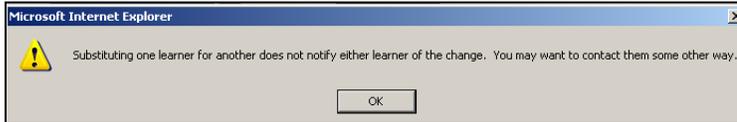
	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="radio"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNN1		NIHSUPERVISOR
<input type="radio"/>	NIH	LocalLearningAdmin	NIHLOCALLEARNINGADMIN	Other	00165950	HNAM6		NIHSUPERVISOR

Save Close

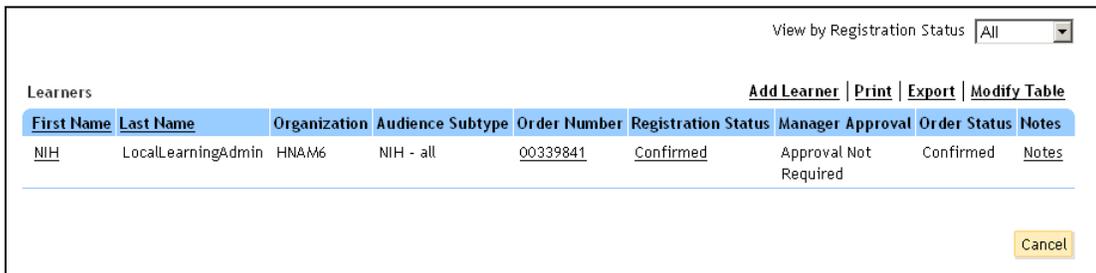
- Enter search criteria for the Learner that will be substituted and click **Search**.
- In the *Select* column of the *People* search results table, select the Learner that will be substituted.

Training Administrator

- Click **Save** to open the 'notification reminder' dialog box.



- Click **OK** to return to the *Learning Details* page.



View by Registration Status: All

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

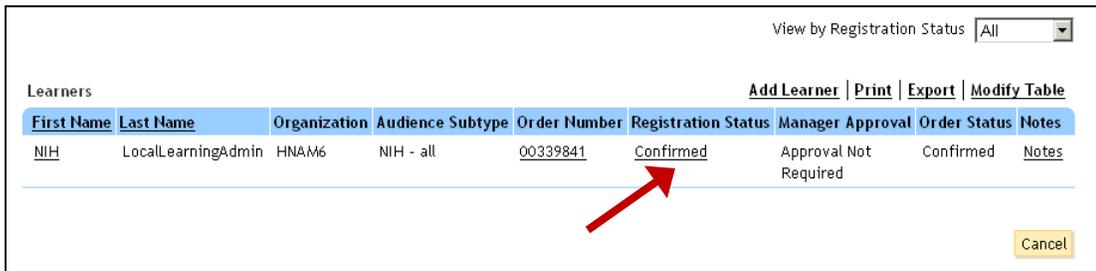
First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	LocalLearningAdmin	HNAME6	NIH - all	00339841	Confirmed	Approval Not Required	Confirmed	Notes

[Cancel](#)

STEP-BY STEP (CANCEL A LEARNER REGISTRATION)

- From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.



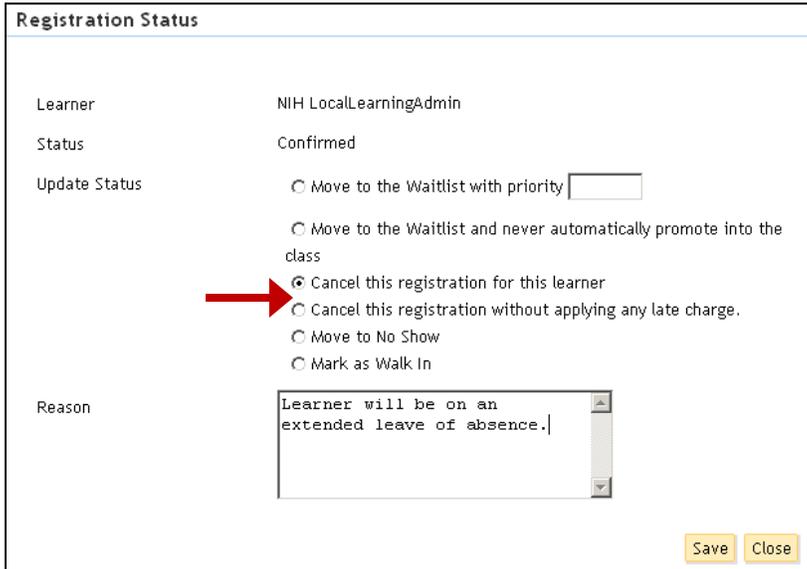
View by Registration Status: All

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

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	LocalLearningAdmin	HNAME6	NIH - all	00339841	Confirmed	Approval Not Required	Confirmed	Notes

[Cancel](#)

- From the *Registration Status* column of the *Learners* table, click the Learner's registration status link (e.g., Confirmed) to open the *Registration Status* window.

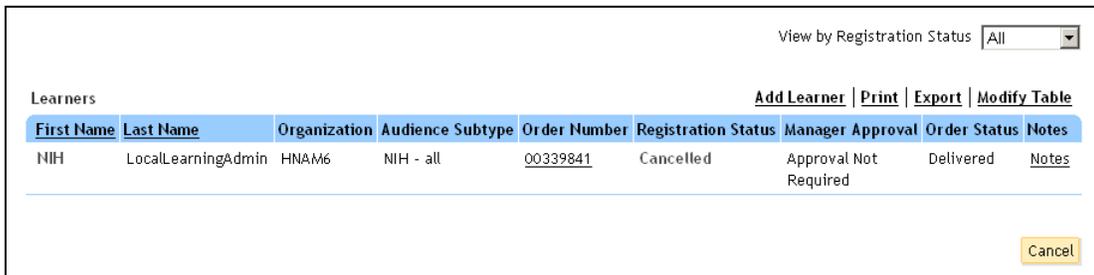


The screenshot shows a 'Registration Status' window. It contains the following fields and options:

- Learner:** NIH LocalLearningAdmin
- Status:** Confirmed
- Update Status:** A list of radio buttons:
 - Move to the Waitlist with priority
 - Move to the Waitlist and never automatically promote into the class
 - Cancel this registration for this learner (indicated by a red arrow)
 - Cancel this registration without applying any late charge.
 - Move to No Show
 - Mark as Walk In
- Reason:** A text area containing the text: "Learner will be on an extended leave of absence."
- Buttons:** Save and Close

- Select one of the following radio buttons:
 - Cancel this registration for this learner
 - Cancel this registration without applying any late charge.

IMPORTANT! At this time, the LMS is not connected to any financial system and is therefore, unable to obligate funds or bill Learners for late charges that may be associated with the Offering Drop Policy.
- In the **Reason** field, enter the reason for cancelling the learner's registration.
- Click **Save** to return to the *Learning Details* page.



The screenshot shows a table of learners with the following data:

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	LocalLearningAdmin	HNAM6	NIH - all	00339841	Cancelled	Approval Not Required	Delivered	Notes

Additional elements in the screenshot include: "View by Registration Status" set to "All", and a "Cancel" button at the bottom right.

Training Administrator

STEP-BY STEP (RESCHEDULE A LEARNER)

1. From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

View by Registration Status:

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

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	NIH - all	00339842	Confirmed	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	NIH - all	00339841	Cancelled	Approval Not Required	Delivered	Notes

[Cancel](#)

2. From the *Order Number* column of the *Learners* table, click the Learner's order number link (8-digit number) to open the *Registration Status* window.

Order Details: Order Number 00339842   

Order Contact: NIH Learner

Created On: 07/23/2009

Order Status:

Billed To: HNN1

Order Notes [Add Note](#)

No items found

Order Items [Modify Table](#)

Title	Learner	Delivery Type	Status	Actions	Price
NIH-LMS Training Administrator	NIH Learner	Instructor led	Confirmed	Change Learner Reschedule Notes Drop	435.00 USD
Total					435.00 USD

[Cancel](#)

3. In the *Actions* column of the *Order Items* table, click the **Reschedule** link.

Training Administrator

- Click **OK** to close the 'cancellation fee reminder' dialog box if it opens and proceed to the *Reschedule* window.

Reschedule: NIH-LMS Training Administrator

Title	NIH-LMS Training Administrator	Location	<input type="text"/>
Keyword	<input type="text"/>	Delivery Type	Computer Laboratory
Start Date >=	11/01/2009	Language	English
End Date <=	<input type="text"/>	Category	<input type="text"/>
Facility	<input type="text"/>	Competency	<input type="text"/>
Currency	US Dollars	Offering ID	<input type="text"/>
Field of Study	<input type="text"/>		

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

Add	Title	Version	Delivery Type	Start Date	End Date	Session	Location	Facility	Language	Price
<input type="radio"/>	NIH-LMS Training Administrator	1	Computer Laboratory	11/17/2009	11/18/2009	NIH Tue- Wed 8:30- 4:30	NIH Training Center	EPS	English	602.00 USD
<input type="radio"/>	NIH-LMS Training Administrator	1	Computer Laboratory	12/10/2009	12/11/2009	NIH Thu- Fri 8:30- 4:30	NIH Training Center	EPS	English	602.00 USD

- If necessary, modify the search criteria and click **Search** to locate the Offering into which the Learner will be moved.
- In the *Add* column of the *Learning Offerings* search results table, select the **radio button** next to the Offering into which the Learner will be moved.
- Scroll to the bottom of the page and click one of the following
 - Reschedule Without Charge
 - Reschedule With Charge

Training Administrator

Order Details: Order Number 00451714

Order Contact: NIH Learner
 Created On: 11/02/2009
 Order Status:
 Billed To: HN&M6

Order Notes [Add Note](#)
 No items found

Order Items [Modify Table](#)

Title	Learner	Delivery Type	Status	Actions	Price
NIH-LMS Training Administrator	NIH Learner	Computer Laboratory	Cancelled	Notes	0.00 USD
NIH-LMS Training Administrator	NIH Learner	Computer Laboratory	Confirmed	Change Learner Reschedule Notes Drop	602.00 USD
Total					602.00 USD

 [Cancel](#)

NOTE: The Order now reflects the cancellation of the Learner's registration in the original Offering, as well as the addition of the Learner's registration into the new Offering.

- Click **Cancel** to return to the *Learning Details* page of the Offering from which the reschedule was initiated.

View by Registration Status:

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

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	NIH - all	00339842	Cancelled	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HN&M6	NIH - all	00339841	Cancelled	Approval Not Required	Delivered	Notes

[Cancel](#)

STEP-BY STEP (WAITLIST A LEARNER)

- From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	NIH - all	00339842	Cancelled	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	NIH - all	00339843	Confirmed	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	NIH - all	00339841	Cancelled	Approval Not Required	Delivered	Notes

- From the *Registration Status* column of the *Learners* table, click the Learner’s registration status link (e.g., Confirmed) to open the *Registration Status* window.

Registration Status

Learner: NIH LocalLearningAdmin

Status: Confirmed

Update Status: Move to the Waitlist with priority

Move to the Waitlist and never automatically promote into the class

Cancel this registration for this learner

Cancel this registration without applying any late charge.

Move to No Show

Mark as Walk In

Reason: Role-based priority given to this learner

Save Close

- Select one of the following radio buttons:

- Move to the waitlist with priority ____
- Move to the waitlist and never automatically promote into the class.

NOTE: Specifying a priority for a waitlisted Learner means that the Learner will be moved to the top of the waitlist and auto-promoted into the class if a seat becomes available. ***Currently the auto-promotion feature is not turned on in the LMS.**

Training Administrator

4. In the *Reason* field, enter the reason for waitlisting the learner's registration.
5. Click **Save** to return to the *Learning Details* page.

View by Registration Status: All

Learners Add Learner | Print | Export | Modify Table

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	NIH - all	00339842	Cancelled	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	Unreserved	00339843	Waitlisted (Priority 1)	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	NIH - all	00339841	Cancelled	Approval Not Required	Delivered	Notes

Cancel

STEP-BY STEP (PROMOTE A WAITLISTED LEARNER)

1. From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

View by Registration Status: All

Learners Add Learner | Print | Export | Modify Table

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	NIH - all	00339842	Cancelled	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	Unreserved	00339843	Waitlisted (Priority 1)	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	NIH - all	00339841	Cancelled	Approval Not Required	Delivered	Notes

Cancel

2. From the *Registration Status* column of the *Learners* table, click the Learner's registration status link (e.g., *Waitlisted*) to open the *Registration Status* window.

Registration Status

Learner: NIH LocalLearningAdmin

Status: Waitlisted (Priority 11)

Update Status

Move to the Waitlist with priority

Move to the Waitlist and never automatically promote into the class

Move into the class with confirmed status

Move into the class with confirmed status, by increasing class count

Cancel this registration for this learner

Move to No Show

Reason: NIHITS nomination received for this Learner

Save Close

3. Select one of the following radio buttons:

- Move into the class with confirmed status
- Move into the class with confirmed status, by increasing class count

IMPORTANT! Increasing the class count means increasing the total number of seats in the class. Make sure that increasing the size of your class does not create a resource shortfall. If, for example, a classroom only contains 16 computers, then adding a 17th Learner to the roster means that one Learner will not have access to a computer.

4. In the *Reason* field, enter the reason for moving the Learner into the Offering.

5. Click **Save** to return to the *Learning Details* page.

View by Registration Status

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

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	NIH - all	00339842	Cancelled	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	NIH - all	00339843	Confirmed	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	NIH - all	00339841	Cancelled	Approval Not Required	Delivered	Notes

STEP-BY STEP (ADD A “WALK-IN” TO A ROSTER)

1. From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

2. Add the “Walk-In” Learner to the roster.

TIP: For more information about adding a Learner to the roster of an Offering, please see *Step-By-Step (Add a Learner to a Roster)* in this guide.

3. From the *Registration Status* column of the *Learners* table, click the Learner’s registration status link (e.g., Confirmed) to open the *Registration Status* window.

4. Select the **Mark as Walk In** radio button.
5. In the *Reason* field, enter the reason for designating the Learner’s registration status as “**Walk In**”.
6. Click **Save** to return the *Learning Details* page.

View by Registration Status: All

Learners Add Learner | Print | Export | Modify Table

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	Unreserved	00339842	Cancelled (No Show)	Approval Not Required	Cancelled	Notes
NIH	Learner	HNN1	Unreserved	00339846	Confirmed (Walk In)	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNA6	Unreserved	00339845	Confirmed	Approval Not Required	Confirmed	Notes

Cancel

STEP-BY STEP (MARK A CONFIRMED LEARNER AS A “NO-SHOW”)

1. From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	NIH - all	00339842	Cancelled	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	NIH - all	00339843	Confirmed	Approval Not Required	Confirmed	Notes
NIH	LocalLearningAdmin	HNAM6	NIH - all	00339841	Cancelled	Approval Not Required	Delivered	Notes

2. From the *Registration Status* column of the *Learners* table, click the Learner's registration status link (e.g., Confirmed) to open the *Registration Status* window.

Registration Status

Learner: NIH LocalLearningAdmin

Status: Confirmed

Update Status:

- Move to the Waitlist with priority
- Move to the Waitlist and never automatically promote into the class
- Cancel this registration for this learner
- Cancel this registration without applying any late charge.
- Move to No Show
- Mark as Walk In

Reason: Learner did not attend this training as scheduled.

Save Close

3. Select the **Move to No Show** radio button.
4. In the **Reason** field, enter the reason for designating the Learner's registration status to “No Show”.

Training Administrator

- Click **Save** to return the *Learning Details* page.

IMPORTANT! At this time, the LMS is not connected to any financial system and is therefore, unable to obligate funds or bill Learners for late charges that may be associated with the Offering Drop Policy.

View by Registration Status

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

First Name	Last Name	Organization	Audience Subtype	Order Number	Registration Status	Manager Approval	Order Status	Notes
NIH	Learner	HNN1	Unreserved	00339842	Cancelled (No Show)	Approval Not Required	Cancelled	Notes

CLOSING-OUT AN OFFERING

STEP-BY STEP (RECORD ATTENDANCE)

1. From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

2. Click the **Attendance** tab.
3. From the **Week** drop-down menu, choose the week of the Offering for which you will mark attendance.
4. From the **Day** drop-down menu, choose the day of the Offering for which you will mark attendance.
5. To grant attendance for the session, do one of the following:
 - Select the **Grant Manually** radio button to mark attendance one-by-one. Proceed to Step 6 below.

The screenshot shows the 'Attendance' tab in the LMS interface. It includes a 'Select Session' section with 'Week' and 'Day' dropdown menus. Below that is the 'Grant Attendance for Session' section with two radio buttons: 'Grant Manually' (selected) and 'Mass-Grant to all learners'. There is also an 'HH:MM' input field set to '00:00'. A table shows the attendance for 'Week 1 : Monday (08:30 - 16:30)' with one learner, 'NIH LocalLearningAdmin', having 08:00 hours. A note at the bottom indicates '*-unconfirmed registration'. At the bottom right are 'Save', 'Clear', and 'Cancel' buttons. Two red arrows point to the 'Week' dropdown and the 'Grant Manually' radio button.

Learner Name	Hours
NIH LocalLearningAdmin	08:00

Training Administrator

- Select the **Mass-Grant to all learners** radio button to mark the same attendance for all Learners on the roster. Proceed to **Step 7** below.

The screenshot shows the 'Attendance' tab in the Training Administrator interface. It includes a 'Select Session' section with dropdowns for 'Week' (Week 1, 08/10/2009) and 'Day' (Monday (08:30 - 16:30)). Below this is the 'Grant Attendance for Session' section with two radio buttons: 'Grant Manually' and 'Mass-Grant to all learners'. The 'Mass-Grant to all learners' radio button is selected, indicated by a red arrow. To the right of the radio buttons is an 'HH:MM' field containing '08:00', also indicated by a red arrow. Below the radio buttons is a table for 'Week 1 : Monday (08:30 - 16:30)' with columns 'Learner Name' and 'Hours'. The table contains one row for 'NIH LocalLearningAdmin' with '00:00' in the 'Hours' column. At the bottom of the table is a note '*-unconfirmed registration' and three buttons: 'Save', 'Clear', and 'Cancel'.

6. If granting attendance manually, perform the following:
 - a) In the *Hours* column of the *Week* table, enter the number of hours of training that the Learner attended on the day specified in *Step 4*, in HH:MM format.
 - b) Proceed to **Step 8** below
7. If mass granting attendance to all learners on the roster, perform the following:
 - a) In the *HH:MM* field, enter the number of training hours that the Learner attended on the day specified in *Step 4*, in HH:MM format.
 - b) Proceed to **Step 8** below.
8. Click **Save**.

STEP-BY STEP (RECORD GRADES & COMPLETION)

1. From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

2. Click the **Results** tab.

The screenshot shows the 'Results' tab selected in the top navigation bar. Below the navigation bar, there is a search section for learning results with fields for Learner Last Name, Learner First Name, From, and To, and a Search button. Below the search section, there are fields for Status (Successful), Score (100), and Grade (A), each with an 'Apply to All' link. A red arrow points to the 'Results' tab, another red arrow points to the 'Apply to All' link for the Score field, and a third red arrow points to the 'Save' button at the bottom of the page. Below the 'Apply to All' links, there are buttons for 'Adjust Credits for Selected', 'Clear', 'Add Offering to Transcript', and 'Cancel'. Below the 'Save' button, there are buttons for 'Adjust Credits for Selected', 'Clear', 'Add Offering to Transcript', and 'Cancel'.

Apply these values to all learners displayed on this page

Status: Successful [Apply to All](#)

Score: 100 [Apply to All](#)

Grade: A [Apply to All](#)

Learning Results [Add Learner](#) | [Mark All Learners](#) | [Adjust Credit for All Learners](#)

<input type="checkbox"/>	Learner Name	Status	Score	Grade	Registration Date	Credits	Actions
<input type="checkbox"/>	NIH Learner	Successful	100	A	07/25/2009		View Evaluation
<input type="checkbox"/>	NIH LocalLearningAdmin	Successful	100	A	07/25/2009		View Evaluation

[Adjust Credits for Selected](#) [Clear](#)

[Save](#) [Add Offering to Transcript](#) [Cancel](#)

3. To mark grades and completions for this Offering, do one of the following:
 - To mass-grant and apply the values to all confirmed Learners on the page, select a completion **Status (Successful or Unsuccessful)**, and enter a **Score** and **Grade**, if applicable, and then click **Apply to All** link to the right of each field.
 - To individually grant grades and completions to confirmed Learners on the roster, select a completion **Status**, and enter a **Score** and **Grade** in the *Learning Results* table, if applicable.
4. Click **Save**.

Training Administrator

STEP-BY STEP (CLOSE AN OFFERING)

1. From the *Offering Details* page, scroll to the bottom of the page and click **Roster** to open the *Learning Details* page.

TIP: For more information about finding an Offering in the LMS as an administrator, please see *Step-By-Step (Locating an Offering after Creation)* in this guide.

Learning Details: NIH-LMS Training Administrator	
Offering Information	
ID	00013219
Instructor	
Delivery Type	Instructor led
Offering Type	Public
Language	English
Location	<u>NIH Training Center</u>
Sessions	<u>NIH Mon-Tue 8:30-4:30</u>
Start Date	08/03/2009
End Date	08/04/2009
Status	<u>Open - Normal</u> ←

2. Click the **Open – Normal** link.

Offering Status	
* = require	
After an offering has been cancelled or delivered, its status cannot be changed again.	
Offering	00013220
Current Status	Open - Normal
Change Status to	→ <input checked="" type="radio"/> Delivered
	Delivery Date <input type="text" value="08/11/2009"/> 
	<input type="checkbox"/> Create Learning Request for Waitlisted Learner
	<input type="radio"/> Cancelled
	<input type="checkbox"/> Create Learning Request for Enrolled Learner
	→ <input type="button" value="Save"/> <input type="button" value="Close"/>

3. Select the **Delivered** radio button.
4. In the **Delivery Date** field, enter the date on which the Offering was delivered.
5. Click Save to return to the *Learning Details* page.
6. Verify that the Offering Status now appears listed as **Delivered – Normal**.

LEARNING ADMINISTRATION

CURRICULA AND CERTIFICATIONS

As a Training Administrator, you may view curricula and certifications 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.
- **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.

The following instructions will detail how you can view a learner's enrollments, curricula, and certifications.

STEP-BY-STEP (VIEW CURRICULA)

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. Click the **Learning Administration** tab.
3. From the left navigation bar, click the **Curricula** link to display the *Curricula* page.

The screenshot shows the Learning Administration interface. The 'Learning Administration' tab is selected. In the left navigation bar, the 'Curricula' link is highlighted. The main content area displays a search box with the text 'NIH LEARNER' and a 'Search' button. To the right of the search box is an 'Advanced Search' section with instructions. Below the search box is a table of search results.

Last Name	First Name	Username	Person Type	View Curricula
Learner	NIH	NIHLEARNER	Other	View Curricula

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.

Training Administrator

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

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

Curricula : NIH Learner

Configure

Name

Target Date <= 

Status

Curricula [Grant Curriculum](#) | [Add Curriculum](#) | [Print](#) | [Export](#) | [Modify Table](#)

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
ASAM Action Officer Training	<div style="width: 100%;"><div style="width: 100%;"></div></div> ASAM Action Officer Path - 100% Completed	Acquired	NIH Learner		Actions
EEO & Diversity Awareness Training for Employees	<div style="width: 0%;"><div style="width: 0%;"></div></div> EEO & Diversity Awareness - 0% Completed	Assigned	NIH Learner		Actions

STEP-BY-STEP (GRANT CURRICULUM)

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

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. Click the **Learning Administration** tab.
3. From the left navigation bar, click the **Curricula** link to display the *Curricula* page.

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.

Curricula

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

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

Last Name	First Name	Username	Person Type	View Curricula
Learner	NIH	NIHLEARNER	Other	View Curricula

5. From the *View Curricula* column of the Curricula Search Results table, click the **View Curricula** link.

Curricula : NIH Learner

[Configure](#)

Name

Target Date <=

Status

Curricula [Grant Curriculum](#) [Add Curriculum](#) [Print](#) [Export](#) [Modify Table](#)

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
ASAM Action Officer Training	ASAM Action Officer Path - 100% Completed	Acquired	NIH Learner		Actions
EEO & Diversity Awareness Training for Employees	EEO & Diversity Awareness - 0% Completed	Assigned	NIH Learner		Actions

6. Search for the curriculum you would like to grant.

Grant Curriculum

1. Select Curriculum ↔ 2. Grant Curriculum

[Configure](#)

Name

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

Select	Name	Version	Description
<input checked="" type="checkbox"/>	Supervisor Development Challenge		"Managers and Supervisors are responsible for developing the tools needed to accomplish organizational objectives and abide by human resources laws and regulations. It is HIGHLY RECOMMENDED for new team leaders, supervisors and managers (including field staff and Commissioned Corps) within the first 6 months of their appointment to complete a course that is designed to assist them in handling the human resources aspects of supervision. This curricula satisfies this recommendation."

Training Administrator

- From the *Select* column of the *Curricula* search results table, select the **radio button** for the curriculum you would like to grant.
- Click **Next**.

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

Learner Name	Acquired On
NIH Learner	07/26/2009

- In the **Date** field, enter the date on which the Curriculum was acquired.
- Click **Finish** to open the *E-Signature* window.

Date: 07/01/2009
Full Name: NIH LocalLearningAdmin
Password*
Comments*
By checking this box, you are acknowledging that you have seen this.
Save & Close Close

- In the **Password** field, enter your LMS log on password.
- In the *Comments* field, enter a justification for why you are granting the curriculum.
- Select the check box acknowledging that you have seen the e-signature box.
- Click **Save & Close**.

STEP-BY-STEP (ADD CURRICULUM)

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

- Select the **Training Administrator** role in the drop-down **Go To** menu.
- Click the **Learning Administration** tab.
- From the left navigation bar, click the **Curricula** link to display the *Curricula* page.

- 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.

Currricula

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

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

Last Name	First Name	Username	Person Type	View Curricula
Learner	NIH	NIHLEARNER	Other	View Curricula

- From the *View Curricula* column of the *Currricula Search Results* table, click the **View Curricula** link.

Currricula : NIH Learner

[Configure](#)

Name
 Target Date <=
 Status

Currricula [Grant Curriculum](#) | [Add Curriculum](#) | [Print](#) | [Export](#) | [Modify Table](#)

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
ASAM Action Officer Training	ASAM Action Officer Path - 100% Completed	Acquired	NIH Learner		Actions
EEO & Diversity Awareness Training for Employees	EEO & Diversity Awareness - 0% Completed	Assigned	NIH Learner		Actions

- Click the **Add Curriculum** link.

Select Curriculum

[Configure](#)

Name
 Discontinued From >=

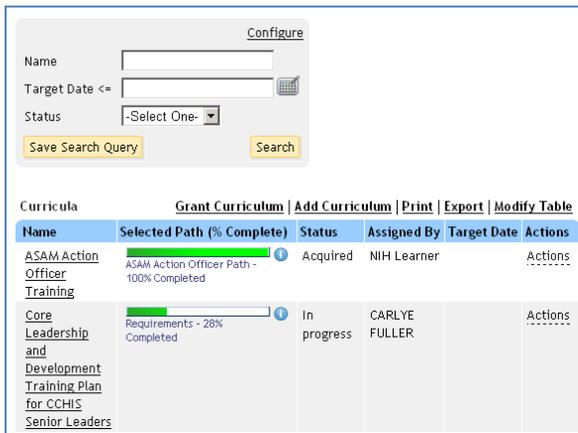
Currricula [Print](#) | [Export](#) | [Modify Table](#)

Select	Name	Available From	Discontinued From	Target Days
<input type="checkbox"/>	Core Leadership and Development Training Plan for CCHIS Senior Leaders	12/11/2008		0

- Search for the curriculum you would like to grant.

Training Administrator

- From the *Select* column of the *Curricula* search results table, select the **radio button** for the curriculum you would like to grant and it will automatically populate to the Learner's Curricula list.

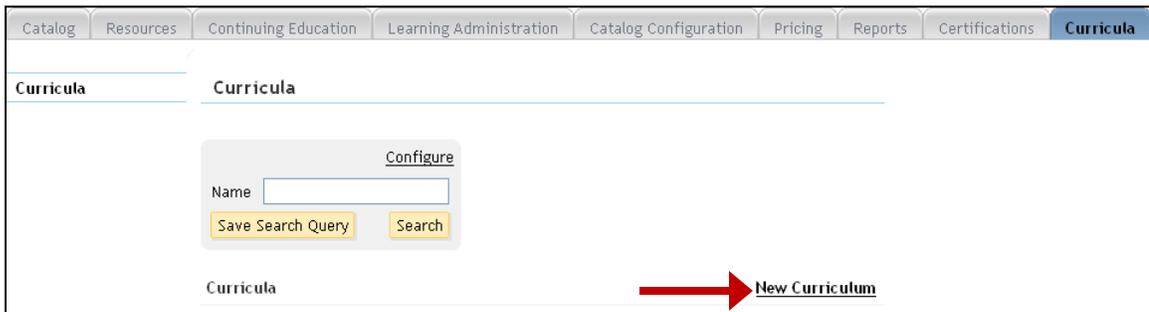


The screenshot shows a search configuration box at the top with fields for Name, Target Date, and Status, along with Save Search Query and Search buttons. Below is a table of search results with columns for Name, Selected Path (% Complete), Status, Assigned By, Target Date, and Actions.

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
ASAM Action Officer Training	ASAM Action Officer Path - 100% Completed	Acquired	NIH Learner		Actions
Core Leadership and Development Training Plan for CCHIS Senior Leaders	Requirements - 28% Completed	In progress	CARLYE FULLER		Actions

STEP-BY-STEP (CREATE A CURRICULUM)

- Select the **Training Administrator** role in the drop-down **Go To** menu.
- Click the **Curricula** tab.
- Click the **New Curriculum** link.



The screenshot shows the Curricula page with a navigation menu at the top including Catalog, Resources, Continuing Education, Learning Administration, Catalog Configuration, Pricing, Reports, Certifications, and Curricula. The Curricula tab is active. Below the navigation menu is a search configuration box with Name, Target Date, and Status fields, and Save Search Query and Search buttons. At the bottom of the page, the text "Curricula" is followed by a red arrow pointing to the "New Curriculum" link.

4. Enter all applicable data. (Fields in Red with an asterisk (*) are required)
- a) **Name***: This is the name used to identify the curriculum.
 - b) **Description**: This is a brief explanation of the curriculum and its components
 - c) **Domain***: The domain of the curriculum should be NIH. (Default)
 - d) **Available From***: This is the date users will be allowed to select the curriculum.
 - e) **Discontinued From**: This is the date on which the curriculum should no longer be available to learners.
 - f) **Status***:
 - i. **Draft** – Set to draft while you are setting up the curriculum. This prevents users from using it.
 - ii. **In Effect** – Set to allow users to access the curriculum.
 - iii. **Obsolete** – Set to discontinue use of the curriculum for users.

The screenshot shows a web form titled "New Curriculum" with a legend indicating that red asterisks denote required fields. The form is divided into two main sections: "Curriculum Details" and "Availability".

Curriculum Details:

- Name***: A text input field containing "LMS Training".
- Description**: A text area containing "LMS Training curriculum." with a character limit of 1000 and 976 characters remaining.
- Domain***: A dropdown menu with "NIH" selected.

Availability:

- Available From***: A date input field showing "10/01/2009".
- Discontinued From**: An empty date input field.
- Status***: A dropdown menu with "Draft" selected. The menu options are Draft, In Effect, and Obsolete.

Red arrows on the left side of the form point to the Name*, Domain*, Available From*, and Status* fields.

Training Administrator

- After entering data into fields, click the **Add** link to add a curriculum path or click the **Next** button at the bottom of the screen.

Completion Criteria

Set the time period or target days in which learners must complete learning items in any one path of the curriculum to acquire the curriculum. If you do not enter a value for target days, then there are no time restrictions and learners would acquire the curriculum as soon as they complete all items.

Target Days [?](#)

Curriculum Paths [Add](#)

No items found

Registration Rules

Select rules for registration that the learner must follow when registering for the curriculum.

Enforce Module Sequencing [?](#) Learners must register for all modules in the order in which they are defined.

Enforce Target Date [?](#) Learners must complete the path by target date selected in the Completion Criteria section.

Omit Offering Selection [?](#) Learners can register for the path without selecting offerings for all courses in the path. Learners must select these offerings at a later time.

Register for Individual Items [?](#) In addition to registering for paths, allow learners to register for individual items in the curriculum.

[Next>](#) [Cancel](#)

- Type the name of the first path the learner must follow.
- Click the **New Module** link.

New Curriculum

* = required

Path

Name*

Modules [New Module](#)

No items found

[Add Another Path](#) [Finish](#) [Cancel](#)

- Enter data in all applicable fields. (Fields in Red with an asterisk (*) are required)

- Click the **Add Learning Element** link.

New Module

Module Details

Name*

Notes

Completion Criteria

Number of Elements to Complete*

Module Required* Yes No

Learning Elements [Add Learning Element](#)

No items found

- Enter the search criteria for the course or curriculum you would like to be included in the path and then click **Search**.

NOTE: Use the toggle button to alternate searching between courses and curricula.

- Select the checkbox to the left of the course/curriculum title and then click **Save**.

Add Learning Elements

Search for Course Curriculum

[Configure](#)

ID

Title

Domain

Audience Type/Sub Type

Add Learning Elements [Print](#) | [Export](#) | [Modify Table](#)

Add	Title	Version	ID
<input type="checkbox"/>	NIH-LMS Human Capital Administrator	1	NIHTCLMS1005
<input type="checkbox"/>	NIH-LMS Local Learning Administrator	1	NIHTCLMS1001
<input checked="" type="checkbox"/>	NIH-LMS Training Administrator	1	NIHTCLMS1003

Training Administrator

12. Repeat steps 9-11 until all courses/curricula have been added to the path.

- You may set the order the courses/curricula should be completed by using the Up/Down arrows.
- Courses/Curricula that no longer need to be in the path can be deleted by clicking the Delete link in the Actions column.

New Module

Module Details

Name* Training Administrator

Notes

Completion Criteria

Number of Elements to Complete* 1

Module Required* Yes No

Learning Elements [Add Learning Element](#) | [Print](#) | [Export](#) | [Modify Table](#)

Up	Down	Name	Version	Type	Actions
		NIH-LMS Training Administrator	1	Course	Delete

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

13. Click **Save** to go to the *Curriculum Details* page.

STEP-BY-STEP (ADD A CURRICULUM OWNER)

1. From the Curriculum Details screen, click the **Add Owner** link.

Curriculum Details: LMS Training

* = required

Curriculum Details

Name* LMS Training

Description Training Administrator

Character Limit : 1000

Domain* NIH

Owner [Add Owner](#)

Name	Actions
NIH Supervisor	Delete

2. Enter criteria to search for the owner and click **Search**.

3. Click the checkbox to the left of the name and then click **Select**.

Search Person, Internal

Supervisors: you can easily display all of **your staff** by entering your **login ID** into the **"Manager"** field, clicking the **Magnifying Glass** graphic, and then clicking the **"Search"** button.

First Name Last Name

Person ID Username

Manager Organization

Location Domain

Person Type Include All Suborganizations

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

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	Supervisor	NIHSUPERVISOR	Other	00165949	HNAM6		NIH0014306293

4. The owner has now been assigned to the curriculum.

STEP-BY-STEP (ADD A CURRICULUM AUDIENCE TYPE)

1. From the Curriculum Details screen, click the **Add Audience Type/Sub Audience Type** link.

Availability

Select time period for which this curriculum will be made available to learners. Only curricula that are in Active status will be available to learners. Use the deeplink URL to make the curriculum available to learners prior to registration.

Available From*

Discontinued From

Status*

Guest Deeplink URL

Roles

No items found

Audience Type / Sub Audience Type [Add Audience Type / Sub Audience Type](#)

No items found

2. Enter the search criteria for the Audience Type (NIH – all) and click **Search**.

Training Administrator

3. Do one of the following:

- Select the checkbox to the left of the Audience Type
- Click the plus (+) symbol to view and select a specific Sub Audience Type.

Add AudienceTypes And Sub Types

Audience Type

Select	Audience Types and Sub Types
<input checked="" type="checkbox"/>	<input type="button" value="+"/> NIH - all

4. Click **Save** to add The Audience Type/Sub type to the curriculum.

STEP-BY-STEP (ADD A REGISTRATION RULE)

1. From the *Curriculum Details* screen, select the options you want enforced during the registration process.

Registration Rules

Select rules for registration that the learner must follow when registering for the curriculum.

Enforce Module Sequencing <input type="checkbox"/> ?	Learners must register for all modules in the order in which they are defined.
Enforce Target Date <input type="checkbox"/> ?	Learners must complete the path by target date selected in the Completion Criteria section.
Omit Offering Selection <input checked="" type="checkbox"/> ?	Learners can register for the path without selecting offerings for all courses in the path. Learners must select these offerings at a later time.
Register for Individual Items <input checked="" type="checkbox"/> ?	In addition to registering for paths, allow learners to register for individual items in the curriculum.

2. Once all registration rules have been set, scroll to the bottom and click **Save**.

STEP-BY-STEP (ADD A CURRICULUM ATTACHMENT)

1. From the *Curriculum* details screen, click the **Add Attachment** link.



3. Enter a name for the attachment.
 - If the attachment is a website, enter the URL.
 - If the attachment is a file, click **Browse** and search for the file.
4. Select a category from the dropdown menu.
5. If you want the attachment to be viewed only by those that have it assigned to them, check the **Is Private** checkbox. Otherwise, leave this blank.
6. Click **Save**.

STEP-BY-STEP (ADD A LEARNING RECOMMENDATION TO A CURRICULUM)

1. From the *Curriculum Details* screen, click the **Add Recommendations** link.



2. Select the type of learning recommendation and when it should be made to the learner.

Training Administrator

3. Click **Next**.

Add Learning Recommendations: LMS Training

1. Select type of Recommendation: ... 2. Add Learning Recommendations

Select type of Learning Recommendation

- Certifications
- Communities
- Courses
- Curricula
- Experts
- Knowledge Base Resource
- Offerings

When should these recommendations be made to the learner?

- When this curriculum is In-progress
- When learner completes this curriculum

Next Cancel

4. Enter search criteria for the learning recommendation and click **Search**.
5. Click the checkbox for the learning recommendation and click **Select**.

Add Learning Recommendations: LMS Training

1. Select type of Recommendation: ... 2. Add Learning Recommendations

Select courses to recommend when this curriculum is in-progress

Configure

Title

ID

Domain 🔍 🔄

Audience Type/Sub Type 🔍 🔄

You have a saved query.

Save Search Query Reset Saved Query Search

Courses Print | Export | Modify Table

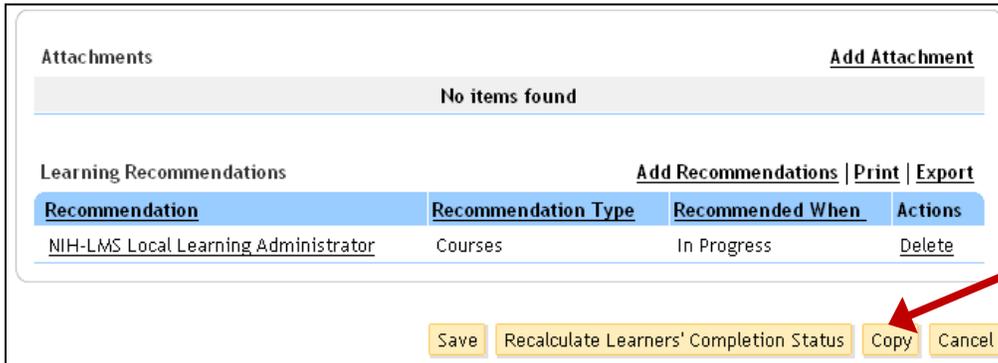
<input type="checkbox"/>	Version	ID	Title
<input checked="" type="checkbox"/>	1	NIHTCLMS1001	NIH-LMS Local Learning Administrator

→ Select Cancel Back

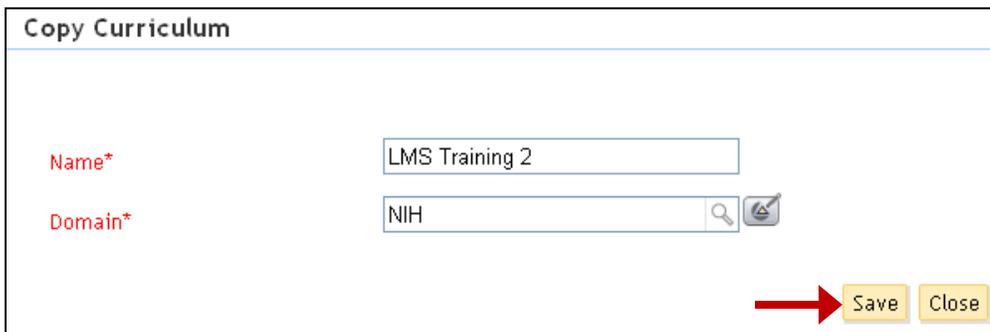
6. Continue adding all recommendations by repeating steps 1 – 5.
7. Click **Save**.

STEP-BY-STEP (COPY A CURRICULUM)

1. From the *Curriculum Details* screen, click the **Copy** button.

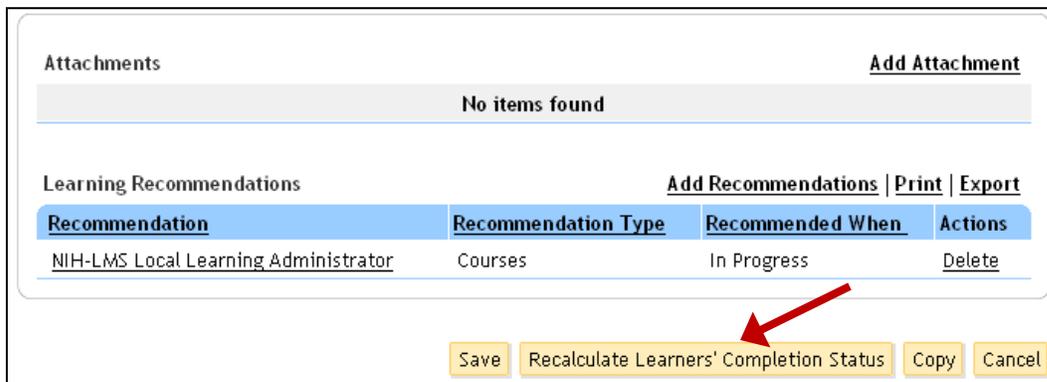


2. Enter a name for the copied curriculum and assign it to the **NIH** domain.
3. Click **Save** to view the copied curriculum.



STEP-BY-STEP (RECALCULATE CURRICULUM PROGRESS FOR LEARNERS)

If additional components or requirements are made to the curriculum after learners have been using it, you may recalculate their progress by clicking the **Recalculate Learner's Completion Status** button.

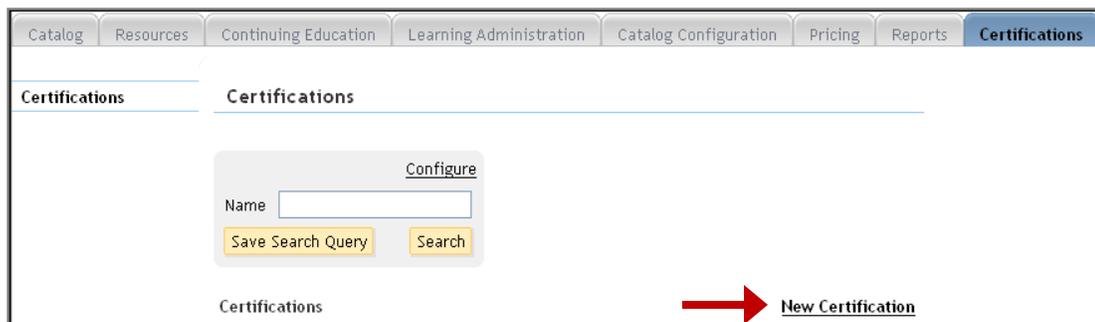


All learners will have their progress updated for the curriculum.

STEP-BY-STEP (CREATE INTERNAL CERTIFICATION)

As a Training Administrator, you have the ability to create a certification. A certification is a predefined set of courses that has been grouped together with a deadline for completion. Credentials earned by completing the certification may expire on a predetermined date. Below you will find the steps to create a certification.

1. Select the **Training Administrator** role in the *Go To* drop-down menu.
2. Click the **Certifications** tab.
3. Click the **New Certification** link.



4. Enter all applicable *Certification Details* data. (Fields in Red with an asterisk (*) are required)
 - a) **Name***: This is the name used to identify the curriculum.
 - b) **Version**: The latest iteration of the certification. (1.0, 2.0, 2009, 2010, A, B, etc.)
 - c) **Description**: This is a brief explanation of the certification and its components
 - d) **Domain***: The domain of the curriculum should be NIH. (Default)

New Certification

* = required

Certification Details

Name*

Version

Description

Character Limit : 1000
Remaining character count: 975

Domain*

5. Enter all applicable *Availability* data. (Fields in Red with an asterisk (*) are required)
 - e) **Available From date***: This is the date users will be allowed to select the curriculum. (Today's date is the default)
 - f) **Status***:
 - i. **Draft** - Prevents users from using the certification while you are setting it up. (Default)
 - ii. **In Effect** - Allows users to access the certification.
 - iii. **Obsolete** - Discontinues use of the certification for users.

Availability

Select time period for which this certification will be made available to learners. Only certifications that are in Active status will be available to learners. Use the deeplink URL to make the certification available to learners prior to registration.

Available From* 

Discontinued From 

Status* 

6. Enter the *Completion Criteria* by specifying the **Target Days** if applicable. Target days are the number of days the learner has to acquire the certification. Leaving this field blank would give the learner an unlimited amount of time to acquire the certification.

Completion Criteria

Set the time period or target days in which learners must complete learning items in any one path of the certification to acquire the certification. If you do not enter a value for target days, then there are no time restrictions and learners would acquire the certification as soon as they complete all items.

Target Days 

Certification Paths  **Add**

No items found

7. Click **Add** to create a certification path for the Certification.
8. Enter a name for the certification path you are creating.

Training Administrator

9. Click the **New Module** link.

New Certification

* = required

Path

Name*

Modules

[New Module](#)

No items found

[Add Another Path](#) [Finish](#) [Cancel](#)

10. In the **Name** field of the *New Module* page *Module Details* section, enter a name for the new module.

New Module

Module Details

Name*

Notes

Completion Criteria

Number of Elements to Complete*

Module Required* Yes No

Learning Elements [Add Learning Element](#) | [Print](#) | [Export](#) | [Modify Table](#)

Up	Down	Name	Version	Type	Actions
<input type="button" value="Up"/>	<input type="button" value="Down"/>	NIH-LMS Local Learning Administrator	1	Course	Delete
<input type="button" value="Up"/>	<input type="button" value="Down"/>	NIH-LMS Training Administrator	1	Course	Delete

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

11. In the **Number of Elements to Complete** field of the *New Module* page *Completion Details* section, enter a whole number.

12. Select the **Yes** or **No** radio button to specify whether the module(s) are required or not.

IMPORTANT! At least one module in a certification should be required.

13. Click the **Add Learning Element** link.

The screenshot shows the 'Add Learning Elements' window. At the top, there are radio buttons for 'Course' (selected) and 'Certification'. Below this is a 'Configure' box containing input fields for 'ID', 'Title' (with 'nih-lms' entered), 'Domain', and 'Audience Type/Sub Type'. There are search and refresh icons for the Domain and Audience Type/Sub Type fields, along with 'Save Search Query' and 'Search' buttons. Below the configure box is a table titled 'Add Learning Elements' with columns 'Add', 'Title', 'Version', and 'ID'. The table contains three rows of results, with checkboxes in the 'Add' column. At the bottom right of the window are 'Save' and 'Close' buttons.

Add	Title	Version	ID
<input type="checkbox"/>	NIH-LMS Human Capital Administrator	1	NIHTCLMS1005
<input checked="" type="checkbox"/>	NIH-LMS Local Learning Administrator	1	NIHTCLMS1001
<input checked="" type="checkbox"/>	NIH-LMS Training Administrator	1	NIHTCLMS1003

14. Select either the **Course** or **Certification** checkbox to designate which of the two will be searched for inclusion in the module.

15. Enter the search criteria for the course or curriculum you would like to include in the module and then click **Search**.

16. From the *Add Learning Elements* search results table, select the checkbox to the left of the course/certification title in the *Add* column and then click **Save** to return to the *New Module* window.

17. Repeat steps 12-16 until the number of courses/certifications specified in the **Number of Elements to Complete** field have been added to the module.

NOTE: You may set the order the courses/certifications should be completed by clicking the **Up** and **Down** arrows, as depicted in Step 10 above.

You may remove Courses/Certifications that no longer need to be in the module by clicking the **Delete** link in the *Actions* column.

18. Click **Save** to return to the *New Certification* page.

19. Do one of the following:

- Click the **New Module** link to add additional modules to the specified Path.
- Click **Add Another Path** to specify an alternate route for the learner to take when acquiring the certification. .

NOTE: When adding additional paths, you may specify whether the path is for recertification. If it is, click the **Recertification** checkbox

- Click **Finish** to return to the *Certification Details* page.

Training Administrator

20. In the *Counting Past Credits* section of the *Certification Details* page, specify **Past Credit Days** if applicable. Past Credit Days are the number of days the LMS will look back at the learner's transcript for courses that will count towards certification completion.

IMPORTANT! Please be aware of the following:

- If this parameter is set to 0, the LMS will not look at the learner's transcript.
- If this parameter is left blank, the learner's entire transcript will be searched for courses that will count towards certification completion.

21. Select the appropriate **Past Credit Days Policy**.

Counting Past Credits

Courses completed in the past can be used towards certification completion. Select policy and number of days which will be used in combination to check learners' transcripts to determine which courses will be used towards certification completion. If the past credits days is set to 0, the system will not look back into the learners' transcript history.

Past Credit Days 

Past Credit Days Policy  Check transcript history up to, but not prior to, any previous Certification "Expired" or "Revoked On" dates

Check transcript history up to, but not prior to, any previous Certification "Revoked On" date

Check transcript history up to, but not prior to, the previous Certification "Acquired" or "Revoked On" dates

22. Scroll to the bottom of the page and click **Save**.

23. In the *Expiration and Recertification* section of the *Completion Details* page, specify the number of days in which the certification will expire in the **Expires in Days** field.

NOTE: If this parameter is left blank, the learner will not have to recertify.

Expiration and Recertification

Select the number of days in which the certification expires and the number of days in which learners must complete learning items on the recertification path in order to recertify. If you do not enter a value for Expires in Days field, then the certification never expires and learners do not need to recertify. If you require the learner to recertify, then enter a recertification path in the Completion Criteria section.

Expires in Days 

Recertify in Days 

Notify Before Days 

24. In the **Recertify In Days** field, enter the number of days the learner has to complete the recertification process in the Recertify in Days field. This number represents the number of days before the Expiration date that a learner may begin completing items that will count towards recertification.

NOTE: If all items for recertification are successfully completed within this period, the learner re-acquires the certification for another full period. Any items completed before this period begins are not counted towards recertification, and must be completed again. If all required items for recertification are not completed before the certification expires, the learner must re-acquire it by taking a regular path instead of a recertification path

25. In the **Notify Before Days** field, enter the number of days before the certification expires that the LMS will trigger an email notification to the learner. If this parameter is left blank, no notification will be sent.

26. In the *Registration Rules* section of the *Completion Details* page, specify the registration rules by clicking one or more of the available checkboxes:

- **Enforce Module Sequencing**
- **Enforce Target Date**
- **Omit Offering Selection**
- **Register for Individual Items**

The screenshot shows a 'Registration Rules' configuration window. It contains a title 'Registration Rules' and a subtitle 'Select rules for registration that the learner must follow when registering for the certification.' Below this are four rows of settings, each with a label, a help icon (question mark in a circle), a checkbox, and a description:

Rule Name	Help Icon	Checkbox	Description
Enforce Module Sequencing	?	<input type="checkbox"/>	Learners must register for all modules in the order in which they are defined.
Enforce Target Date	?	<input type="checkbox"/>	Learners must complete the path by target date selected in the Completion Criteria section.
Omit Offering Selection	?	<input checked="" type="checkbox"/>	Learners can register for the path without selecting offerings for all courses in the path. Learners must select these offerings at a later time.
Register for Individual Items	?	<input checked="" type="checkbox"/>	In addition to registering for paths, allow learners to register for individual items in the certification.

At the bottom right of the window are two buttons: 'Next>' and 'Cancel'.

27. Click **Save**.

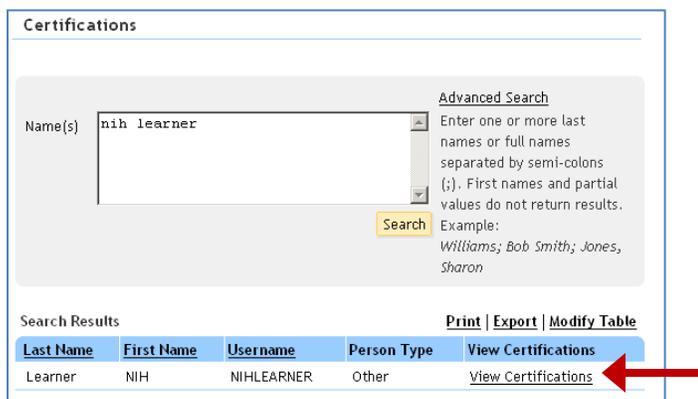
Training Administrator

STEP-BY-STEP (VIEW CERTIFICATIONS)

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. Click the **Learning Administration** tab.
3. From the left navigation bar, click the **Certifications** link to display the *Certifications* page.
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.



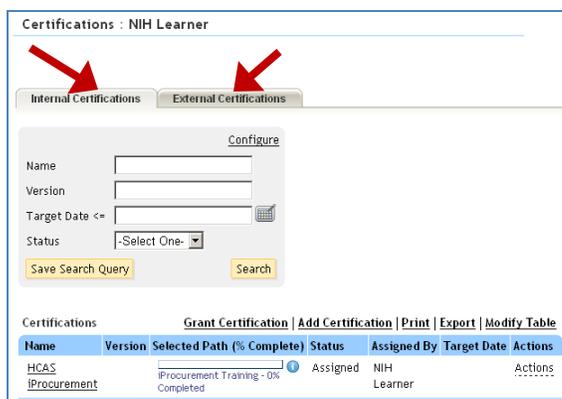
Certifications

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

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

Last Name	First Name	Username	Person Type	View Certifications
Learner	NIH	NIHLEARNER	Other	View Certifications

5. From the *View Certifications* column of the *Certifications Search Results* table, click the **View Certifications** link.



Certifications : NIH Learner

[Internal Certifications](#) [External Certifications](#)

[Configure](#)

Name

Version

Target Date <=

Status

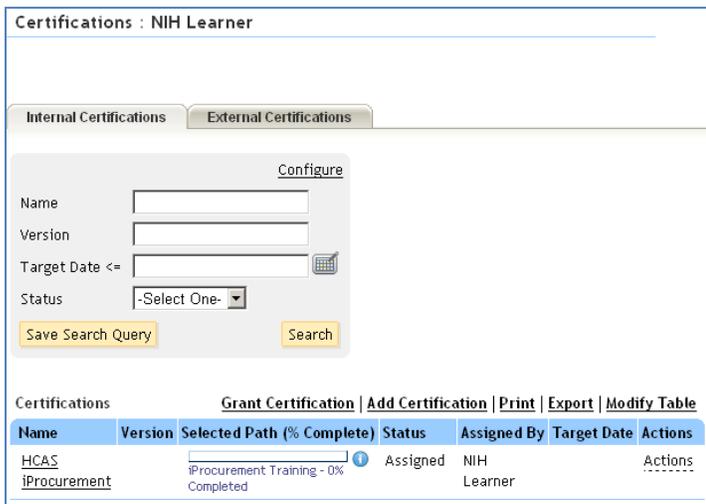
[Grant Certification](#) | [Add Certification](#) | [Print](#) | [Export](#) | [Modify Table](#)

Name	Version	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
HCAS iProcurement		iProcurement Training - 0%	Assigned	NIH Learner		Actions

6. Do one of the following:

- Select the **Internal Certifications** tab (for HHS certifications) to view any certifications that an LMS Training Administrator has created to administer through the LMS.
- Select the **External Certifications** tab (for non-HHS certifications) to view any certifications the learner has completed and entered that are not administered through the LMS.

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



STEP-BY-STEP (GRANT INTERNAL CERTIFICATION)

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

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. Click the **Learning Administration** tab.
3. From the left navigation bar, click the **Certifications** link to display the *certifications* page.

Training Administrator

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

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

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

Certifications

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

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

Last Name	First Name	Username	Person Type	View Certifications
Learner	NIH	NIHLEARNER	Other	View Certifications

5. From the *View Certifications* column of the *Certifications Search Results* table, click the **View Certifications** link.

Certifications : NIH Learner

[Internal Certifications](#) | [External Certifications](#)

[Configure](#)

Name
Version
Target Date <=
Status

[Grant Certification](#) | [Add Certification](#) | [Print](#) | [Export](#) | [Modify Table](#)

Name	Version	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
HCAS iProcurement		iProcurement Training - 0% Completed	Assigned	NIH Learner		Actions

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

Grant Certification

1. Select Certification <--> 2. Grant Certification

[Configure](#)

Name

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

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

7. From the *Select* column of the *Certifications* search results table, select the **radio button** for the certification you would like to grant.
8. Click **Next**.

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

The screenshot shows a window titled "Grant Certification" with a progress indicator "1. Select Certification <--> 2. Grant Certification". Below this is a table titled "Granted Certifications" with columns "Learner Name", "Acquired On", and "Expiration Date". The table contains one row for "NIH Learner" with dates "07/26/2009" and "07/26/2010". There are "Print" and "Export" links to the right of the table. At the bottom are "Finish", "Back", and "Close" buttons.

Learner Name	Acquired On	Expiration Date
NIH Learner	07/26/2009	07/26/2010

9. In the **Acquired On** field, enter the date on which the Certification was acquired.
10. In the **Expiration Date** field, enter the date on which the Certification will expire.
11. Click **Finish** to open the *E-Signature* window.

The screenshot shows an "E-Signature" window with fields for "Date" (07/01/2009), "Full Name" (NIH LocalLearningAdmin), "Password*", and "Comments*". Below these fields is a checkbox with the text "By checking this box, you are acknowledging that you have seen this." A red arrow points to the checkbox. At the bottom are "Save & Close" and "Close" buttons.

12. In the **Password** field, enter your LMS log on password.
13. In the Comments field, enter a justification for why you are granting the certification.
14. Select the check box acknowledging that you have seen the e-signature box.
15. Click **Save & Close**.

Training Administrator

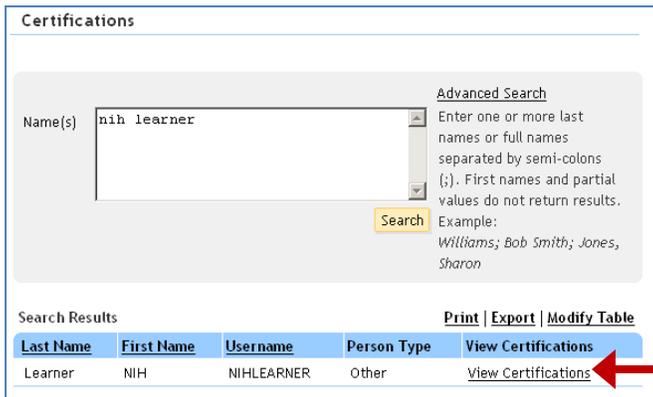
STEP-BY-STEP (ADD INTERNAL CERTIFICATION)

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

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. Click the **Learning Administration** tab.
3. From the left navigation bar, click the **Certifications** link to display the *Certifications* page.
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.



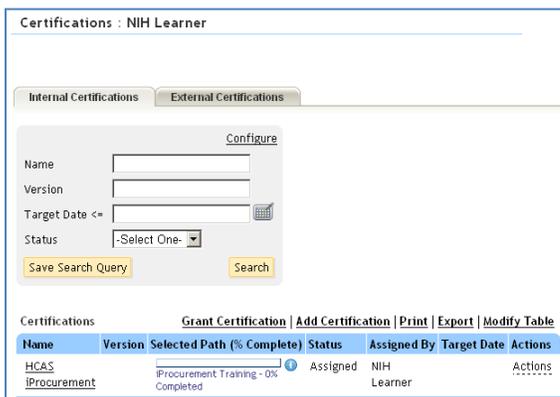
Certifications

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

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

Last Name	First Name	Username	Person Type	View Certifications
Learner	NIH	NIHLEARNER	Other	View Certifications

5. From the *View Certifications* column of the Certifications Search Results table, click the **View Certifications** link.



Certifications : NIH Learner

[Internal Certifications](#) | [External Certifications](#)

[Configure](#)

Name

Version

Target Date <=

Status

Certifications [Grant Certification](#) | [Add Certification](#) | [Print](#) | [Export](#) | [Modify Table](#)

Name	Version	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
HCAS iProcurement		iProcurement Training - 0% Completed	Assigned	NIH Learner		Actions

6. Click the **Add Certifications** link.

Grant Certification

1. Select Certification ↔ 2. Grant Certification

Configure

Name

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

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

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

8. From the *Select* column of the *Certifications* search results table, select the **radio button** for the certification you would like to grant and it will automatically populate to the Learner's Certifications list.

Internal Certifications External Certifications

Configure

Name

Version

Target Date <=

Status

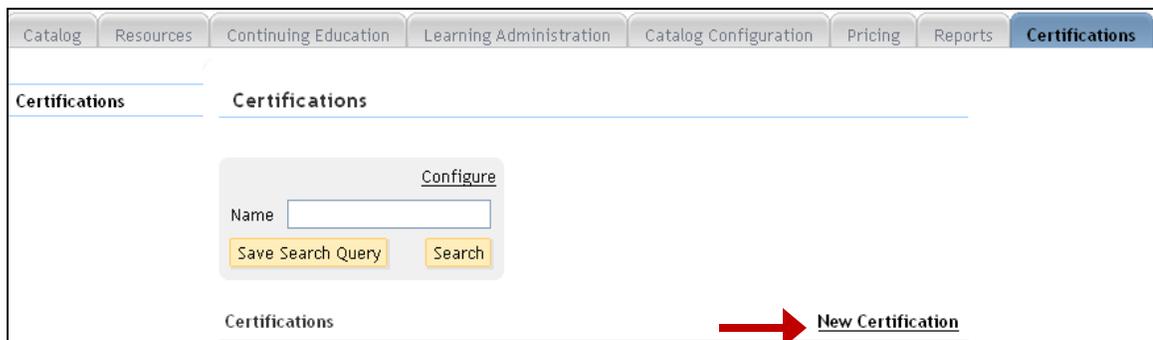
Certifications [Grant Certification](#) | [Add Certification](#) | [Print](#) | [Export](#) | [Modify Table](#)

Name	Version	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
HCAS iProcurement		<div style="width: 0%; background-color: #ccc;">iProcurement Training - 0% Completed</div>	Assigned	NIH Learner		Actions
HCAS PRISM 1		<div style="width: 0%; background-color: #ccc;">PRISM Training - 0% Completed</div>	Acquired	CARLYE FULLER		Actions
HCAS PRISM 5		<div style="width: 100%; background-color: #008000;">PRISM Training - 100% Completed</div>	Acquired	CARLYE FULLER		Actions

STEP-BY-STEP (CREATE A NEW CERTIFICATION)

Creating a certification is necessary before it can be added to a learner's learning plan. You will be able to specify the certification's requirements, availability, as well as expiration dates. Certifications may include other certifications, curricula and courses.

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. Click the **Certifications** tab.
3. Click the **New Certification** link.



The screenshot shows the 'Certifications' page in the Training Administrator interface. The page has a navigation bar with tabs for Catalog, Resources, Continuing Education, Learning Administration, Catalog Configuration, Pricing, Reports, and Certifications. The Certifications tab is active. Below the navigation bar, there is a search box with a 'Name' field, a 'Configure' link, and buttons for 'Save Search Query' and 'Search'. At the bottom right, there is a red arrow pointing to a 'New Certification' link.

4. **Certification Details:** (Fields in Red with an asterisk (*) are required)
 - a) **Name***: This is the name used to identify the certification.
 - b) **Version**: This is the new version number.
 - c) **Description**: An explanation of the certification and its components should be entered here.
 - d) **Domain***: The domain of the certification should be NIH. (Default)

5. **Availability:** (Fields in Red with an asterisk (*) are required)
- a) **Available From*:** This is the date learners will be allowed to select the certification.
 - b) **Discontinued From:** This is the date the certification will be made unavailable to learners.
 - c) **Status*:**
 - i. **Draft** – Set to draft while you are setting up the certification. This prevents users from using it.
 - ii. **In Effect** – Set to allow users to access the certification.
 - iii. **Obsolete** – Set to discontinue use of the certification for users.

New Certification

* = required

Certification Details

Name*

Version

Description

Character Limit : 1000
Remaining character count: 973

Domain*

Availability

Select time period for which this certification will be made available to learners. Only certifications that are in Active status will be available to learners. Use the deeplink URL to make the certification available to learners prior to registration.

Available From*

Discontinued From

Status*

6. **Completion Criteria** – Enter the number of days the learner has to complete the certification along with the certification path.

NOTE: No value in this field will result in the learner having an unlimited amount of time to complete the certification.

Training Administrator

7. Adding a certification path – Click the **Add** link.

Completion Criteria

Set the time period or target days in which learners must complete learning items in any one path of the certification to acquire the certification. If you do not enter a value for target days, then there are no time restrictions and learners would acquire the certification as soon as they complete all items.

Target Days ?

Certification Paths → **Add**

No items found

8. In the **Name** field, enter the name of the path.

New Certification

* = required

Path

Name*

Modules → **New Module**

No items found

Add Another Path Finish Cancel

9. Click the **New Module** link. (Fields in Red with an asterisk (*) are required)

1. Module Details:

- a) **Name***: Enter the name of the module for the path.
- b) **Notes**: Enter any additional information about the module.

2. Completion Criteria:

- a) **Number of Elements to Complete***: Enter how many training elements (courses, curricula, certifications) the learner will need to complete for the module.
- b) **Module Required***: Indicate whether this module is required for the path.

10. Click the **Add Learning Element** link.

New Module

Module Details

Name*

Notes

Completion Criteria

Number of Elements to Complete*

Module Required* Yes No

Learning Elements

No items found [Add Learning Element](#)

11. Enter the search criteria for the course or certification being added to the module. You may toggle between course and certifications as needed.

Add Learning Elements

Search for Course Certification

[Configure](#)

ID

Title

Domain

Audience Type/Sub Type

Add Learning Elements [Print](#) | [Export](#) | [Modify Table](#)

Add	Title	Version	ID
<input checked="" type="checkbox"/>	NIH-LMS Training Administrator	1	NIHTCLMS1003

Training Administrator

12. Click **Save** and do one of the following:

- You may continue adding additional learning elements by repeating steps 9-11.
- You may change the order of sequence the elements must be completed in by clicking the **Up** and **Down** arrows shown left of the element's name.
- You may delete an element for the module at any time by clicking the **Delete** link in the Actions column.

New Module

Module Details

Name*

Notes

Completion Criteria

Number of Elements to Complete*

Module Required* Yes No

Learning Elements [Add Learning Element](#) | [Print](#) | [Export](#) | [Modify Table](#)

Up	Down	Name	Version	Type	Actions
		NIH-LMS Training Administrator	1	Course	Delete

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

13. When all elements have been added, click **Save**.

New Curriculum

* = required

Path

Name*

Modules [New Module](#) | [Print](#) | [Export](#)

Up	Down	Name	Actions
		LMS Training Administrator	Delete

[Copy](#) [Add Another Path](#) [Finish](#) [Cancel](#)

ENROLLMENTS AND TRANSCRIPTS

An **Enrollment** is an offering that a learner is registered for, but has not completed.

A **Transcript** is a chronological history of completed training enrollments, either successfully and unsuccessfully.

STEP-BY STEP (VIEW LEARNER ENROLLMENTS)

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. Click the **Learning Administration** tab.
3. From the left navigation bar, click the **Enrollments** link (if not already selected) to display the *Enrollments* page.
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.

Enrollments

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

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

Last Name	First Name	Username	Person Type	View Enrollments
Learner	NIH	NIHLEARNER	Other	View Enrollments

5. Click the **View Enrollments** link to the right of the correct account.
6. From the **View Enrollments by** drop-down menu, choose one of the following: **All**, **Pending Approval**, **Approved**, or **Unscheduled**.

Enrollments: NIH Learner

View Enrollments by [Print](#) [Export](#)

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

Training Administrator

Optional:

This page allows you to also do the following:

- Verify whether a learner is enrolled in a particular class.
- View the details of an item by clicking on the course title.
- See how long a learner has spent in an online course by clicking the **View Contents** link.
- Mark an item complete or drop an item for a learner, if appropriate.

STEP-BY STEP (VIEW LEARNER TRANSCRIPTS)

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

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

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

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. Click the **Learning Administration** tab.
3. From the left navigation bar, click the **Transcripts** link to display the *Transcripts* page.
4. Enter the learner's name in the search field and click **Search**.

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

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

5. Select the **View Transcript** link to the right of the correct account.

People | **Learning** | Organizations | Reports | Success Plans

Enrollments | **Transcripts** | Certifications | Curricula

Name(s) NIH Learner [Advanced Search](#)

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

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

Last Name	First Name	Username	Person Type	View Transcripts
Learner	NIH	NIHLEARNER	Other	View Transcript

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

Transcript: NIH Learner

Active | Deleted

Completion Date after

Completion Date before

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

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

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

Optional:

This page allows you to also do the following:

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

Training Administrator

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

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

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

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. Click the **Learning Administration** tab.
3. From the left navigation bar, click the **Transcripts** link to display the *Transcripts* page.
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.

Transcripts

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

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

Last Name	First Name	Username	Person Type	View Transcripts
Learner	NIH	NIHLEARNER	Other	View Transcript

5. Select the **View Transcript** link to the right of the correct account.

Transcript: NIH Learner

View your active transcripts. For more courses,

Completion Date after

Completion Date before

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
Getting Started with Project 2002	2.2	Online Training	06/08/2009	Successful Print Certificate of Completion	06/08/2009		96			View Content
Learning With Saba	1.0	Online Training	06/08/2009	Successful Print Certificate of Completion	06/08/2009		0			View Content

6. Click the **Add Learning to Transcript** link.

7. Do one of the following:

- If the training you want to add is in the LMS catalog or may have been added to someone else’s transcript already, click the **Use Existing Item** link and continue to Step 8.

- If the training you are adding is unique, continue to Step 11.

NOTE: See Appendix B for explanations of data fields required for EHRI reporting.

8. If you selected **Use Existing Item** in Step 7 above, do one of the following:

- To search for the course from those available in the LMS, select the **Search Catalog** radio button.
- To search for a course that is not in the LMS course catalog but may have been added to someone else’s transcript already, select the **Search Existing Transcript Items** radio button. This is useful for finding learning that was taken from a non-HHS entity.

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

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

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

Training Administrator

10. Select the check box to the left of the course you wish to add to the learner's transcript. This will return you to the *Edit Item Added to Transcript* page.

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

11. Enter additional data into all appropriate fields.

The screenshot shows a web interface for 'Continuing Education Credits'. It features several sections: 'Continuing Education Credits' (No items found), 'Learners' (with a 'Modify Table' link), a table with columns 'Name', 'Score', 'Grade', and 'Completion Status', 'Competencies' (No items found), and 'Notes' (No items found). At the bottom are 'Save' and 'Cancel' buttons. A red arrow points to the 'Score' input field in the table.

Name	Score	Grade	Completion Status
NIH Learner	<input type="text"/>	<input type="text"/>	Successful

1. In the *Learner* section of the *Edit Item Added to Transcript* page, record the Learner's **Score** and **Grade** if applicable.

TIP: If you do not wish to display a score on the Learner's transcript, delete all text in the **Score** field and leave it blank.

2. Scroll to the bottom of the page and click **Save**.

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

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

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 **Training Administrator** role in the drop-down **Go To** menu.
2. Click the **Learning Administration** tab.
3. From the left navigation bar, click the **Transcripts** link to display the *Transcripts* page.

The screenshot shows the 'Transcripts' page. It includes a search form with a 'Name(s)' input field, a 'Search' button, and an 'Advanced Search' section with instructions and an example. At the bottom right, there is an 'Add To Transcript' button, which is highlighted with a red arrow.

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

Search Results **Add To Transcript**

4. Click the **Add To Transcript** link.

5. Do one of the following:

- If the training you want to add is in the LMS catalog or may have been added to someone else's transcript already, click the **Use Existing Item** link and continue to Step 8.

- If the training you are adding is unique, continue to Step 11.

NOTE: See Appendix B for explanations of data fields required for EHRI reporting.

6. If you selected **Use Existing Item** in Step 7 above, do one of the following:

- To search for the course from those available in the LMS, select the **Search Catalog** radio button.
- To search for a course that is not in the LMS course catalog but may have been added to someone else's transcript already, select the **Search Existing Transcript Items** radio button. This is useful for finding learning that was taken from a non-HHS entity.

Training Administrator

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

Search for Items to Add to Transcript

Name

ID

Search Existing Transcript Items
 Search Catalog

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

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

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

- Select the check box to the left of the course you wish to add to the learners' transcripts. This will return you to the *Edit Item Added to Transcript* page.

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

- Enter additional data into all appropriate fields.

Continuing Education Credits

No items found

Learners [Modify Table](#)

Name	Score	Grade	Completion Status
NIH Learner	<input type="text" value="0"/>	<input type="text"/>	Successful

Competencies

No items found

Notes

No items found

- In the *Learner* section of the *Edit Item Added to Transcript* page, click the **Add Learners** link.

Search Person, Internal * = required

Supervisors: you can easily display all of your staff by entering your login ID into the "Manager" field, clicking the Magnifying Glass graphic, and then clicking the "Search" button.

Population*

Last Name

Username

Organization

Domain

Include All Suborganizations

First Name

Person ID

Manager

Location

Person Type

1 2

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

	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	AARON	BELL	00039345	Federal	00032726	HNAM4A2		00091673

11. Enter criteria to search for one or more Learners.
12. Click **Search**.
13. Do one of the following
 - To select an individual Learner, click the **check box** to the left of the Learner's name.
 - To select everyone in the People search results table, click the **check box** in the left-most column header.
14. Click **Select** to return to the *Edit Item Added to Transcript* page.

Continuing Education Credits						Add Field of Study		
No items found								
Learners						Add Learners Modify Table		
Name	Start Date	Date Marked Complete	Score	Grade	Completion Status	Actions		
ELIZABETH ROWE	<input type="text" value="07/01/2009"/>	<input type="text" value="07/26/2009"/>	<input type="text"/>	<input type="text"/>	Successful	Delete		
JAMES PETERSON	<input type="text" value="07/08/2009"/>	<input type="text" value="07/26/2009"/>	<input type="text"/>	<input type="text"/>	Successful	Delete		
Competencies						Add Competencies		
No items found								
						<input type="button" value="Save"/>	<input type="button" value="Done"/>	<input type="button" value="Cancel"/>

15. In the *Learner* section, record the following:
 - **Start Date** (of the Offering)
 - **Date Marked Complete**
 - **Score** (if applicable)
 - **Grade** (if applicable)

TIP: If you do not wish to display a score on the Learner's transcript, delete all text in the **Score** field and leave it blank.
16. Scroll to the bottom of the page and click **Save**.

Training Administrator

17.

LEARNING REQUESTS

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

STEP-BY-STEP (CREATING A LEARNING REQUEST)

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. From the left navigation bar, click the **Learning Requests** link to display the *Search Learning Requests* page.
3. From the left navigation bar, click the **Submit Request** link to display the *Select type of learning request* page.

The screenshot shows the 'Select type of learning request' page. The navigation menu on the left includes 'Offerings', 'Learning Requests', 'Request History', 'Submit Request', and 'Interest List'. The 'Submit Request' link is highlighted. The main content area displays the title 'Select type of learning request.' and three radio button options:

- Request new public offering of a course from the Saba Catalog. A public offering is published to the Saba Catalog and is available to all learners.
- Request a private offering of a course from the Saba Catalog. A private offering is available only to a specific set of learners.
- External Learning - Any learning that is taken outside the Saba Learning Management System
 - Use SF182 form to request enrollment into future-dated external learning.

 A red arrow points to the first radio button option, and another red arrow points to the 'Next' button at the bottom right of the form.

4. Select one of the following radio buttons:
 - Public offering – This request will allow all of NIH to register for the offering you are requesting.
 - Private offering – This request will allow a specific group of people to register for the offering you are requesting.
5. Click **Next**.

Training Administrator

Create Request- Step 1: Choose Contact Person

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

Population* First Name

Last Name Person ID

Username Manager

Organization Location

Domain Person Type

Choose contact for request [Export](#) | [Modify Table](#)

	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="radio"/>	C	NIH	TrainingContentAdmin	NIHTRAININGCONTENTADMIN	Other	00165951	HNAM6	NIHSUPERVISOR

6. Enter search criteria for the name of the contact person. (This will be the person the Administrator will call if there are questions about the request.)
7. Click **Search**.
8. From the *Choose contact for request* search results table, select the **radio button** to the left of the contact person's name.
9. Click **Next**.

Create Request- Step 2: Search Courses

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

Contact Information

Name

Organization

Search Courses [Configure](#)

Title Keyword

Available From >= Discontinued From >=

Category Competencies

Version ID

Field of Study Offering ID

Select Course [Print](#) | [Export](#) | [Modify Table](#)

	Title	Version
<input type="radio"/>	C NIH-LMS Training Administrator	1

10. Enter search criteria of the course for which you would like to request an offering.
11. Click **Search**.
12. From the *Select Course* search results table, select the **radio button** to the left of the course title.

13. Click **Next**.

Create Request- Step 3: Learning Request Details

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

Base Learner: NIHTRAININGCONTENTADMIN
 Title: NIH-LMS Training Administrator
 Delivery Type: Computer Laboratory
 Requested Start On/After: 09/01/2009
 Requested End On/Before: 09/30/2009
 Location: NCI Frederick
 Facility:
 Notes: We'd like to schedule a class for 10 Training Administrators.
 Unassigned Learners: 10
 Learners: No items found **Add**
 Back Save Cancel

14. Enter the specific parameters you would like the course administrator to consider when creating the new offering.

15. Add any known learners by clicking the **Add** button and searching for each learner to be added, if applicable. The added learners' names will appear in the table.

NOTE: You may delete any learners from the request by clicking the **Delete** link in the *Actions* column on the right side.

16. In the **Unassigned Learners** field, specify the number of unassigned learner seats being requested, if applicable.

17. Click **Save** to create a Learning Request for each Learner – both assigned and unassigned.

Create Request- Step 4: Learning Request Submitted

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

Base Learner: NIHTRAININGCONTENTADMIN

Request Details Print | Export | Modify Table

Title	Learner	Delivery Type	Requested Start On/After	Requested End On/Before	Status	Location
NIH-LMS Training Administrator	Unassigned	Computer Laboratory	09/01/2009	09/30/2009	Pending	NCI Frederick
NIH-LMS Training Administrator	Unassigned	Computer Laboratory	09/01/2009	09/30/2009	Pending	NCI Frederick
NIH-LMS Training Administrator	Unassigned	Computer Laboratory	09/01/2009	09/30/2009	Pending	NCI Frederick
NIH-LMS Training Administrator	Unassigned	Computer Laboratory	09/01/2009	09/30/2009	Pending	NCI Frederick

IMPORTANT! The administrator of the course will need to create a new offering to fill your request.

Training Administrator

STEP-BY-STEP (CHECKING THE LEARNING REQUEST HISTORY)

1. Select the **Training Administrator** role in the drop-down **Go To** menu.
2. From the left navigation bar, click the **Learning Requests** link to display the *Search Learning Requests* page.

<input type="checkbox"/>	Course	Delivery Type	Submitted Date	Learner First Name	Learner Last Name	Requested Start Date	Requested End Date	Status	Location	Actions
<input type="checkbox"/>	NIH-LMS Training Administrator	Computer Laboratory	07/26/2009			09/01/2009	09/30/2009	Pending	NCI Frederick	Delete View Details
<input type="checkbox"/>	NIH-LMS Training Administrator	Computer Laboratory	07/26/2009			09/01/2009	09/30/2009	Pending	NCI Frederick	Delete View Details
<input type="checkbox"/>	NIH-LMS Training Administrator	Computer Laboratory	07/26/2009			09/01/2009	09/30/2009	Pending	NCI Frederick	Delete View Details

3. Select one of the following radio buttons:
 - **Public offering** – This request will allow all of NIH to register for the offering you are requesting.
 - **Private offering** – This request will allow a specific group of people to register for the offering you are requesting.
4. Enter criteria by which to search for submitted Learning Requests.
TIP: As the administrator of a course, you will most often enter a course title in the **Course** field as a search parameter.

Optional:

This page allows you to also do the following:

- **Reject** selected Learning Requests
- **Delete** Learning Requests
- View **Details** of Learning Requests
- Register Learners associated with a Learning Request to an existing Offering by clicking **Register to Offering**.
- **Create an Offering** for selected Pending Learning Requests.

LEARNING PLANS

A Learning Plan is an individualized list of learning opportunities that have been self-selected or assigned to a learner. As a Training Administrator, you have the ability to view courses, add additional courses to the learning plan, and register learners for courses that are on listed on the learning plan.

STEP-BY-STEP (VIEW A LEARNER'S LEARNING PLAN)

1. Select the **Training Administrator** role in the **Go To** drop-down menu.
2. Click the **Learning Administration** tab.
3. From the left menu click **Learning Plans**.
4. Using the simple or advanced search, enter the criteria of the learner for which you wish to view a plan.
5. Click **Search**.
6. From the *View Courses* column, click the **View Course** link.

The screenshot shows the 'Learning Administration' tab in a web application. The left sidebar contains a menu with 'Learning Plans' selected. The main content area is titled 'Courses on Learning Plan' and features a search box with 'NIH Learner' entered. To the right of the search box is an 'Advanced Search' section with instructions and an example. Below the search box is a 'Search' button. The search results are displayed in a table with columns: Last Name, First Name, Username, Person Type, Created by, and View Courses. The first row shows 'Learner', 'NIH', 'NIHLEARNER', 'Other', '00064122', and a 'View Course' link. A red arrow points to the 'View Course' link.

Last Name	First Name	Username	Person Type	Created by	View Courses
Learner	NIH	NIHLEARNER	Other	00064122	View Course

Training Administrator

STEP-BY-STEP (VIEW THE STATUS OF ONLINE COURSE CONTENT IN A LESSON PLAN)

1. Complete Steps 1 through 6 of *Step-by-Step (View a Learner's Learning Plan)*.
2. From the *Related Links* column of the *Courses* table, click **Launch** to view the progress of a particular course.

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	
Records Management for Everyone	NIH LocalLearningAdmin	07/31/2009	In Progress	- Launch - Mark Complete - Add to Plan	
Creating and Analyzing an Operating Budget	NIH Learner (more)	09/25/2009	In Progress	- Launch ← - Mark Complete - Add to Plan	
Alternative Dispute Resolution (ADR)	Test Prescriptive Rule		In Progress	- Register - Add to Plan	

3. If the course you launch is an online course, from the *Progress Report* page you may click **Launch** from the *Actions* column of the *Results by Content Modules* table

NOTE: This will allow you to review the course content of the online training. Once you exit the online training, the *Progress Report* page will be updated to include a "View Results by Lesson" link in the *Actions* column of the *Results by Content Modules* table.

- If the course you launched is an online course and you reviewed the course content, then you may click the **View Results by Lesson** link from the *Actions* column of the *Results by Content* table to view the responses a learner has made in an online course— provided that the course was designed to track learner responses.

Progress Report for Learning With Saba

Offering Name: [Learning With Saba](#)

Learner Name: NIH Learner

Overall Completion Status: Not Evaluated

Score: 0

Grade:

Comments:

Results by Content Modules Print | Export | Modify Table

Module	Required?	Completion Status	Mastery Score	Attempts On Content	Score	Module Availability	Actions	Sign Off
CO-Learning_With_Saba	Required	Not Evaluated		Unlimited		Available	Launch View Results by Lesson	N/A

Save Cancel

STEP-BY-STEP (MARKING A COMPLETION FROM THE LEARNING PLAN)

- Complete Steps 1 through 6 of *Step-by-Step (View a Learner's Learning Plan)*.
- From the *Related Links* column of the *Courses* table, click **Mark Complete** to mark a learner's completion for a particular course.

Offering Status: Learning With Saba

Learner Name: NIH Learner

Offering: Learning With Saba

Current Status:

Update Status To:

Successful
 Not Evaluated
 Unsuccessful

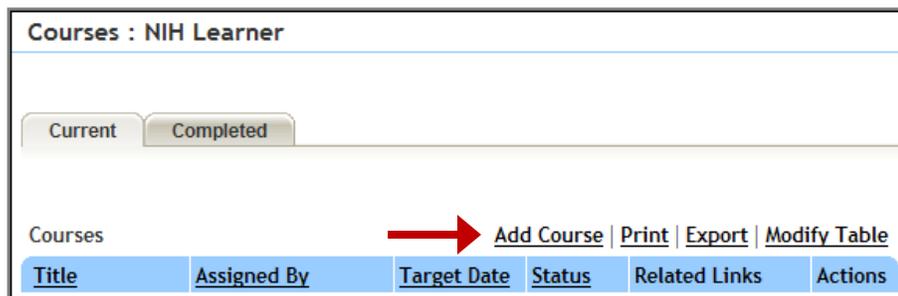
Save Cancel

- Select the appropriate radio button and click **Save**.

Training Administrator

STEP-BY-STEP (ADDING A COURSE TO A PLAN)

1. Complete Steps 1 through 6 of *Step-by-Step (View a Learner's Learning Plan)*.
2. Click the **Add Course** link.



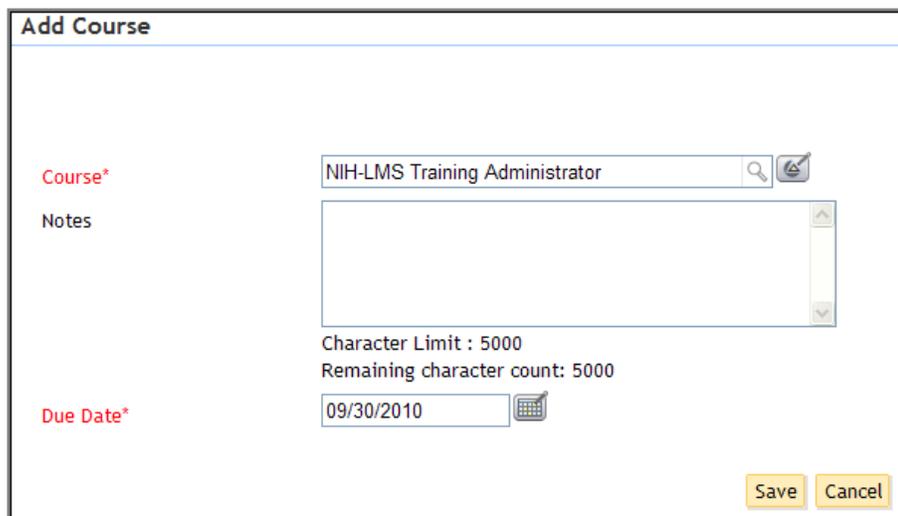
Courses : NIH Learner

Current Completed

Courses [Add Course](#) | [Print](#) | [Export](#) | [Modify Table](#)

Title	Assigned By	Target Date	Status	Related Links	Actions
-------	-------------	-------------	--------	---------------	---------

3. Locate the course by using the pick button to bring up the course search window.
4. Add any applicable notes in the **Notes** field.
5. Enter the **Due Date** for when the course needs to be completed.
6. Click **Save**.



Add Course

Course* NIH-LMS Training Administrator

Notes

Character Limit : 5000
Remaining character count: 5000

Due Date* 09/30/2010

Save Cancel

MANAGING ORDERS

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

- A *registration* (also referred to as an “enrollment”) is generated when a learner uses the LMS to register him/herself for an offering.
- An *order* is generated when a learner, manager or administrator registers a learner for an offering.

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

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

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

1. Select the **Training Administrator** role in the **Go To** drop-down menu.
2. Click the **Learning Administration** tab.
3. Select **Create Order** from the vertical menu on the left side of the screen.
4. Use the search fields to find the name of the contact for the order.

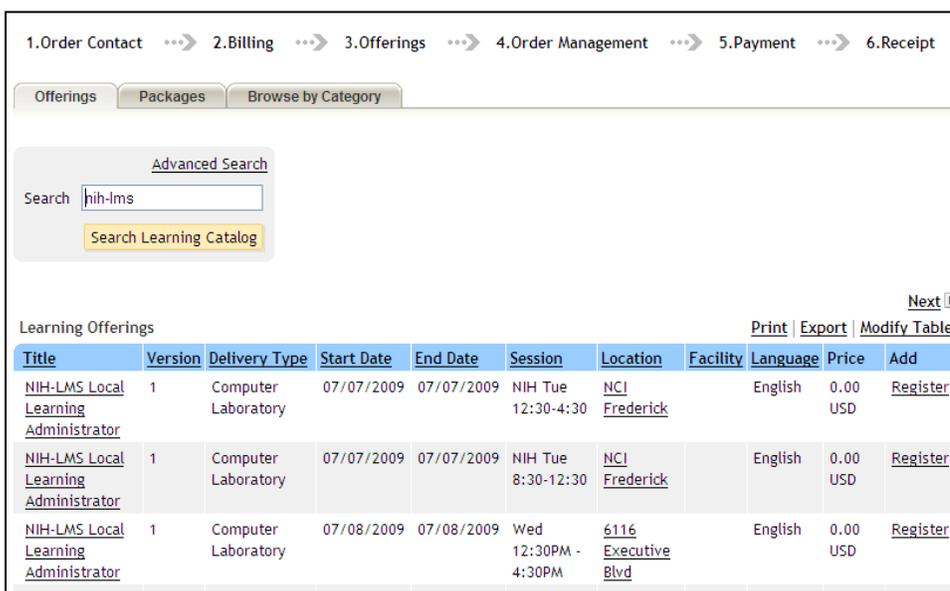
NOTE: This should be the person that is responsible for the order. It may or may not be the name of the person being registered.

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

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

Training Administrator

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



The screenshot displays the '3. Offerings' step in a multi-step process. At the top, there are navigation tabs for 'Offerings', 'Packages', and 'Browse by Category'. Below these is an 'Advanced Search' section with a search box containing 'nih-lms' and a 'Search Learning Catalog' button. The main content area shows a table of 'Learning Offerings' with columns for Title, Version, Delivery Type, Start Date, End Date, Session, Location, Facility, Language, Price, and Add. A red arrow points to the 'Register' link in the 'Add' column of the first row.

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

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

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

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

9. From the Create Order screen, you may do one of the following:
- **Add Learners:** to add additional learners to the same order (See *Step-By-Step (Adding Additional Learners/Offerings – Optional)* on page 158 of this guide.)
 - **Add Notes:** to include additional information for the Training Administrator about a specific learner or the order as a whole. (See *Step-By-Step (Adding Notes to a Learner’s Line Item – Optional)* on page 160 and *(Step-By-Step (Adding a Note to the Order – Optional)* on page 161 of this guide.)
 - **Remove From Cart:** to remove line items from the order;
 - **Continue Shopping:** to add registrations for another offering to the same order.
 - **Place Order:** when you are finished. (See *Step-By-Step (Place the Order)* on page 162 of this guide.)

Create Order

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

Order Contact NIH Competency

Billed To HNAM6

Title	Learner	Status	Training Units	Actions	Price
NIH-LMS Local Learning Administrator	NIH Competency	Confirmed		Add Learners Notes Remove From Cart	265.00 USD

Order Notes [Add](#)

No items found

Order Total 265.00 USD
Discount 0.00 USD
Total 265.00 USD

Continue Shopping
Place Order

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

Training Administrator

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

1. Complete Steps 1 through 8 of *Step-By-Step (Create an Order for a Learner)* on page 155 of this guide.
2. Click the **Add Learners** link to search for additional learners you want to register for the same exact offering.

Create Order

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

Order Contact: NIH Competency
Billed To: HNAM6

Title	Learner	Status	Training Units	Actions	Price
NIH-LMS Local Learning Administrator	NIH Competency	Confirmed		Add Learners Notes Remove From Cart	265.00 USD

Order Notes [Add](#)

No items found

Order Total 265.00 USD
Discount 0.00 USD
Total 265.00 USD

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

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

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

NOTE: To select all the learners listed in the *People* search results, select the checkbox in table header.

5. Click **Select** to add the learner(s) to the order.

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

NOTE: To add learners for a different offering to the same order, click **Continue Shopping**. This will take you back to step 6 in the *Create an Order for a Learner* section of the guide (See page 152). From there you may choose a different offering to include on the order. You will then have the same options to add learners, make notes, etc.

6. Repeat Steps 1 through 5 as needed to add all offerings, learners, and reserved seats to the order.

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

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

7. Please perform one of the following:

- If you are finished, click **Place Order** (See *Step-By-Step (Place Order)*) on page 162 of this guide).
- To add notes to an individual learner or to the order as a whole, (See *Step-By-Step (Adding Notes to a Learner's Line Item – Optional)* on page 160 and (*Step-By-Step (Adding a Note to the Order – Optional)*) on page 161 of this guide.)

Training Administrator

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

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

1. Complete Steps 1 through 8 of *Step-By-Step (Create an Order for a Learner)* on page 155 of this guide.
2. Click the **Notes** link in the *Actions* column to the right of the appropriate line item.

Order Contact	NIH Competency				
Billed To	HNAM6				
Title	Learner	Status	Training Units	Actions	Price
NIH-LMS Local Learning Administrator	NIH Competency	Confirmed		Add Learners Notes Remove From Cart	265.00 USD

3. Click **Add Note**.

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

Add/View Notes

View By Category: ALL

Notes

No items found

Add Note

Close

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

- Click **Save**.

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

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

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

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

- If you are finished, click **Place Order** (See *Step-By-Step (Place Order)*) on page 159 of this guide).

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

- Complete Steps 1 through 8 of *Step-By-Step (Create an Order for a Learner)* on page 155 of this guide.
- Click the **Add** link in the **Order Notes** section.

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

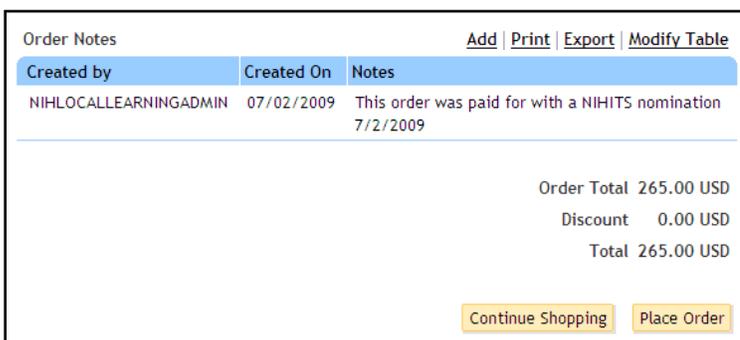
Training Administrator

5. Click **Save**.



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

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



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

Order Total 265.00 USD
Discount 0.00 USD
Total 265.00 USD

6. If you are finished, click **Place Order** (See *Step-By-Step (Place Order)*) on page 159 of this guide).

STEP-BY-STEP (PLACE THE ORDER)

1. Complete Steps 1 through 8 of *Step-By-Step (Create an Order for a Learner)* on page 155 of this guide.
2. When the order appears exactly as you want it, click **Place Order**.

IMPORTANT! For security purposes, the system will time you out if you take a long time to place the final order. Consider placing a few smaller orders rather than one large order encompassing many different offerings.

3. To print a hard copy of the order receipt for your records, click the **Printer Friendly Version** link.

Registration Confirmation

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

[Printer Friendly Version](#)

Order Contact: NIH Competency
Billed To: HNAM6
Order Status:
Order Number: 00356739

Order Items

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

Order Total 265.00 USD
Discount 0.00 USD
Total 265.00 USD

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

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

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

1. From the *Learning Administration* tab, click **Order History** from the vertical navigation.
2. Enter your search criteria in the appropriate fields and click **Search**.

Training Administrator

- From the *Order Number* column of the *Orders* search results table, click the **Order Number** link for the order you wish to see.

Orders Learning Requests Reports

Order Order History

Order History

Search Orders

Order Number [] Base Organization []

Title [] Learner Name []

Bill-To Organization [] Order Contact NIHLOCALLEARNING []

Price [] Created On <= 09/18/2009

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

Show Orders for Private Offerings Only

Save Search Query Search

Orders Print | Export | Modify Table

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

- From the *Order Details* page, you may view more details about the following:

- Click the **Title** link to get more information about the course.
- Click the **Learner** link to view details about the learner.

- From the *Actions* column of the *Order Details* page, you may click to edit the following:

- Change Learner** to search for a new learner. This is considered a substitution.

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

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

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

IMPORTANT! This does not actually process any financial transaction.

- Notes** to add notes about the learner.

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

Training Administrator

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

Order Details: Order Number 00146705

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

Order Notes [Add Note](#)

No items found

Order Items [Modify Table](#)

Title	Learner	Delivery Type	Status	Actions	Price
Learning With Saba	NIH LocalLearningAdmin	Online Training	Confirmed	Change Learner Reschedule Notes Drop	0.00 USD
Total					0.00 USD

[Cancel](#)

REPORTS

The Training 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 between the roles of Training Administrator and Content Administrator. Below you will find instructions on how to work with reports in the LMS.

STEP-BY-STEP (GENERATE A REPORT)

1. Select the **Training Administrator** 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.

Run Reports		
Run Reports		Modify Table
Name	Description	Actions
<input checked="" type="checkbox"/> General Category		
<input checked="" type="checkbox"/> Administrators		
<input checked="" type="checkbox"/> Assessment		
<input checked="" type="checkbox"/> Certification		
<input checked="" type="checkbox"/> Content		
<input checked="" type="checkbox"/> Financial		
<input checked="" type="checkbox"/> Learners		
<input checked="" type="checkbox"/> Offerings		
All Orders by Offering Start Date	This report enables administrators to identify the orders placed by all learners for an offering start date range.	Email Subscribe
Class Tent Cards	This report prints the tent card for each learner in a given class.	Email Subscribe
Content Results By Learner	Content Results By Learner for the specified Offering that is completed and Date Range	Email Subscribe

4. Click **HHS Training Completion Detail** to bring up the *Report Parameters* screen.

HHS Training Completion Detail	Custom report that displays transcript detail based on 3 required parameters and 4 optional parameters	Email Subscribe
--	--	--

Training Administrator

5. Enter criteria into appropriate fields.

NOTE: You do not need to enter the complete title for this report. Using 'HNA%' for an admin code will return all completion for users within NIH OD.

6. Click **Submit**.

Report Parameters - HHS Training Completion Detail- Custom-Custom

* = required

Course Title*

Completion Start Date*

Completion End Date*

Course Domain

Admin Code

Employee EOD Start Date

Employee EOD End Date

Person Type

Person Status

Here is an example of what these report parameters would return:

Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information
HNA	Safiya Stewart Sagoua	00117808	04/13/2008		08/19/2009	Records Management for Everyone
HNA3842	Romica Brown	00113308	09/16/2007		05/19/2009	Records Management for Everyone
HNA3842	Vernon Cardwell	00100918	04/16/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3842	April Harrison	00101849	05/30/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3844	Charles Choi	00103021	07/09/2008	Brenda Bernard	08/24/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104284	09/03/2008	Darla Hayes	08/17/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104284	09/03/2008	Darla Hayes	08/23/2009	HHS Records Management for All Employees
HNAM428	Cathleen-Megan Moran	00088234	08/01/2004	Darla Hayes	08/17/2009	Records Management for Everyone

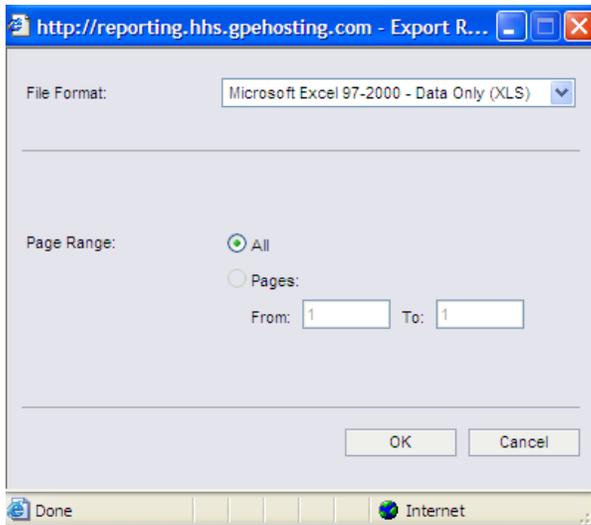
STEP-BY-STEP (EXPORT A REPORT)

1. Click the export icon in the upper left corner.

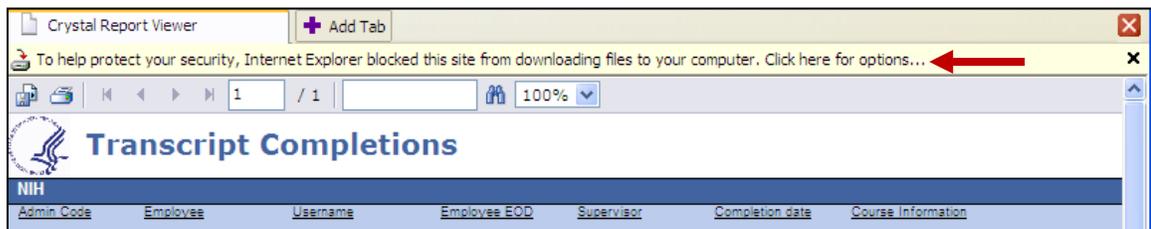


2. Select the **File Format** you want, indicate the **Page Range**, and click **OK**.

NOTE: 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.

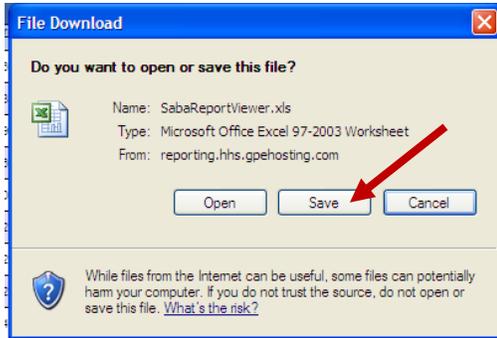


3. If you see the following browser warning, click the yellow warning bar and select **Download File**. Repeat Step 2.

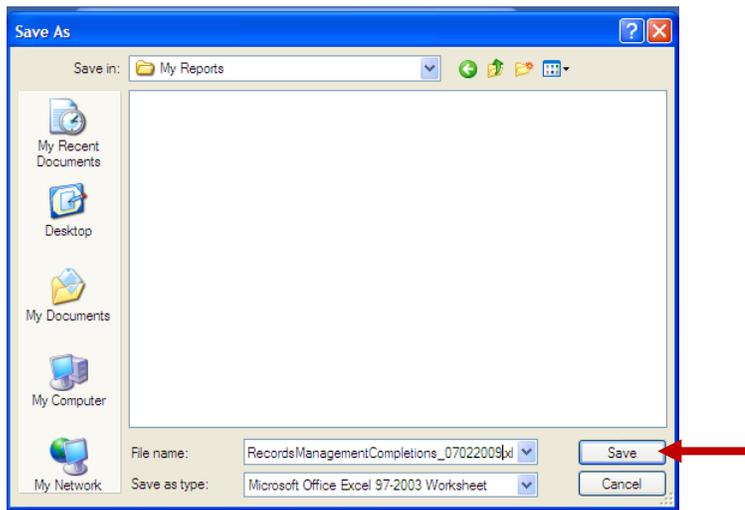


Training Administrator

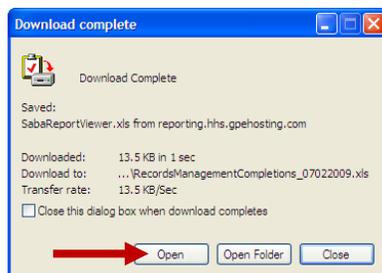
- You will be prompted to open or save the file. Click **Save**.



- Locate where you want to save the file and give it a meaningful name; click **Save**.



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

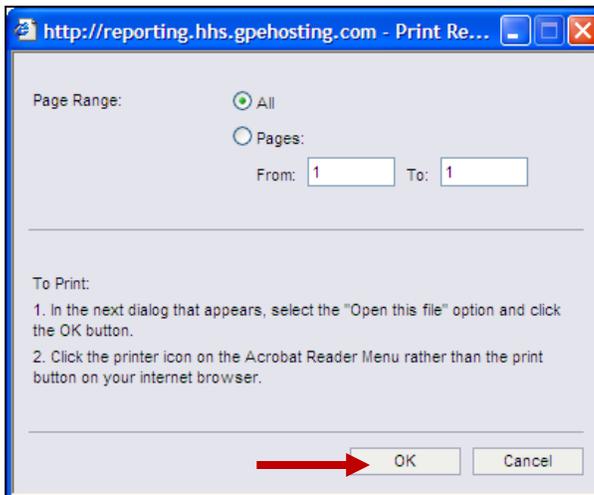


STEP-BY-STEP (PRINT A REPORT)

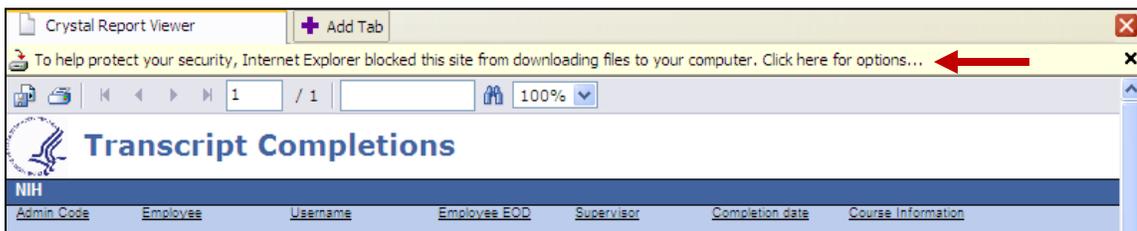
1. Click the print icon in the upper left corner.



2. Indicate the Page Range you want, and click OK.

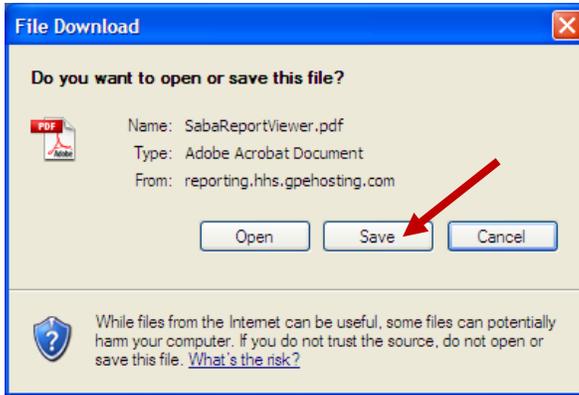


3. If you see the following browser warning, click the yellow warning bar and select **Download File**. Repeat Step 2.

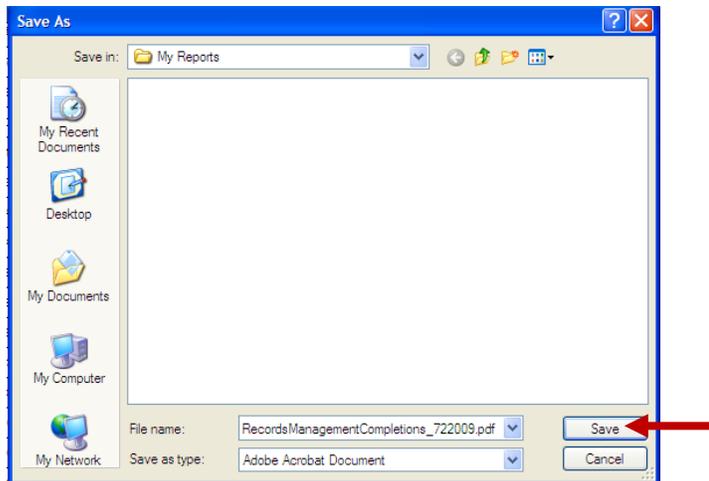


Training Administrator

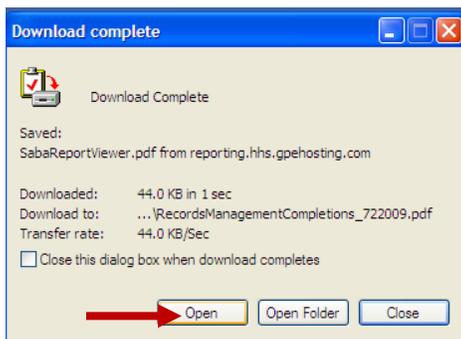
- You will be prompted to open or save the file. Click **Save**.



- Locate where you want to save the file and give it a meaningful name; click **Save**.



- You will receive a prompt when the download is complete. Click **Open** to open the report file you just downloaded in Adobe Reader and click the Adobe Reader print icon to send the report to your printer.



STEP-BY-STEP (EMAIL A REPORT)

1. From the Run Reports screen, click the **Email** link to the right of the report description.

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

2. Enter one or more recipient email addresses in the **To** field.
3. Modify the **Subject** and **Mail Text** fields to appear as you want them in the email.

Email HHS Training Completion Detail-Custom-Custom

[Run Reports](#) > Email HHS Trai... * = required

To*

Character Limit : 255
Remaining character count: 232

Subject*

Mail Text*

Character Limit : 255

Report Format*

Course Title*

Completion Start Date*

* Enter Date

Completion End Date*

Course Domain

Admin Code

Employee EOD Start Date

Employee EOD End Date

Person Type

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

Training Administrator

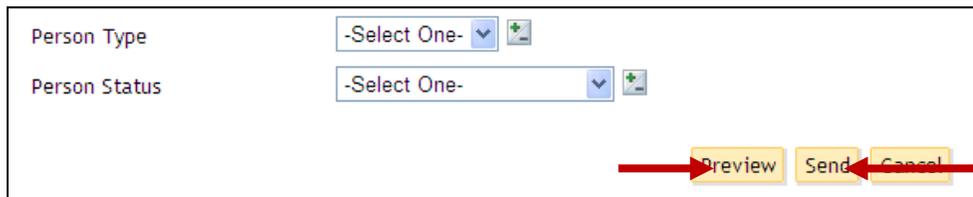
5. Enter at least part of the **Course Title** and choose from the drop-down choices for **Completion Start Date** and **Completion End Date**.

NOTE: If you select **Date on which report is run** for both start and end date fields, you will only get data gathered for the day the report is generated.

If you select **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, you will receive data gathered back from the number of days indicated up to the date the report is generated.

If you select **Fixed date** for both fields, you will get the data gathered between those two dates only.

6. Enter your ICs **Admin Code** to limit returns to your IC only.
7. Click **Preview** to see the report as it will appear with the parameters you entered.
8. If the report preview is correct, click **Send** to send the report to the email recipients.



The screenshot shows a form with two dropdown menus. The first dropdown is labeled "Person Type" and has a value of "-Select One-". The second dropdown is labeled "Person Status" and also has a value of "-Select One-". Below the dropdowns are three buttons: "Preview", "Send", and "Cancel". A red arrow points to the "Preview" button, and another red arrow points to the "Send" button.

STEP-BY-STEP (SUBSCRIBE TO A REPORT)

1. From the **Run Reports** screen, click the **Subscribe** link to the right of the report description.

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

2. Click the **New Report Subscription** link on the right.

Report Subscription for HHS Training Completion Detail-Custom-Custom	
Run Reports > Report Subscri...	
Report Subscription	New Report Subscription
No items found	

3. Enter a **Name** for the report subscription and a meaningful **Description**.
4. Enter at least part of the **Course Title** and choose from the drop-down choices for **Completion Start Date** and **Completion End Date**.

NOTE: If you select **Date on which report is run** for both start and end date fields, you will only get data gathered for the day the report is generated.

If you select **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, you will receive data gathered back from the number of days indicated up to the date the report is generated.

If you select **Fixed date** for both fields, you will always get the same set of data when the report is generated.

Training Administrator

5. Enter your ICs **Admin Code** to limit returns to your IC only.

Report Subscription for HHS Training Completion Detail- Custom-Custom

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

Name*

Description*

Course Title*

Completion Start Date*

Completion End Date*

Course Domain

Admin Code

Employee EOD Start Date

Employee EOD End Date

Person Type

Person Status

To*

Character Limit : 255

6. Enter one or more recipient email addresses in the **To** field.
7. Modify the **Subject** and **Mail Text** fields to appear as you want them in the email.

To*

Character Limit : 255
Remaining character count: 232

Subject*

Mail Text*

Character Limit : 255
Remaining character count: 163

Report Format*

Occurs Daily Weekly Monthly

Occurs Monthly
Every* month(s)
On* day of the month

Frequency Once Every Hour(s)

Frequency-Once
Start Time* : a.m. p.m.
Start Date*

Training Administrator

8. Choose a **Report Format** from the drop-down choices.
9. Select whether you want the report to email **Daily**, **Weekly**, or **Monthly**, and indicate the number for each.
10. Set corresponding options for **Frequency**.
11. Click **Preview** to see the report as it will appear.
12. Click **Save** to activate the report subscription. The report will send at the times you designated, to email recipients you entered.
13. You may click **Subscribe** next to the report to view any subscriptions you have set up. Click the subscription title to edit details, or click the red X to delete the subscription.

Report Subscription for HHS Training Completion Detail-Custom-Custom		
Run Reports > Report Subscri...		
Report Subscription		New Report Subscription Print Export
Name	Description	Actions
Records Management Report Subscription	Send monthly IC completion reports each month	

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

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

LEGEND

LMS Required Fields
 EHRI Required Fields
 Non Required Fields

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Item/Event Name*	Item or Event Title	Microsoft Excel 2007 for PC Users
Description	Description of the Item or Event entering Character limit: 1000	This class will expand the learner’s knowledge of Microsoft Excel 2007.
Offering Start Date	Date the class started	MM/DD/YYYY
Ended/Completed On Date	Date the class ended	MM/DD/YYYY
Registration Date	Date the learner registered for the Item/Event	MM/DD/YYYY
Date Marked Complete*	Date the Item/Event was marked complete by an administrator	MM/DD/YYYY
Start Time (HH:MM)	Start time of the Item/Event	08:30
End Time (HH:MM)	End time of the Item/Event	16:30
Duration (HH:MM)	How many hours and minutes the class lasted	07:30
Delivery Type	Method the Item/Event was delivered in	Auditorium, Book, Coaching, Computer Laboratory, Conference, Correspondence Course, DVD/CD, Instructor led, Mentoring, Online Training, On the Job Training, Recorded Online Offering, Satellite, Scientific Laboratory, TeleConferencing, Traditional classroom, Video conferencing, Video Tape, Virtual Class, Web Cast, Workshop

Training Administrator

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
ID*	Unique ID that identifies this entry	User Initials + Completion Date = JM09132008 where user = Jaime Martinez and Completion Date = 09/13/2008
Location	Location where course was taken. It could be a building or a city.	Examples: Executive Plaza North or Rockville
Marked Complete by	Search for the username of the person entering this record (yourself).	At first your username will display but once the record is saved the field will display your name.
Continued Service Agreement Required Indicator (1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Accreditation Indicator (1102)	Indicates that the course has been accredited by an accreditation body.	N => No NA => Non Applicable Y => Yes
Training Accreditation Organization Type (1103)	The name and description of the accreditation organization	Leave empty if unknown.
Course ID From Vendor (1105)	The course ID as assigned by the vendor	Leave empty if unknown.
EHRI: Training Source Type (1120)	Source of the training which has been completed by the employee.	Foreign Governments and Organizations; Government External; Government Internal; Government State/Local; Non-government
EHRI: Default Training Purpose (1122)	Code representing the purpose of the training completed by the employee	Develop Unavailable skills; Future Staffing Needs; Improve Present Performance; Mandatory Training; New Work Assignment; Program/Mission Change; Retention

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
EHRI: Default Training Type (1124)	Code for the type of training which has been completed by the employee.	Acquisition; Adult Basic Education; Agency Required Training; Basic Computer Training; etc. <i>There are more options available in this drop-down</i>
EHRI: Training Credit (1126)	Amount of academic credit hours or continued education units earned by the employee for the completed training. This should match either credit hours or CPE hours. This value is used for reporting to EHRI.	If amount of credit is known, input the number. If not available or not applicable input 0.
EHRI: Training Credit Designation Type (1127)	Code for the type of academic credit hours or continued education units earned by the employee for the completed training course.	Continuing Education Units, Graduate Credit; NA; Post Graduate Credit; Undergraduate Credit
EHRI: Training Delivery Type (1129)	Code for the type of training delivery for the training course completed by the employee.	Blended; Conference or Retreat; Correspondence; Instructor Lead; On the Job; Technology based
EHRI: Training Credit Type Code (1131)	Code representing the type of credit hours the employee received for the completed training.	CPEs; Continuing Education Unit; NA; Quarter Hours; Semester Hours
Instructor Competencies (1200)	Description of areas the instructor should be competent in to teach the class.	If don't have any particular information on competencies for the instruction, leave empty.
Multilingual Course (1201)	List of alternate languages for the course	Input the name of the other language the course was provided in. If not known or if it wasn't delivered in another language, leave empty.
Internal or External Course (1202)	Determine if the course is external or internal to the organization	External, Internal
Training Certification Type (1211)	Enter the type of certification earned after completing the course.	If any available enter the name of the certification, if don't know or if no certification was earned, leave empty.

Training Administrator

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Course Development Cost (1220)	The cost for developing the course. This only applies for internally developed courses the Federal Organization sponsored.	If no cost were incurred, leave empty .
EHRI: Estimated Training Tuition and Fees Cost (1221)	The cost of the training tuition and fee for training completed by the employee that was paid for by the Federal Government.	Enter the total cost paid for taking the course, if none available or no cost were incurred, input 0 .
EHRI: Training Materials Cost (1222)	Cost to the Government for the training materials used during the training unit completed by the employee. This includes all direct costs associated with purchasing the training materials used by the employee that is in addition to the tuition cost. It can include but is not limited to costs of supplies, cost of equipment, and cost of software used by the student during the training event.	Enter the total cost of training materials, if none available or no cost were incurred, input 0 .
EHRI: Continued Service Agreement Required Indicator(1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Duty Hours (1101)	Number of employee duty hours the employee used to complete the training unit.	Enter the amount of duty hours, if none available or none duty hours were used, input 0 .
EHRI: Training Non Duty Hours (1102)	Number of employee non-duty hours for the completed training course.	Enter the amount of non duty hours, if none available or none duty hours were used, input 0 .
EHRI: Training Per Diem Cost (1103)	Cost of the per diem (meal, lodging, misc. expenses) for training completed by the employee that was paid for by the Federal Government.	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no per diem was allotted, input 0.00
EHRI: Training Travel Cost (1104)	Cost for the travel, excluding per diem, for training completed by the employee that was paid for by the Federal Government	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no travel cost was allotted, input 0.00

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

APPENDIX C – HHS LEARNING PORTAL DOMAIN STRUCTURE

