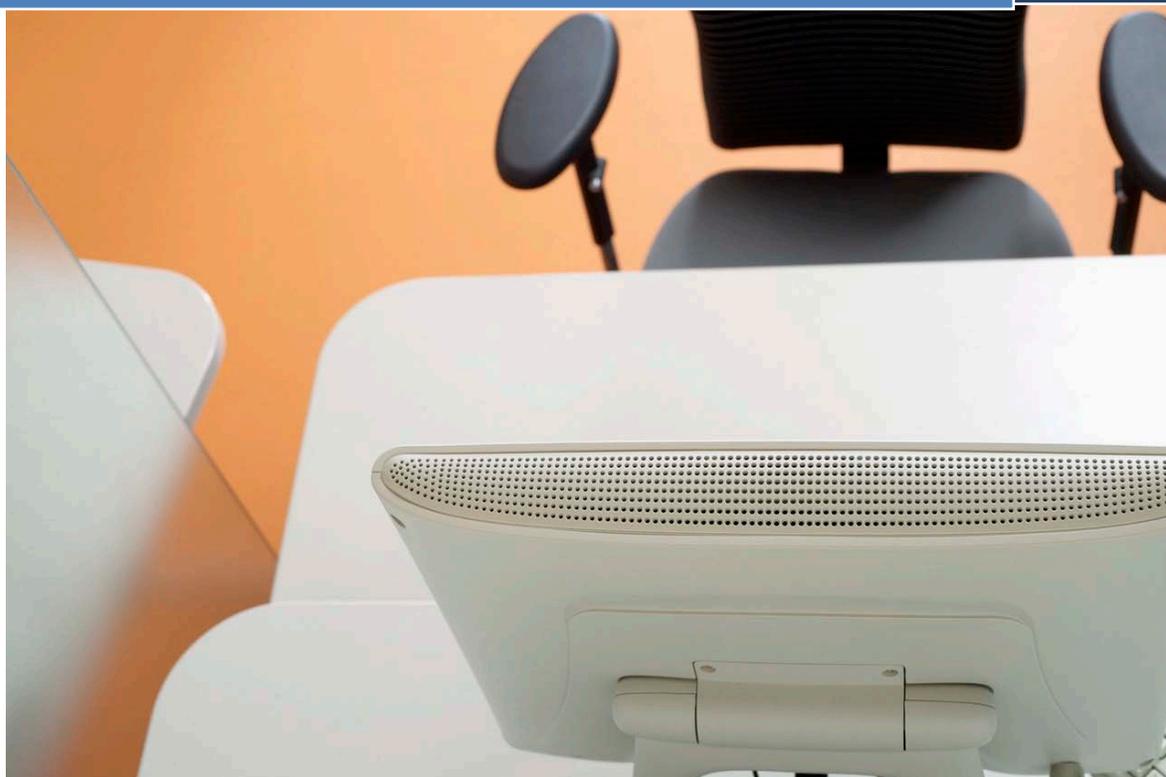


HHS Learning Portal

Human Capital Administrator



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HHS LEARNING PORTAL HUMAN CAPITAL ADMINISTRATOR

Version 1.5



National Institutes of Health Training Center

National Institutes of Health Training Center, Rockville 20852

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

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HUMAN CAPITAL ADMINISTRATOR

INTRODUCTION

HHS Learning Portal/LMS: These terms are used interchangeably and refer to the same system. The Learning Management System (LMS) is a Department-wide system for managing, accessing, and tracking training. As a Department-wide system, the overall LMS is managed at the HHS level – hence the name HHS Learning Portal. Following are some concepts and terms you should understand before beginning to perform administrative tasks in the LMS.

LEARNER PROFILE

The Learner Profile contains information about the learner such as employee status, start date, name, and organization. The profile does not contain personally identifiable information such as the employee's social security number or date of birth.

The Learner Profile receives data from the following sources on a nightly basis:

- NIH Enterprise Directory (NED)
- Capital HR
- Commissioned Corp Personnel Database

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

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

- **E-mail:** Accurate email addresses in the LMS will ensure learners receive notifications generated in the LMS.
- **Manager:** Having the correct manager (a.k.a. supervisor) listed will allow supervisors to view their direct reports and access training and development information about them.
- **Organization:** People are grouped in the LMS according to Organization/SAC Code. (See Appendix A.) This code is used to build audience types (which restrict access to courses), narrow the scope of reports, etc. This code must be correct or learners will neither show up in reports correctly nor have access to the correct training opportunities.

DOMAINS

Domains (a.k.a. Security Domains) in the LMS are used to segment users into hierarchical groups of people who should all have the same basic security permissions. The HHS Learning Portal is comprised of many domains; some of which are strictly dedicated to NIH and its staff and learning resources. (See Appendix C for a graphic depiction.)

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

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

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

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

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

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

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

SECURITY ROLES

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

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

Domain-Specific Security Roles include:

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

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

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

HUMAN CAPITAL ADMINISTRATOR ROLE

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

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

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

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

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

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

LMS TERMS AND DEFINITIONS

Audience Types - Audience Types are used to group learners in the system. Similarly, Audience Sub-Types allow for the further grouping of learners within an Audience Type.

These groups can then be used to control access to learning offerings in the LMS:

- by associating audience types and subtypes at the course level;
- attaching audience types with seat percentages at the delivery type level; and,
- specifying seat numbers for audience subtypes at the offering level.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Ratee – The employee whose competencies are being rated.

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

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

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

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

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

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

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

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

WORKING WITH LEARNER PROFILES

PEOPLE - INTERNAL

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

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

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

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

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

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

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

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

The screenshot shows the 'People' section of the LMS interface. At the top, there are tabs for 'People', 'Learning', 'Competencies', 'Prescriptive Rules', 'Reports', and 'Learning Plans'. Below these, there is a search bar with the text 'Search for People' and a dropdown menu set to 'Internal'. The search input field contains 'nih learner' and a 'Search' button. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search results, there is a table with columns: Last Name, First Name, Username, Person Type, Person ID, Organization, Location, Job, and View. The table contains one row for a learner with Last Name 'Learner', First Name 'NIH', Username 'NIHLEARNER', Person Type 'Other', Person ID '00165395', and Organization 'HNAM6'. A red arrow points to the 'Edit Profile Information' link in the 'View' column of this row.

Last Name	First Name	Username	Person Type	Person ID	Organization	Location	Job	View
Learner	NIH	NIHLEARNER	Other	00165395	HNAM6			Edit Profile Information Profile Snapshot Full Profile

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

Edit Profile Of NIH Learner * = required

Main Contact Information Address Password Preferences Privileges

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

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

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

The screenshot shows a form for adding an alternate manager or team member. The form includes fields for personal information (Title, First Name, Middle Name, Domain, Home Domain, Organization, Job, Manager, Additional Approver for Orders, Location, Start Date, Terminated On, Manager Access, Username, Last Name, Suffix, Status, Person No, Job Title, E-mail, Type, Discount, TimeZone) and a table for alternate managers. A red arrow points to the 'Add Manager' link, and another red arrow points to the 'Add Team Member' link.

Name	Actions
Thomas HOLSCHER	X

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

The screenshot shows the 'Search Person, Internal' pop-up window. It contains search criteria fields (First Name, Last Name, Person ID, Username, Manager, Organization, Location, Domain, Person Type, Include All Suborganizations) and a 'Search' button. Below the search fields is a table of search results. A red arrow points to the search criteria fields, another red arrow points to the 'Search' button, and a third red arrow points to the 'Select' button.

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

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

The screenshot shows the 'Edit Profile Of NIH Learner' interface with the 'Contact Information' tab selected. The form contains the following fields:

Field	Value
Home Phone	
Work Phone	301-496-6211
Fax	301-898-1212
E-mail	lmssupport@mail.nih.gov

Buttons: Save, Cancel

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

The screenshot shows the 'Edit Profile Of NIH Learner' interface with the 'Address' tab selected. The form contains the following fields:

Field	Value
Address 1	EPS
Address 2	6120 Executive Blvd
Address 3	Suite 350
City	Rockville
State/Province	MD
Zip/Postal Code	20852
Country/Region	US

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

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

Edit Profile Of NIH Learner * = required

Main | Contact Information | Address | Password | **Preferences** | Privileges

Environment Settings

Locale* English

Notification Method E-mail

Catalog Search Preferences

Offering Language English

Delivery Type -Select One-

Continuing Education Compliance (No Active Continuing Education Requirement)

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

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

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

Edit Profile Of NIH Learner * = required

Main | Contact Information | Address | Password | Preferences | **Privileges**

Security Roles [Add Roles](#) | [Print](#) | [Export](#)

Name	Domain	Actions
Common Privileges in world domain	Global	✘
Report Privileges in world domain	Global	✘
Learner	HHS Common	✘
Internal Person Login Privileges	NIH	✘
Learner	NIH	✘

Audience Types and Sub Types [Add Audience Type](#)

No items found

Audience Types and Sub Types From Organization [Print](#) | [Export](#)

Audience Type	Audience Sub Types
NIH - all	NIH NHGRI

Profile Quicklinks

- [Certifications](#)
- [Curricula](#)
- [Competencies](#)
- [Enrollments](#)
- [Transcript](#)
- [Continuing Education Status](#)
- [Profile Snapshot](#)
- [Multirater Assessment](#)
- [Plans](#)

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

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

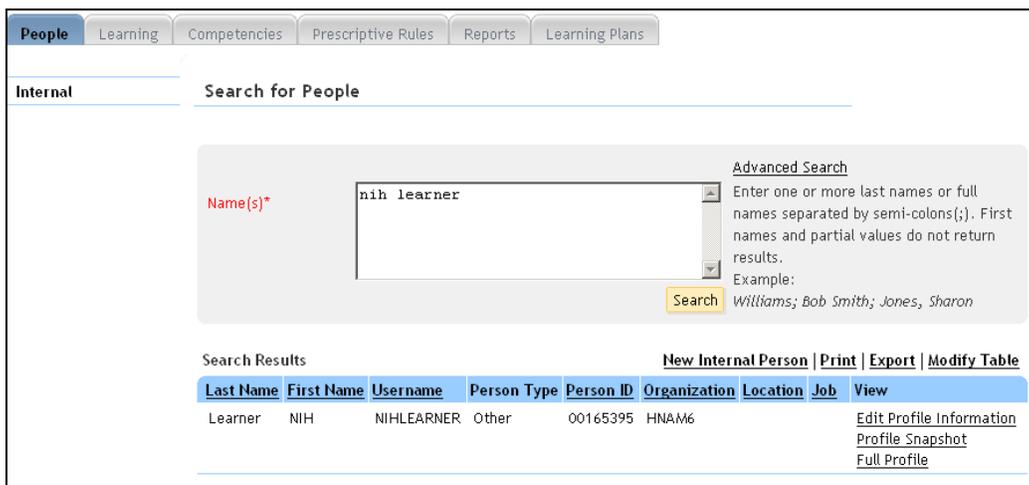
Learners can reset their own passwords using the LMS self-service password reset tool (**Forgot your password?**) on the log in page of the LMS. However, a learner may ask an administrator to reset their password instead. The following instructions will show you how to reset a learner's password.

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

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

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

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



The screenshot shows the 'People' section of the LMS interface. The search box contains 'nih learner' and the search button is highlighted. The search results table shows one result for a learner named NIHLEARNER. A red arrow points to the 'Edit Profile Information' link in the 'View' column.

Last Name	First Name	Username	Person Type	Person ID	Organization	Location	Job	View
Learner	NIH	NIHLEARNER	Other	00165395	HNAM6			Edit Profile Information Profile Snapshot Full Profile

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

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

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

The screenshot shows the 'Edit Profile Of NIH Learner' interface with the 'Password' tab selected. The form contains the following fields and text:

- Page title: Edit Profile Of NIH Learner
- Legend: * = required
- Navigation tabs: Main, Contact Information, Address, Password (selected), Preferences, Privileges
- Section: Change Password (120106)
- Message: You have entered an invalid password. Password must meet the following criteria:
- Criteria list:
 - Must be a minimum of 8 characters in length.
 - Must contain at least one upper-case character and one lower-case character.
 - Must not include any part of your login ID or name.
 - Password must contain a minimum of 2 alphabetic characters.
 - Password must contain a minimum of 1 numeric characters.
- Instruction: Please type a password which meets these requirements.
- Fields:
 - User Name: NIHLEARNER
 - New Password* (empty text box)
 - Confirm Password* (empty text box)
 - Secret Question: -Select One- (dropdown menu)
 - Secret Answer (empty text box)
 - Confirm Secret Answer (empty text box)
- Buttons: Save, Cancel

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

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

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

Human Capital Administrator

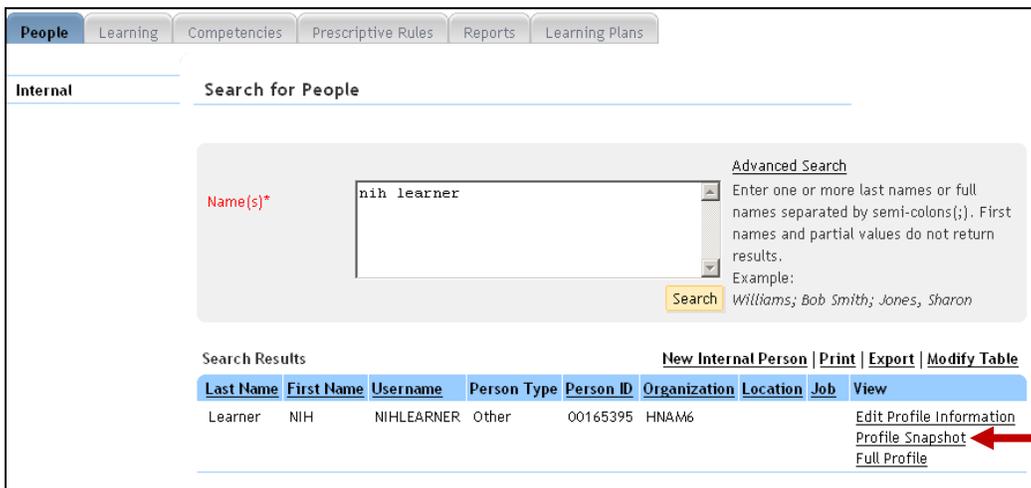
STEP-BY-STEP (VIEW A LEARNER'S PROFILE SNAPSHOT)

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

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

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

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



The screenshot shows the 'People' tab selected in the top navigation bar. Below it, the 'Internal' section is active, and the 'Search for People' form is displayed. The search box contains 'nih learner' and a 'Search' button is visible. To the right of the search box, there is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search results, a table lists the search results. The first result is 'Learner' with details: NIH, NIHLEARNER, Other, 00165395, HNAM6. To the right of the table, there are links for 'Edit Profile Information', 'Profile Snapshot', and 'Full Profile'. A red arrow points to the 'Profile Snapshot' link.

Last Name	First Name	Username	Person Type	Person ID	Organization	Location	Job	View
Learner	NIH	NIHLEARNER	Other	00165395	HNAM6			Edit Profile Information Profile Snapshot Full Profile

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

NIH Learner's Profile

Snapshot Full Profile **Resource** Quicklinks

[Edit Profile Snapshot](#)

[Update Photo](#)



NIH Learner

I want to be a rock star
LMS administrator.

NIH Learner, JR
JOBTITLE
Organization: HN45G
Job:
Full Time Other
(GMT-05:00) Eastern Time (US & Canada)
Office Phone: 301-496-6211
lmsupport@mail.nih.gov
Person ID: 00165395
Username: NIHLEARNER
Manager: NIH Supervisor
Alternate Manager: Thomas HOLSCHER
Start Date: 04/08/2008
Terminated Date:
Domain: NIH
Home Domain: NIH
Profile Status: Complete Current

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

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

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

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

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

MANAGING JOBS AND ROLES

JOBS

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

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

STEP-BY-STEP (VIEW JOBS)

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

The screenshot shows the 'Human Capital Administrator' interface. At the top, there is a navigation bar with 'Calendar', 'Preferences', 'Help', and 'Log Out'. The user is logged in as 'Welcome NIH Competency'. The 'Go To' menu is set to 'Human Capital Administrator - Orgs & Jobs'. The main navigation tabs include 'Organizations', 'Positions', 'Competencies', 'Places', 'Reports', and 'Learning Plans'. The 'Positions' tab is active, and the 'Jobs' sub-tab is selected. The search form contains the following fields: Name (17), Job Family, Critical Job (checkbox), End Date <=, Description, Key Responsibilities, Start Date >=, and Status (-Select One-). There are 'Save Search Query' and 'Search' buttons. A red arrow points to the 'Search' button. Below the search form is a table of job listings.

Name	Description	Status	Actions
1701-GENERAL EDUCATION AND TRAINING SERIES	1701-GENERAL EDUCATION AND TRAINING SERIES	Active	✖
1701-HEALTH EDUCATION SPECIALIST	1701-HEALTH EDUCATION SPECIALIST	Active	✖
1702-EDUCATION AND TRAINING TECHNICIAN SERIES	1702-EDUCATION AND TRAINING TECHNICIAN SERIES	Active	✖

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

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

IMPORTANT! Do not edit any details of a job.

Human Capital Administrator

ROLES

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

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

STEP-BY-STEP (VIEW A ROLE)

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

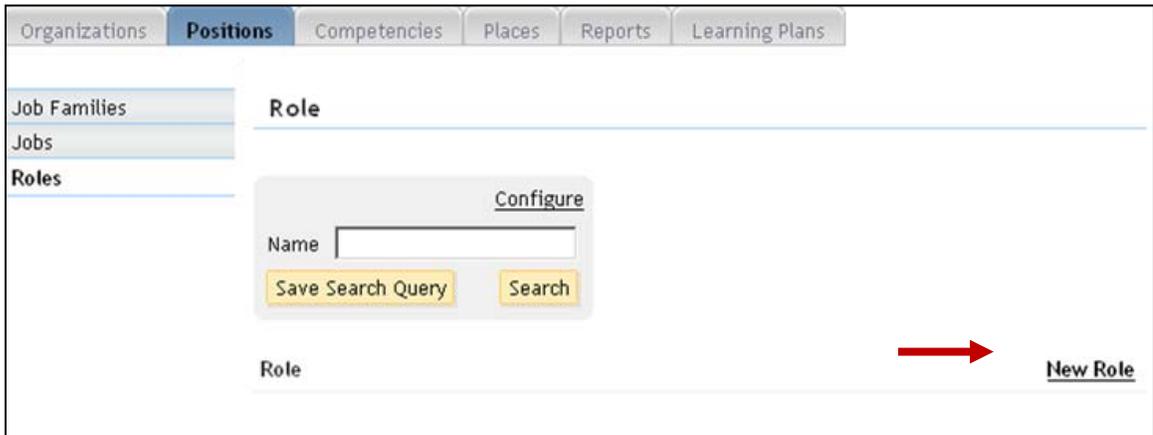
The screenshot displays the Human Capital Administrator web application interface. At the top, there is a navigation bar with links for Calendar, Preferences, Help, and Log Out, along with a 'Welcome NIH Competency' message and a 'Go To' dropdown menu set to 'Human Capital Administrator - Orgs & Jobs'. Below the navigation bar, there are tabs for Organizations, Positions, Competencies, Places, Reports, and Learning Plans. The 'Positions' tab is active, and the 'Roles' section is selected in the left-hand menu. A search form is visible with a 'Name' field containing 'nih', a 'Save Search Query' button, and a 'Search' button. A red arrow points to the 'Search' button. Below the search form, a table lists roles. The table has columns for 'Role' and 'Actions'. The first row is highlighted in blue and has a red arrow pointing to the 'Name' column header. The table contains the following data:

Role	Actions
NIH Administrative Officer	X
NIH Administrative Officer (GS-11)	X
NIH Administrative Officer (GS-12)	X
NIH Administrative Officer (GS-13)	X
NIH Administrative Officer (GS-14)	X
NIH Administrative Officer (GS-15)	X
NIH Administrative Officer (GS-7)	X

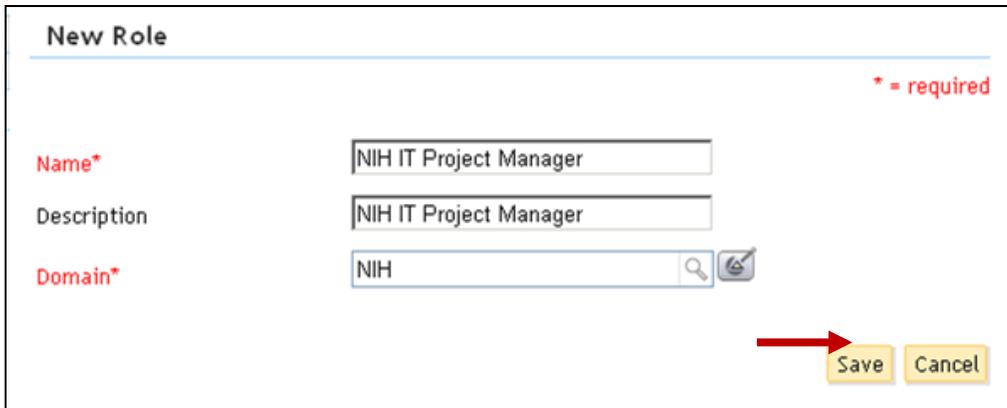
6. On the Roll Details, Main tab, edit any necessary information and click **Save** when you are finished.

STEP-BY-STEP (CREATE A ROLE)

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



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



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

USING COMPETENCIES, SURVEYS & ASSESSMENTS

COMPETENCIES

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

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

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

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

STEP-BY-STEP (VIEW LEARNER COMPETENCIES)

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

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

Human Capital Administrator

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

The screenshot shows the 'Competencies' section of a system. A search box contains 'NIH Learner'. Below the search box, a table displays search results. The table has columns: Last Name, First Name, Username, Person Type, Required Competencies, and Held Competencies. The first row shows 'Learner', 'NIH', 'NIHLEARNER', 'Other', and two links: 'View Required' (highlighted with a red arrow) and 'View Held'.

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

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

The screenshot shows a table titled 'Required Competencies: NIH Learner'. A dropdown menu for 'View By' is open, showing options: 'All Required Competencies', 'CurrentJob', 'Active Plans', 'Assigned Goals', 'Career Interests', 'View', 'Close Gap', and 'Assessments'. The table has columns: Competency Name, Source, Source Name, Required Level, Held Level, Performance Level, Gap, and View. The second row is highlighted, and a red arrow points to the 'View' link in the 'View' column. Another red arrow points to the 'View By' dropdown menu.

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

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

Competency Assessments: NIH Federal and Departmental Policies and Procedures Knowledge						
Competency Name	<u>NIH Federal and Departmental Policies and Procedures Knowledge</u>					
Description	Understand and applies knowledge of Federal and Departmental statutes, regulations, policies, and procedures.					
Current Assessed Level	4 - Advanced					
Past Assessments	Print Export Modify Table					
Date	Method	Level	In Calculation?	Rating	Comments	Details
12/10/2008	Manager Assessment	3 - Intermediate	No			NIH Supervisor
01/26/2009	Self Assessment	3 - Intermediate	No			NIH Learner
02/02/2009	Manager Assessment	3 - Intermediate	Yes			NIH Supervisor
06/17/2009	Multi-Rater Assessment	5 - Expert	No			See Ratings with Options Turned Off?
06/17/2009	Multi-Rater Assessment	5 - Expert	Yes			See Ratings with Options Turned Off?
10/09/2009	Self Assessment	4 - Advanced	Yes		Testing for comments	NIH Learner

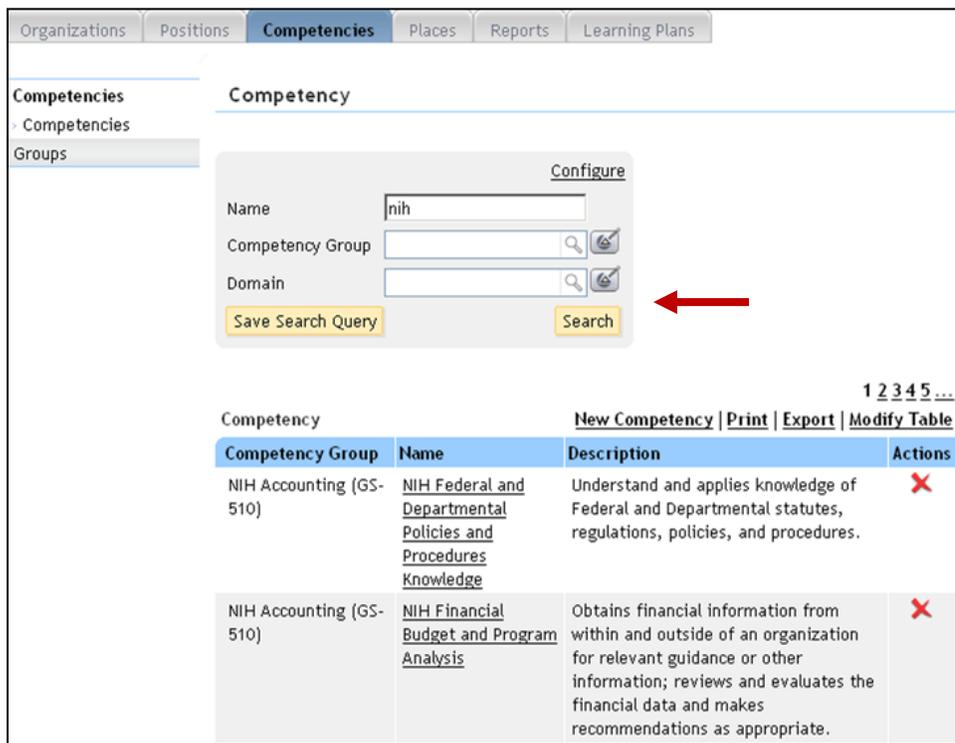
- The **Competency Assessments** screen lists all assessments made for the competency. It gives the **Date** the assessment occurred, the **Method** (source) of the assessment, the **Level** assessed, whether the rating is **In Calculation**, and any **Comments** that were given.

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

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

Human Capital Administrator

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



The screenshot shows the 'Competency' configuration screen. The 'Competencies' tab is selected. A 'Configure' form is visible with the following fields:

- Name: nih
- Competency Group: [empty]
- Domain: [empty]
- Buttons: Save Search Query, Search

A red arrow points to the 'Search' button. Below the form is a table of competencies:

Competency Group	Name	Description	Actions
NIH Accounting (GS-510)	NIH Federal and Departmental Policies and Procedures Knowledge	Understand and applies knowledge of Federal and Departmental statutes, regulations, policies, and procedures.	✖
NIH Accounting (GS-510)	NIH Financial Budget and Program Analysis	Obtains financial information from within and outside of an organization for relevant guidance or other information; reviews and evaluates the financial data and makes recommendations as appropriate.	✖

- Click the **Name** of a competency to view details, such as **Description**, **Proficiency Indicators**, **Descriptors**, **Weights**, **Groups**, and **Attachments**.
IMPORTANT! You should not edit the details of any competency that you did not create.

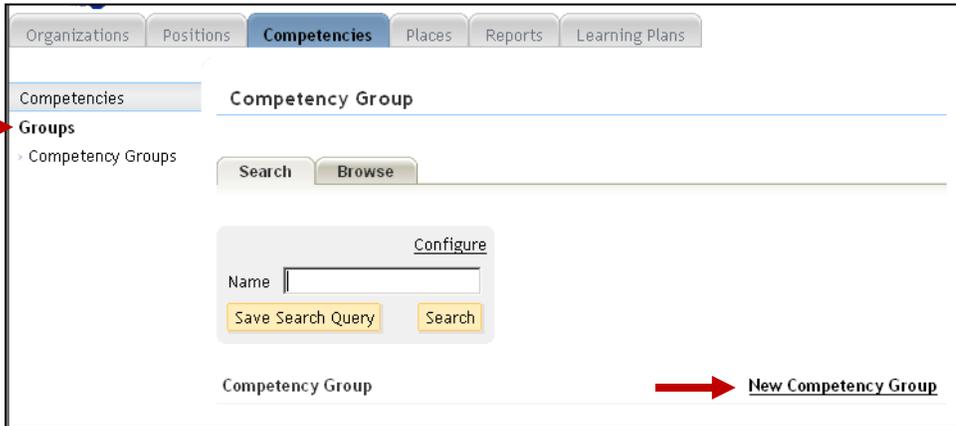
STEP-BY-STEP (CREATE COMPETENCY GROUPS)

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

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

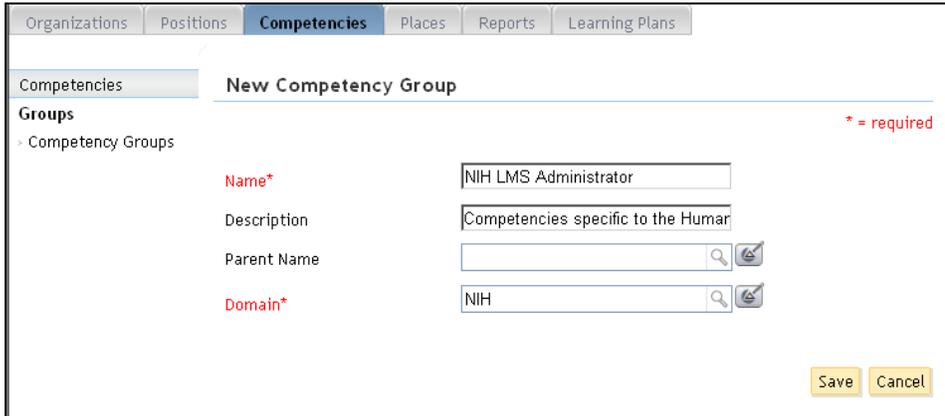
- Select the **Human Capital Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.
- Click the **Competencies** tab.

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



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

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



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

Human Capital Administrator

9. Click **Save**.

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

Organizations Positions **Competencies** Places Reports Learning Plans

Competencies **Competency Group Details**

Groups * = required

Competency Groups

Name* NIH LMS Administrator

Description Competencies specific to the Humar

Parent Name

Domain* NIH

Subordinate Competency Groups **New Subordinate Competency Group**

No items found

Competencies **Add Competency**

No items found

Save Cancel

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

Add Competency

Configure

Name nih admin

Competency Group

Save Search Query Search

Modify Table

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	NIH Administrative Support

Select Close

12. Select the check box to the left of the competency to be added to the group.

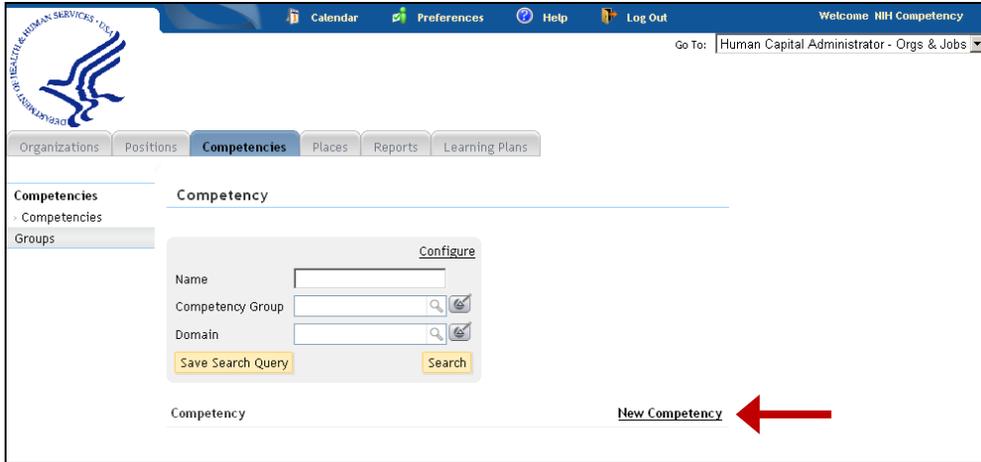
13. Click **Select**.

14. Repeat Steps 10 through 13 until all desired competencies are added to the group.

STEP-BY-STEP (CREATE A NEW COMPETENCY)

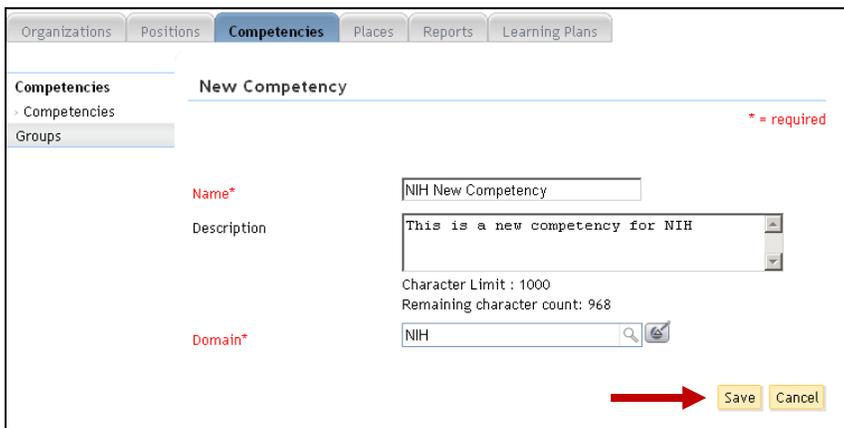
Remember to consult the NIH Competencies Team in the NIH Training Center (<http://trainingcenter.nih.gov/contact.html>) before deciding to add any additional competencies to the LMS.

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



4. Enter a name for the competency in the **Name** field prefaced by “NIH”.
IMPORTANT! When adding a New Competency, the Name field must always start with NIH, and then the IC if the competency is specific to that IC.

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



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

Human Capital Administrator

7. Click **Save**.

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

Organizations Positions **Competencies** Places Reports Learning Plans

Competencies
Competencies
Groups

Competency Details: NIH Federal and Departmental Policies and Procedures Knowledge

* = required

Main **Proficiency Indicators** Descriptors Weights Groups Attachments

Create Community

Name* NIH Federal and Departmental Polici

Description Understand and applies knowledge of Federal and Departmental statutes, regulations, policies, and procedures.
Character Limit : 1000

Domain* NIHTC

Save Cancel

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

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

Organizations Positions **Competencies** Places Reports Learning Plans

Competencies
Competencies
Groups

Competency Details: NIH Federal and Departmental Policies and Procedures Knowledge

Main **Proficiency Indicators** Descriptors Weights Groups Attachments

Rate Competency By:
 Proficiency Levels
 Behavioral Indicators

Proficiency Levels [Print](#) [Export](#)

Name	Proficiency Level	Description
Fundamental Awareness	1	You have a common knowledge or an understanding of basic techniques and concepts.
Novice	2	You have the level of experience gained in a classroom and/or experimental scenarios or as a trainee on-the-job. You are expected to need help when performing this skill.
Intermediate	3	You are able to successfully complete tasks in this competency as requested. Help from an expert may be required from time to time, but you can usually perform the skill independently.
Advanced	4	You can perform the actions associated with this skill without assistance. You are certainly recognized within your immediate organization as "a person to ask" when difficult questions arise regarding this skill.
Expert	5	You are known as an expert in this area. You can provide guidance, troubleshoot and answer questions related to this area of expertise and the field where the skill is used.

Behavioral Indicators [Add Behavioral Indicator](#) [Print](#) [Export](#)

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

Competency Details: NIH Federal and Departmental Policies and Procedures Knowledge

Main | Proficiency Indicators | **Descriptors** | Weights | Groups | Attachments

You may add, edit or delete Descriptors in the table below

Behavioral Descriptors [New Behavioral Descriptors](#) | [Print](#) | [Export](#) | [Modify Table](#)

Description	Level	Actions
You have a common knowledge or an understanding of basic techniques and concepts.	Fundamental Awareness	✗
You have the level of experience gained in a classroom and/or experimental scenarios or as a trainee on-the-job. You are expected to need help when performing this skill.	Novice	✗
You are able to successfully complete tasks in this competency as requested. Help from an expert may be required from time to time, but you can usually perform the skill independently.	Intermediate	✗
You can perform the actions associated with this skill without assistance. You are certainly recognized within your immediate organization as "a person to ask" when difficult questions arise regarding this skill.	Advanced	✗
You are known as an expert in this area. You can provide guidance, troubleshoot and answer questions related to this area of expertise and the field where the skill is used.	Expert	✗

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

Competency Details: NIH Federal and Departmental Policies and Procedures Knowledge

Main | Proficiency Indicators | Descriptors | **Weights** | Groups | Attachments

Use this tab to give weights to acquisition methods. Methods with higher weights will lend the competency a higher valuation when it is assessed.

Weights

Method	Rating Weight
Multi-Rater Assessment	<input type="text" value="3"/>
Self Assessment	<input type="text" value="1"/>
Learning Offering	<input type="text" value="0"/>
Manager Assessment	<input type="text" value="2"/>
Custom-Direct Observation	<input type="text" value="1"/>

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

Human Capital Administrator

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

Organizations Positions **Competencies** Places Reports Learning Plans

Competency Details: NIH Federal and Departmental Policies and Procedures Knowledge

Main Proficiency Indicators Descriptors Weights **Groups** Attachments

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

Name	Description	Actions
NIH Accounting (GS-510)	The Accounting competencies are applicable to all employees (all GS levels) in this occupational series. Each competency in this model includes a definition and key behaviors.	

- Click on the **Attachments** tab.

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

Organizations Positions **Competencies** Places Reports Learning Plans

Competency Details: NIH Federal and Departmental Policies and Procedures Knowledge

Main Proficiency Indicators Descriptors Weights **Groups** **Attachments**

Add or remove Attachments to or from the Competency.

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

Attachment Name	Type	Category	Locale	Private	Actions
Federal Accounting Procedures - Proficiency Map	URL	User Documentation	English	No	
Federal Accounting Procedures and Process - Key Behaviors	File	User Documentation	English	No	

MULTI-RATER ASSESSMENTS

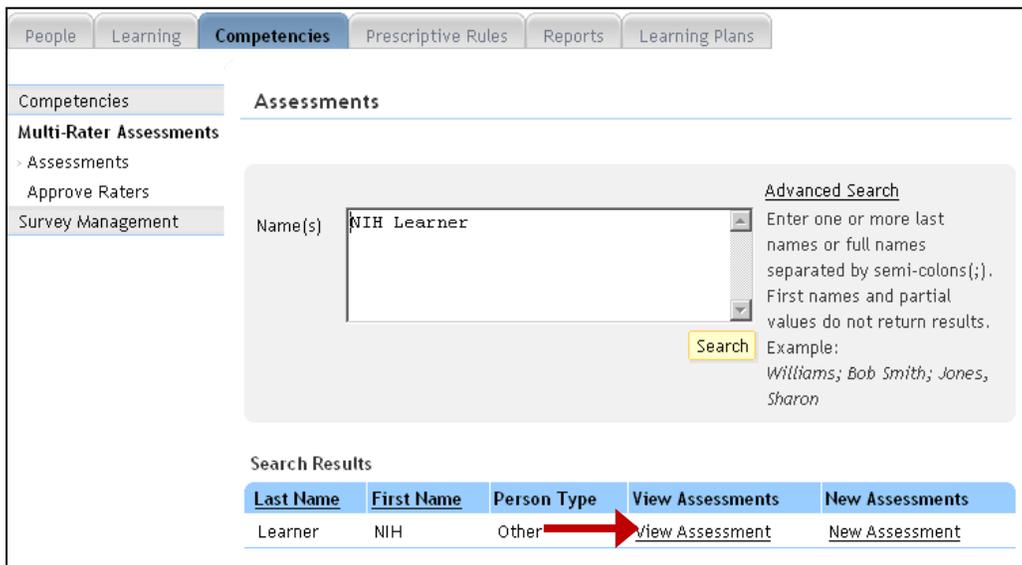
As a Human Capital Administrator, you are able to view a learner’s multi-rater competency assessments (current and completed), create new assessments, and approve raters for multi-rater assessments (MRAs).

STEP-BY-STEP (VIEW LEARNER ASSESSMENTS)

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

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

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



Human Capital Administrator

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

Assessments: NIH Learner

Current Completed

Assessments [New Assessment](#) | [Print](#) | [Export](#) | [Modify Table](#)

<u>MRA Title</u>	<u>Closes On</u>	<u>MRA Status</u>	<u>Created By</u>	<u>Actions</u>
Learner Test MRA for Approval Process	12/31/2014	In Progress	NIH Learner	Edit
Second test MRA to approve raters	12/31/2014	In Progress	KIMBERLY HILL	Edit
Test MRA		In Progress	NIH Competency	Edit
Test MRA	12/31/2014	In Progress	NIH Competency	Edit
User Manual Demo		In Progress	NIH Learner	Edit

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

MRA Details * = required

MRA Title: Test MRA

Description:

Ratee: NIH Learner

Closes On:  

Type: Competency-based

Assessment Results: Show Individual Comments
 Show Individual Rating Levels

Competencies to be Assessed [Print](#) | [Export](#)

<u>Competency Name</u>
NIH Process Management
NIH Strategic and/or Operating Plans
NIH Reconciliation and Financial Reporting
NIH Communicate Effectively with Senior Leadership
NIH Policy and Procedure Research
NIH Risk Analysis
NIH Federal and Departmental Policies and Procedures Knowledge
NIH Financial Budget and Program Analysis
NIH Project Management

Raters  [Add Rater](#) | [Print](#) | [Export](#)

<u>Rater Name</u>	<u>Person Type</u>	<u>Approval Status</u>	<u>Rater Acceptance</u>	<u>Actions</u>
-------------------	--------------------	------------------------	-------------------------	----------------

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

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

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

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

The screenshot shows the 'Competencies' tab in the Human Capital Administrator system. The left sidebar has 'Multi-Rater Assessments' selected, with 'Assessments' highlighted. The main content area shows a search box with 'NIH Learner' entered. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. A yellow 'Search' button is located below the search box. Below the search box is a 'Search Results' table with the following data:

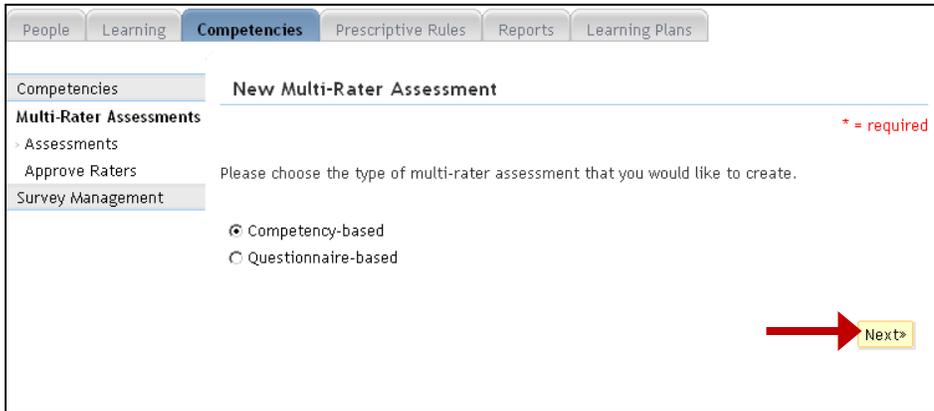
Last Name	First Name	Person Type	View Assessments	New Assessments
Learner	NIH	Other	View Assessment	New Assessment

A red arrow points to the 'New Assessment' link in the search results table.

Human Capital Administrator

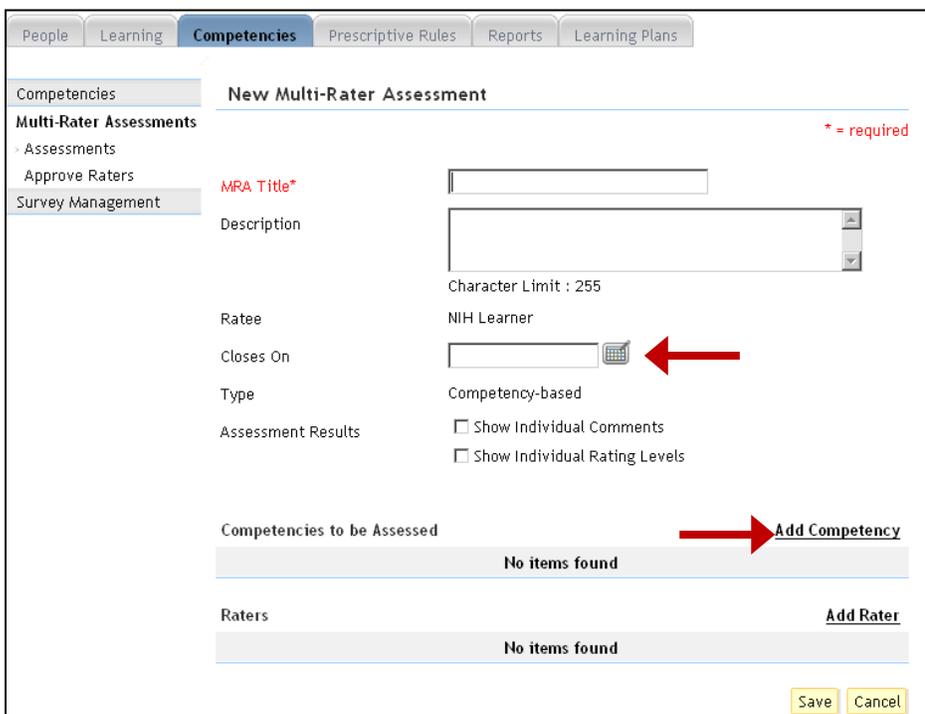
- Click the Competency-based radio button on the **New Multi-Rater Assessment** screen.

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



The screenshot shows the 'New Multi-Rater Assessment' screen with the 'Competencies' tab selected. The 'Competency-based' radio button is selected. A red arrow points to the 'Next' button.

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



The screenshot shows the 'New Multi-Rater Assessment' screen with the 'MRA Title' field, 'Description' field, 'Closes On' field, and 'Add Competency' button. Red arrows point to the 'Closes On' field and the 'Add Competency' button.

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

15. When finished, click **Submit**.

Select Competencies

View By: Held

Competencies

<input type="checkbox"/> Competency Name
<input type="checkbox"/> NIH Process Management
<input type="checkbox"/> NIH Create and Execute Annual Strategic and/or Operating Plans
<input type="checkbox"/> NIH Reconciliation and Financial Reporting
<input type="checkbox"/> NIH Communicate Effectively with Senior Leadership
<input type="checkbox"/> NIH Policy and Procedure Research
<input type="checkbox"/> NIH Risk Analysis and Internal Control
<input type="checkbox"/> NIH Federal Accounting Procedures and Process
<input type="checkbox"/> NIH Financial Budget and Program Analysis
<input type="checkbox"/> NIH Project Management

Submit Close

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

Competencies to be Assessed

Add Competency | Print | Export

Competency Name	Actions
NIH Risk Analysis	Remove Competency

Raters

No items found

Add Rater

Save Cancel

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

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

Human Capital Administrator

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

Search for People

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 [Modify Table](#)

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

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

Ratee: NIH Learner

Closes On:

Type: Competency-based

Assessment Results: Show Individual Comments
 Show Individual Rating Levels

Competencies to be Assessed [Add Competency](#) | [Print](#) | [Export](#)

Competency Name	Actions
NIH Process Management	Remove Competency
NIH Create and Execute Annual Strategic and/or Operating Plans	Remove Competency
NIH Reconciliation and Financial Reporting	Remove Competency
NIH Communicate Effectively with Senior Leadership	Remove Competency
NIH Policy and Procedure Research	Remove Competency
NIH Risk Analysis and Internal Control	Remove Competency
NIH Federal Accounting Procedures and Process	Remove Competency
NIH Financial Budget and Program Analysis	Remove Competency
NIH Project Management	Remove Competency

Raters [Add Rater](#) | [Print](#) | [Export](#)

Rater Name	Person Type	Actions
NIH Supervisor	Other	Remove Rater

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

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

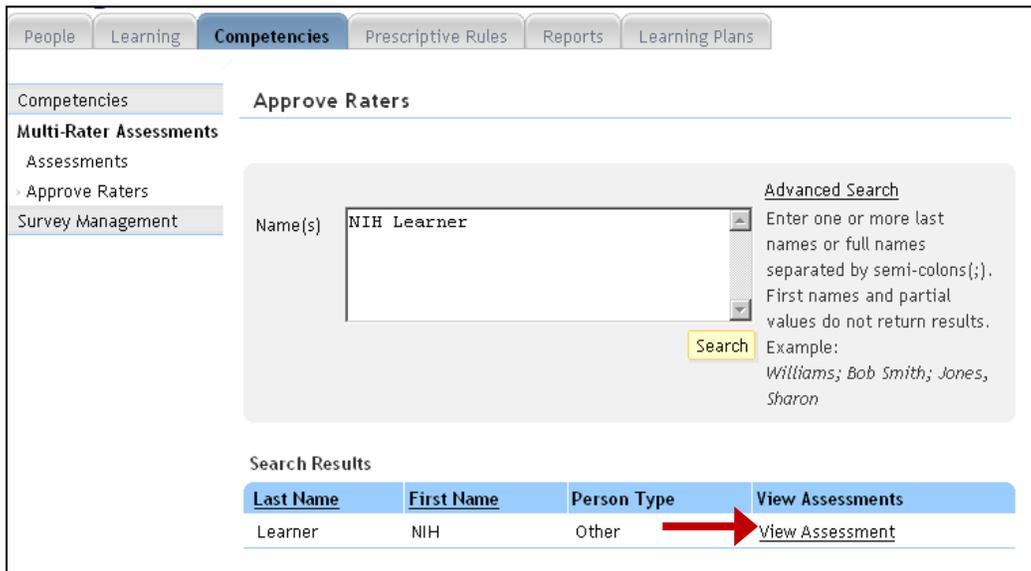
21. Click **Yes**.

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

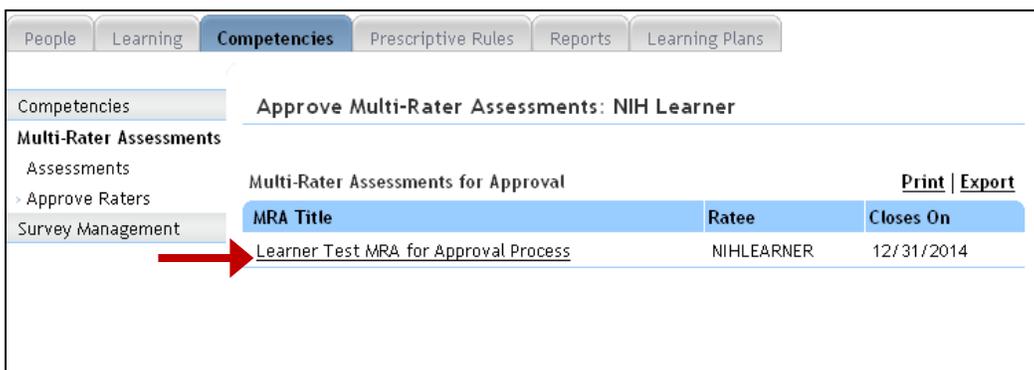
1. Select the **Human Capital Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Competencies** tab
3. Select **Multi-Rater Assessments** from the menu on the left.
4. Select **Approve Raters** from the menu on the left.
5. Enter the learner’s name in the search box and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

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

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



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



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

Human Capital Administrator

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

People
Learning
Competencies
Prescriptive Rules
Reports
Learning Plans

Competencies

Approve Assessment Raters

Multi-Rater Assessments

* = required

Assessments

Approve Raters

Survey Management

MRA Title	Learner Test MRA for Approval Process
Description	Learner Test MRA for Approval Process
Ratee	NIH Learner
Closes On	12/31/2014
Type	Competency-based

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

Rater Name	Person Type	Approval Status	Rater Acceptance	Approve Rater
NIH DomainSysAdmin	Other	Approved	Pending	Approved
NIH TrainingContentAdmin	Other	Pending	Pending	Approve Reject
NIH User	Contractor	Pending	Pending	Approve Reject

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

Rater Name	Person Type	Reason for rejection	Date rejected
NIH LocalLearningAdmin	Other	- out for extended leave	01/14/2009

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SURVEY MANAGEMENT

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

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

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

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

The screenshot shows the 'Survey Management' page within the 'Competencies' tab. The page has a navigation bar with tabs for 'People', 'Learning', 'Competencies', 'Prescriptive Rules', 'Reports', and 'Learning Plans'. On the left, there is a sidebar with 'Competencies', 'Multi-Rater Assessments', and 'Survey Management'. The main content area has a 'Name' input field and a 'Search' button. Below this, there is a section for 'Surveys' with a 'No items found' message. A red arrow points to the 'Create Survey' link in the top right corner of the 'Surveys' section.

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

The screenshot shows the 'Survey Creation and Distribution' form. It has the same navigation bar as the previous screenshot. The sidebar shows 'Competencies', 'Multi-Rater Assessments', and 'Survey Management'. The form fields are: 'Name*' (Test Survey), 'Description' (This is a test survey), 'Closes On' (09/30/2009), 'Status' (Draft), and 'Domain*' (NIH). A red asterisk indicates required fields. A red arrow points to the 'Next' button at the bottom right of the form.

Human Capital Administrator

8. Click Add Questionnaire.

People Learning **Competencies** Prescriptive Rules Reports Learning Plans

Competencies
Multi-Rater Assessments
Survey Management

Survey Details and Distribution: Test Survey

* = required

Name* Test Survey

Description This is a test survey
Character Limit : 255

Closes On 09/30/2009

Status Draft

Domain* NIH

Questionnaire Content **Add Questionnaire**

No items found

Respondents **Add Respondents**

No items found

Save For Later Cancel

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

Attach Evaluation:

Browse Search

Production Repository

Select Item

- Production
 - HHS U
 - NIH
 - IT security
 - NEMS
 - NIH CSR
 - NIH-OER FCOI
 - NIHTC
 - NIHTC-MSS Program Evaluations [SCORM Package, Version:]
 - OEODM Courses
 - P3 Courses
 - Privacy
 - Race, Ethnicity and Disability Status Survey [SCORM Package, Version: 4.7.09]
 - SkillSoft

Refresh Finish Close

10. Click **Finish**.

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

People Learning **Competencies** Prescriptive Rules Reports Learning Plans

Competencies Survey Details and Distribution: Test Survey

Multi-Rater Assessments * = required

Survey Management

Name* Test Survey

Description This is a test survey
Character Limit : 255

Closes On 09/30/2009

Status Draft

Domain* NIH

Questionnaire Content

Questionnaire	Actions
NIHTC-MSS Program Evaluations	Preview X

Respondents **Add Respondents**

No items found

Save For Later Cancel

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

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

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

Search for People

Name(s) NIH Learner; NIH Supervisor

Advanced Search

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

Search

Search Results **Modify Table**

<input checked="" type="checkbox"/>	Last Name	First Name	Username	Person Type	Person ID	Organization	Location	Job
<input checked="" type="checkbox"/>	Learner	NIH	NIHLEARNER	Other	00165395	HNN1		
<input checked="" type="checkbox"/>	Supervisor	NIH	NIHSUPERVISOR	Other	00165949	HNAM6		

Select Close

Human Capital Administrator

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

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

14. Do one of the following:

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

The screenshot displays the 'Survey Details and Distribution' page for a 'Test Survey'. The interface includes a navigation menu at the top with tabs for 'People', 'Learning', 'Competencies', 'Prescriptive Rules', 'Reports', and 'Learning Plans'. The 'Competencies' tab is active. On the left, a sidebar menu shows 'Competencies', 'Multi-Rater Assessments', and 'Survey Management'. The main content area is titled 'Survey Details and Distribution: Test Survey' and contains the following fields:

- Name***: Test Survey
- Description**: This is a test survey (Character Limit: 255)
- Closes On**: 09/30/2009
- Status**: Draft
- Domain***: NIH

Below these fields is the 'Questionnaire Content' section, which includes a table with the following data:

Questionnaire	Actions
NIHTC-MSS Program Evaluations	Preview

The 'Respondents' section features a table with the following data:

First Name	Last Name	User Name	Organization Name	Status	Actions
NIH	Learner	NIHLEARNER	HNN1	Pending	
NIH	Supervisor	NIHSUPERVISOR	HNAM6	Pending	

At the bottom of the page, there are three buttons: 'Save For Later', 'Save and Distribute', and 'Cancel'. Red arrows point to the 'Save For Later' and 'Save and Distribute' buttons.

STEP-BY-STEP (VIEW A SURVEY)

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

5. Under the **Actions** column, you will see various options, depending on the status of the survey.
 - a. **Edit Survey** allows modifications to survey details before distribution.
 - b. **Distribute Survey** makes the survey available to respondents.

The screenshot shows the 'Survey Management' section of the Human Capital Administrator interface. At the top, there are navigation tabs: People, Learning, **Competencies**, Prescriptive Rules, Reports, and Learning Plans. Below these, there are sub-tabs: Competencies, Multi-Rater Assessments, and **Survey Management**. A search bar contains the text 'Test Survey' and a 'Search' button is to its right. Below the search bar, there are links for 'New Survey Content', 'Create Survey', and 'Modify Table'. A table lists survey details:

Name	Status	Create Date	Distribution Date	Close Date	Domain	Number of Completions	Actions
Test Survey	Draft	07/15/2009		09/30/2009	NIH	0	Edit Survey Distribute Survey

A red arrow points to the 'Distribute Survey' link in the Actions column.

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

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

The screenshot shows the 'Survey Management' section of the Human Capital Administrator interface, similar to the previous one. The search bar still contains 'Test Survey'. The table below shows the survey status updated:

Name	Status	Create Date	Distribution Date	Close Date	Domain	Number of Completions	Actions
Test Survey	In Progress	07/15/2009	07/15/2009	09/30/2009	NIH	0	View Distribution Close Survey

MANAGING LEARNING

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

ENROLLMENTS

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

STEP-BY-STEP (VIEW AND MANAGE ENROLLMENTS)

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

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

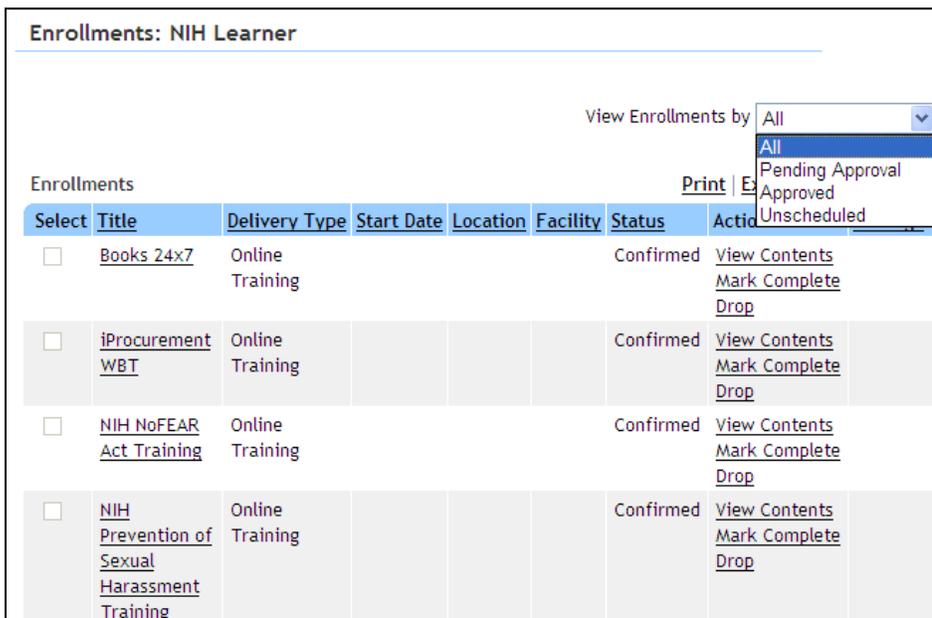
5. Click **View Enrollments** to the right of the correct learner.

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

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

Human Capital Administrator

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



The screenshot shows the 'Enrollments: NIH Learner' page. At the top right, there is a 'View Enrollments by' dropdown menu with a red arrow pointing to it. The dropdown menu is open, showing options: All (highlighted), Pending Approval, Approved, and Unscheduled. Below the dropdown is a table with columns: Select, Title, Delivery Type, Start Date, Location, Facility, Status, and Actions. The table contains four rows of enrollment data.

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Actions
<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

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

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

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

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

- **Drop** will allow you to cancel the registration of a learner.

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

TRANSCRIPTS

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

NOTE: Because the LMS is still a relatively new system and not all historic training has been migrated, some records may not appear on the LMS transcript. If you have a question about whether something should be appearing on the LMS transcript, contact the NIH LMS Team at LMSsupport@mail.nih.gov.

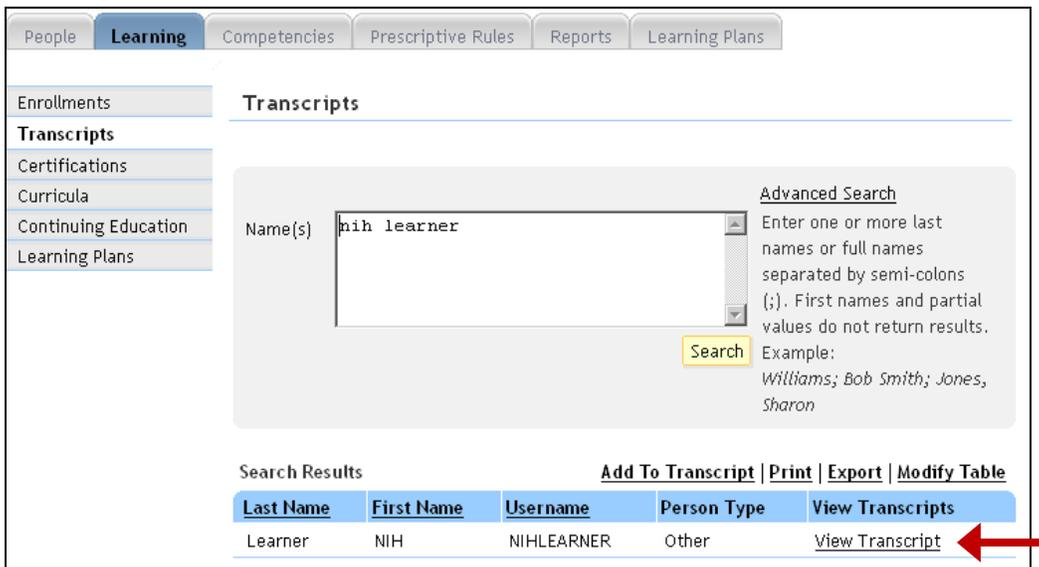
The following instructions will show you how to view, edit, delete, and add learning to a learner's Transcript.

STEP-BY-STEP (VIEW A LEARNER TRANSCRIPT)

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

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

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



Human Capital Administrator

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

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

Additional Tips:

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

STEP-BY-STEP (DELETE A TRANSCRIPT ITEM)

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

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

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



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

Human Capital Administrator

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

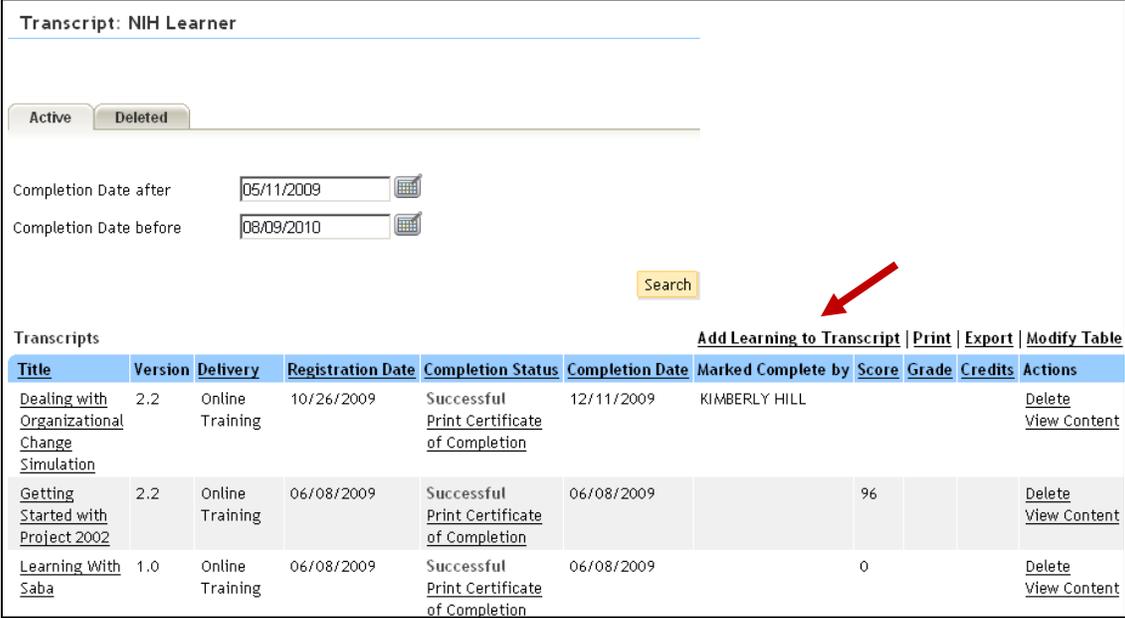
Use this method to add learning to a single learner's transcript.

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

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

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

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



Transcript: NIH Learner

Active Deleted

Completion Date after: 05/11/2009

Completion Date before: 08/09/2010

Search

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

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

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

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

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

Search for Items to Add to Transcript

Name

ID

Search Existing Transcript Items

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

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

[Cancel](#)

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

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

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

10. Enter additional data into all appropriate fields.

Edit Item Added to Transcript

* = required

[Use Existing Item](#)

Item/Event Name Microsoft Office 2000 - Beginning Excel

Version 2.2

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

Offering Start Date

Ended/Completed On Date

Registration Date

Date Marked Complete*

Start Time (HH:MM)

End Time (HH:MM)

Duration(HH:MM)

Delivery Type

ID 111080_ENG

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

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

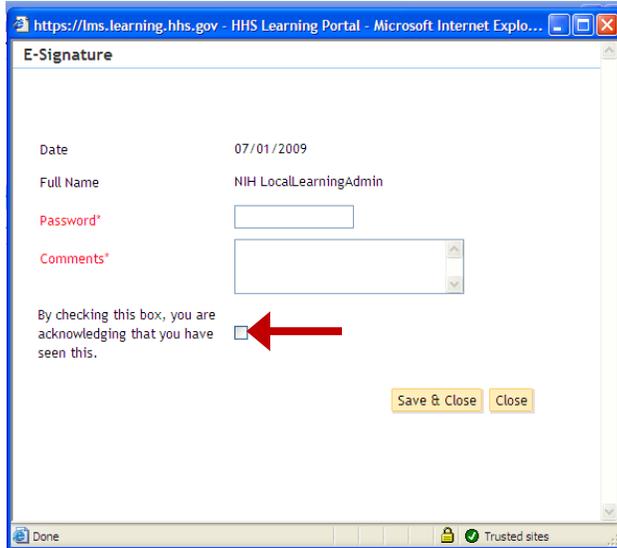
Human Capital Administrator

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

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

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

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



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

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

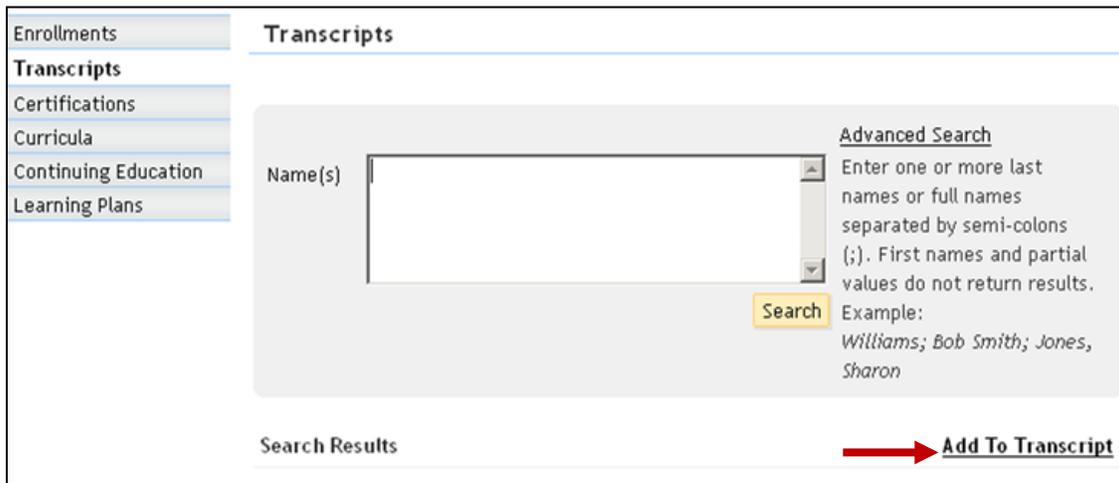
The browser's status bar at the bottom shows "Done" and "Trusted sites".

14. Click **Save & Close**.

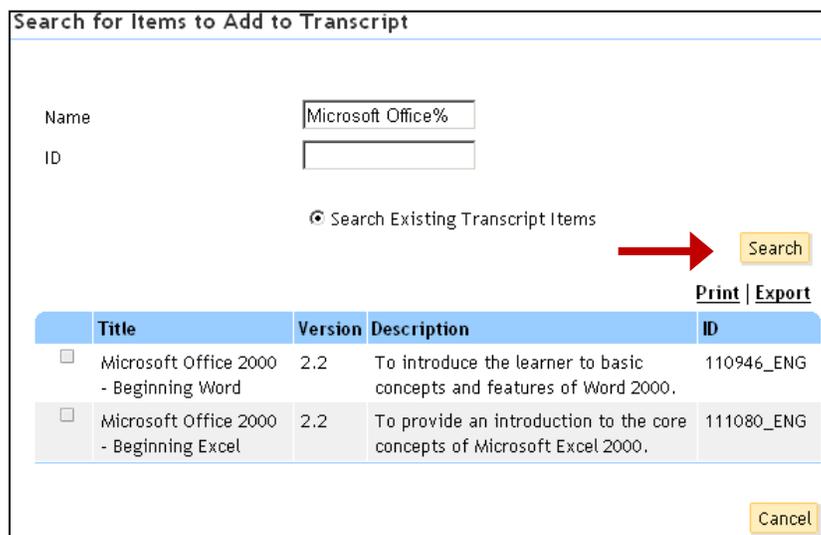
STEP-BY-STEP (ADD LEARNING TO A TRANSCRIPT: MULTIPLE LEARNERS)

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

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



5. Click the **Use Existing Item** link.
6. Enter the course **Name** and/or the course **ID** and click **Search**.



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

Human Capital Administrator

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

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

- Enter additional data into all appropriate fields.

Edit Item Added to Transcript

* = required
[Use Existing Item](#)

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

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

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

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

Continuing Education Credits

No items found

Learners [Add Learners](#)

No items found

Competencies

No items found

Notes

No items found

- Enter the criteria to **Search** for one or more learners.
- Select the box to the left of the name of one or more learners, or click the box in the blue table header to select everyone in the list.
- Click **Select**.

Search Person, Internal * = required

Population* First Name

Last Name Person ID

Username Manager

Organization Location

Domain Person Type

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

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

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

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

Continuing Education Credits

No items found

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

Name	Start Date	Date Marked Complete	Score	Grade	Completion Status	Actions
NIH Competency	<input type="text" value="06/01/2009"/>	<input type="text" value="07/01/2009"/>	<input type="text" value="85"/>	<input type="text"/>	<input type="text" value="Successful"/>	<input type="button" value="Delete"/>
NIH Learner	<input type="text" value="06/01/2009"/>	<input type="text" value="07/01/2009"/>	<input type="text" value="90"/>	<input type="text"/>	<input type="text" value="Successful"/>	<input type="button" value="Delete"/>
NIH Supervisor	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="New"/>	<input type="button" value="Delete"/>

Competencies

No items found

Notes

No items found

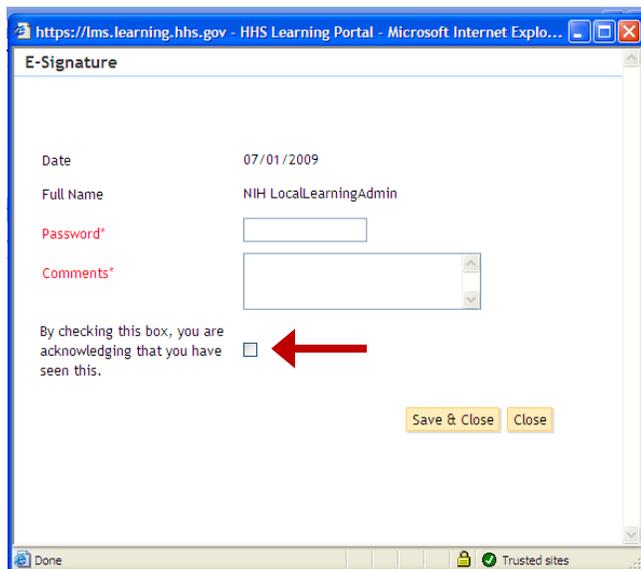
NOTE: It's a good idea to delete the "0" that defaults in the Score field so that learners do not become concerned about seeing a "0" score on their transcript.

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

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

Human Capital Administrator

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



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

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

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

17. Click **Save & Close**.

CERTIFICATIONS

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

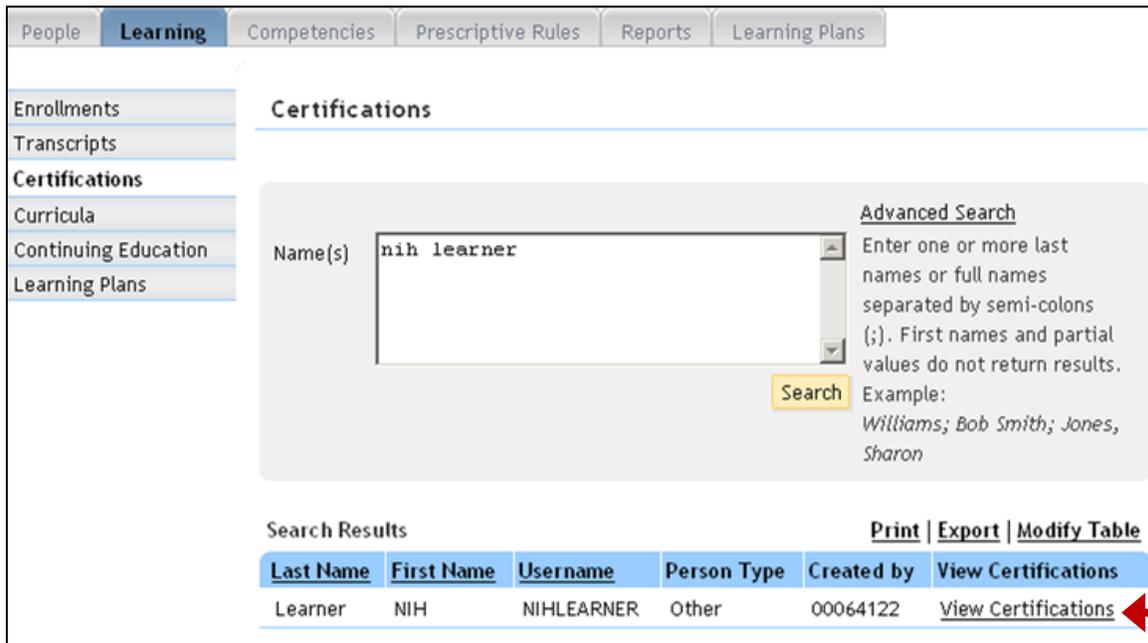
Certification – A predefined set of courses that have been grouped together, with a deadline for completion. Credentials earned by completing the certification may expire on a predetermined date.

STEP-BY-STEP (VIEW CERTIFICATIONS)

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

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

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



The screenshot shows the 'Learning' tab selected in the top navigation bar. On the left, a sidebar menu has 'Certifications' highlighted. The main content area is titled 'Certifications' and contains a search box with 'nih learner' entered. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons (;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. A yellow 'Search' button is located below the search box. Below the search box, the 'Search Results' section displays a table with the following data:

Last Name	First Name	Username	Person Type	Created by	View Certifications
Learner	NIH	NIHLEARNER	Other	00064122	View Certifications

A red arrow points to the 'View Certifications' link in the table.

Human Capital Administrator

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

Internal Certifications External Certifications

Configure

Name

Version

Target Date <=

Status

Save Search Query Search

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

Name	Version	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
NIH Prevention of Sexual Harassment Training Certification	1.0	<div style="width: 100%;"><div style="width: 100%;"></div></div> Certification online course - 100% Completed	Acquired	NIH Learner		Actions

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

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

STEP-BY-STEP (GRANT INTERNAL CERTIFICATION)

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

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

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

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

People **Learning** Competencies Prescriptive Rules Reports Learning Plans

Enrollments
Transcripts
Certifications
Curricula
Continuing Education
Learning Plans

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	Created by	View Certifications
Learner	NIH	NIHLEARNER	Other	00064122	View Certifications

6. Click **Grant Certification**.

Certifications : NIH Learner

Internal Certifications **External Certifications**

[Configure](#)

Name
Version
Target Date <=
Status

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

No items found

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

Human Capital Administrator

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

Grant Certification

1. Select Certification → 2. Grant Certification

Configure

Name

Save Search Query Search

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

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

Next Close

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

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

Grant Certification

1. Select Certification → 2. Grant Certification

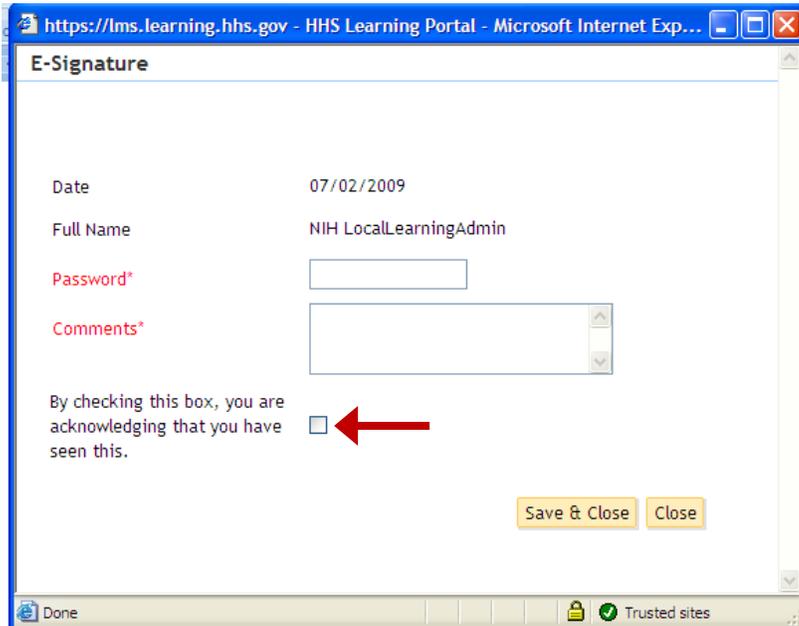
Granted Certifications [Print](#) [Export](#)

Learner Name	Acquired On	Expiration Date
NIH Learner	07/02/2009	

Finish Back Close

Human Capital Administrator

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



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

- Date: 07/02/2009
- Full Name: NIH LocalLearningAdmin
- Password*: [Text input field]
- Comments*: [Text area with scrollbars]
- A checkbox with the text: "By checking this box, you are acknowledging that you have seen this." A red arrow points to this checkbox.
- Buttons: "Save & Close" and "Close" (both in yellow boxes).

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

11. Click **Save & Close**.

STEP-BY-STEP (ASSIGN INTERNAL CERTIFICATION)

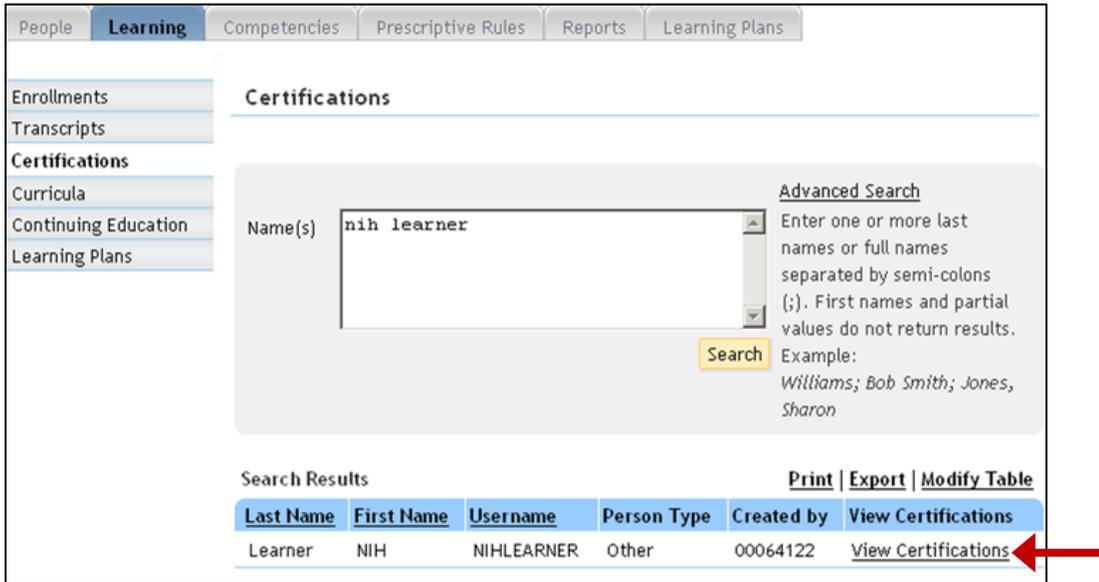
A certification must first be created in the LMS by an LMS Training Administrator before it will be available for you to assign to a learner.

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

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

Human Capital Administrator

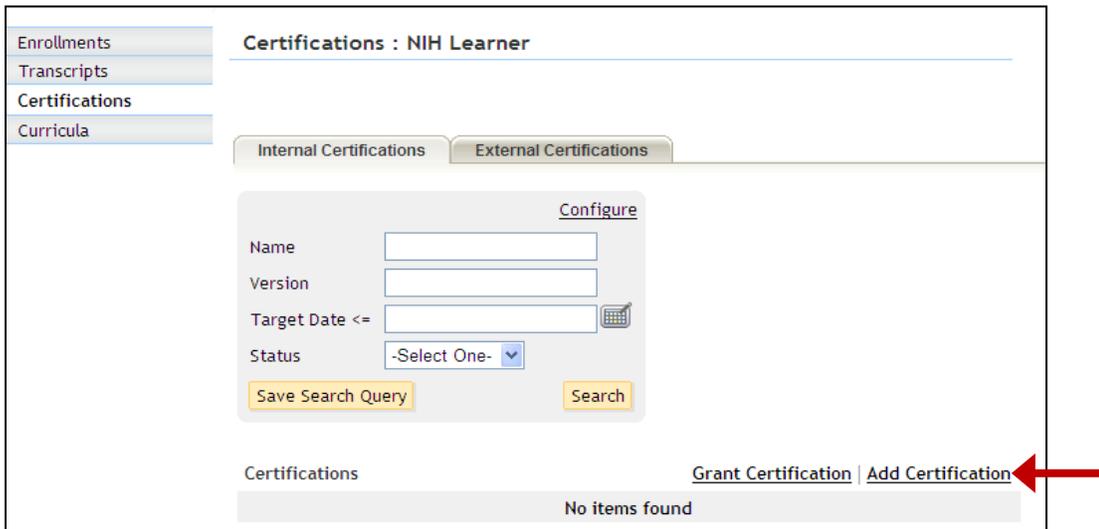
- Click **View Certifications** to the right of the correct learner.



The screenshot shows the 'Learning' tab selected in the top navigation bar. On the left, a sidebar contains links for Enrollments, Transcripts, Certifications, Curricula, Continuing Education, and Learning Plans. The main content area is titled 'Certifications' and features a search box with the text 'nih learner' entered. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons (;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search box is a 'Search' button. Underneath, a 'Search Results' table is displayed with columns: Last Name, First Name, Username, Person Type, Created by, and View Certifications. The table contains one row with the following data: Learner, NIH, NIHLEARNER, Other, 00064122. A red arrow points to the 'View Certifications' link in the last column of this row.

Last Name	First Name	Username	Person Type	Created by	View Certifications
Learner	NIH	NIHLEARNER	Other	00064122	View Certifications

- Click **Add Certification**.



The screenshot shows the 'Certifications : NIH Learner' page. The left sidebar has links for Enrollments, Transcripts, Certifications, and Curricula. The main content area has two tabs: 'Internal Certifications' and 'External Certifications'. Below the tabs is a 'Configure' section with fields for Name, Version, Target Date <= (with a calendar icon), and Status (a dropdown menu set to '-Select One-'). There are 'Save Search Query' and 'Search' buttons. At the bottom, there is a 'Certifications' section with a 'Grant Certification' link and an 'Add Certification' link. A red arrow points to the 'Add Certification' link.

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

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

Select Certification

[Configure](#)

Name

Discontinued From >= 

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

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



CURRICULA

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

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

STEP-BY-STEP (VIEW CURRICULA)

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

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

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

The screenshot shows the 'Learning' tab selected in the top navigation bar. On the left, a sidebar menu has 'Curricula' selected. The main content area is titled 'Curricula' and contains a search box with 'nih learner' entered. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons (;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. A yellow 'Search' button is located below the search box. Below the search box, the 'Search Results' section displays a table with the following data:

Last Name	First Name	Username	Person Type	Created by	View Curricula
Learner	NIH	NIHLEARNER	Other	00064122	View Curricula

A red arrow points to the 'View Curricula' link in the table.

Human Capital Administrator

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

Curricula : NIH Learner

[Configure](#)

Name

Target Date <=

Status

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

No items found

STEP-BY-STEP (GRANT CURRICULUM)

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

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

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

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

Curricula : NIH Learner

Configure

Name

Target Date <=

Status

Save Search Query Search

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

No items found

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

Grant Curriculum

1. Select Curriculum <-> 2. Grant Curriculum

Configure

Name

Save Search Query Search

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

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

Next Close

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.

Human Capital Administrator

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

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

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

The screenshot shows a web browser window with the address bar displaying "https://lms.learning.hhs.gov - HHS Learning Portal - Microsoft Internet Expl...". The page title is "E-Signature". The form contains the following fields: "Date" with the value "07/01/2009", "Full Name" with the value "NIH LocalLearningAdmin", "Password*" with an empty text box, and "Comments*" with an empty text area. Below these fields, there is a checkbox with the text "By checking this box, you are acknowledging that you have seen this." and a red arrow pointing to the checkbox. At the bottom right, there are two buttons: "Save & Close" and "Close". The browser's status bar at the bottom shows "Done" and "Trusted sites".

11. Click **Save & Close**.

STEP-BY-STEP (ASSIGN CURRICULUM)

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

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

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

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

Curricula : NIH Learner

Configure

Name

Target Date <=

Status

Save Search Query Search

Curricula Grant Curriculum | Add Curriculum

No items found

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

Select Curriculum

Configure

Name

Discontinued From >=

Save Search Query Search

Curricula Print | Export | Modify Table

Select	Name	Available From	Discontinued From	Target Days
<input type="checkbox"/>	ASAM Action Officer Training	10/30/2008		0
<input type="checkbox"/>	EEO & Diversity Awareness Training for Employees	09/13/2007		0

Close

CONTINUING EDUCATION

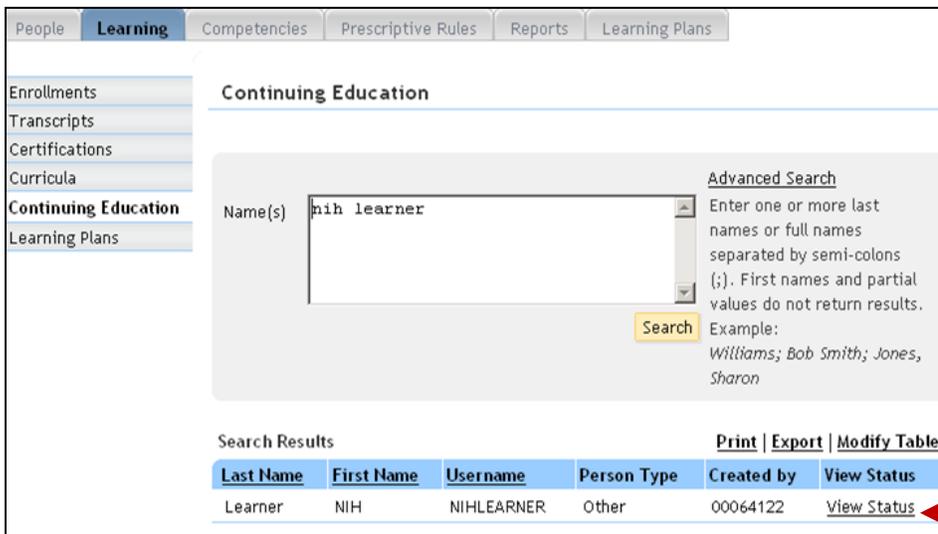
If an LMS Training Administrator has created continuing education Fields of Study and/or Continuing Education Plans in the LMS, a Human Capital Administrator may add the requirements to learners and/or check their progress against requirements. NIH is not yet making frequent use of the Continuing Education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

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

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

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

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



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

Human Capital Administrator

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

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

Continuing Education Requirement: NIH Learner

Start Date >=

End Date <=

Group By Field of Study Courses Continuing Education Requirements

Continuing Education Requirements [Add Requirement](#)

No items found

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

Select Continuing Education Requirements

Name Description

Start Date = End Date =

Domain

Select Continuing Education Requirements [Print](#) | [Export](#) | [Modify Table](#)

<input type="checkbox"/>	Name	Description	Status	Start Date	End Date
<input checked="" type="checkbox"/>	NIH LMS Administrator Credentials		Active	10/01/2009	09/30/2010

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

LEARNING PLANS

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

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

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

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

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

The screenshot shows the 'Learning' tab interface. On the left is a navigation menu with 'Learning Plans' selected. The main area is titled 'Courses on Learning Plan'. It features a search box with 'nih learner' entered and a 'Search' button. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons (;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search box is a 'Search Results' table with columns: Last Name, First Name, Username, Person Type, Created by, and View Courses. The table contains one row: Learner, NIH, NIHLEARNER, Other, 00064122, and View Course. A red arrow points to the 'View Course' link in the table.

Last Name	First Name	Username	Person Type	Created by	View Courses
Learner	NIH	NIHLEARNER	Other	00064122	View Course

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

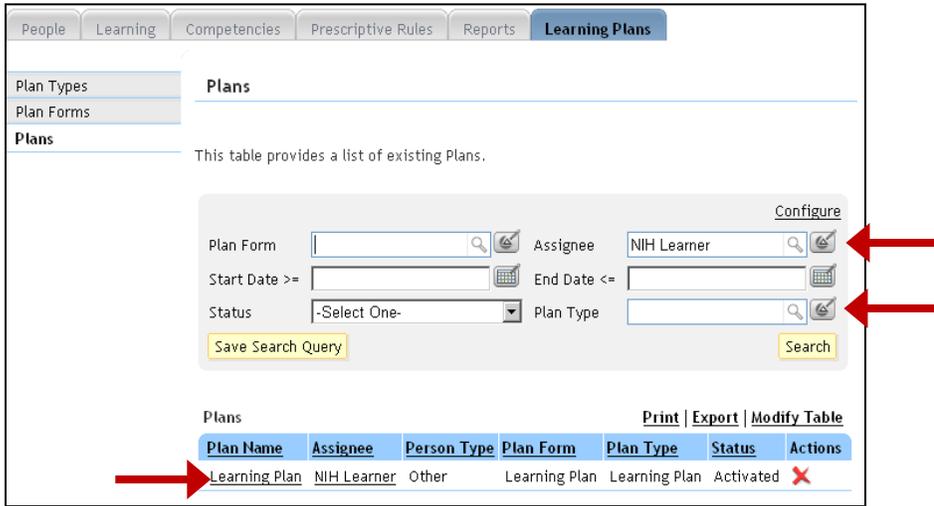
Human Capital Administrator

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

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

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

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



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



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

Human Capital Administrator

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



The screenshot shows a dialog box titled "Pick Activity Type". Inside the dialog, the text "Select Activity Type." is displayed. Below this text are four radio button options: "Course" (which is selected), "Certification", "Curriculum", and "Goal". At the bottom right of the dialog, there are two buttons: "Next" and "Cancel". A red arrow points to the "Next" button.

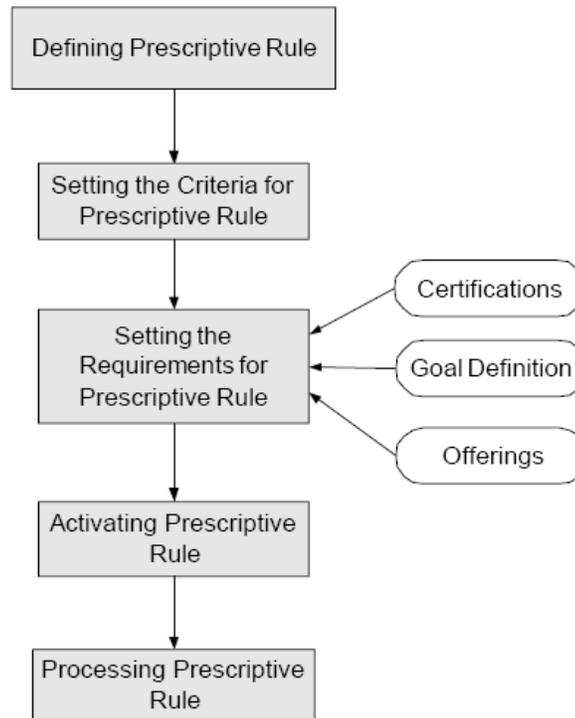
9. Follow the prompts for the type of activity you chose to add the specific learning item you want to add to the learning plan. You will see a confirmation message that the item has been added to the plan. Click **Close** to exit the message pop-up and return to the **Plan Details** screen. You should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

MANAGING PRESCRIPTIVE RULES

PRESCRIPTIVE RULES

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

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



The following points are **VERY IMPORTANT!**

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

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

STEP-BY-STEP (CREATE A PRESCRIPTIVE RULE)

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

The screenshot shows the 'Prescriptive Rules' tab selected in the top navigation bar. On the left, there is a sidebar with links: 'Prescriptive Rules', 'Error Log', 'Monitor', and 'Start Stop Processing'. The main content area is titled 'Prescriptive Rule' and contains a 'Configure' section with fields for 'Name', 'Status' (a dropdown menu), and 'Domain' (with search and refresh icons). Below these fields are 'Save Search Query' and 'Search' buttons. At the bottom of the main area, there is a link 'New Prescriptive Rule' which is highlighted with a red arrow. A 'Stop' button is located at the bottom right of the main area.

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

The screenshot shows the 'New Prescriptive Rule' form. The top navigation bar is the same as in the previous screenshot. The sidebar is also the same. The main content area is titled 'New Prescriptive Rule' and has a progress indicator with five steps: '1. Rule Details', '2. Member Selection', '3. Requirements', '4. Preview', and '5. Activate'. A note below the progress indicator states: 'Note: The scheduling of the prescriptive rule is based on the time zone of the application server. Application server time zone : Eastern Daylight Time'. The form fields are: 'Name*' (text input with 'NIH Celebrity Accounts'), 'Description' (text area with 'Prescriptive rule for adding competencies to the Audience Sub Type NIH Celebrity Accounts'), 'Member Selection*' (radio buttons for 'Select members manually' and 'Define selection criteria based on which members will be selected dynamically', with the second option selected), 'Domain*' (text input with 'NIH'), 'Processing Schedule' (radio buttons for 'Once' and 'Recurring', with 'Recurring' selected; 'Daily' is also an option with a 'recurs every' field and 'days' label; 'Weekly' is selected with a 'recurs every' field and 'weeks on' label; checkboxes for days of the week are shown, with 'Wed' selected), and 'Start Date*' (text input with '10/07/2009'). A red asterisk indicates required fields.

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

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

7. Select NIH for the **Domain** field (location of all the people accounts).
8. Set up a processing schedule. Read the options carefully and make sure you know the implications of every selection. If you have any questions, contact the NIH LMS Team at LMSSupport@mail.nih.gov.
9. Go to the next step by clicking **Step 2a: Member Selection**.

Created By: nihcompetencyadmin

This rule must run with:
 Creator's privileges
 Administrator's privileges

Buttons: Cancel, Save & Finish Later, Step 2a: Member Selection >>

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

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

People | Learning | Competencies | **Prescriptive Rules** | Reports | Learning Plans

Prescriptive Rules | Prescriptive Rule Details: NIH Celebrity Accounts

Prescriptive Rules
Error Log
Monitor
Start Stop Processing

Select the member search criteria for this rule. You will define values on the next screen.

1. Rule Details >>> 2. Member Selection >>> 3. Requirements >>> 4. Preview >>> 5. Activate

Member Information

- Person Type
- Status
- Start Date After
- Start Date Before
- Country
- Other Information
- Manager
- Domain
- Audience Type
- Location

Job and Role Information

- Job
- Role

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

Human Capital Administrator

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

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

The screenshot shows the 'Prescriptive Rules' configuration page for 'NIH Celebrity Accounts'. The page is divided into several sections:

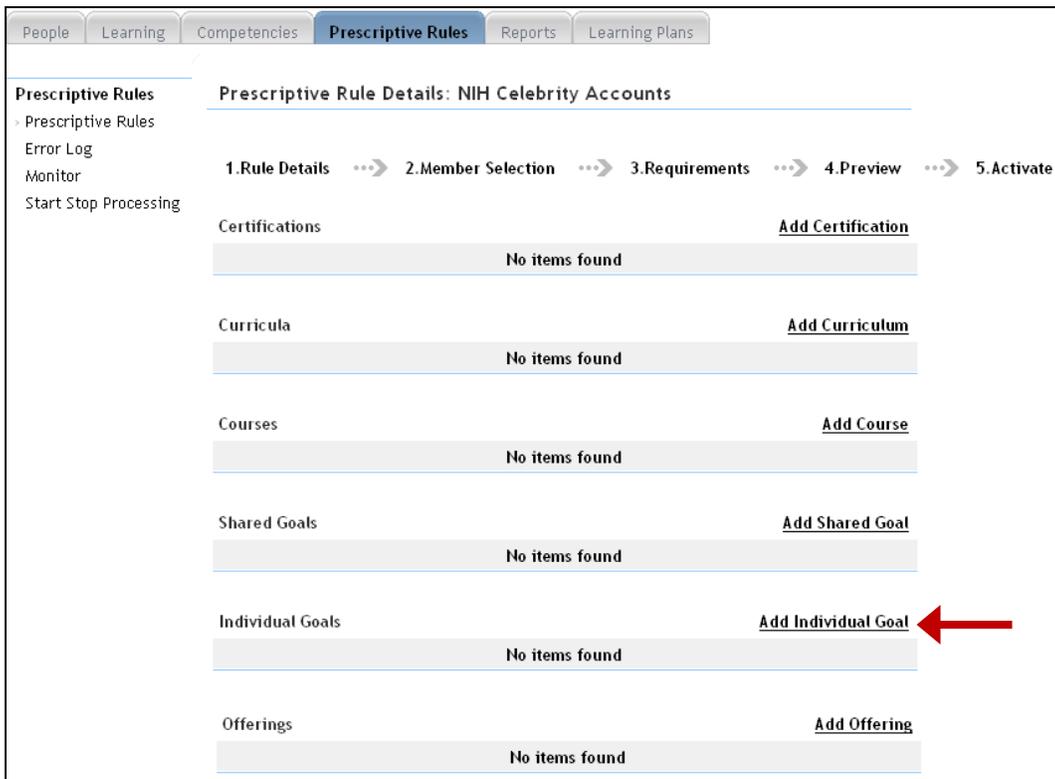
- Navigation:** A top bar with tabs for 'People', 'Learning', 'Competencies', 'Prescriptive Rules' (active), 'Reports', and 'Learning Plans'. Below this is a breadcrumb trail: 'Prescriptive Rules > Prescriptive Rule Details: NIH Celebrity Accounts'.
- Progress:** A horizontal progress bar with five steps: '1. Rule Details' (active), '2. Member Selection', '3. Requirements', '4. Preview', and '5. Activate'.
- Member Information:** A section with a 'Population' dropdown menu. The 'Both' option is selected. Other options are 'Internal' and 'External'. A link 'Show All Available Criteria' is located to the right.
- Audience Type:** A section with a dropdown menu showing 'No items found'. A red arrow points to a link 'Add Audience Type' to the right.
- Buttons:** At the bottom, there are five buttons: 'Cancel', 'Back', 'Save And Preview Members', 'Save', and 'Step 3: Set Requirements >>'. A red arrow points to the 'Step 3: Set Requirements >>' button.

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

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

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

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

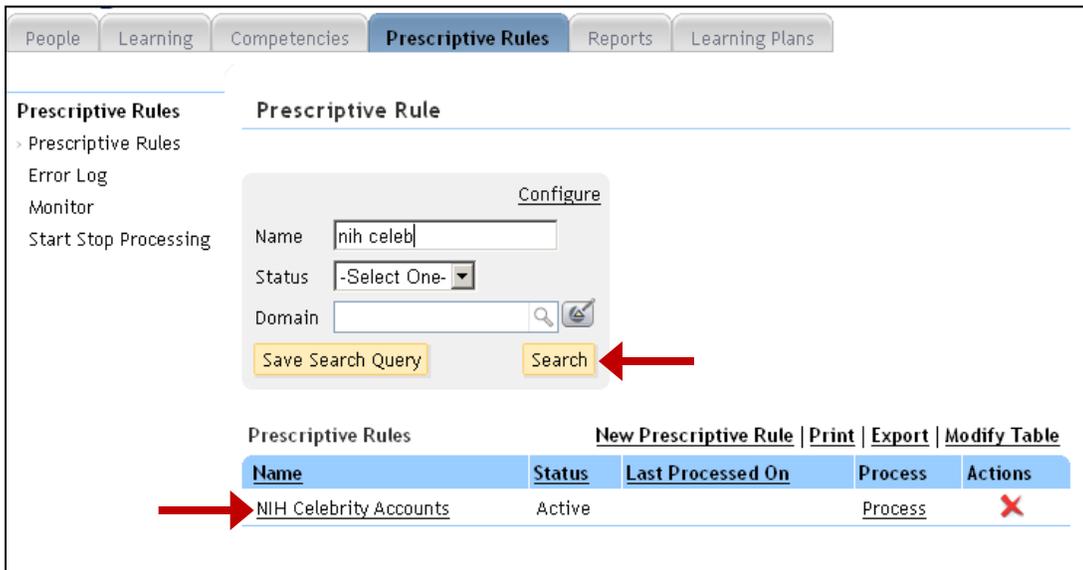


- Click **Step 4: Preview** at the bottom of the page
- Review all of the details, and when you are certain everything is correct, click **Step 5: Activate** at the bottom of the page. Choosing this activate button will make the prescriptive rule run according to the settings you entered.
- Once the screen indicates that the prescriptive rule “is activated successfully,” then you may either start again by clicking **New Prescriptive Rule**, or click **Finish**.



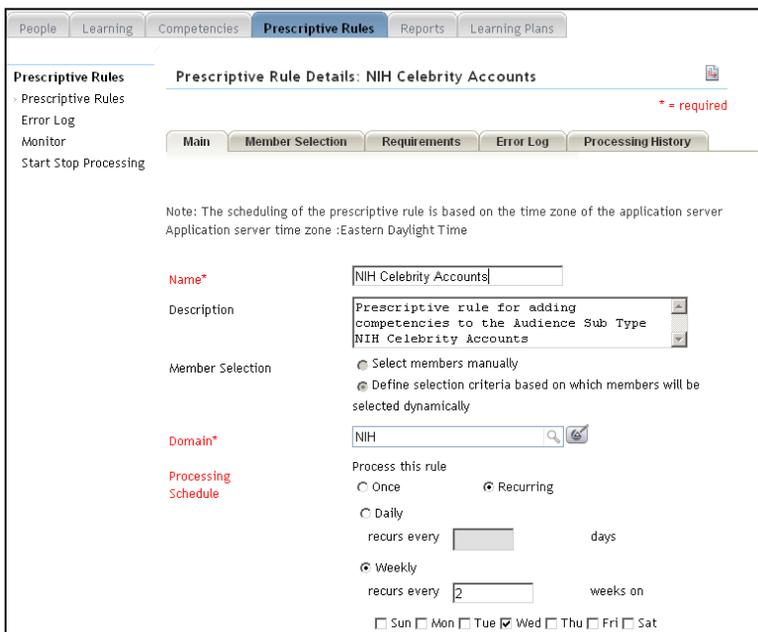
STEP-BY-STEP (VIEW/EDIT A PRESCRIPTIVE RULE)

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



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

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



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

The screenshot shows the 'Prescriptive Rules' section of the Human Capital Administrator interface. The main heading is 'Prescriptive Rule Details: NIH Celebrity Accounts'. Below this, there are several tabs: 'Main', 'Member Selection' (which is active), 'Requirements', 'Error Log', and 'Processing History'. Under the 'Member Selection' tab, there are sub-tabs for 'Personal Criteria' and 'Profile Criteria'. The 'Member Information' section includes a 'Population' dropdown menu with radio buttons for 'Both' (selected), 'Internal', and 'External'. There is a link for 'Show All Available Criteria'. The 'Audience Type' section features a table with columns for 'Name' and 'Actions'. The table contains one entry: 'NIH Celebrity Accounts' with a red 'X' icon in the 'Actions' column. At the bottom of the page, there are three buttons: 'Save And Preview Members', 'Save', and 'Cancel'.

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

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

Human Capital Administrator

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

The screenshot shows the 'Prescriptive Rule Details' page for 'NIH Celebrity Accounts'. The 'Requirements' tab is selected. The page displays several sections, each with a 'No items found' message and an 'Add' button:

- Certifications:** Add Certification
- Curricula:** Add Curriculum
- Courses:** Add Course
- Shared Goals:** Add Shared Goal
- Individual Goals:** Add Individual Goal

Name	Status	Actions
NIH Celebrity Accounts	Active	Delete

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

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

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

The screenshot shows the 'Prescriptive Rule' configuration page. The 'Requirements' tab is selected. The page displays a configuration form and a table of prescriptive rules.

Configuration Form:

- Name: nih celeb
- Status: -Select One-
- Domain: [Search]
- Buttons: Save Search Query, Search

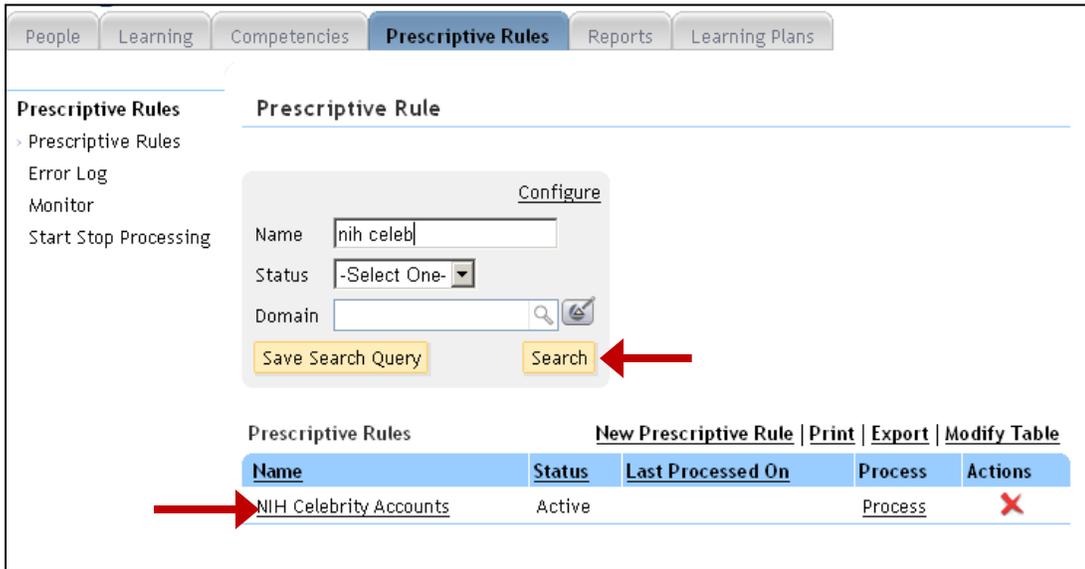
Prescriptive Rules Table:

Name	Status	Last Processed On	Process	Actions
NIH Celebrity Accounts	Active		Process	X

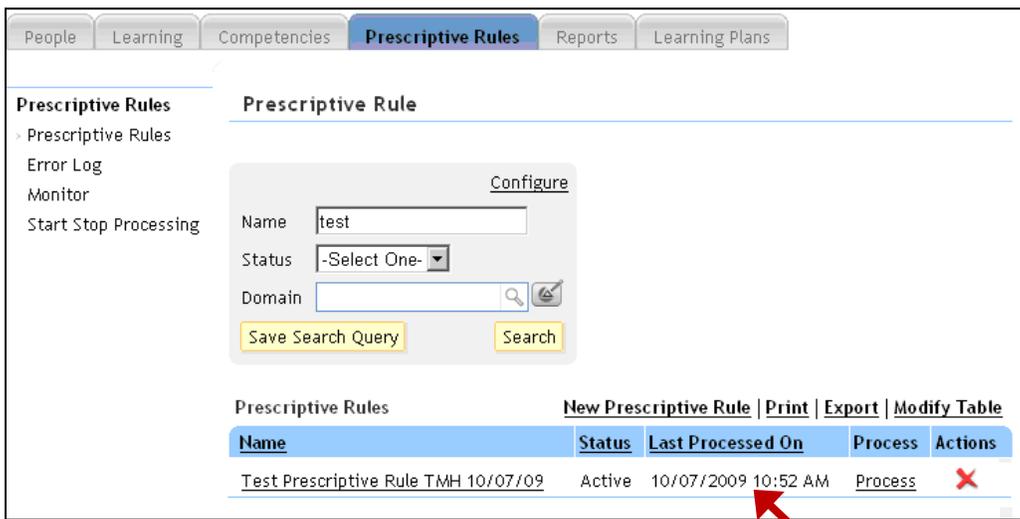
STEP-BY-STEP (PROCESS A PRESCRIPTIVE RULE)

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

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



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



UNDERSTANDING INTERNAL ORGANIZATIONS

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

The screenshot shows the 'Organizations' tab selected. Under the 'Internal Organization' section, there is a 'Configure' form with the following fields: Internal Organization (value: HN), Internal Organization Number, City, and Objectives Administrator. A red arrow points to the 'Search' button. Below the form is a table of results with columns: Internal Organization, Internal Organization Number, City, Objectives Administrator, and Actions. A red arrow points to the first row of the table.

Internal Organization	Internal Organization Number	City	Objectives Administrator	Actions
HN	00010462			✘
HN2	00010513			✘
HN21	00006477			✘

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

- **Profile** tab:
 - **Create Community** through which people in your organization may share documents and other information through the LMS
 - Add **Contact** information for your organization ONLY
 - **IMPORTANT!** Do not alter data in any of the required fields marked in red with an asterisk (*). These are populated automatically and referenced by several functions throughout the LMS.
 - View the names of any **Local Learning Registrars** in your organization
 - **IMPORTANT!** You are not authorized to add Local Learning Registrar permission to anyone. Doing so would be grounds for removing your administrative access to the LMS.
- **Members** tab: view all learners in the LMS assigned to your org/SAC code. This list can be exported to an Excel file in order to verify names and designated supervisors. This can be a good way to ensure the appropriate people are designated to your organization and identify any learner accounts that should not be designated to your organization. (Remember: Incorrect org/SAC codes must be corrected in the source HR system.) You will need to access individual user profiles to edit incorrect or missing supervisor names.
- Do not use the **Prescriptive Rules** tab for Internal Organizations.

USING EXTERNAL ORGANIZATIONS TO ADD VENDORS

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

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

STEP-BY-STEP (VIEW EXTERNAL ORGANIZATIONS)

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

The screenshot shows the Human Capital Administrator interface. At the top, there is a navigation bar with 'Calendar', 'Preferences', 'Help', and 'Log Out' buttons. The user is logged in as 'Welcome NIH Competency'. The 'Go To' menu is set to 'Human Capital Administrator - Orgs & Jobs'. The 'Organizations' tab is selected, and the 'External Organization' sub-tab is active. On the left, there are tabs for 'Internal' and 'External'. The main content area shows a 'Configure' form for an 'External Organization' with fields for 'External Organization', 'External Organization Number', and 'City'. Below the form are 'Save Search Query' and 'Search' buttons. A red arrow points to the 'Search' button. Below the form is a table of existing external organizations.

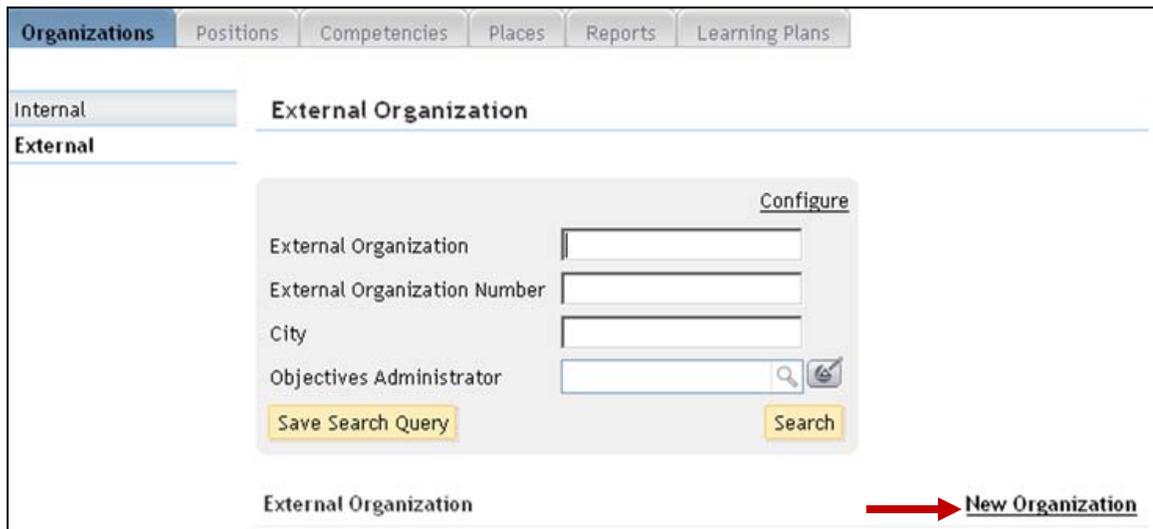
External Organization	External Organization Number	City	Actions
Bill Redeem	00001024	Bethesda	✖
Business Management Research Ass., Inc. (BMRA)	00001066	Fairfax	✖
Creative Approaches Unlimited	00001086	Rockville	✖
Department of Veterans Affairs	00001125		✖

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

Human Capital Administrator

STEP-BY-STEP (ADD AN EXTERNAL ORGANIZATION)

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



The screenshot shows the 'Organizations' tab selected in the top navigation bar. Below it, the 'External Organization' section is active. On the left, there are two tabs: 'Internal' and 'External', with 'External' selected. The main content area contains a 'Configure' form with the following fields: 'External Organization', 'External Organization Number', 'City', and 'Objectives Administrator'. The 'Objectives Administrator' field has a search icon and a refresh icon. Below the fields are two buttons: 'Save Search Query' and 'Search'. At the bottom of the screen, there is a red arrow pointing to the 'New Organization' link.

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

WORKING WITH PLACES

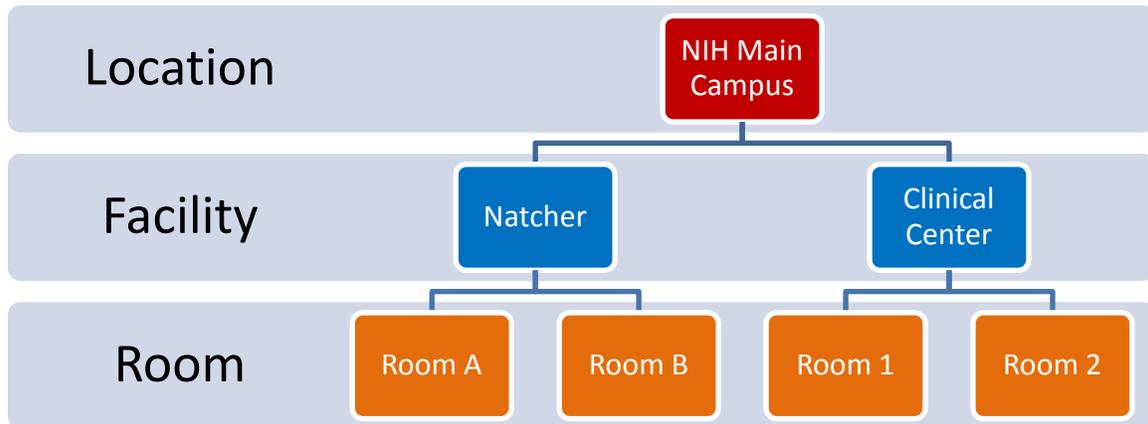
LOCATIONS

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

Some examples of locations are:

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

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



STEP-BY STEP (CREATE A LOCATION)

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

Human Capital Administrator

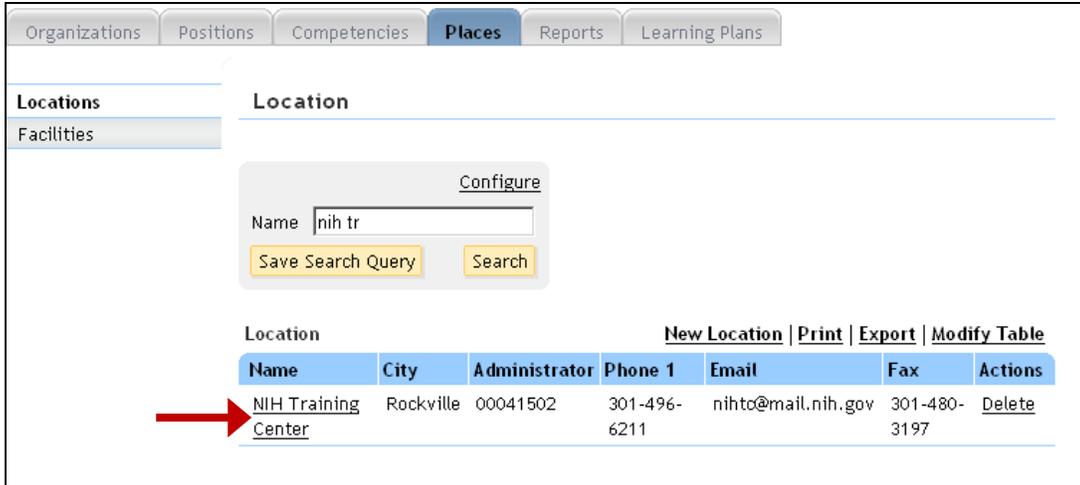
The screenshot shows the 'Places' tab selected in the top navigation bar. Below the navigation bar, there are tabs for 'Locations' and 'Facilities'. The main content area is titled 'Location' and contains a 'Configure' dialog box with a 'Name' input field, a 'Save Search Query' button, and a 'Search' button. At the bottom right of the page, there is a 'New Location' button with a red arrow pointing to it.

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

The screenshot shows the 'New Location' form. The form has a title bar with 'Locations' and 'Facilities' tabs. The main content area is titled 'New Location' and contains a list of fields for entering location information. The fields are: Number, Name* (with a red asterisk indicating it is required), Enabled (checked), Address 1, Address 2, City, State, Zip, Country, Administrator (with a search icon and a refresh icon), Phone 1, Phone 2, Email, Fax, Department Id (with a search icon and a refresh icon), Domain* (with a search icon and a refresh icon, and the value 'NIH'), and Timezone* (with a dropdown menu showing '-Select One-'). At the bottom of the form, there is a section titled 'Other Information' with a 'Description' field. At the bottom right of the page, there are 'Save' and 'Cancel' buttons with a red arrow pointing to the 'Save' button.

STEP-BY-STEP (MODIFY A LOCATION)

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



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

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

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

Human Capital Administrator

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

The screenshot shows the 'Places' tab in the Human Capital Administrator interface. The 'Locations' sidebar is active. A search box contains 'nih tr' with 'Save Search Query' and 'Search' buttons. Below is a table of locations with a red arrow pointing to the 'NIH Training Center' row.

Name	City	Administrator	Phone 1	Email	Fax	Actions
NIH Training Center	Rockville	00041502	301-496-6211	nihto@mail.nih.gov	301-480-3197	Delete

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

The screenshot shows the 'Location Details: NIH Training Center' page. The 'Related Info' tab is active. The 'Attachments' section has a red arrow pointing to the 'Add Attachment' link. The 'Notes' section has a red arrow pointing to the 'Add Notes' link.

Attachment Name	Type	Category	Locale	Private	Actions
Directions to the NIH TC	File	Directions	English	No	Edit Attachment Delete Attachment

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**.

FACILITIES

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

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

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

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

STEP-BY-STEP (CREATE A FACILITIES)

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

The screenshot displays the 'Facilities' configuration page in the Human Capital Administrator system. The top navigation bar includes tabs for 'Organizations', 'Positions', 'Competencies', 'Places', 'Reports', and 'Learning Plans', with 'Places' currently selected. On the left, a sidebar shows 'Locations' and 'Facilities' options. The main area is titled 'Facility' and features a 'Configure' form with the following fields: 'Facility Number', 'Name', 'Administrator', and 'Location'. The 'Location' field includes a search icon and a dropdown arrow. Below the form are two buttons: 'Save Search Query' and 'Search'. At the bottom right of the page, a red arrow points to a 'New Facility' link.

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

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

Human Capital Administrator

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

The screenshot shows a web form titled "New Facility" under the "Facilities" tab. The form contains the following fields and controls:

- Facility Number
- Name* (required)
- Administrator*
- Contact Phone
- Contact Fax
- Contact Email
- Address 1
- Address 2
- City
- State
- Zip
- Country
- Corporate Number
- Disabled:
- Location: [Search] [Clear]
- Domain*: [Search] [Clear]

A red arrow points to the "Save" button at the bottom right of the form. A "Cancel" button is also visible next to it. A legend in the top right corner indicates that "*" denotes a required field.

STEP-BY-STEP (MODIFY A FACILITY)

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

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

Organizations Positions Competencies **Places** Reports Learning Plans

Locations **Facility**

Facilities

[Configure](#)

Facility Number

Name

Administrator

Location NIH Training Center

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

Name	Facility Number	Location	Administrator	Actions
EPN	00001542	NIH Training Center	Edsson Contreras	Delete
EPS	00001541	NIH Training Center	Edsson Contreras	Delete

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

Human Capital Administrator

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

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

The screenshot shows the 'Facility Details: EPS' page in the Human Capital Administrator system. The 'Places' tab is active in the top navigation bar. The left sidebar shows 'Locations' and 'Facilities'. The 'Facility Details: EPS' page has a 'Main' and 'Related Info' tab, with 'Related Info' selected. Below the tabs are sections for 'Attachments' and 'Notes'. The 'Attachments' section has a table with one row: 'Parking Locations' (File, Map, English, No). The 'Notes' section has a table with two rows of notes. Red arrows point to the 'Add Attachment | Print | Export' and 'Add Notes | Print | Export | Modify Table' links. The 'Tasks' section at the bottom shows 'No items found'.

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

GENERATING REPORTS

REPORTS

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

STEP-BY-STEP (GENERATE A REPORT)

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

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

Human Capital Administrator

12. Enter criteria into appropriate fields.

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

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

13. Click **Submit**.

Report Parameters - HHS Training Completion Detail

* = required

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

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

NIH Transcript Completions							
Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information	Course Domain
HNA383	Aaron Fier	NIH0014308279	03/02/2009		03/04/2009	Learning With Saba	HHS Common
HNA383	Donna Howell	NIH0014333995	05/18/2009		06/25/2009	Learning With Saba	HHS Common
HNA384	Geraldine Page	00049238	06/30/2005		06/25/2009	Learning With Saba	HHS Common
HNA3842	Diana Lee Ransom	00044313	08/30/1998	Charlene Patrick	05/14/2009	Learning With Saba	HHS Common

STEP-BY-STEP (EXPORT A REPORT)

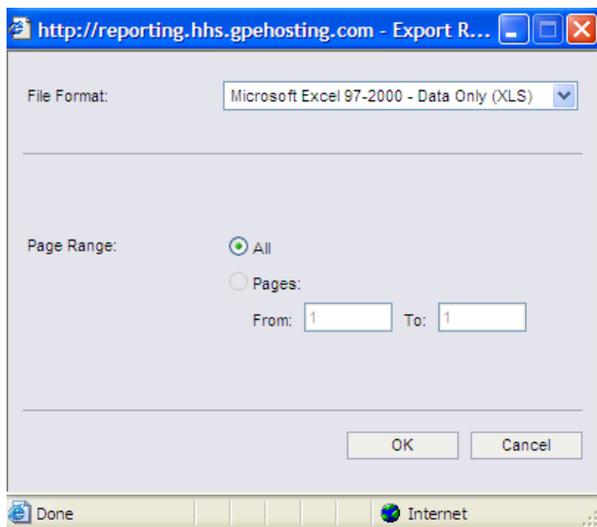
Once a report is generated, it can be exported from the LMS into other file formats. Of these, “Adobe Acrobat – PDF” and “Microsoft Excel 97-2000 – Data Only (XLS)” are the most commonly used.

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



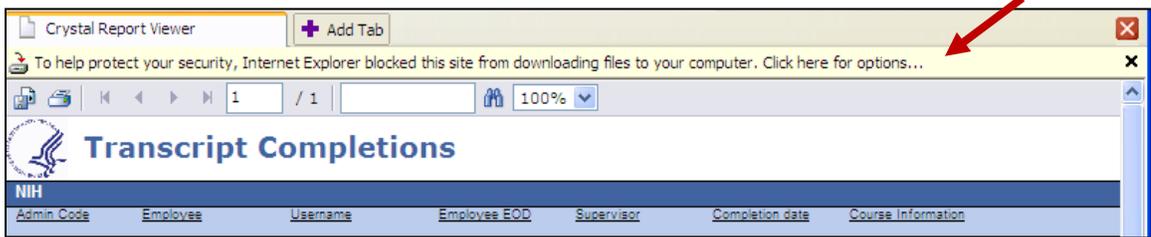
3. Select the **File Format** you want, indicate the **Page Range**, and click **OK**. The following two formats are the most commonly used:
 - The **Adobe Acrobat (PDF)** format will export a report ready for printing.
 - The **Microsoft Excel 97-2000 – Data Only (XLS)** format will export a report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

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

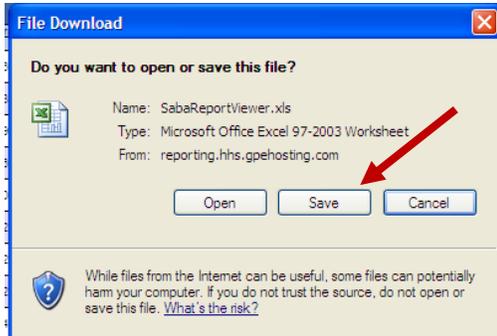


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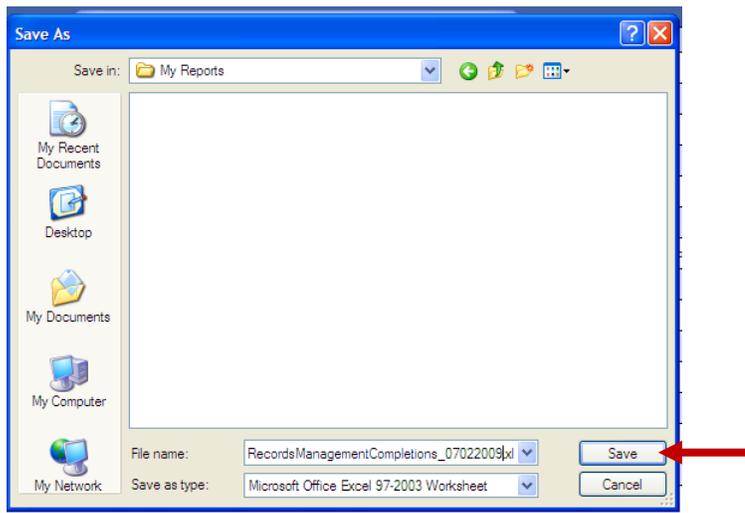
- You may see the following browser warning. Click the **yellow warning bar** and select **Download File**. Repeat Step 2.



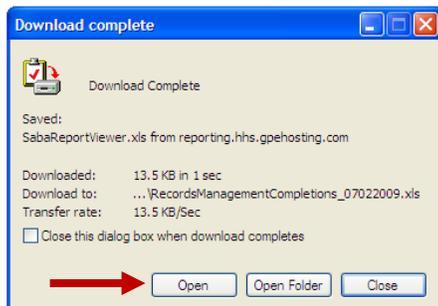
- You will be prompted to open or save the file. Click **Save**.



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



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

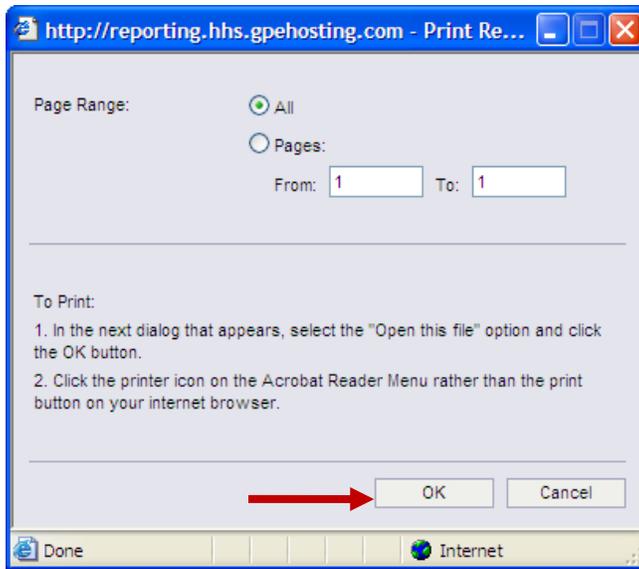


STEP-BY-STEP (PRINT A REPORT)

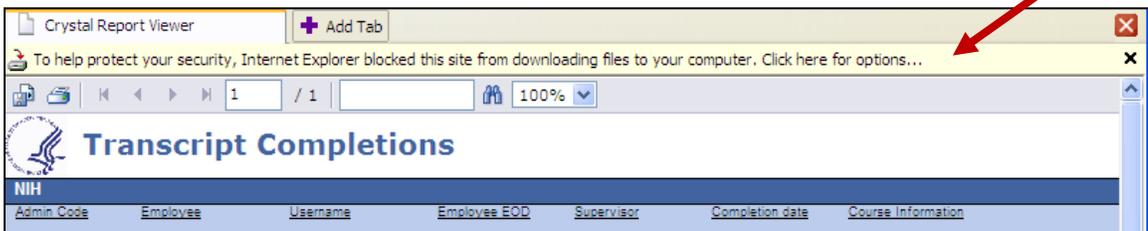
1. Complete the steps in section **Step-By-Step (Generate a Report)** on page 107 of this guide.
2. Click the **print icon** in the upper left corner of the report.

Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information
HNA	Safiya Stewart Sagoua	00117606	04/13/2008		06/19/2009	Records Management for Everyone
HNA3842	Romica Brown	00113306	09/16/2007		05/19/2009	Records Management for Everyone
HNA3842	Vernon Cardwell	00100918	04/16/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3842	April Harrison	00101649	05/30/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3844	Charles Choi	00103021	07/09/2008	Brenda Bernard	06/24/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104284	09/03/2008	Darla Hayes	06/17/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104284	09/03/2008	Darla Hayes	06/23/2009	HHS Records Management for All Employees
HNAM426	Cathleen-Megan Moran	00088234	06/01/2004	Darla Hayes	06/17/2009	Records Management for Everyone

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

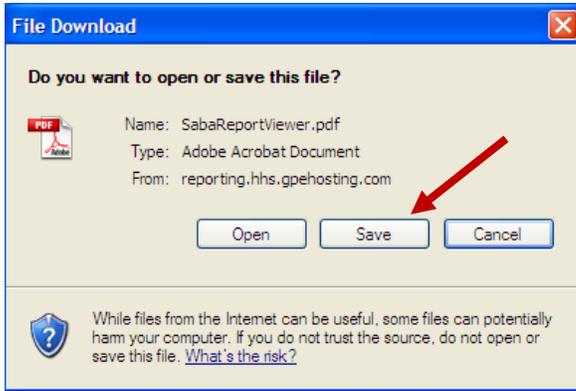


4. You may see the following browser warning. Click the **yellow warning bar** and select **Download File**. Repeat Step 2.

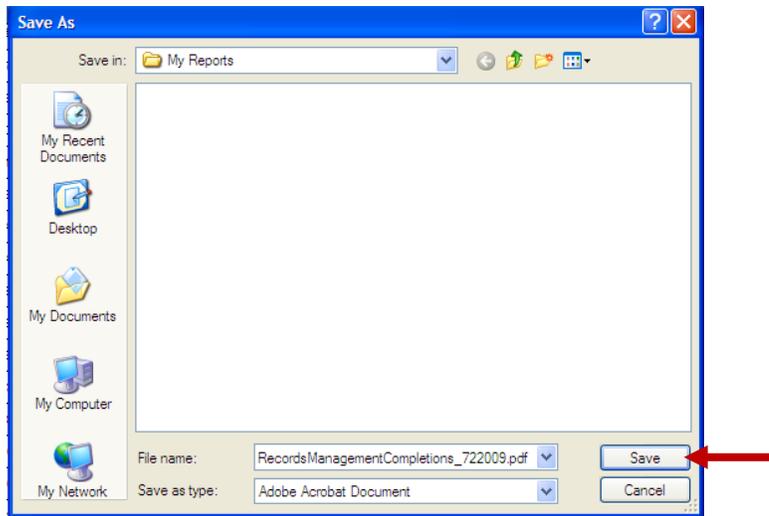


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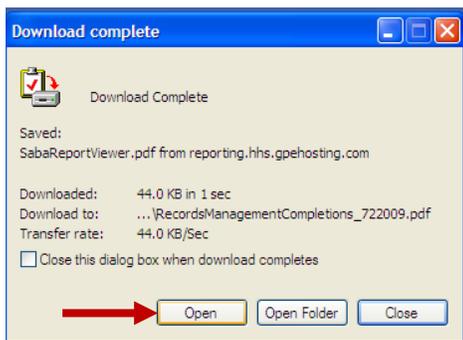
5. You will be prompted to open or save the file. Click **Save**.



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



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

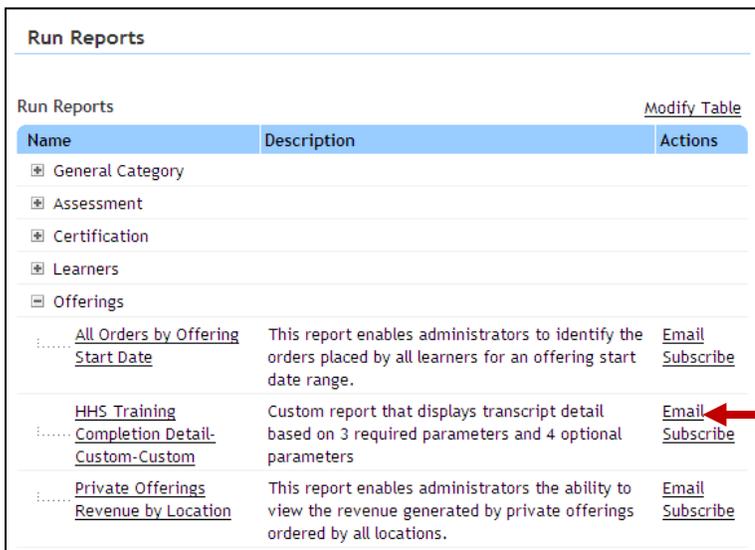


8. Click the **Adobe Reader print icon** to send the report to your printer.

STEP-BY-STEP (EMAIL A REPORT)

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

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



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

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

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

Email HHS Training Completion Detail-Custom-Custom

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

To*

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

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

Person Type

Person Status

STEP-BY-STEP (SUBSCRIBE TO A REPORT)

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

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

Run Reports		
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

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

Report Subscription for HHS Training Completion Detail

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

Report Subscription [New Report Subscription](#)

No items found

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

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

- Selecting **Date** on which report is run for both start and end date fields, returns only get data gathered for the day the report is generated.
- Selecting **Number of days before the date on which report is run** for the completion start date and **Date on which report is run** for the completion end date, returns data from the number of days indicated up to the date the report is run.
- Selecting **Fixed date** for both fields returns data gathered between those two dates only.

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

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

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

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

Character Limit : 255

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

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

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

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

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

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

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

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

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

HELPFUL INFORMATION

LINKS AND RESOURCES

- HHS Learning Portal log on page
<https://lms.learning.hhs.gov>
- HHS Learning Portal Help Desk
1-866-246-5440
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

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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

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LEGEND

 LMS Required Fields	 EHRI Required Fields	 Non Required Fields
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FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Item/Event Name*	Item or Event Title	Microsoft Excel 2007 for PC Users
Description	Description of the Item or Event entering Character limit: 1000	This class will expand the learner's knowledge of Microsoft Excel 2007.
Offering Start Date	Date the class started	MM/DD/YYYY
Ended/Completed On Date	Date the class ended	MM/DD/YYYY
Registration Date	Date the learner registered for the Item/Event	MM/DD/YYYY
Date Marked Complete*	Date the Item/Event was marked complete by an administrator	MM/DD/YYYY
Start Time (HH:MM)	Start time of the Item/Event	08:30
End Time (HH:MM)	End time of the Item/Event	04:30
Duration (HH:MM)	How many hours and minutes the class lasted	07:30
Delivery Type	Method the Item/Event was delivered in	Auditorium, Book, Coaching, Computer Laboratory, Conference, Correspondence Course, DVD/CD, Instructor led, Mentoring, Online Training, On the Job Training, Recorded Online Offering, Satellite, Scientific Laboratory, TeleConferencing, Traditional classroom, Video conferencing, Video Tape, Virtual Class, Web Cast, Workshop
ID*	Unique ID that identifies this entry	User Initials + Completion Date = JM09132008 where user = Jaime Martinez and Completion Date = 09/13/2008
Location	Location where course was taken. It could be a building or a city.	Examples: Executive Plaza North or Rockville
Marked Complete by	Search for the username of the person entering this	At first your username will display but once the record is saved the

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

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

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

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APPENDIX C – HHS LEARNING PORTAL DOMAIN STRUCTURE

