HHS Learning Portal

Local Learning Administrator

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HHS LEARNING PORTAL
LOCAL LEARNING ADMINISTRATOR

Version 3.0

National Institutes of Health Training Center

National Institutes of Health Training Center, Rockville 20852

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1.0	11/16/09	NIH LMS Team	11/16/09	Initial publication
2.0	04/03/12	NIH LMS Team	04/03/12	5.5 SP1 Upgrade
3.0	05/31/13	NIH LMS Team	05/31/2013	Internal Training Payments

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LOCAL LEARNING ADMINISTRATOR

INTRODUCTION

HHS Learning Portal/LMS: These terms are used interchangeably and refer to the same system. The Learning Management System (LMS) is a Department-wide system for managing, accessing, and tracking training. As a Department-wide system, the overall LMS is managed at the HHS level – hence the name HHS Learning Portal. The 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
- Integrated Time and Attendance System (ITAS)

Anyone given an NIH Enterprise Directory (NED) account and has been included in the NIH Active Directory will automatically be given an LMS account. Due to the nightly updates, all data changed in the learner profile will be overwritten, with the following exceptions:

Email - Accurate email addresses in the LMS will ensure learners receive notifications generated by the LMS. If the email address is incorrect, then an LMS People Administrator (formerly known as a Human Capital Administrator) can manually update it.

Manager (Non-FTE staff only): This field is currently populated with the Learner's ITAS Approving Official. 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.

If the Approving Official in ITAS is not the Learner's training approver, then a Local Learning Administrator may set up an Alternate Manager for the Learner.

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

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

Component	***Example…***
Business rules	NIH Proxies receive email notifications seven days prior to the expiration of their Proxy status.
Notifications	NIH email notifications include NIH-specific information and logos.
Locations, facilities, and rooms	NIH resources are only available to NIH administrators in the LMS.
User accounts	Only NIH administrators may access and modify the accounts of NIH staff.

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

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

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

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

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

SECURITY ROLES

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

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

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Domain-Specific Security Roles include:

- Learning Administration
- Content Administration
- System Administration
- People Administration

Only the Learning Registrar (a.k.a. Local Learning Administrator or LLA) Security Role is defined by Organization/SAC code instead of the domain. This restricts the LLA to performing actions associated with Learners within a specific organization/SAC and its sub-organizations only.

LOCAL LEARNING ADMINISTRATOR ROLE

The LMS Local Learning Administrator role is a combination of the People Administration and Registrar's Desk roles found within the LMS. The Local Learning Administrator is similar in function to the Super User role in the NIHITS system.

With Local Learning Administrator privileges you can do the following within the Organization code/ Sub-codes to which your permissions are assigned:

- View account profiles for Learners
- Reactivate deactivated LMS accounts
- Register Learners for all training in the LMS catalog
- Manage course enrollments
- Manage learner transcripts
- Approve NIH Training Center courses and obligate funds
- Generate various reports

This user manual will provide step-by-step instructions for the major functions used by Local Learning Administrators.

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.

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:

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

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

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

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

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

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

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

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

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

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

Ratee – The employee whose competencies are being rated.

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

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

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

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

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

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

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

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

LEARNER PROFILE

The Learner Profile contains detailed information about each learner. This information is populated through nightly data feeds from the following NIH HR Systems:

- Employees = Capital HR (CapHR)
- Contractors = NIH Employee Directory (NED)
- Commissioned Corps Officers = Office of Public Health Service (OPHS)

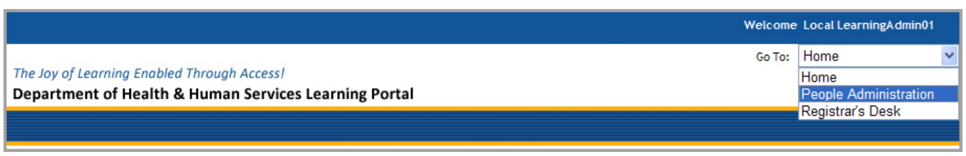
When viewing the Learner Profile, all of the fields appear editable. Changes in many of these fields will be overwritten by the HR database feeds. Only a few fields can be edited without being affected by the data feeds. They are:

- Email address
- Managers (Non-FTE staff only)
- Alternate managers

Changes to all other fields should be made in the HR database. Contact your organization's Administrative Officer to make these changes. Changes made in the HR database will be sent to the LMS through the data feed.

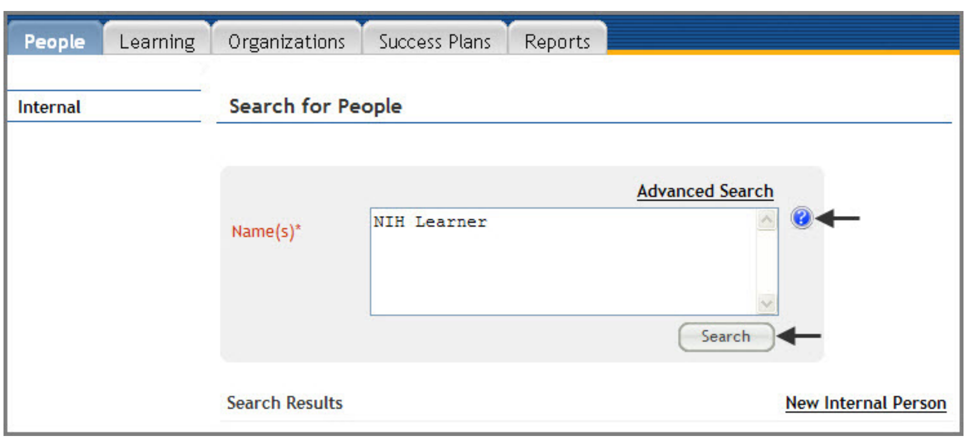
VIEW & EDIT A LEARNER PROFILE

1. Select the **People Administration** role in the pull-down **Go To** menu.



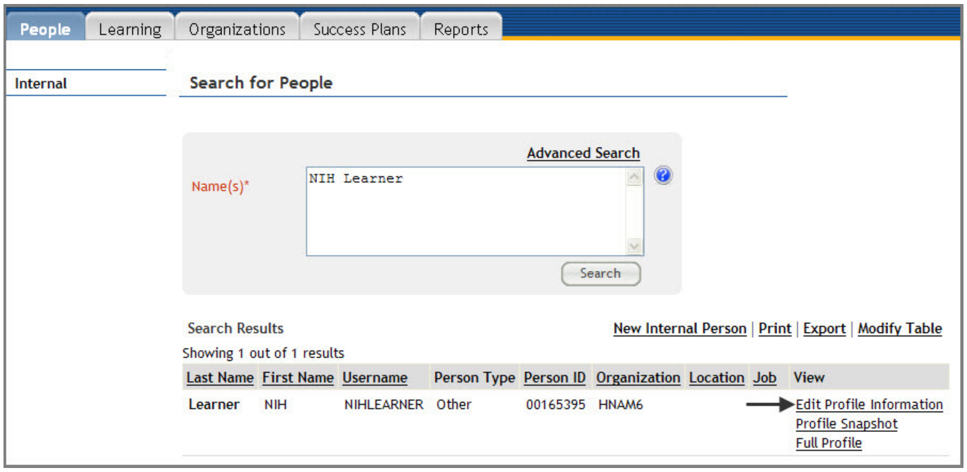
2. Enter the learner's name in the Name(s) search field and click **Search**.

   NOTE: To view acceptable formats for searching, click the **Help** icon to the right of the Name(s) search field.



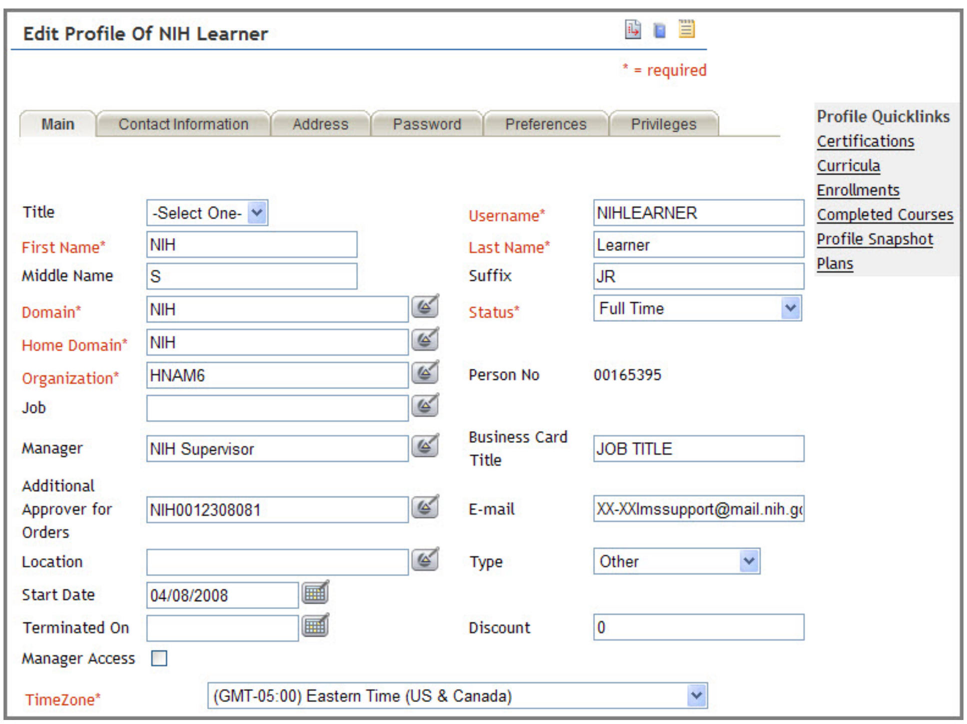
   NOTE: If you do not find the account you are looking for, try using the Advanced Search. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

3. Select the **Edit Profile Information** link in the View column of the Search Results table.



IMPORTANT! The majority of HR Information in the Learner Profile is populated by automated data feeds from the Capital HR, NED, and/or Commission Corp databases. If any of the information is incorrect, it must be corrected in the source system and not the LMS.

4. The learner's profile will be displayed.



CORRECT A LEARNER'S EMAIL

A learner's email address must be correct in order for them to receive emails generated by the LMS (e.g., registration confirmation, cancelation notifications, etc.)

Follow the steps below to change a learner's email.

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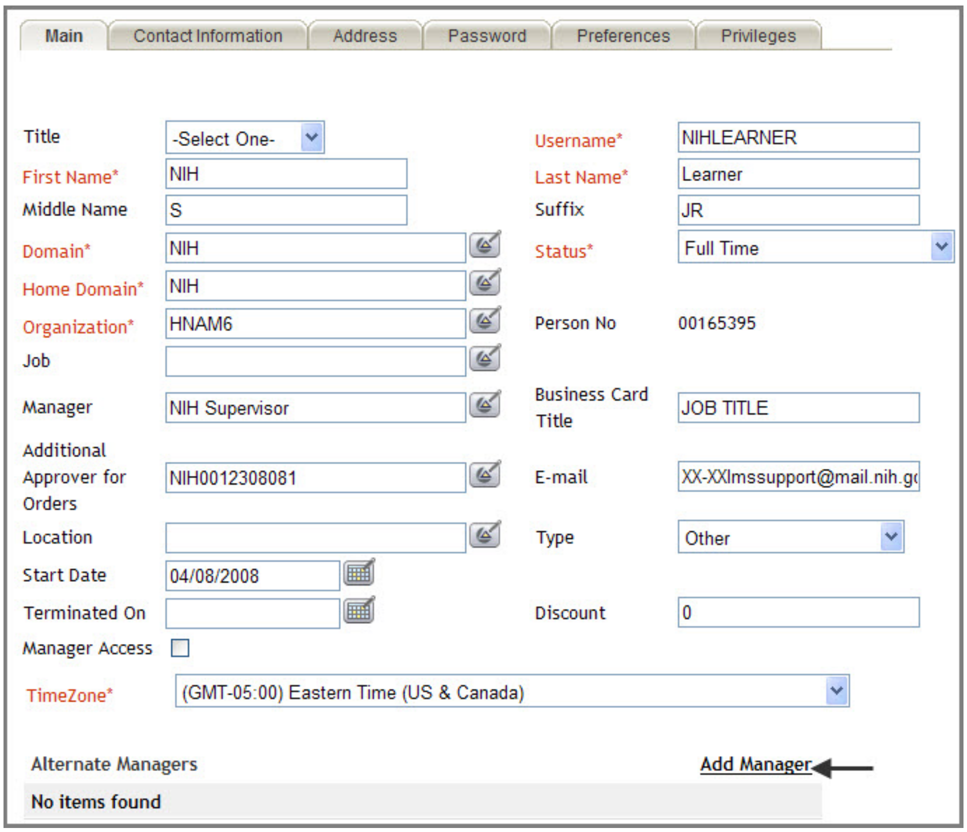
5. While viewing the Edit Profile screen, enter the new address in the E-Mail field and click **Save** at the bottom of the screen.

ADD AN ALTERNATE MANAGER

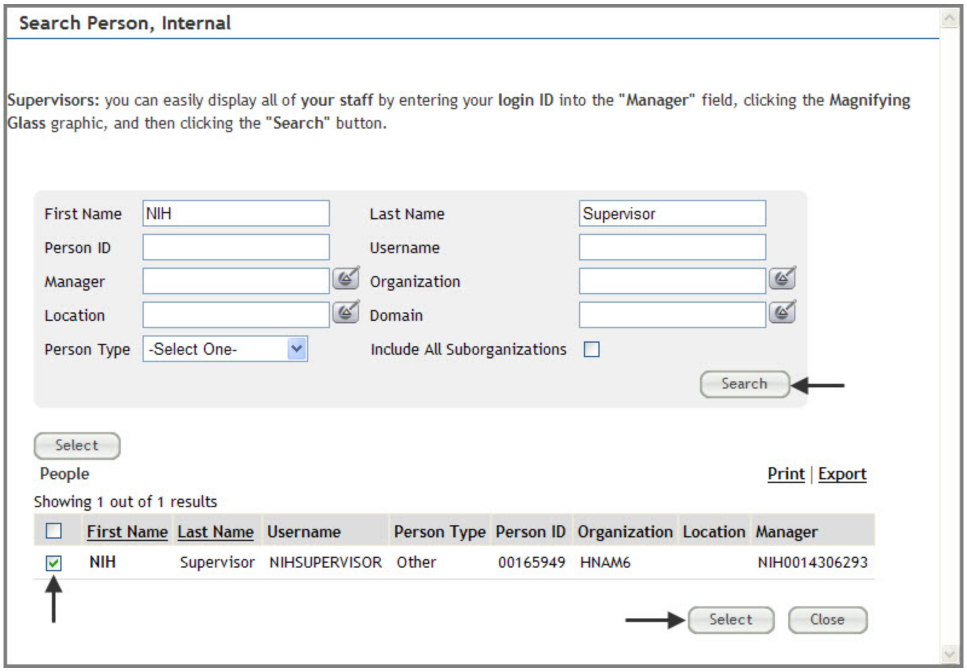
There are situations where a learner requires someone other than, or in addition to, the person specified in the Manager field to perform managerial tasks such as approvals. In these situations, an LLA can add one or more people to the Alternate Manager section of the learner's profile.

Follow the steps below to add an Alternate Manager.

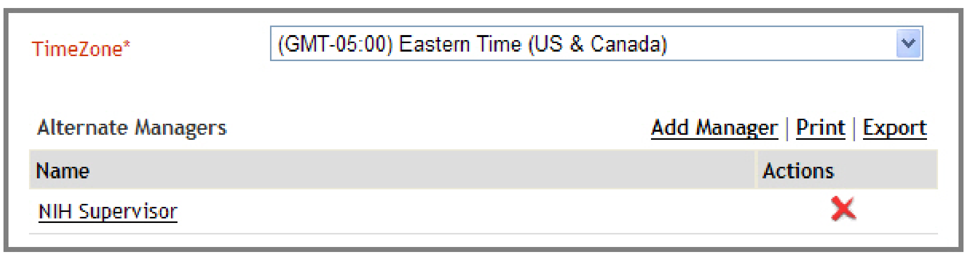
1. While viewing the Edit Profile screen, click the **Add Manager link**.



3. Enter the search criteria for the Alternate Manager then click **Search**.
4. Click the **checkbox** to the left of the first name of the Alternate Manager.
5. Click the **Select button**.



6. The name of the Alternate Manager will now be listed in the learner's profile.



NOTE: You can add as many Alternate Managers as needed. Alternate Managers will receive the same LMS notifications and privileges as managers.

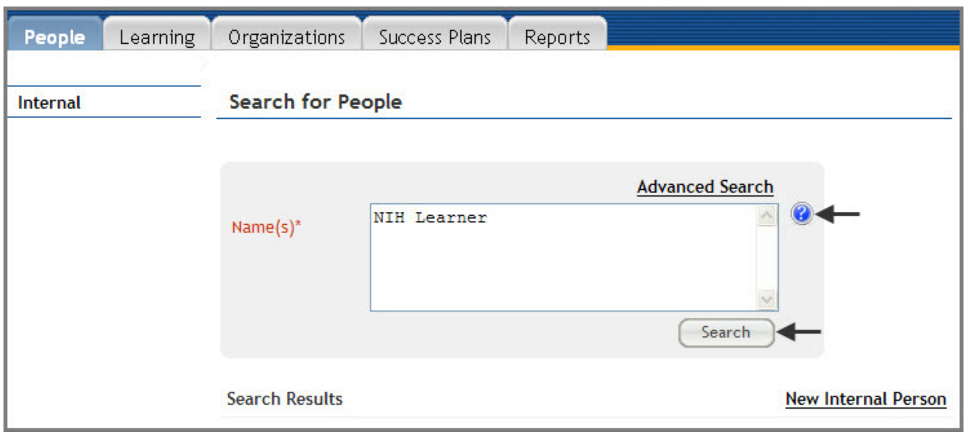
VIEW/EDIT PROFILE SNAPSHOT

The Profile Snapshot provides a summary of information about the learner. Follow the instructions below to view a learner's profile snapshot.

1. Select the **People Administration** role in the pull-down **Go To** menu.

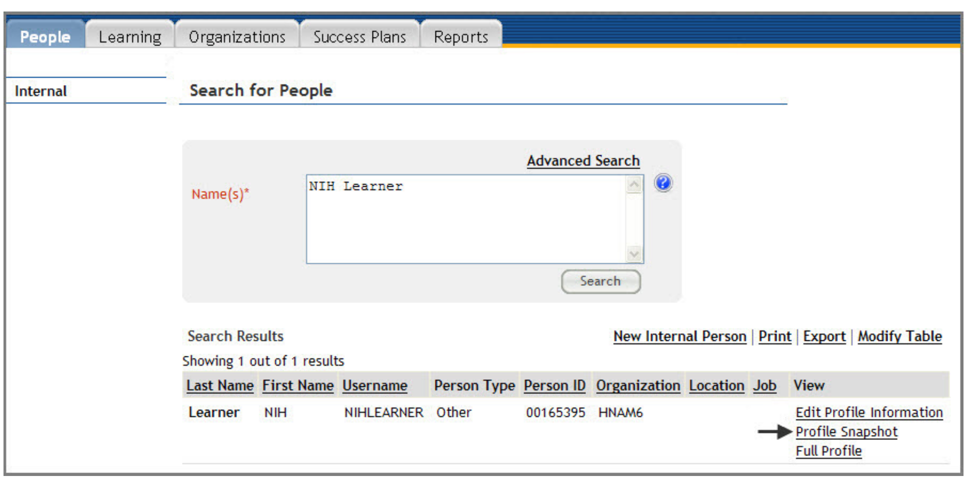
2. Enter the learner's name in the Name(s) field and click **Search**.

   NOTE: To view acceptable formats for searching, click the **Help** icon to the right of the search box.

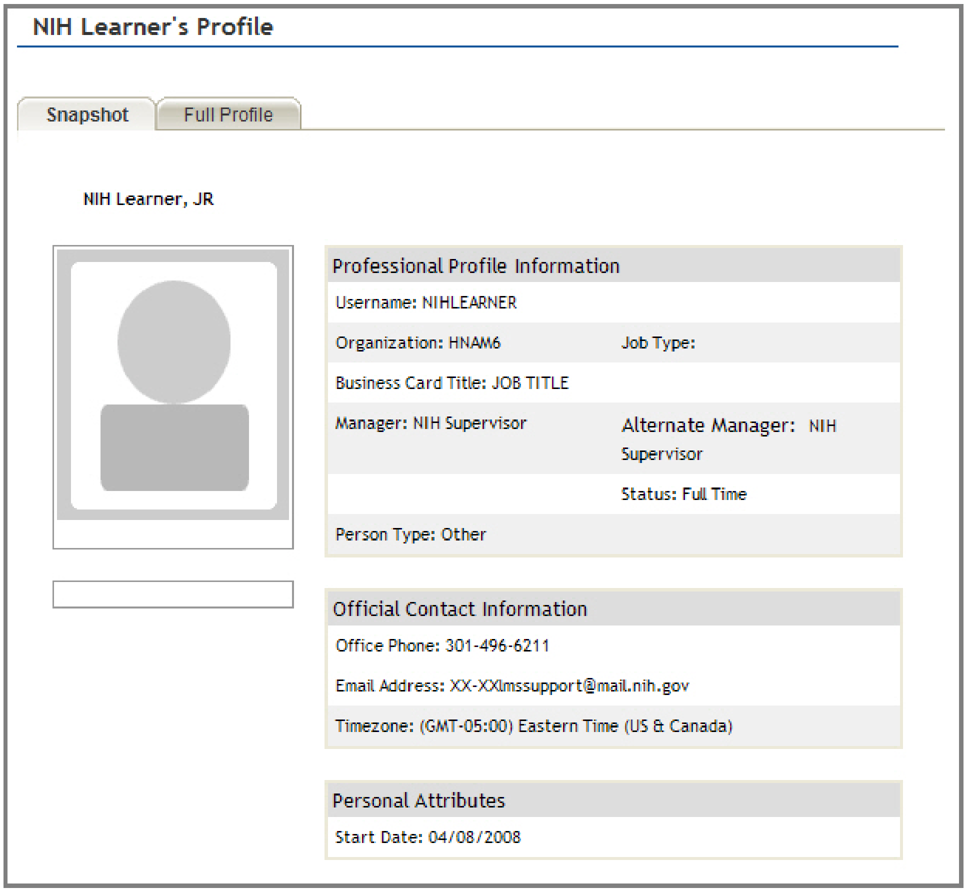


   NOTE: If you do not find the account you are looking for, try using the Advanced Search. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

3. Select the **Profile Snapshot** link in the View column.



4. The Profile Snapshot is now being displayed.



NIH Learner's Profile

Snapshot | Full Profile

NIH Learner, JR

Professional Profile Information

Username: NIHLEARNER	
Organization: HNAM6	Job Type:
Business Card Title: JOB TITLE	
Manager: NIH Supervisor	Alternate Manager: NIH Supervisor
	Status: Full Time
Person Type: Other	

Official Contact Information

Office Phone: 301-496-6211

Email Address: XX-XXlmssupport@mail.nih.gov

Timezone: (GMT-05:00) Eastern Time (US & Canada)

Personal Attributes

Start Date: 04/08/2008

NOTE: The learner's Full Profile which contains more detailed information can be accessed by clicking the Full Profile tab.

VIEW A LEARNER'S FULL PROFILE

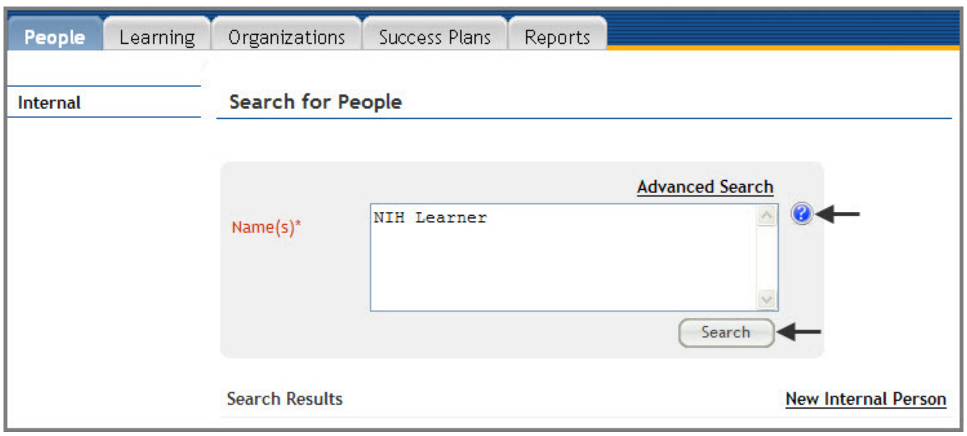
The **Full Profile** includes information contained in the learner's profile that is not displayed in the Profile Snapshot. This includes summary information about current job, competencies, licenses & certifications.

Follow the instructions below to view a learner's Full Profile.

1. Select the **People Administration** role in the drop-down **Go To** menu.

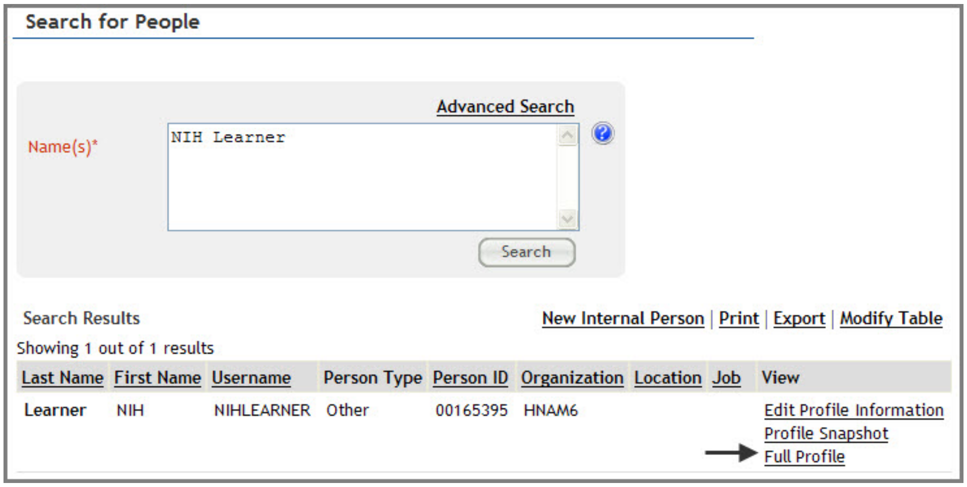
2. Enter the learner's name in the Name(s) field and click **Search**.

   NOTE: To view acceptable formats for searching, click the **Help** icon to the right of the search box.

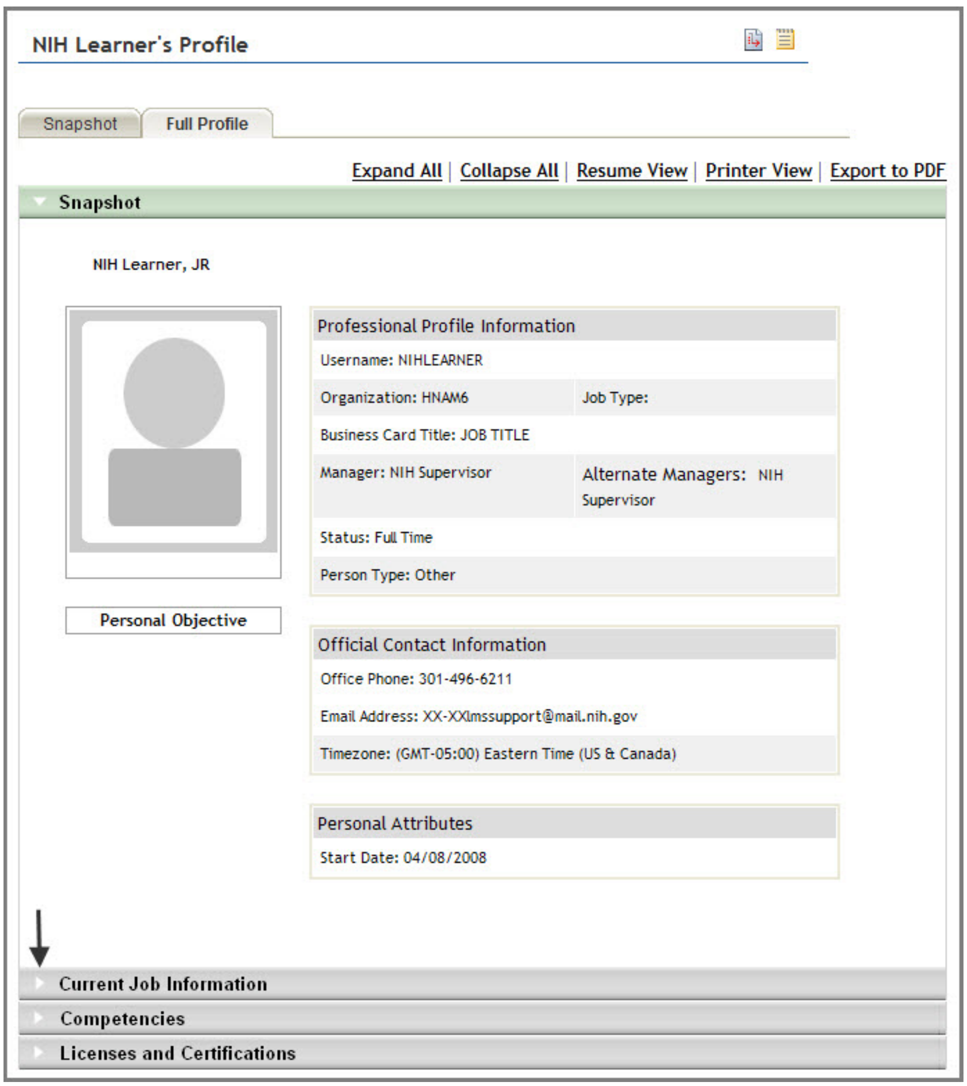


   NOTE: If you do not find the account you are looking for, try using the Advanced Search. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

3. Select the **Full Profile** link in the View column.



4. The learner's full profile is now displayed. Click the **expansion arrows** to view more information in each category.



REACTIVATING A DEACTIVATED ACCOUNT

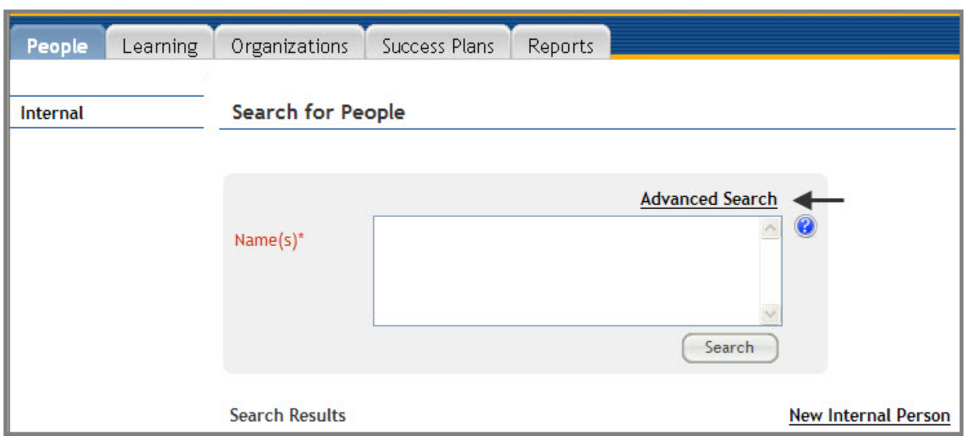
LMS accounts that are deactivated cannot be found using the simple search. Here are some key things to remember with deactivated accounts:

- Accounts are deactivated every 365 days of account inactivity by the account holder.
- Local Learning Administrators can reactivate an account at any time and use the account as needed. (E.g. Registrations, transcript additions, etc.)
- Accounts that are reactivated are not available for use by the learner until the next calendar day.
- Starting the day after the account has been reactivated, learners have six grace days to logon. A successful logon will reset the 365 day cycle giving the learner another year before deactivation occurs again. If the account is not accessed within 6 days, the account will be deactivated again.

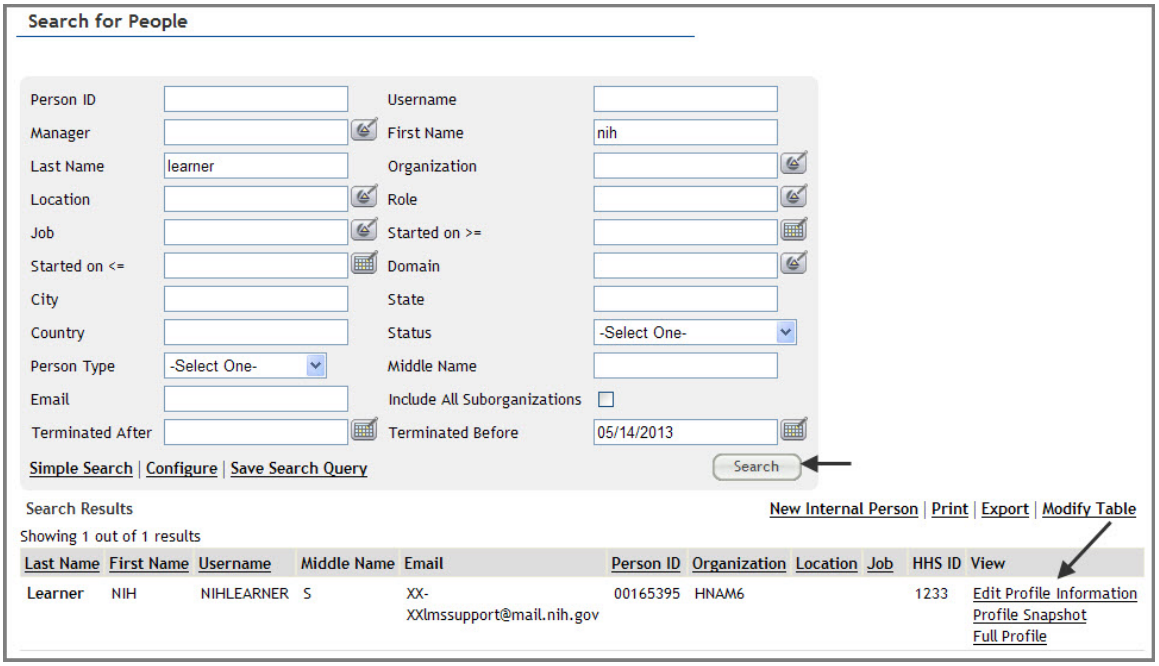
Follow the instructions below to reactivate a deactivated account.

1. Select **People Administrator** from the **Go To: drop-down menu**.

2. Click **Advanced Search**.



3. Enter the **First Name** and **Last Name** of the user with the deactivated account.
4. Enter today's date in the **Terminated Before** field.
5. Click **Search**.
6. Click the **Edit Profile Information** link.



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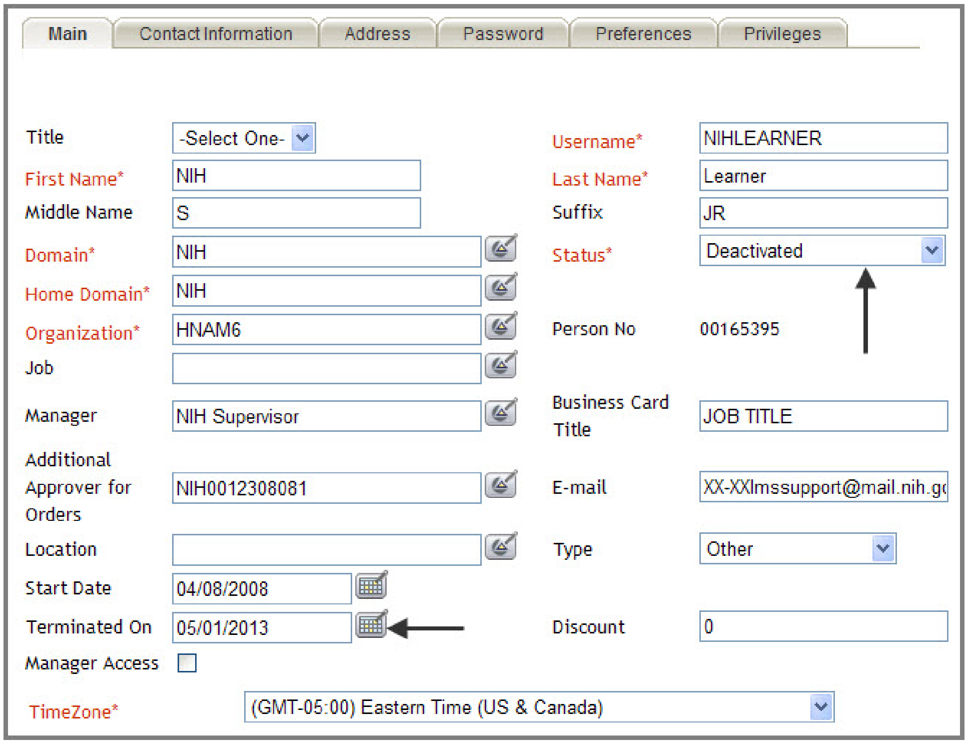
7. Change the **Status** from Deactivated to “Full Time”.
8. Delete the date in the **Terminated On** field.
9. Scroll to the bottom of the screen and click **Save**.



10. The account is now reactivated in the LMS. You can verify that the account is active by searching for the account using the simple search. If the account can be found using the simple search, it is reactivated successfully. The learner has 6 days starting the next calendar day to logon and reset the 365 day deactivation schedule for the account. Failure to do so will result in the account being deactivated again.

    IMPORTANT! There are no notifications associated with the reactivation of an account. Local Learning Administrators should notify the learner immediately so they can login within the next 6 days.

LEARNER ENROLLMENTS

An Enrollment of an offering is the equivalent of a class registration. This means that a learner is scheduled to attend or is currently attending the designated course offering, but has not yet successfully completed it. As a Local Learning Administrator, you may view or drop enrollments for learners within your IC.

Follow the instructions below to view a learner's enrollments.

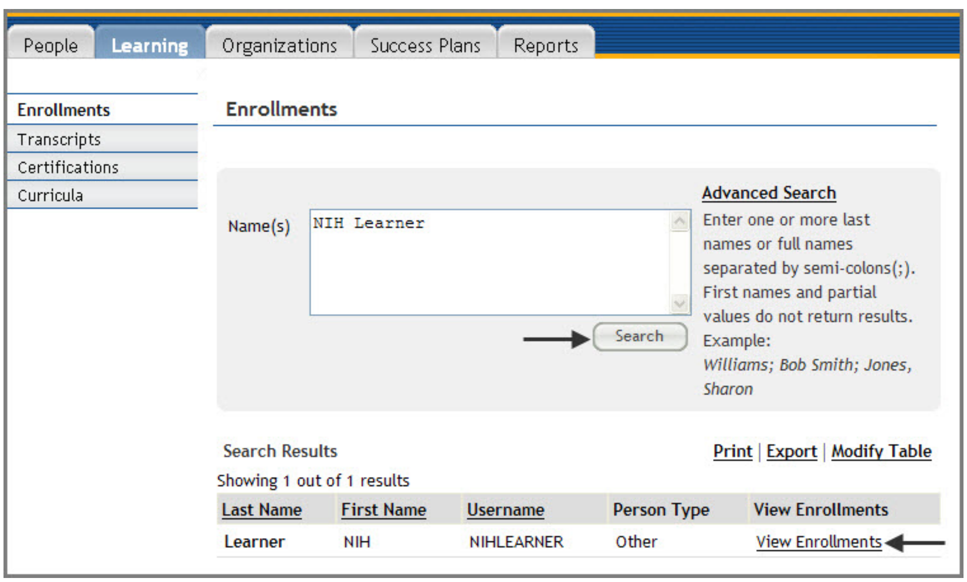
VIEW LEARNER ENROLLMENTS

1. Select the **People Administration** role in the drop-down Go To menu.

2. Click the **Learning tab**.
3. Select **Enrollments** from the left vertical navigation menu. (Default)
4. Enter the learner's name in the Name(s) search field and click **Search**.

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

5. Click the **View Enrollments link** in the View Enrollments column.



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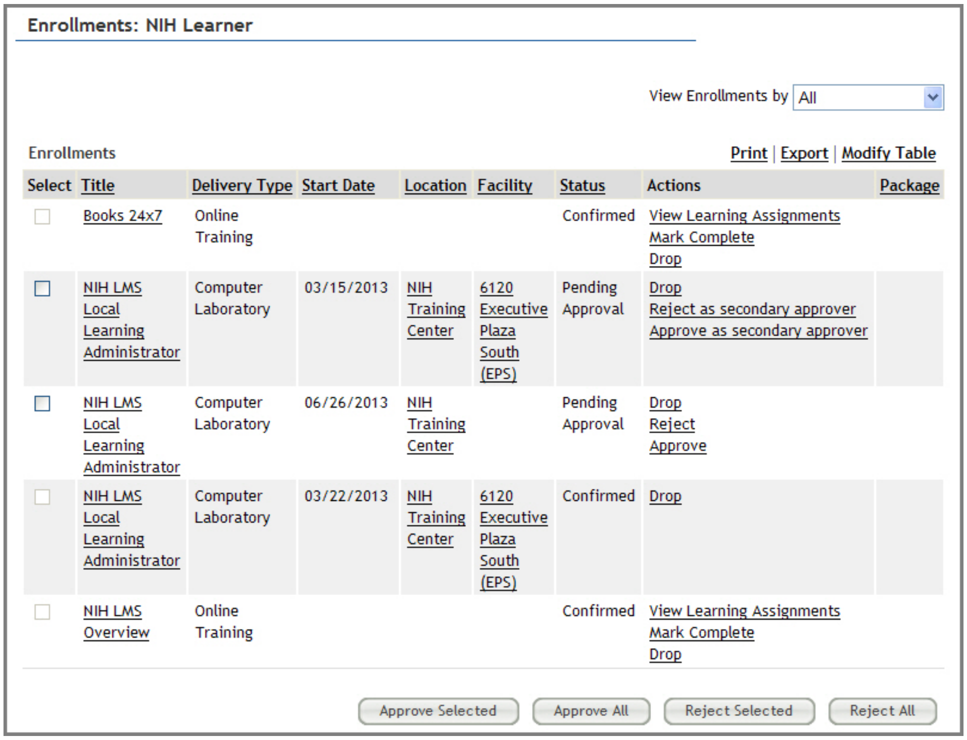
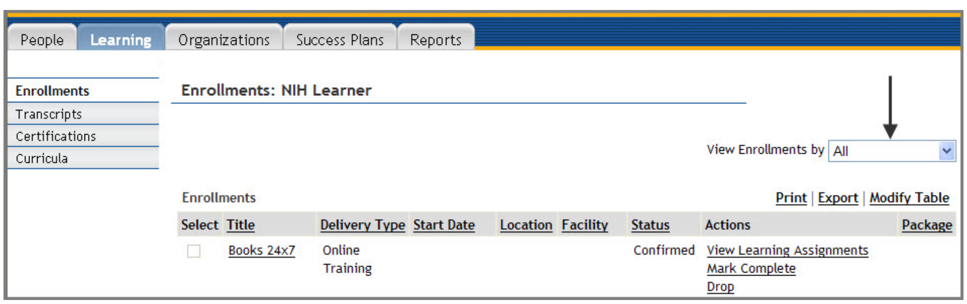
NOTE: There are a number of different actions that can be performed based on the enrollment status and delivery type of the course as outlined below.



LIMITING THE TYPE OF ENROLLMENTS DISPLAYED (OPTIONAL)

To limit the type of enrollments displayed, click the View Enrollments by pull-down menu and select one of the following:



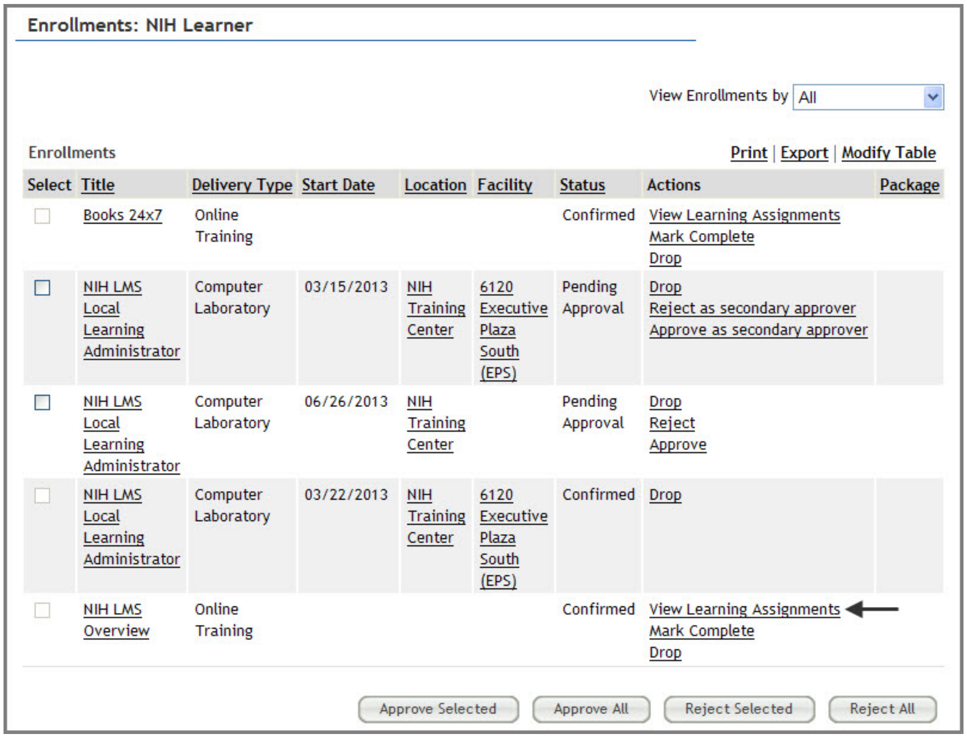
- **All**: Default view. This option displays all enrollments regardless of status.
- **Pending Approval**: This option displays all enrollments currently awaiting approval by one or more approvers in the learner's training approval chain.
- **Approved**: This option displays all enrollments for which all approvers have approved the enrollment and the learner has a "Confirmed" enrollment status. This enrollment remains on the Enrollments page until training is conducted and the learner is marked complete by a Learning Administrator. (Online courses will be marked complete by the LMS automatically.)
- **Unscheduled**: This option displays all enrollments for courses without a specific date and time.

ENROLLMENT ACTIONS - VIEW LEARNING ASSIGNMENTS

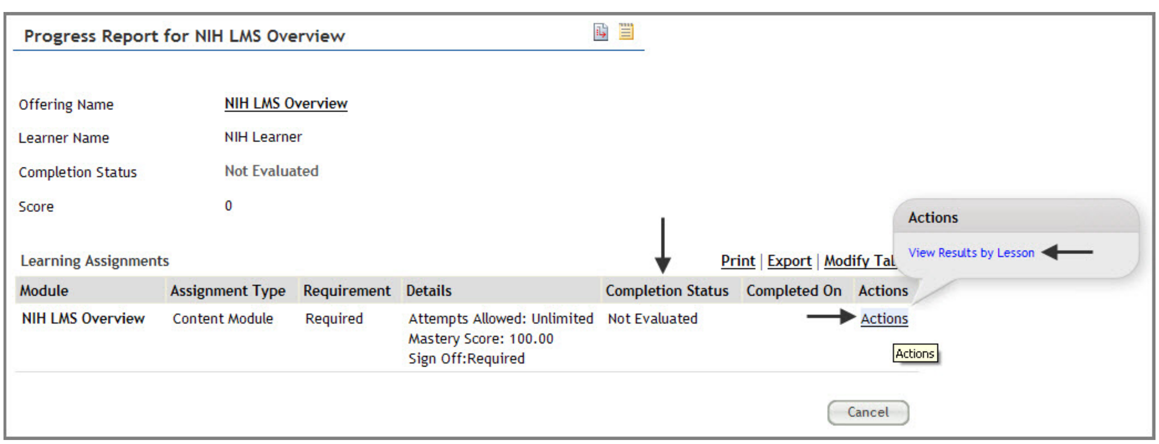
The View Learning Assignments Action is designed to give administrators access to the additional tasks that are required for completing an offering or results from online training courses.

Follow the instructions below to view the learning assignments of a course.

1. While viewing a learner's enrollments, click **View Learning Assignments** in the Actions column. (For online courses)



2. You will now see all of the learning assignments and their completion statuses for the offering. (For online courses)
3. Click **Actions** in the Actions column. (For online courses)
4. Click **View Results by Lesson**. (For online courses)



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5. Click the **Responses** link. (For online courses)

Results: NIH LMS Overview

Results By Lesson

Lesson	Status	Total Attempts	Last Accessed	Time Spent	Score	Mastery Score	Objectives	Responses	History
LMS Overview									
Click to begin course	Incomplete	1	04/04/2013	00:02:58				Responses	History

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6. You will be able to view the learner's answers to the questions in the course as shown below: (This functionality is based on how the course was programmed.)

Responses For Attempt 1

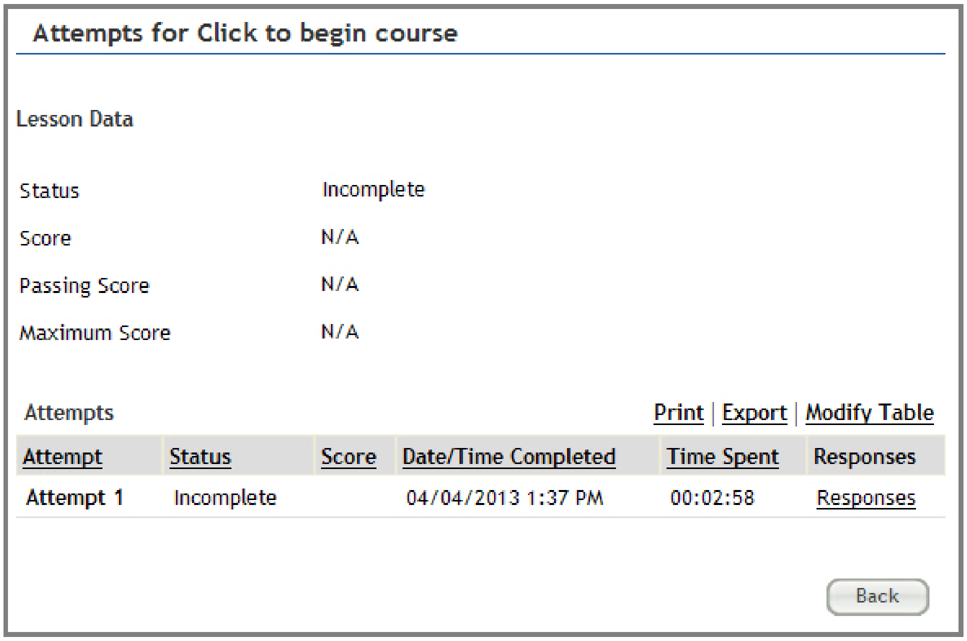
Responses

Print | Export | Modify Table

Question ID	Question Text	Type	Response	Result	Time Spent	Date/Time
Question_1_418_1365097197018	The LMS allows…	Multiple Choice	F	Correct	00:00:04	2013-04-04T13:38:14
Question_2_997_1365097197018	Which browser …	Multiple Choice	B,D	Correct	00:00:13	2013-04-04T13:38:21
Question_3_1019_1365097197018	Which browser …	Multiple Choice	A	Correct	00:00:11	2013-04-04T13:38:42
Question_4_1033_1365097197018	Identify the p…	Multiple Choice	B	Correct	00:00:08	2013-04-04T13:39:01
Question_5_1046_1365097197018	Which of the f…	Multiple Choice	A,C	Correct	00:00:12	2013-04-04T13:39:13
Question_6_472_1365097197018	The training h…	True-False	True	Correct	00:00:01	2013-04-04T13:39:29
Question_7_500_1365097197034	The LMS will a…	True-False	True	Correct	00:00:01	2013-04-04T13:39:34
Question_8_1058_1365097197034	Check the item…	Multiple Choice	A,B,C,D	Correct	00:00:04	2013-04-04T13:39:38
Question_9_1072_1365097197034	What types of …	Multiple Choice	D	Correct	00:00:02	2013-04-04T13:39:45
Question_10_1084_1365097197034	Which of the f…	Multiple Choice	D	Correct	00:00:01	2013-04-04T13:39:51

Back

7. In step 5, selecting the **History** link will show the following screen:



Attempts for Click to begin course

Lesson Data

Status	Incomplete
Score	N/A
Passing Score	N/A
Maximum Score	N/A

Attempts Print | Export | Modify Table

Attempt	Status	Score	Date/Time Completed	Time Spent	Responses
Attempt 1	Incomplete		04/04/2013 1:37 PM	00:02:58	Responses

Back

NOTE: From this screen, you will be able to see the current completion status, score information, the dates the content was attempted by the learner, and how long the learner accessed the content on each attempt. Clicking the **Responses link** will take you to the screen shown in step 6.

APPROVE OR REJECT A LEARNER'S REGISTRATION (ON BEHALF OF THE MANAGER)

As a Local Learning Administrator, you may approve or reject a learner's registration on behalf of their manager as long as you have the authority from your organization to do so.

Follow the instructions below to approve or reject a learner's registration.

1. While viewing the enrollments for a learner, click the **Reject** or **Approve** link in the Actions column associated with the course you wish to approve or reject.

Enrollments: NIH Learner

View Enrollments by All

Enrollments

Print | Export | Modify Table

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Actions	Package
☐	Books 24x7	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	
☐	NIH LMS Local Learning Administrator	Computer Laboratory	03/15/2013	NIH Training Center	6120 Executive Plaza South (EPS)	Pending Approval	Drop Reject as secondary approver Approve as secondary approver	
☐	NIH LMS Local Learning Administrator	Computer Laboratory	06/26/2013	NIH Training Center		Pending Approval	Drop Reject Approve ←	
☐	NIH LMS Local Learning Administrator	Computer Laboratory	03/22/2013	NIH Training Center	6120 Executive Plaza South (EPS)	Confirmed	Drop	
☐	NIH LMS Overview	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	

Approve Selected | Approve All | Reject Selected | Reject All

2. If the **Approve** link is selected, the Actions column will change to display Approve/Reject as secondary approver. (Shown below)

☐	NIH LMS Local Learning Administrator	Computer Laboratory	06/26/2013	NIH Training Center	Pending Approval	Drop Reject as secondary approver Approve as secondary approver

3. If the **Reject** link is selected, the enrollment is removed and the registration is cancelled for the learner.

   NOTE: Each action, reject or approve, will trigger a notification to the learner (and AAO for approvals) informing them of the action that was taken.

IMPORTANT!: If the course enrollment already displays Approve/Reject as secondary approver in the actions column, the manager/alternate manager has already approved the enrollment and it is now ready for the Additional Approver for Orders (AAO) to approve. You should not click Approve/Reject as secondary approver unless you are the AAO or have been give the authority to do so.

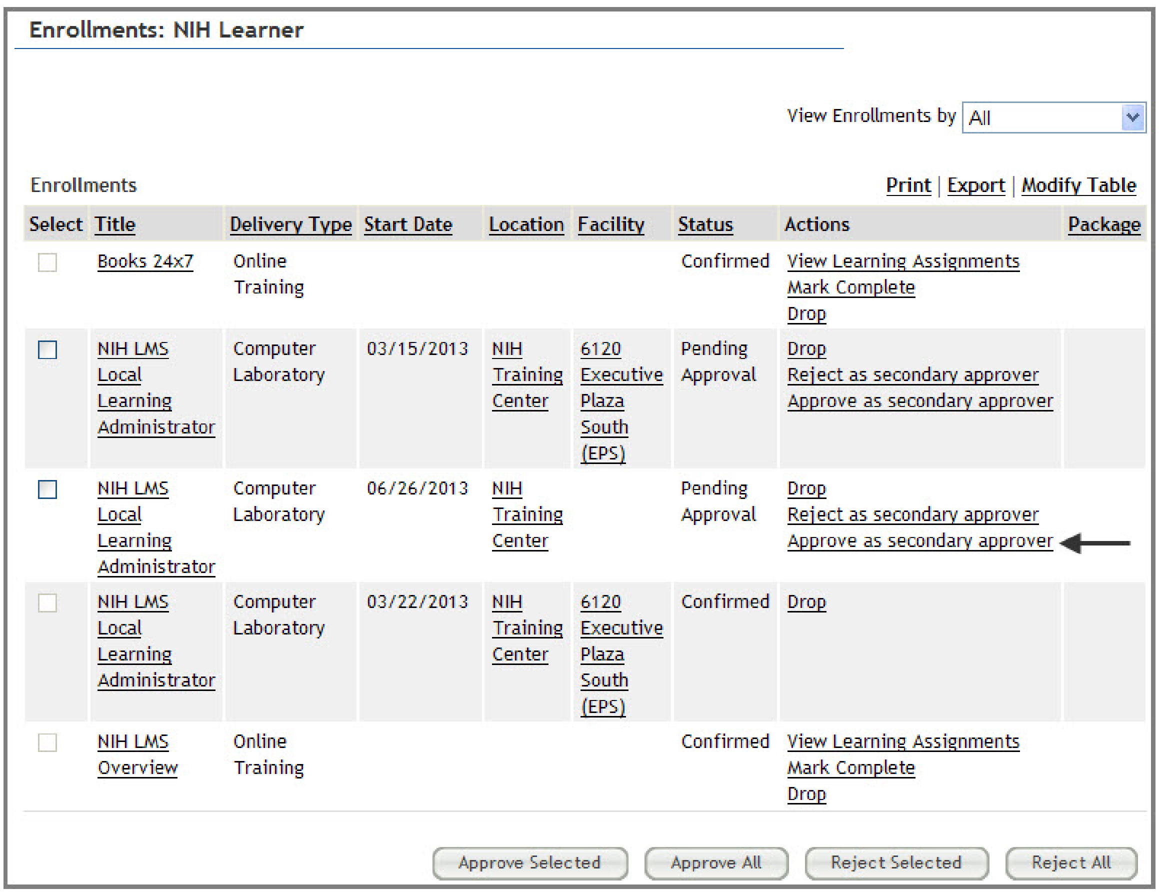
Enrollments for learners without a manager identified in their LMS profile are sent directly to the AAO for approval. Approve/ Reject as secondary approver will be the only options for learners in this situation.

Follow the instructions below to approve or reject a learner's registration on behalf of the Additional Approver for Orders.

APPROVE OR REJECT A LEARNER'S ENROLLMENT (ON BEHALF OF THE AAO)

As a Local Learning Administrator, you may approve or reject a learner's registration on behalf of their Additional Approver for Orders (AAO) as long as you have the authority from your organization to do so.

1. While viewing a learner's enrollments, click the **Reject as secondary approver** or **Approve as secondary approver** link in the Actions column.



Enrollments: NIH Learner

View Enrollments by All

Enrollments

Print | Export | Modify Table

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Actions	Package
	Books 24x7	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	
	NIH LMS Local Learning Administrator	Computer Laboratory	03/15/2013	NIH Training Center	6120 Executive Plaza South (EPS)	Pending Approval	Drop Reject as secondary approver Approve as secondary approver	
	NIH LMS Local Learning Administrator	Computer Laboratory	06/26/2013	NIH Training Center		Pending Approval	Drop Reject as secondary approver Approve as secondary approver	
	NIH LMS Local Learning Administrator	Computer Laboratory	03/22/2013	NIH Training Center	6120 Executive Plaza South (EPS)	Confirmed	Drop	
	NIH LMS Overview	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	

Approve Selected | Approve All | Reject Selected | Reject All

IMPORTANT! NIHTC courses require a CAN to be entered **BEFORE** the registration is approved. Approving a registration without a CAN will generate an error and could delay the learner being confirmed to attend training.

Local Learning Administrator

2. If the **Reject as secondary approver** link is clicked, the enrollment will be removed and the learner's registration cancelled.

   NOTE: Each action, reject or approve, will trigger a notification to the learner informing them of the action that was taken.

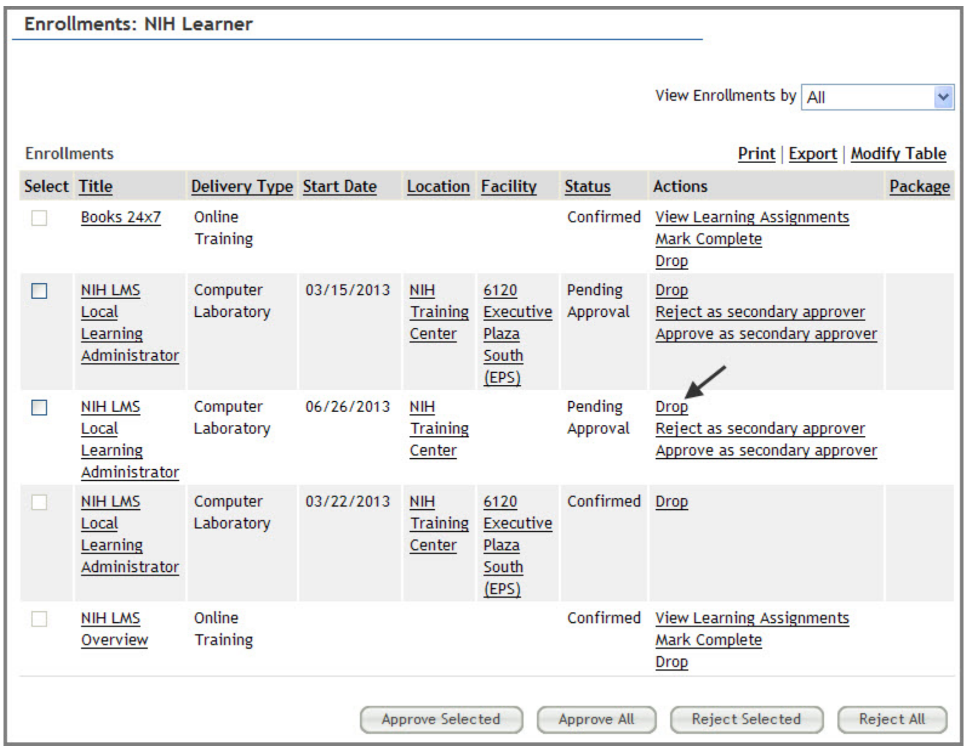
ENROLLMENTS – DROP/CANCEL A COURSE ENROLLMENT

As a Local Learning Administrator, you may drop an enrollment on behalf of a learner. Dropping an enrollment will do the following:

- Cancel the learner's registration and remove from their enrollments
- Notify the learner, managers/alternate managers, and AAOs as appropriate
- Cancel the obligation of funds for NIHTC courses if the registration was approved

Follow the instructions below to drop/cancel a learner's enrollment.

1. While viewing a learner's enrollments, click the **Drop** link in the Actions column.


Enrollments: NIH Learner

View Enrollments by All

Enrollments

Print | Export | Modify Table

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Actions	Package
	Books 24x7	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	
	NIH LMS Local Learning Administrator	Computer Laboratory	03/15/2013	NIH Training Center	6120 Executive Plaza South (EPS)	Pending Approval	Drop Reject as secondary approver Approve as secondary approver	
	NIH LMS Local Learning Administrator	Computer Laboratory	06/26/2013	NIH Training Center		Pending Approval	Drop Reject as secondary approver Approve as secondary approver	
	NIH LMS Local Learning Administrator	Computer Laboratory	03/22/2013	NIH Training Center	6120 Executive Plaza South (EPS)	Confirmed	Drop	
	NIH LMS Overview	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	

Approve Selected | Approve All | Reject Selected | Reject All

   NOTE: Dropping the Books 24X7 enrollment will prevent the learner from accessing Books 24/7 content in the LMS.

2. Scroll to the bottom of the Drop Offering screen.

3. Click the **Drop** button.

4. The enrollment will be dropped and all appropriate notifications sent.

MARK AN ENROLLMENT COMPLETE

IMPORTANT! Local Learning Administrators should **not** mark any course complete from the enrollments area. While Local Learning Administrators have the technical ability to mark an enrollment complete, this should not be done for the following reasons:

- Enrollments are currently being taken or are scheduled in the future and have not yet occurred.
- Online courses are automatically marked complete and at that time they are removed from the enrollments area and become transcript items.
- Instructor-led training should be marked complete by a Learning Administrator that has access to a roster or other information to justify marking the learner complete.

If you feel an enrollment has not been marked complete in a timely manner, please contact the course owner or HRSS Helpdesk to receive assistance.

LEARNER TRANSCRIPTS

A learner's transcript is a record of their completed training. Transcripts may contain records for training delivered by NIH, the Department of Health and Human Services (HHS), in addition to training completed outside of HHS (e.g. a college course, conference, etc.). Since the LMS is a department-wide system, transcripts will go with an employee if he/she moves to another agency within HHS.

> **NOTE**: All historic training has not yet been migrated into the LMS from existing systems. As a result, some records may not appear on a Learner's LMS transcript but can be manually added by a Local Learning Administrator.

Follow the instructions below to view a learner's transcript.

VIEW A LEARNER TRANSCRIPT

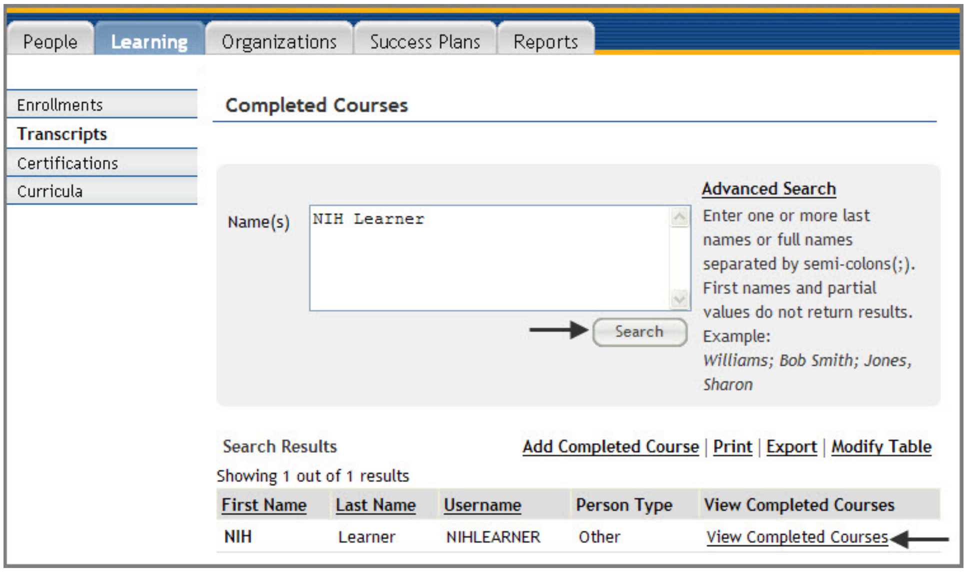
1. Select the **People Administration** role in the drop-down Go To menu.

2. Click the **Learning tab**.
3. Select **Transcripts** in the left vertical menu.
4. Enter the learner's name in the Name(s) search field and click **Search**.

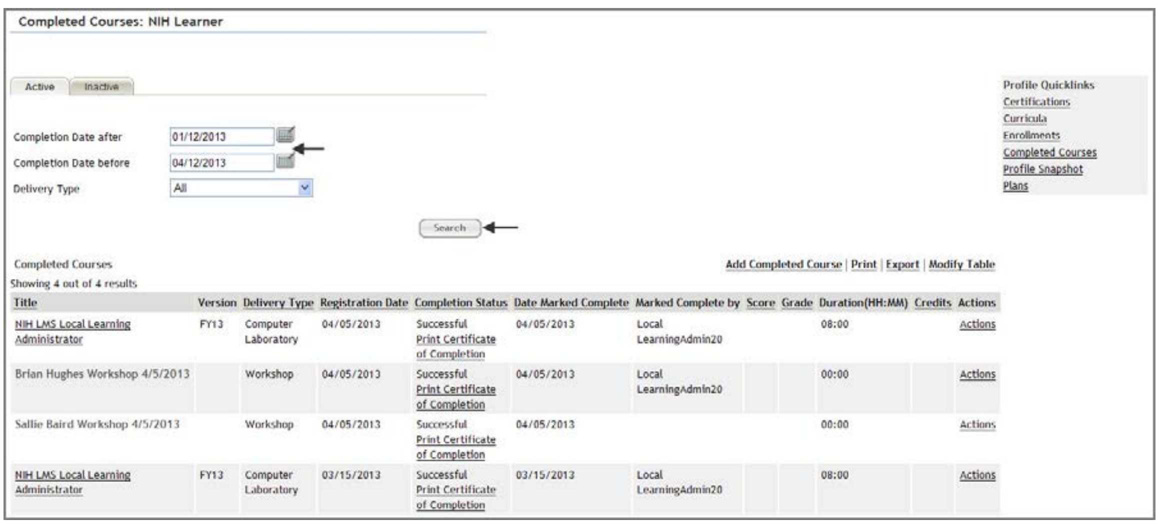
   NOTE: See instructions for searching listed to the right of the search box.

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

5. Select the **View Completed Courses** link from the View Completed Courses column of the search results table.



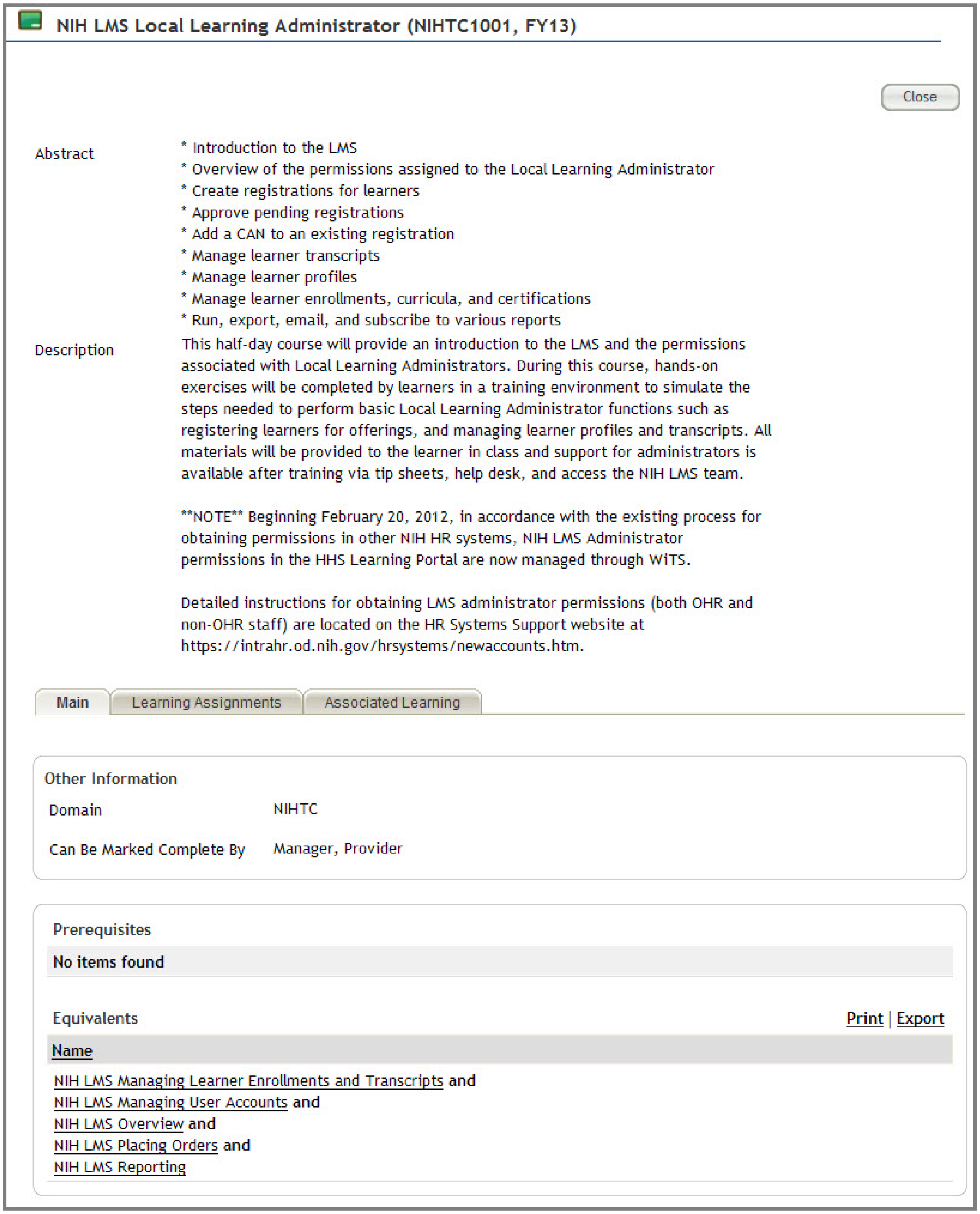
6. The transcript shows the last 90 days worth of training by default. To view transcript items outside of that date range, change the date range values and then click **Search**.



NOTE: The default date range of the completed courses 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.

VIEW COURSE DETAILS

1. While viewing the transcript, click the **Title link** to view the course details as shown below:



NIH LMS Local Learning Administrator (NIHTC1001, FY13)

Close

Abstract
* Introduction to the LMS
* Overview of the permissions assigned to the Local Learning Administrator
* Create registrations for learners
* Approve pending registrations
* Add a CAN to an existing registration
* Manage learner transcripts
* Manage learner profiles
* Manage learner enrollments, curricula, and certifications
* Run, export, email, and subscribe to various reports

Description
This half-day course will provide an introduction to the LMS and the permissions associated with Local Learning Administrators. During this course, hands-on exercises will be completed by learners in a training environment to simulate the steps needed to perform basic Local Learning Administrator functions such as registering learners for offerings, and managing learner profiles and transcripts. All materials will be provided to the learner in class and support for administrators is available after training via tip sheets, help desk, and access the NIH LMS team.

NOTE Beginning February 20, 2012, in accordance with the existing process for obtaining permissions in other NIH HR systems, NIH LMS Administrator permissions in the HHS Learning Portal are now managed through WiTS.

Detailed instructions for obtaining LMS administrator permissions (both OHR and non-OHR staff) are located on the HR Systems Support website at https://intrahr.od.nih.gov/hrsystems/newaccounts.htm.

Main | Learning Assignments | Associated Learning

Other Information

Domain NIHTC

Can Be Marked Complete By Manager, Provider

Prerequisites

No items found

Equivalents Print | Export

Name

NIH LMS Managing Learner Enrollments and Transcripts and
NIH LMS Managing User Accounts and
NIH LMS Overview and
NIH LMS Placing Orders and
NIH LMS Reporting

NOTE: Courses that are added manually that do not exist in the LMS catalog will be displayed with gray text and cannot be clicked to show course details.

EDIT TRANSCRIPT ITEM DETAILS

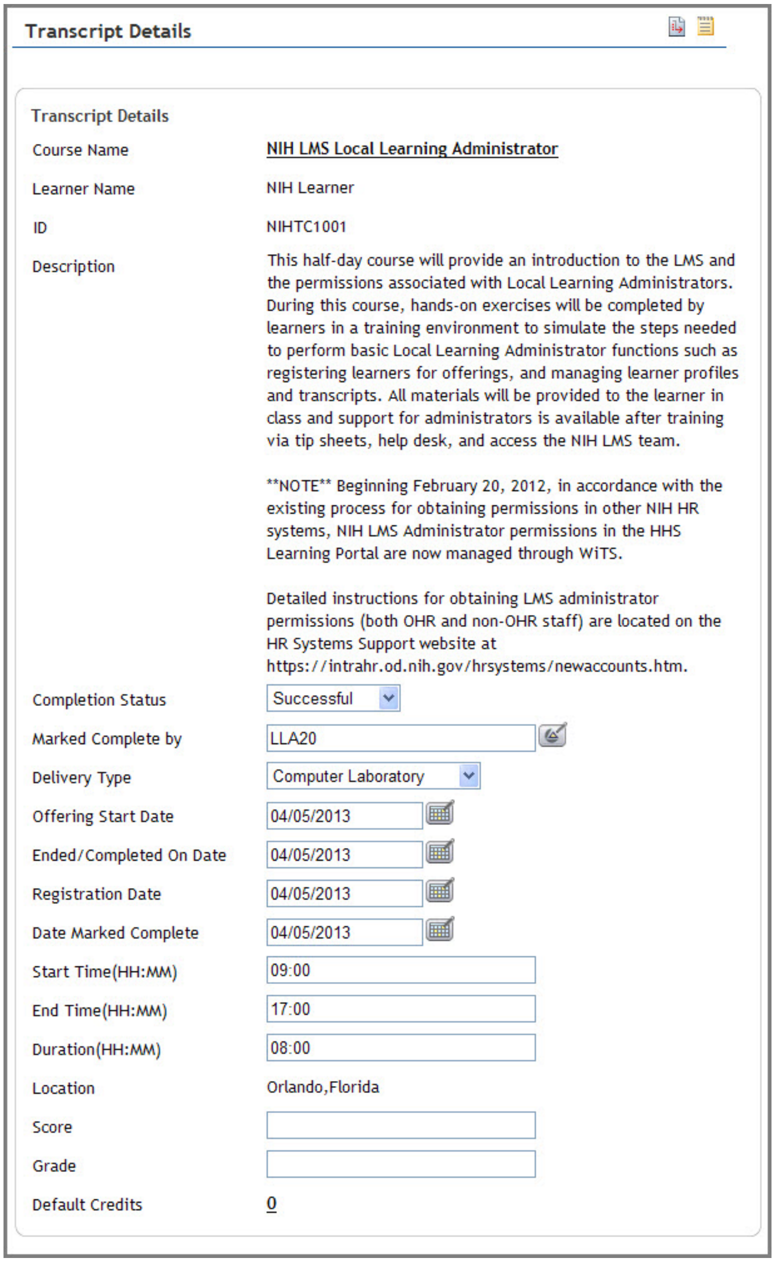
IMPORTANT! Edits to the transcript should only be performed when you take possession of the credentials that warrant the changes. These credentials should be kept on file in a secure location designated by your organization's management team.

Follow the instructions below to edit a transcript item.

1. While viewing the transcript, click the **Actions link** in the *Actions* column of the *Completed Courses* table.
2. Click the **Edit link** from the *Actions* balloon.

Local Learning Administrator

3. Make all necessary changes then click the **Save button** at the bottom of the screen.



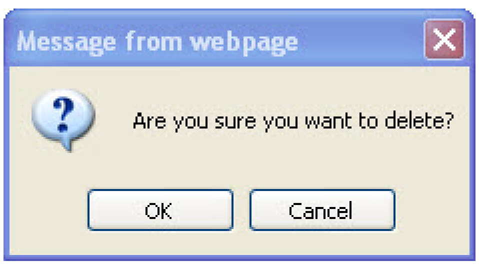
4. After clicking the **Save button**, click the **Cancel** button to return to the transcript.

DELETE A TRANSCRIPT ITEM

IMPORTANT! Once a transcript item is deleted, the action cannot be undone. A new transcript item would need to be added if one was deleted unintentionally.

1. While viewing the transcript, click the **Actions link** in the *Actions* column of the *Completed Courses* table.
2. Click the **Delete link** from the *Actions* balloon.

3. Click the **OK button** in the confirmation popup window.



4. The transcript item will now be added to the Inactive tab. To see all the items that have previously been deleted, click the Inactive tab.

IMPORTANT! Only transcript items on the Active tab will be factored into completion reports.

ADD LEARNING TO A TRANSCRIPT: SINGLE USER

Local Learning Administrators may add training to a learner's transcript. The types of learning that are frequently added manually are:

- External training that was completed outside of NIH/HHS
- NIH/HHS training that is not in the LMS catalog
- LMS catalog courses that could not be added by a learning administrator during the time completions were being marked.

Follow the instructions below to manually add learning to a learner's transcript.

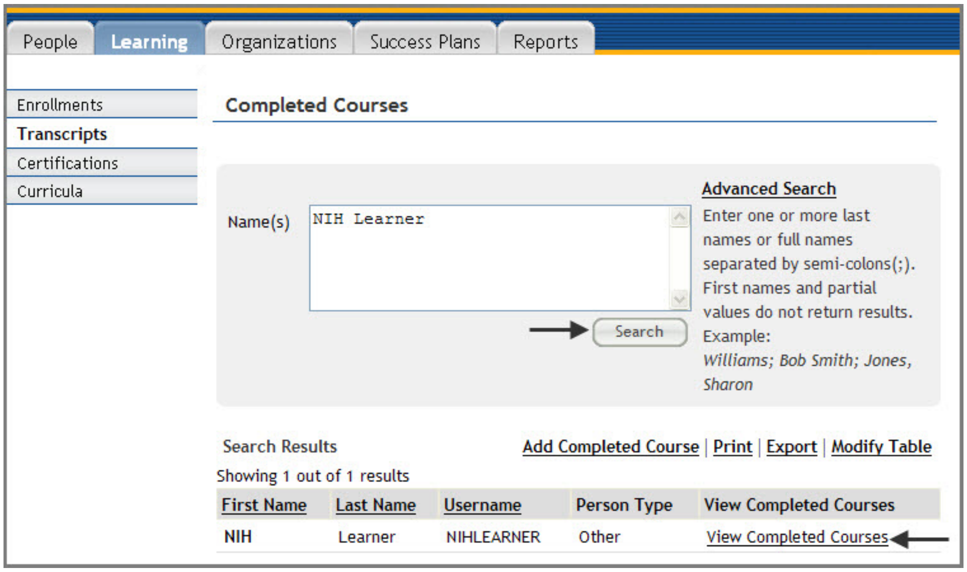
IMPORTANT! The guidelines for verifying completed training may vary by IC, office, division, etc. Please be sure to check with your organization to determine the process for verifying the completion of training prior to manually entering it onto a learner's LMS transcript.

1. Select the **People Administration** role in the drop-down Go To menu.

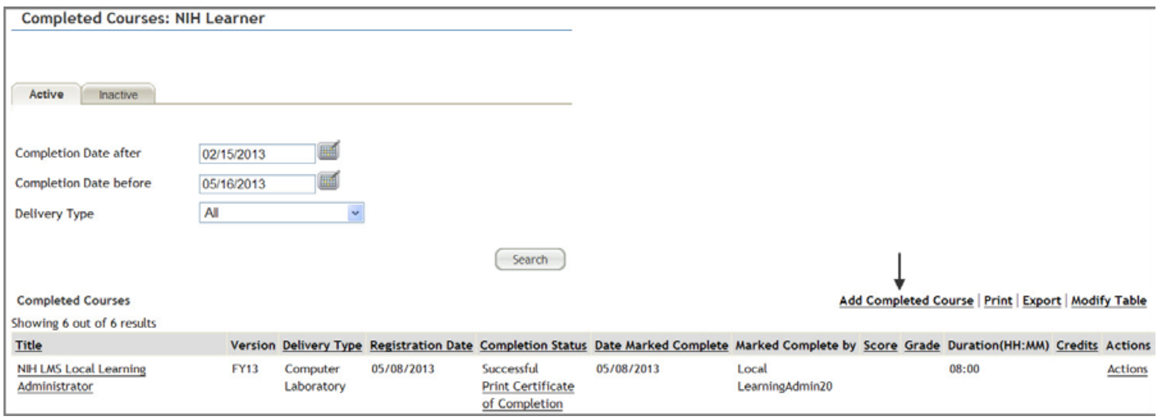
2. Click the **Learning tab**.
3. Select **Transcripts** in the left vertical menu.
4. Enter the learner's name in the Name(s) search field and click **Search**.

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

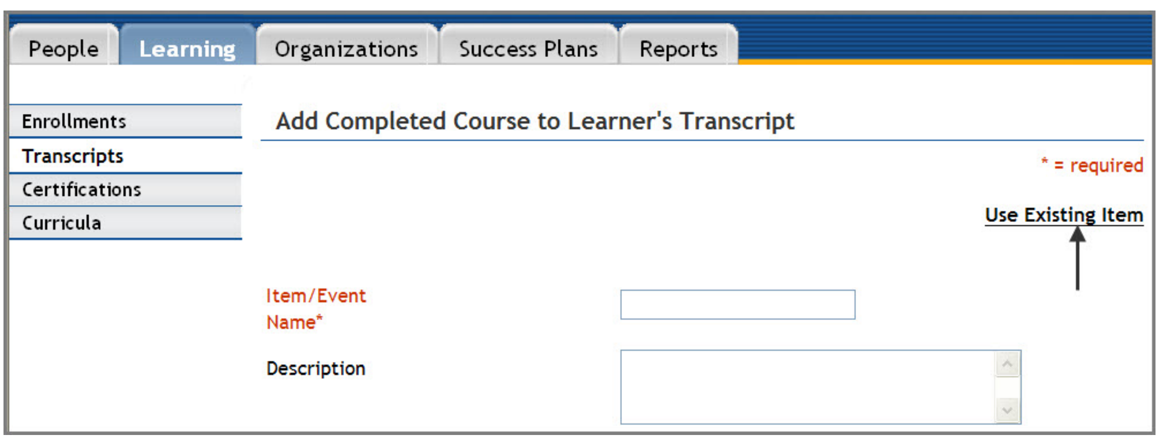
   If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.
5. Select the **View Completed Courses** link from the View Completed Courses column of the search results table.



6. Click the **Add Completed Course** link.



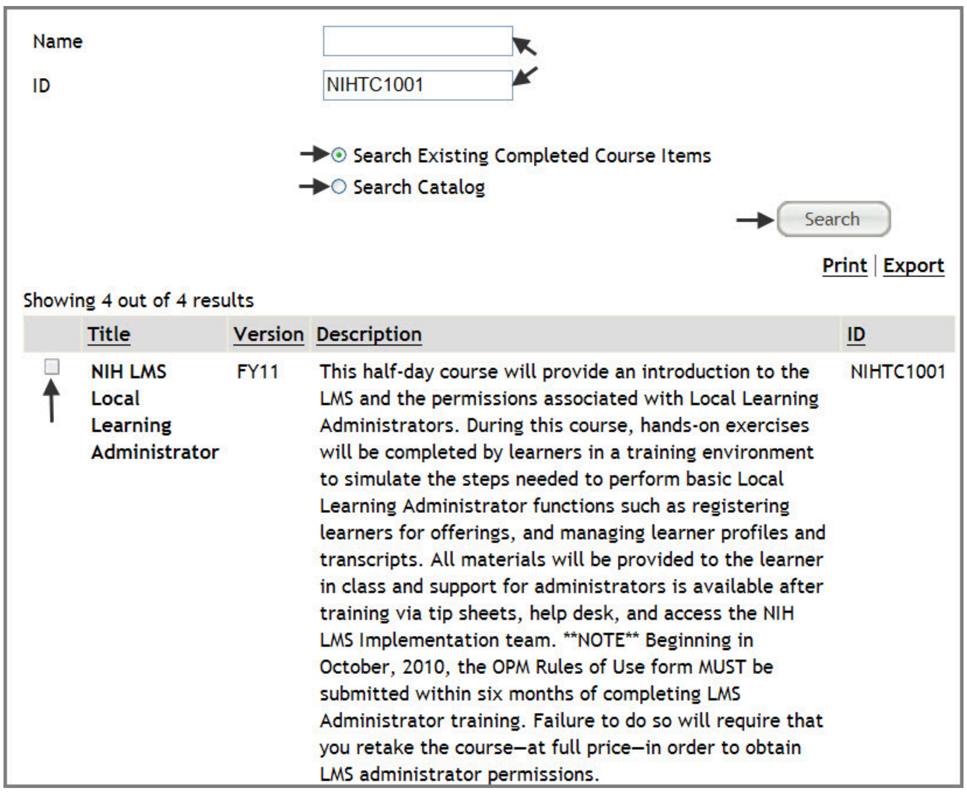
7. Click **Use Existing Item**.



NOTE: If the training being added is not in the LMS catalog or already added to someone else's transcript, it cannot be found in the LMS as an existing item. The data entry form should be completed and saved as a new transcript item.

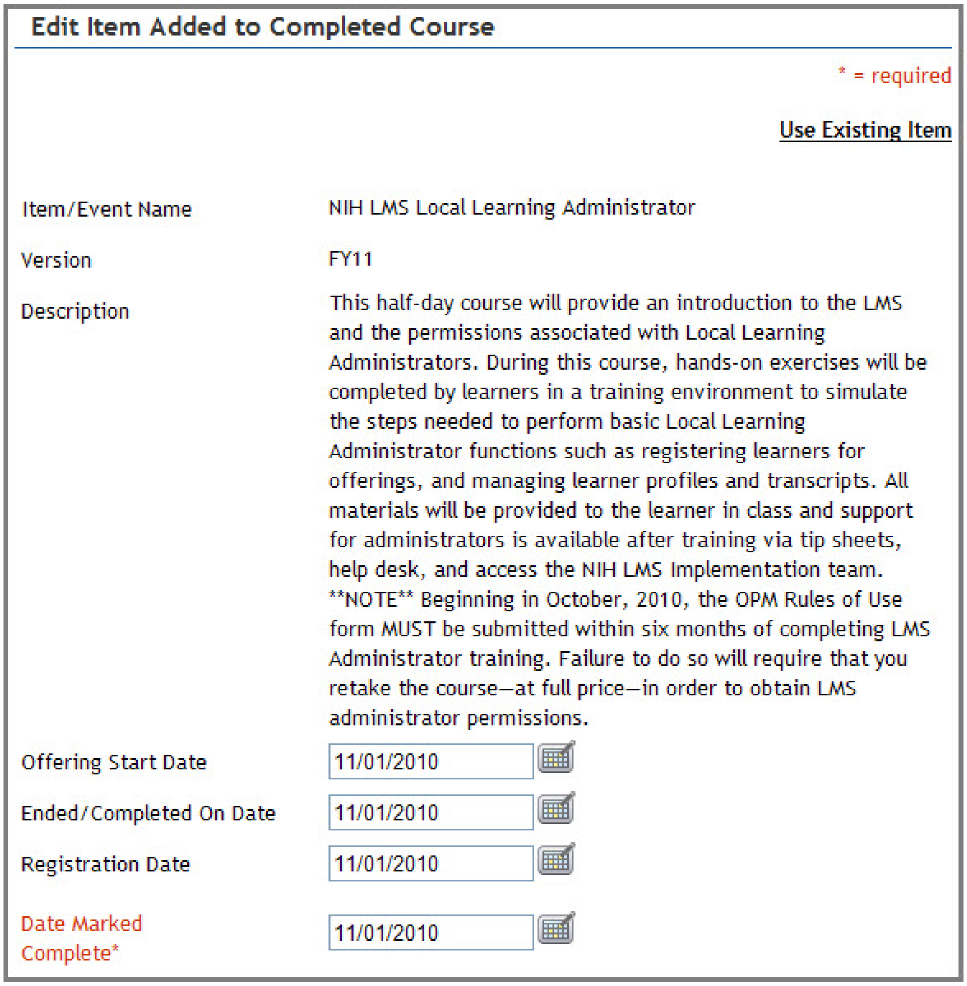
Local Learning Administrator

8. Enter search criteria in the Name and/or ID fields.
    a. Name – The actual name of the course. The wildcard (%) can also be used in this field.
    b. ID – The unique course number associated with the course.
9. Select your search method:
    a. Search Existing Completed Course Items – Use this option if the course is not a course that appears in the LMS training such as courses at a college or university.
    b. Search Catalog – Use this option if the course is available in the LMS catalog.
10. Click **Search**.
11. Click the **checkbox** to the left of the course title.



NOTE: If the training being added cannot be found by using an existing item, enter all the data available in the blank data fields and click **Save** at the bottom of the page. (See Appendix B for explanations of data fields required for EHRI reporting.)

12. Enter additional data such as dates of completion, location, time, and score.
13. **Marked Complete By** – This will always be the administrator that is adding the transcript item.



Edit Item Added to Completed Course

* = required

Use Existing Item

Item/Event Name	NIH LMS Local Learning Administrator
Version	FY11
Description	This half-day course will provide an introduction to the LMS and the permissions associated with Local Learning Administrators. During this course, hands-on exercises will be completed by learners in a training environment to simulate the steps needed to perform basic Local Learning Administrator functions such as registering learners for offerings, and managing learner profiles and transcripts. All materials will be provided to the learner in class and support for administrators is available after training via tip sheets, help desk, and access the NIH LMS Implementation team. **NOTE** Beginning in October, 2010, the OPM Rules of Use form MUST be submitted within six months of completing LMS Administrator training. Failure to do so will require that you retake the course—at full price—in order to obtain LMS administrator permissions.
Offering Start Date	11/01/2010
Ended/Completed On Date	11/01/2010
Registration Date	11/01/2010
Date Marked Complete*	11/01/2010

IMPORTANT! All EHRI values included at the bottom of this page should be validated. If any of the values are incorrect, the transcript item should be cancelled and the values corrected in the LMS course catalog by an LMS Learning Administrator. (See Appendix B for explanations of data fields required for EHRI reporting.)

If the transcript item is from an external source, the EHRI data values cannot be changed by an administrator. The administrator should not use this transcript item.

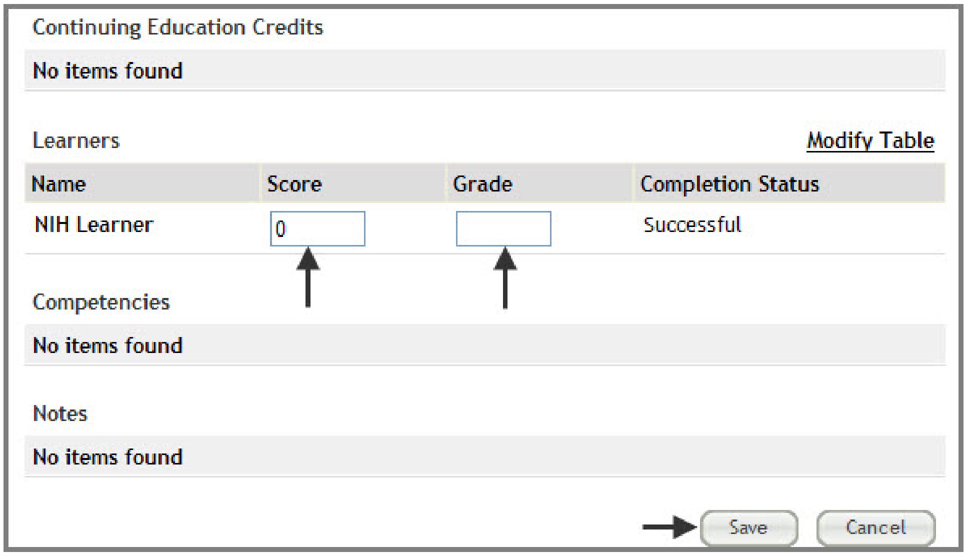
NOTE: The **Ended/Completed On Date** field must be populated even though it is not designated as "required". This is the date that appears on a Learner's Certificate of Completion from the LMS.

Local Learning Administrator

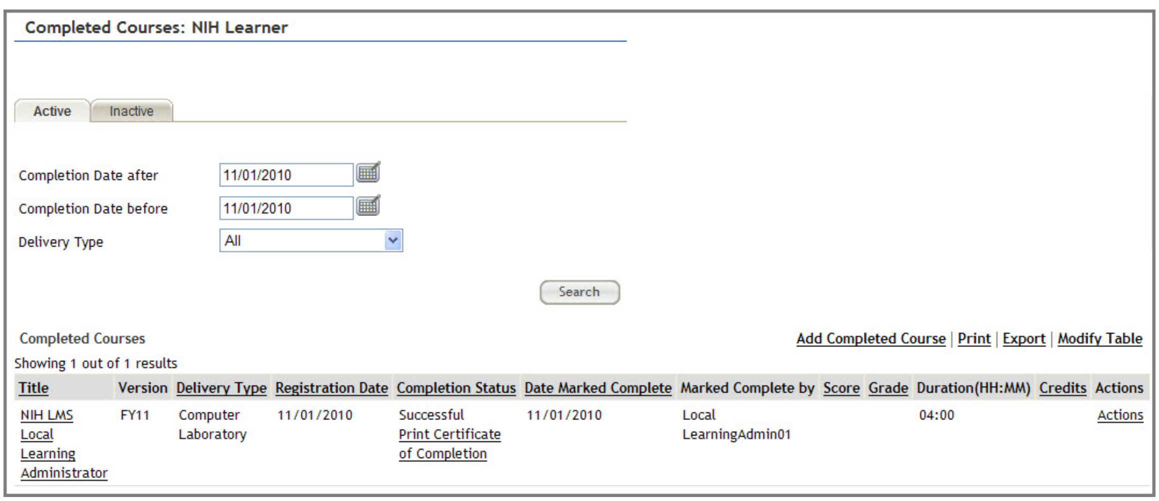
14. In the Learners section at the bottom of the page, update the Score and Grade fields the information provided by the learner.

    NOTE: The **Score** field will default to a value of “0”. Delete this value when entering transcript items that do not have scores earned by the learner.

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



16. The learner’s transcript will now be displayed. Search through the transcript to verify that the item has been successfully added. The completion date ranges may need to be adjusted if the training was completed more than 90 days in the past.



ADD LEARNING TO TRANSCRIPT: MULTIPLE USERS

Local Learning Administrators may add training to the transcripts of multiple learners simultaneously. The types of learning that are frequently added manually are:

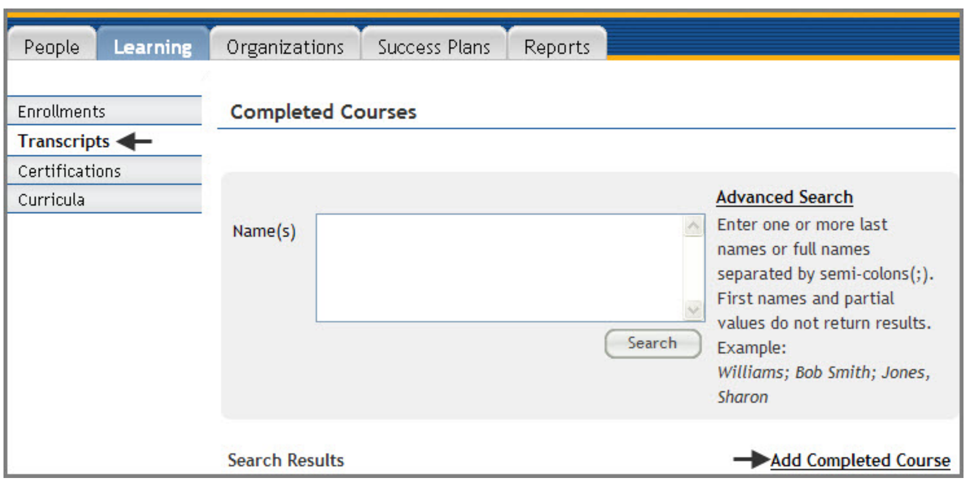
- External training that was completed outside of NIH/HHS
- NIH/HHS training that is not in the LMS catalog
- LMS catalog courses that could not be added by a learning administrator during the time completions were being marked.

Follow the instructions below to manually add learning multiple learner transcripts.

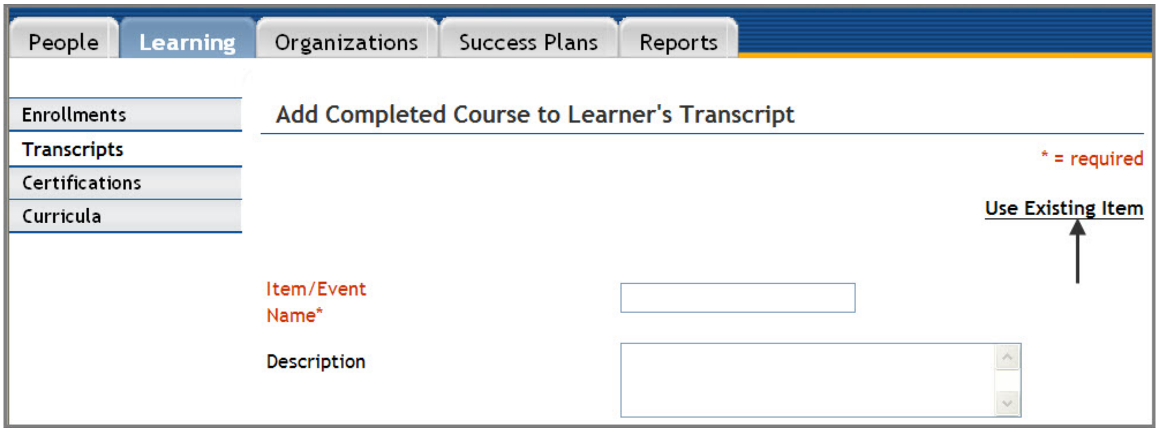
IMPORTANT! The guidelines for verifying completed training may vary by IC, office, division, etc. Please be sure to check with your organization to determine the process for verifying the completion of training prior to manually entering it onto a learner's LMS transcript.

1. Select the **People Administration** role in the drop-down Go To menu.

2. Click the **Learning tab**.
3. Select **Transcripts** in the left vertical menu.



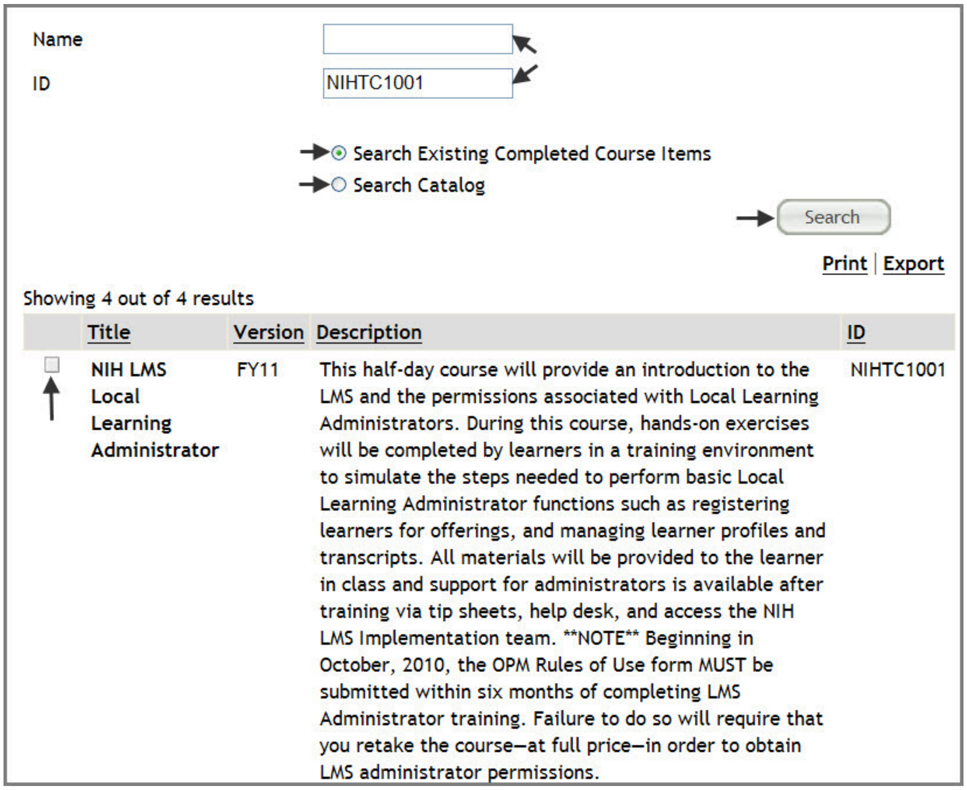
4. Click **Use Existing Item**.



NOTE: If the training being added is not in the LMS catalog or already added to someone else's transcript, it cannot be found in the LMS as an existing item. The data entry form should be completed and saved as a new transcript item.

5. Enter search criteria in the Name and/or ID fields.
    a. Name – The actual name of the course. The wildcard (%) can also be used in this field.
    b. ID – The unique course number associated with the course.
6. Select your search method:
    a. Search Existing Completed Course Items – Use this option if the course is not a course that appears in the LMS training such as courses at a college or university.
    b. Search Catalog – Use this option if the course is available in the LMS catalog.
7. Click **Search**.

8. Click the **checkbox** to the left of the course title.

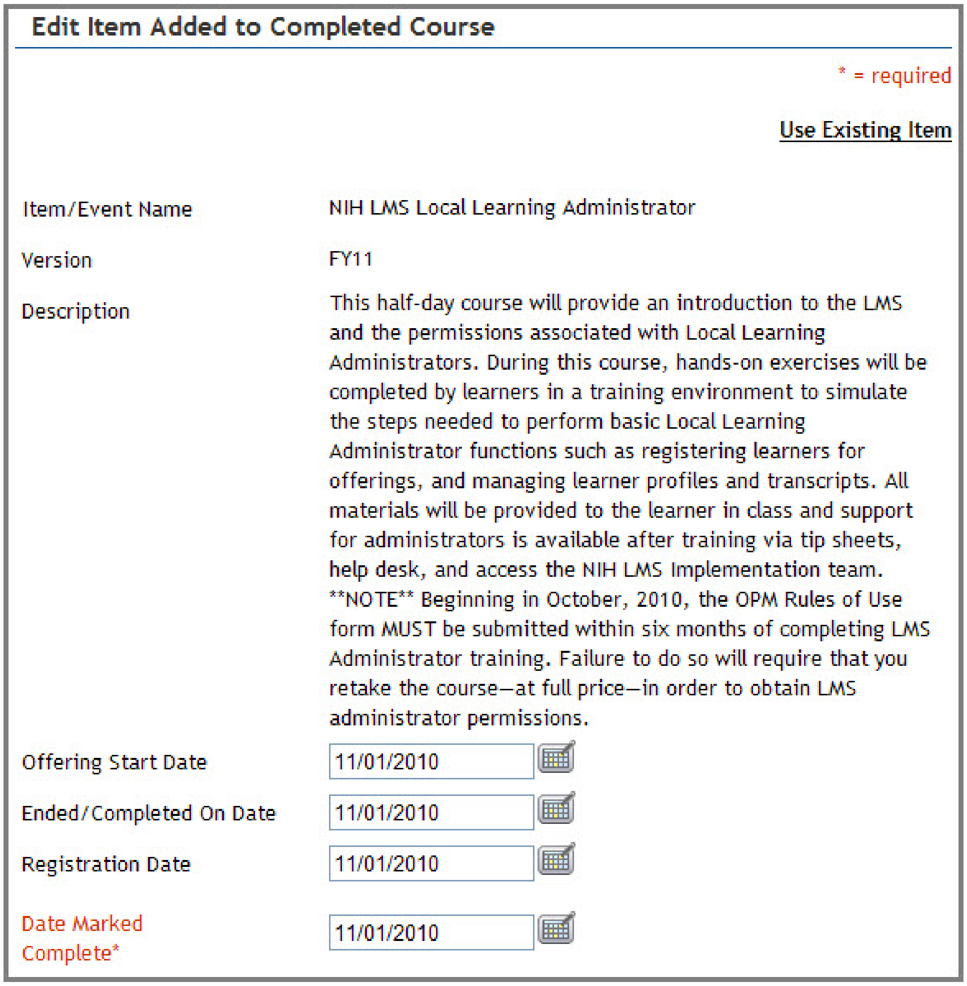


NOTE: If the training being added cannot be found by using an existing item, enter all the data available in the blank data fields and click **Save** at the bottom of the page. (See Appendix B for explanations of data fields required for EHRI reporting.)

9. Enter additional data such as the start and end dates, location, time, and score.

10. **Marked Complete By** – This will always be the administrator that is adding the transcript item.

Local Learning Administrator



Edit Item Added to Completed Course

* = required

Use Existing Item

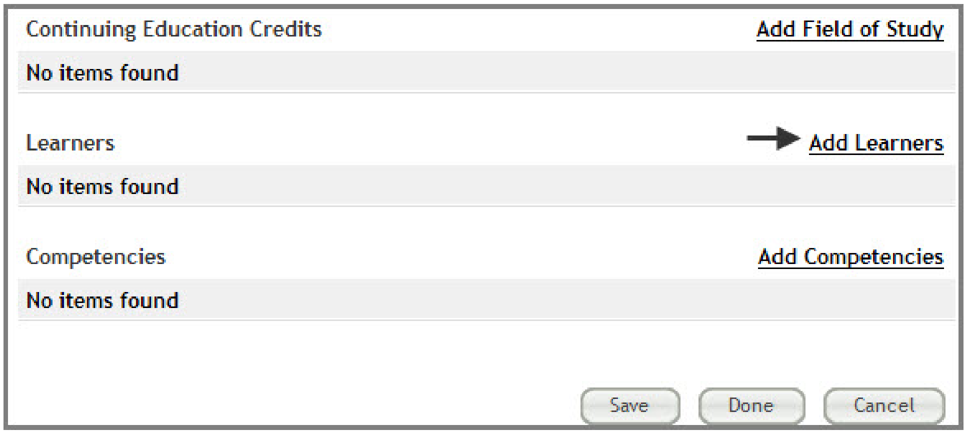
Item/Event Name	NIH LMS Local Learning Administrator
Version	FY11
Description	This half-day course will provide an introduction to the LMS and the permissions associated with Local Learning Administrators. During this course, hands-on exercises will be completed by learners in a training environment to simulate the steps needed to perform basic Local Learning Administrator functions such as registering learners for offerings, and managing learner profiles and transcripts. All materials will be provided to the learner in class and support for administrators is available after training via tip sheets, help desk, and access the NIH LMS Implementation team. **NOTE** Beginning in October, 2010, the OPM Rules of Use form MUST be submitted within six months of completing LMS Administrator training. Failure to do so will require that you retake the course—at full price—in order to obtain LMS administrator permissions.
Offering Start Date	11/01/2010
Ended/Completed On Date	11/01/2010
Registration Date	11/01/2010
Date Marked Complete*	11/01/2010

IMPORTANT! All EHRI values included at the bottom of this page should be validated. If any of the values are incorrect, the transcript item should be cancelled and the values corrected in the LMS course catalog by an LMS Learning Administrator. (See Appendix B for explanations of data fields required for EHRI reporting.)

If the transcript item is from an external source, the EHRI data values cannot be changed by an administrator. The administrator should not use this transcript item.

NOTE: The **Ended/Completed On Date** field must be populated even though it is not designated as "required". This is the date that appears on a Learner's Certificate of Completion from the LMS.

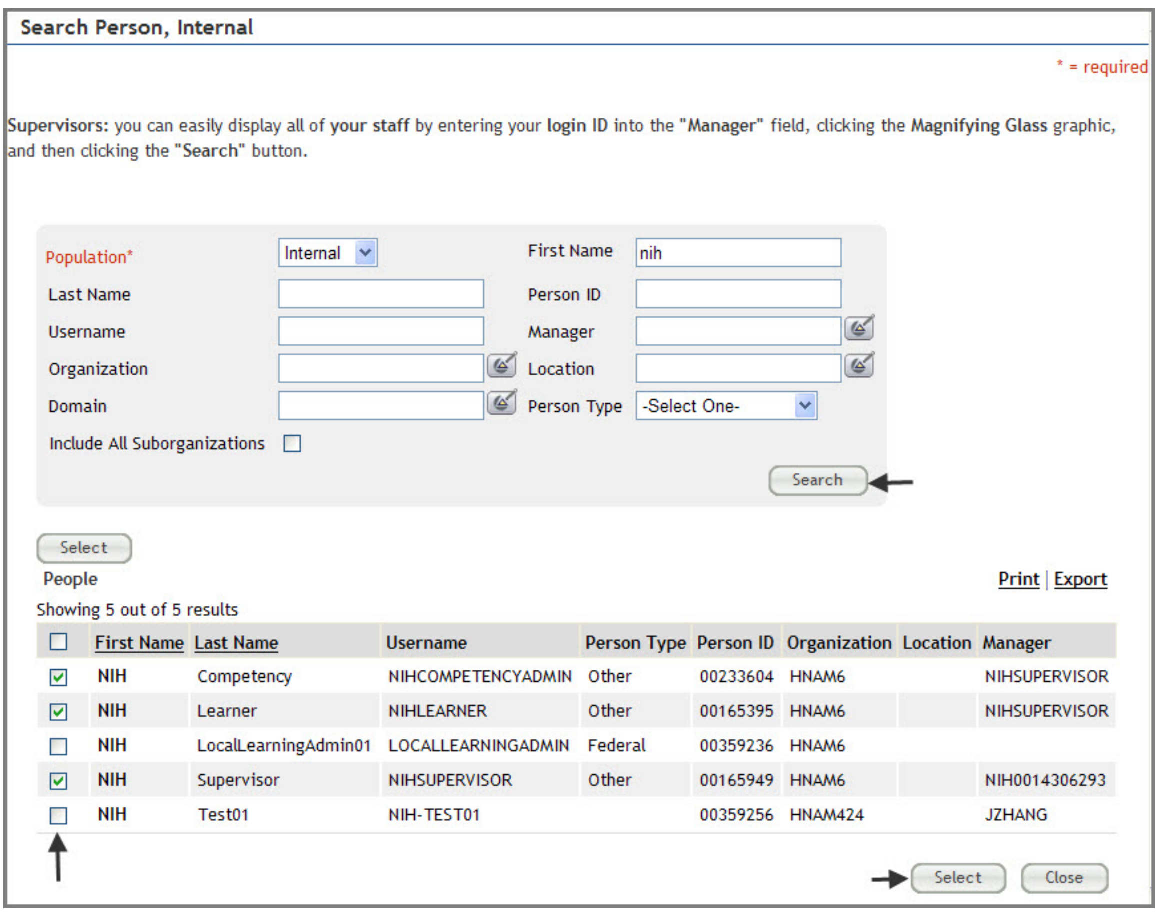
11. Click the **Add Learners link** from the *Learners* section of the transcript item.



12. In the Search Person, Internal window, enter search criteria and click **Search**.
13. Select one or more of the checkboxes next to names in the *People* search results table.

    NOTE: Click the checkbox in the *People* table header to select all search results displayed at one time.

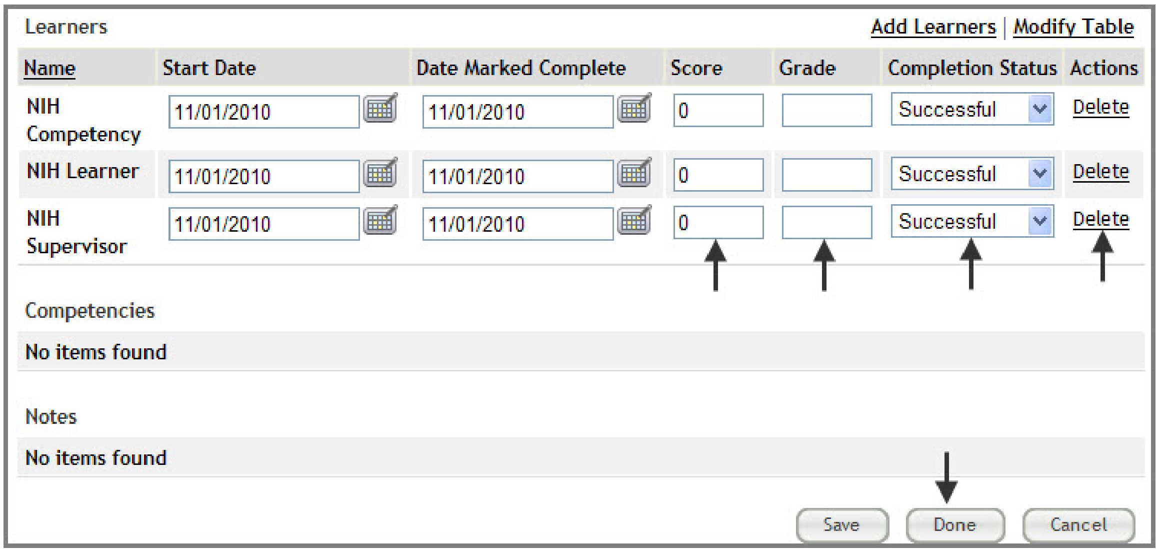
14. Click **Select**.



Local Learning Administrator

15. Update the **Score, Grade**, and **Completion Status** fields as appropriate.
16. The default score of “0” should be deleted unless that score was earned through an assessment given during the course.

    NOTE: The Start Date and Date Marked Complete will auto-populate based on the dates entered in step 7. The dates can be manually adjusted if the learners did not complete the training on the same date.
17. **NOTE:** Learners can be deleted by clicking the **Delete** link in the *Actions* column.
18. When all learners have been added and data fields updated, click **Done** at the bottom of the screen.



19. Search for the transcript item on one of learner’s transcripts to be sure that the addition was completed successfully.

LEARNER REGISTRATIONS AND ORDERS

Local Learning Administrators have the ability to create orders which register learners for courses found in the LMS catalog.

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

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

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

Follow the instructions below to register a learner for a course offering.

CREATE AN ORDER FOR A LEARNER

1. Select **Registrar's Desk** from the Go To: drop-down menu.

2. Uncheck the "Include Contact as Learner" **checkbox**. If the contact is being registered for the offering, leave it checked and proceed to step 3.

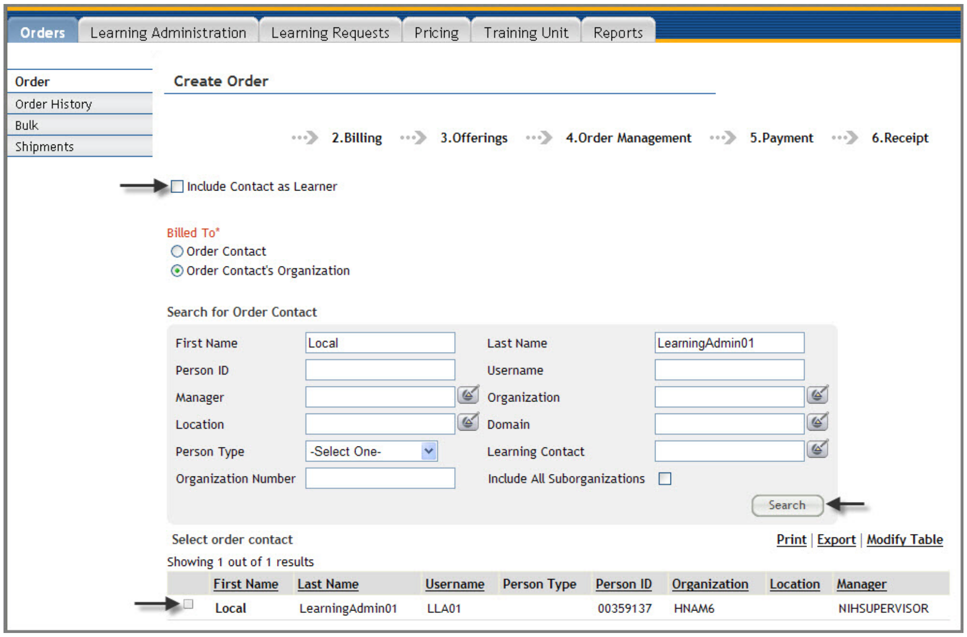
   NOTE: It is recommended that the person placing the order is listed as the contact.

3. Enter the contact's first and last name in the corresponding search fields then click **Search**. You may use additional search fields to help locate the contact.

   NOTE: It is recommended that the person placing the order is identified as the contact for the order.

4. Click the **checkbox** to the left of the contact's first name.

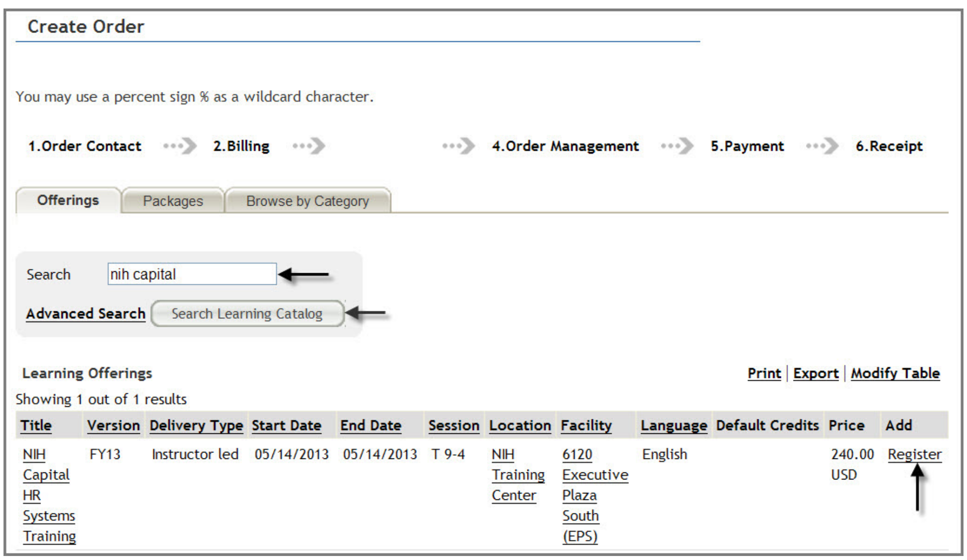
Local Learning Administrator



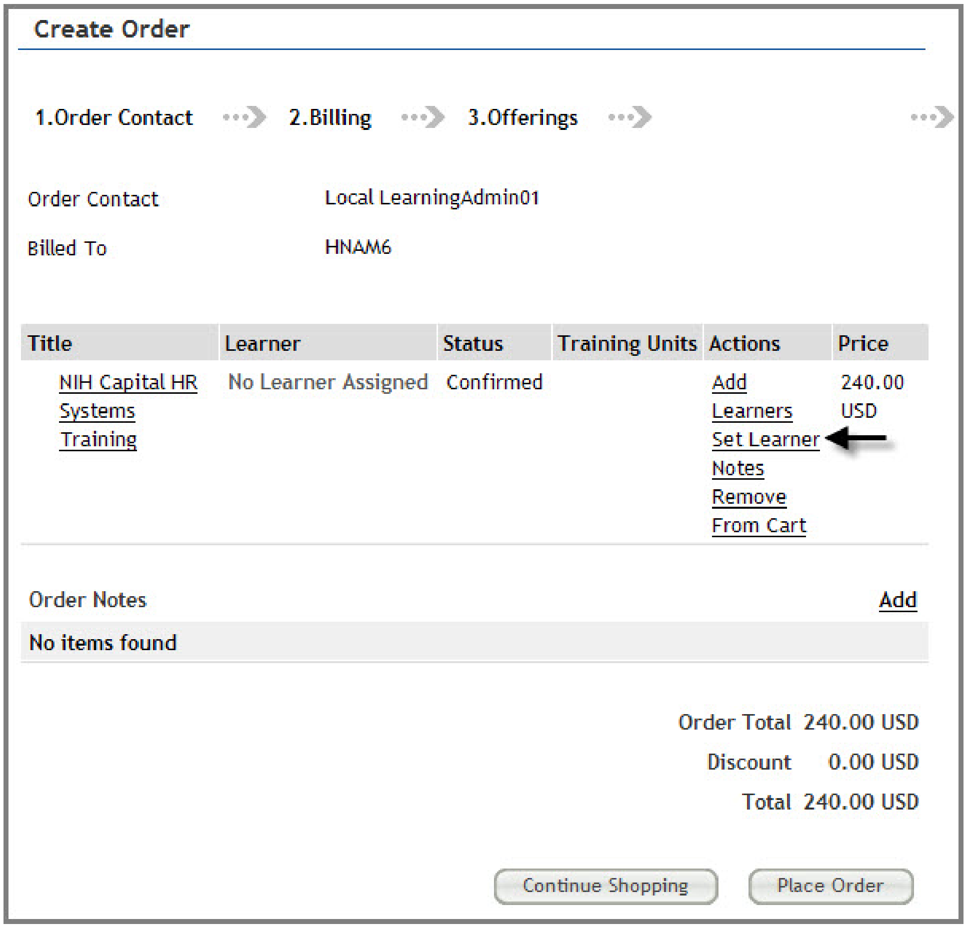
5. Enter the title of the course into the search field then click **Search Learning Catalog**.

   NOTE: Many NIH courses are prefixed with NIH in the title. You may also try using the **Advanced Search** or **Browse by Category** options to help locate a course.

6. Click **Register** to the right of the correct offering in the Add column.



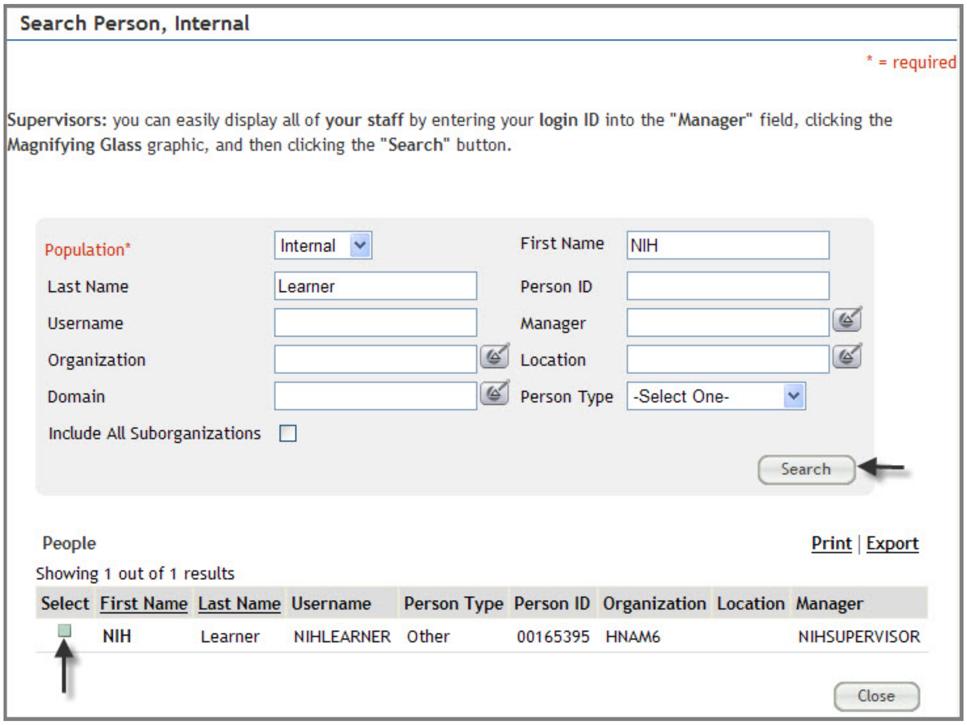
8. Click **Set Learner** in the Actions column to search for the learner you want to register.



NOTE: If the Set Learner option is not there, it is the result of not unchecking the checkbox in step 2.

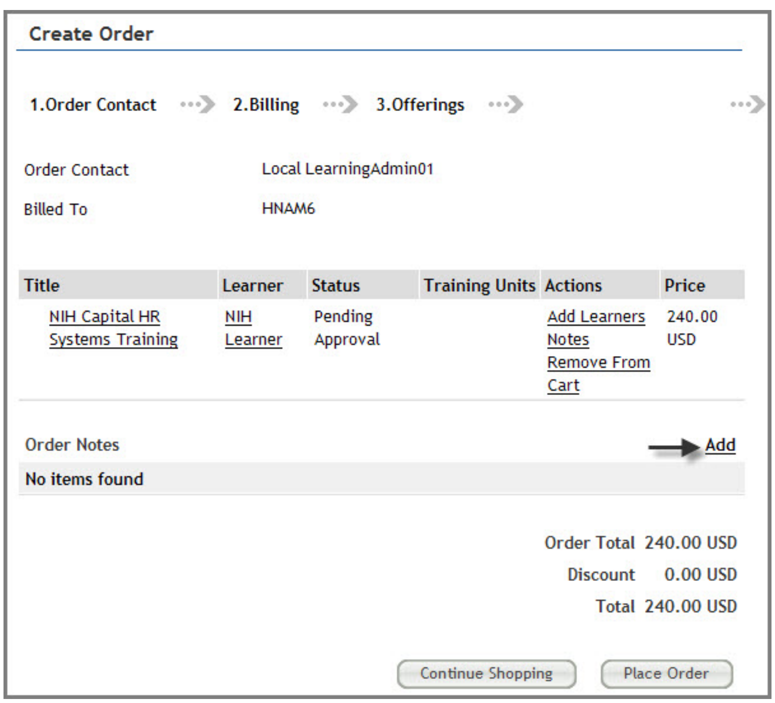
Local Learning Administrator

10. Enter the name (or other known criteria) in the search fields and click **Search**.
11. Click the **checkbox** to the left of the learner's name.

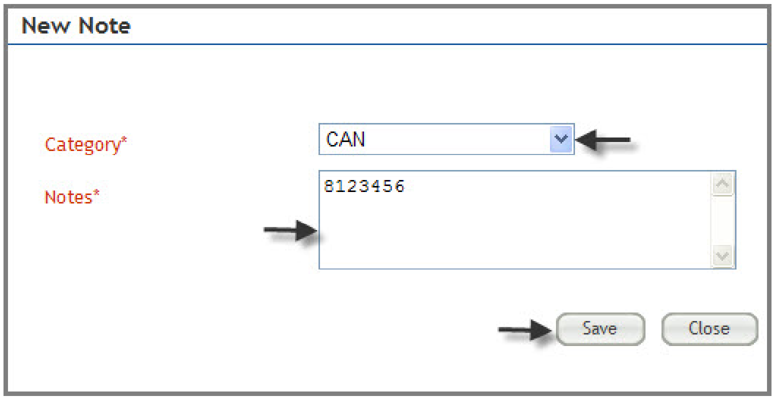


IMPORTANT: Courses that have tuition **must contain a valid CAN** to ensure the proper obligation of funds in NBS. A valid CAN must be added and verified by the Additional Approver for Orders as part of the order approval process.

12. To add the CAN, click the **Add link** in the Order Notes section.



13. Select CAN from the **Category pull-down menu**.
14. Enter the 8-digit CAN that will be charged for this course in the **Notes field**.
15. Click **Save**.

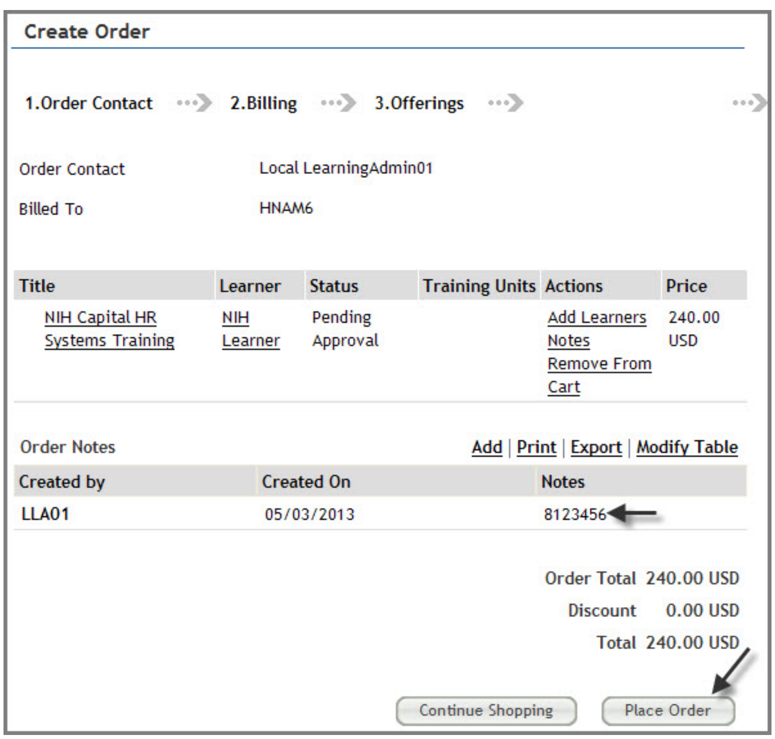


16. The CAN will be displayed in the Order Notes section.

    NOTE: If the CAN was entered incorrectly or needs to be changed, repeat steps 12 – 15 to make the correction.

    IMPORTANT! The CAN will apply to all learners on the order. If a specific CAN for one or more learners is to be designated, please refer to the Specifying a CAN by Individual Learner section of this manual.

17. Click **Place Order**.

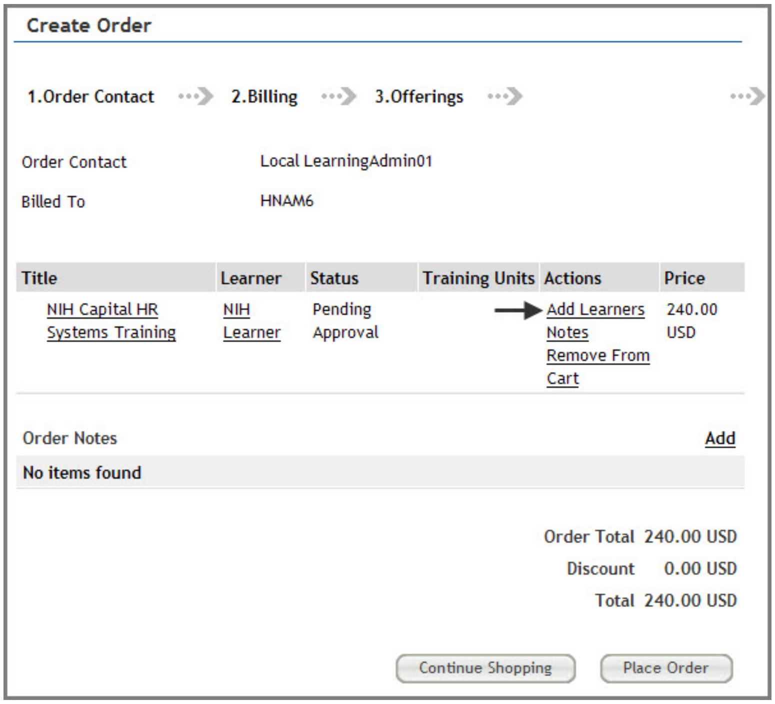


Local Learning Administrator

18. A Registration Confirmation screen with the details of the order will be displayed. The learner will immediately be notified as well as any managers for courses requiring manager approval.

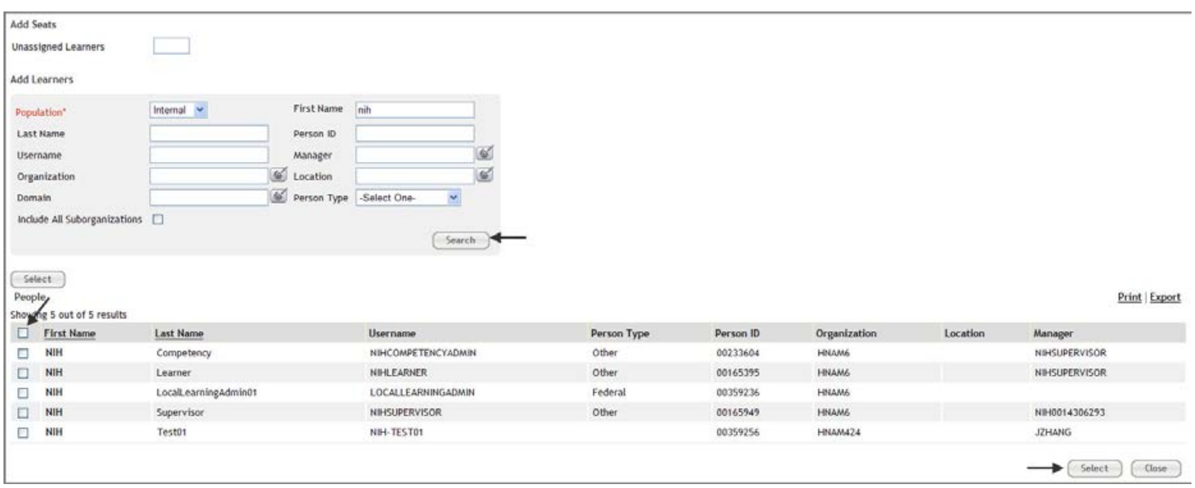
ADDING ADDITIONAL LEARNERS (OPTIONAL)

1. While viewing the Create Order screen, click the **Add Learners link** in the Actions column.



2. Enter search criteria for additional learners then click **Search**.
3. Click the checkboxes to the left of the corresponding learners you wish to register.

   NOTE: You may select multiple learners by clicking multiple checkboxes or you may select all the learners being viewed by selecting the checkbox in the column header.



4. Click **Select**.
5. All of the learners selected will now be added to the order.

1.Order Contact ··· 2.Billing ··· 3.Offerings ···

Order Contact Local LearningAdmin01

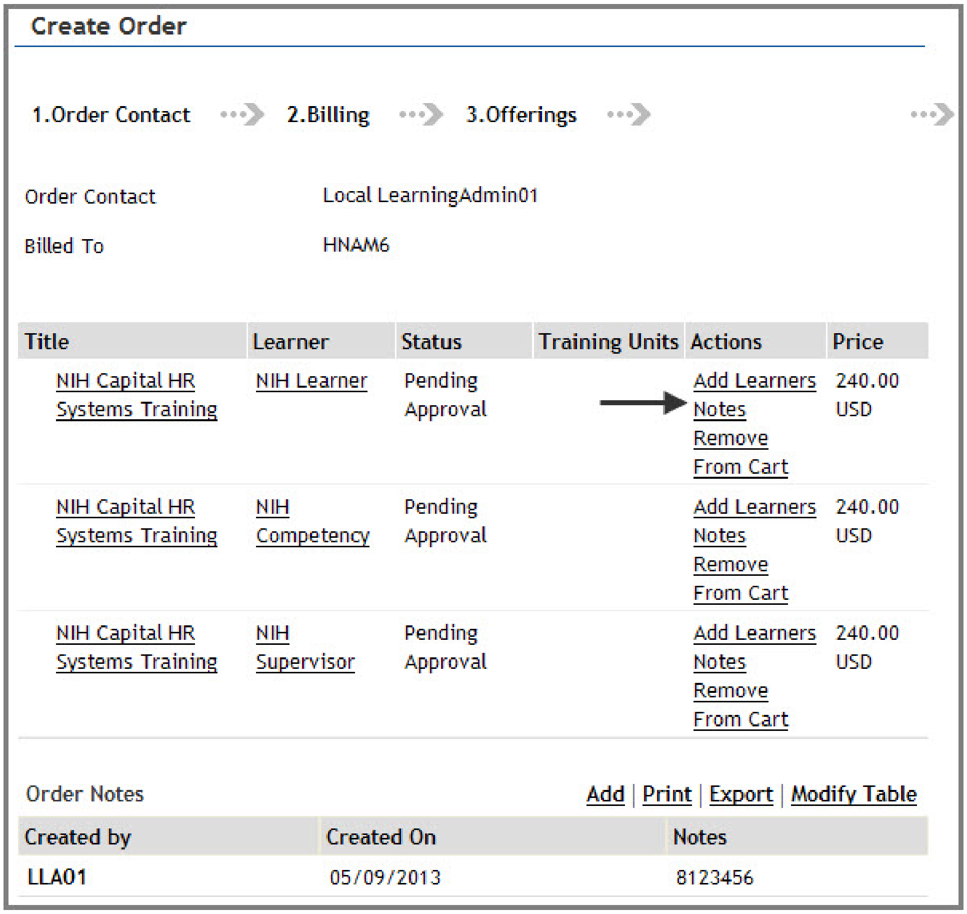
Billed To HNAM6

Title	Learner	Status	Training Units	Actions	Price
NIH Capital HR Systems Training	NIH Learner	Pending Approval		Add Learners Notes Remove From Cart	240.00 USD
NIH Capital HR Systems Training	NIH Competency	Pending Approval		Add Learners Notes Remove From Cart	240.00 USD
NIH Capital HR Systems Training	NIH Supervisor	Pending Approval		Add Learners Notes Remove From Cart	240.00 USD

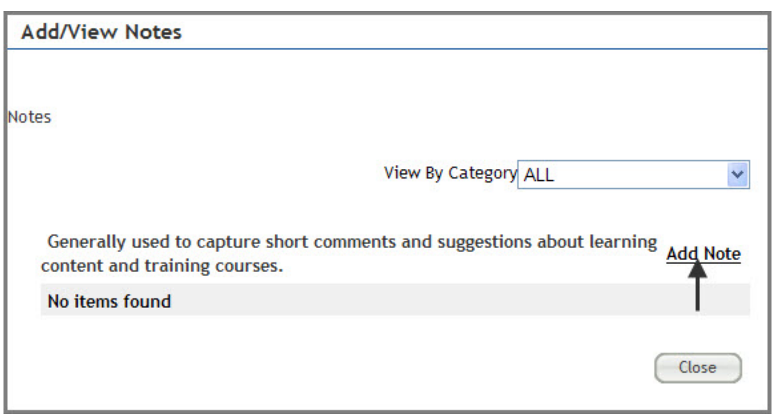
SPECIFYING A CAN BY INDIVIDUAL LEARNER (OPTIONAL)

If an order is created with multiple learners, an option is available to specify the CAN each individual learner should have charged for their training. It is important to note that each CAN that is specified as outlined in the steps below will take precedence over the steps to enter a CAN outlined in the Create An Order For A Learner section of this manual.

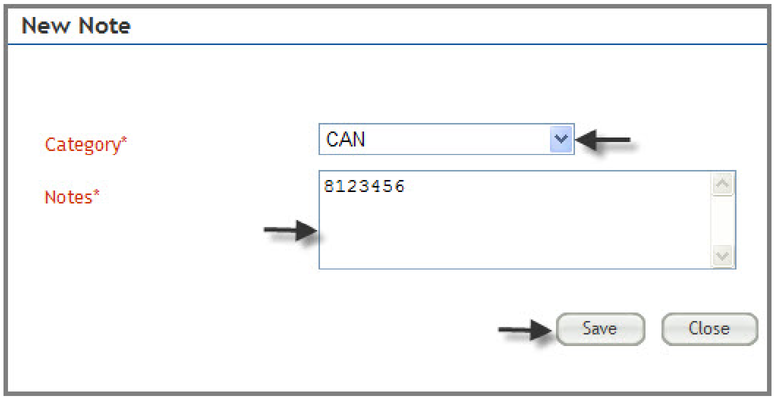
1. While viewing the Create Order screen, click the **Notes link** in the Actions column.



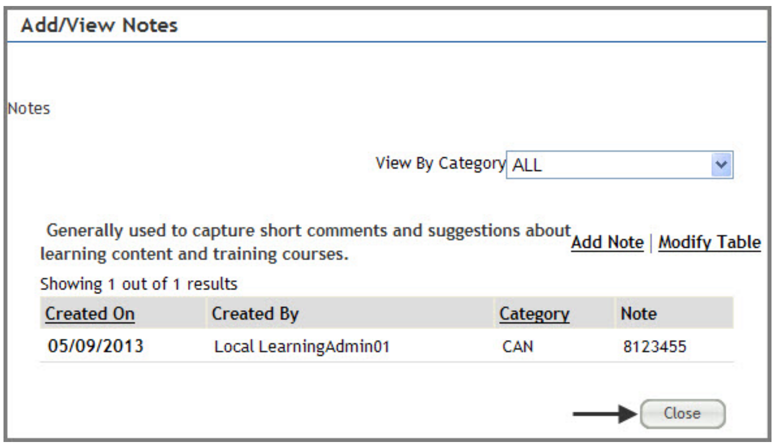
2. Click the **Add Note link** in the popup window.



3. Select CAN from the **Category pull-down menu**.
4. Enter the CAN into the **Notes field**.
5. Click **Save**.



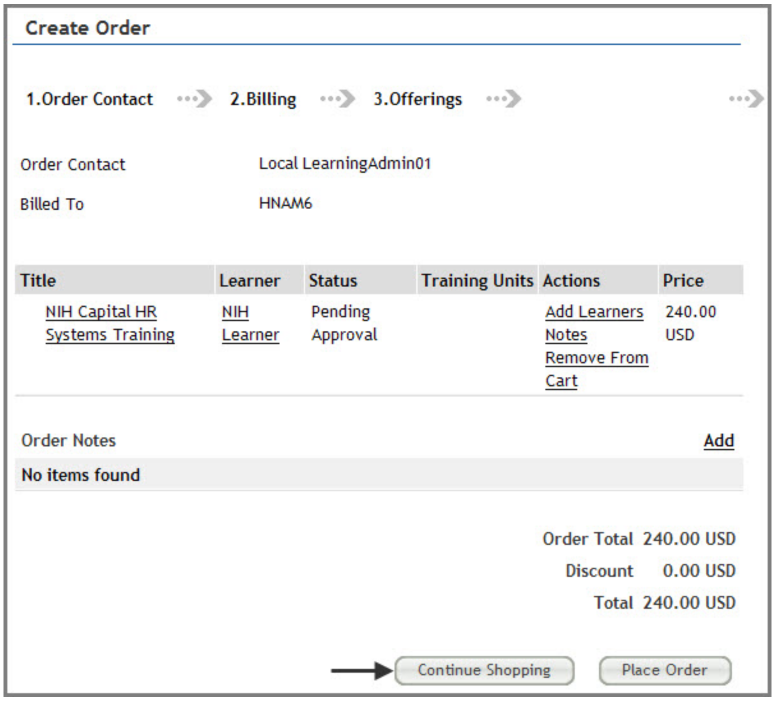
6. Click **Close** in the popup window.



7. The CAN entered in this area will be used instead of the CAN listed in the Order Notes section.

ADDING ADDITIONAL COURSES TO THE ORDER (OPTIONAL)

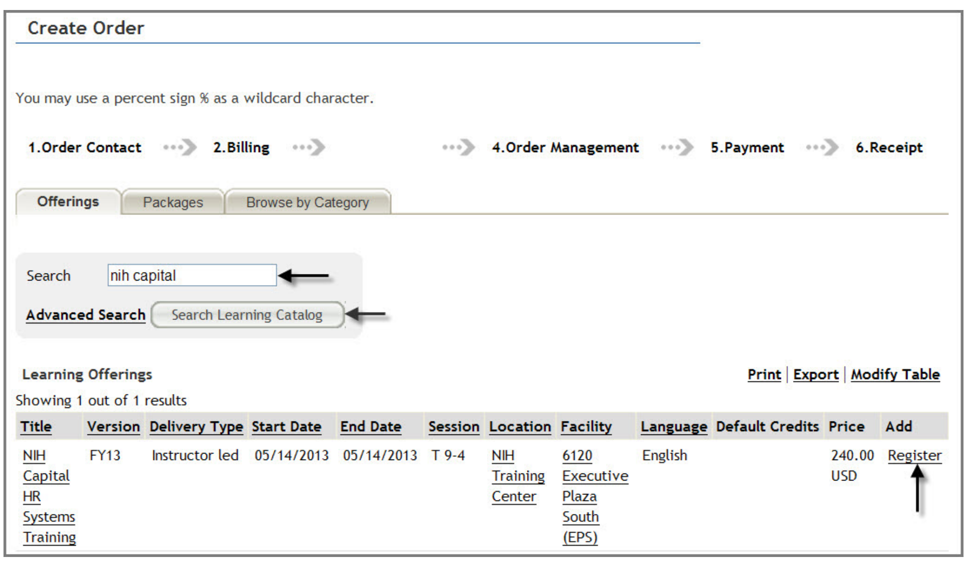
1. While viewing the Create Order screen, click the **Continue Shopping** button.



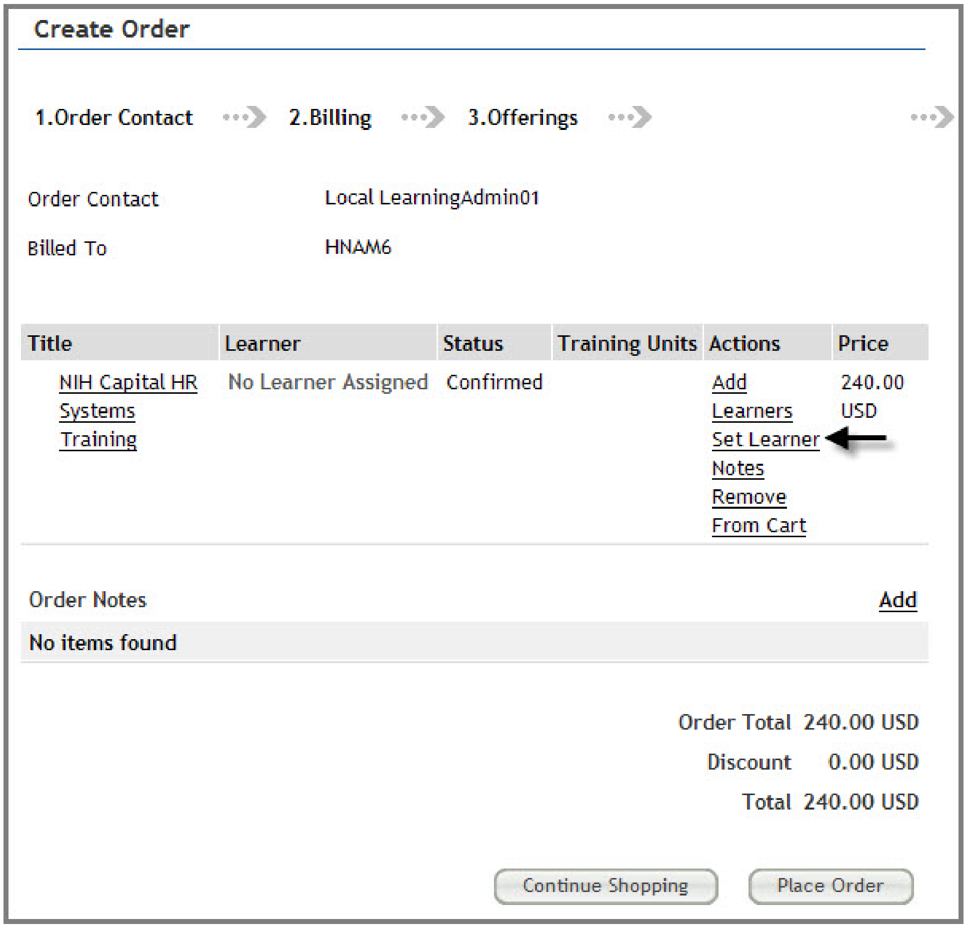
2. Enter the title of the course into the search field then click **Search Learning Catalog**.

   NOTE: Many NIH courses are prefixed with NIH in the title. You may also try using the **Advanced Search** or **Browse by Category** options to help locate a course.

3. Click **Register** to the right of the correct offering in the Add column.

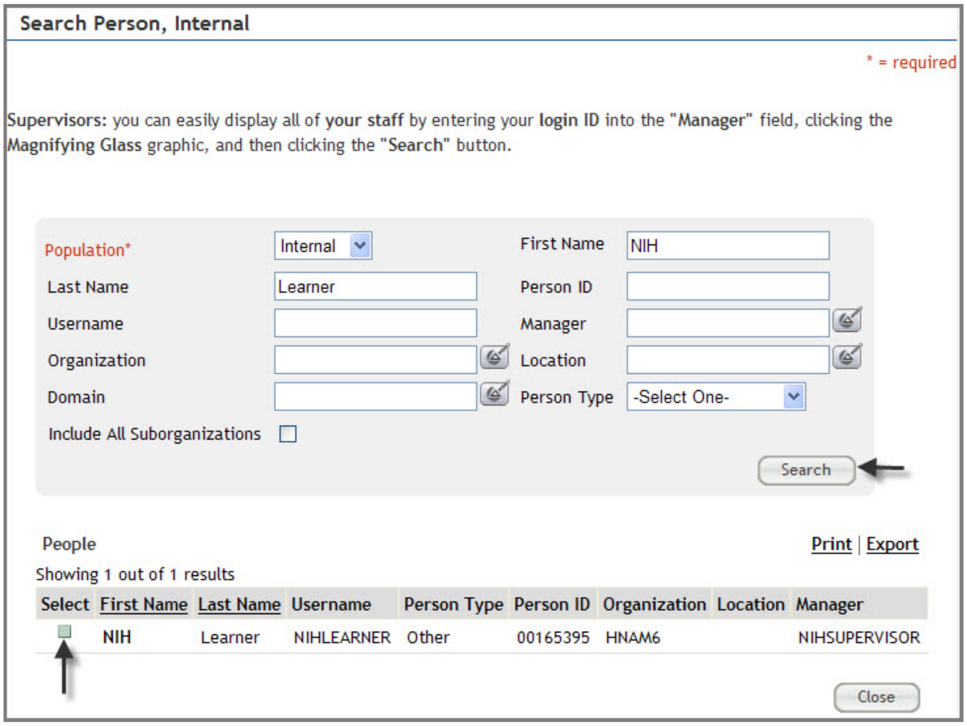


5. Click **Set Learner** in the Actions column to search for the learner you want to register.



Local Learning Administrator

6. Enter the name (or other known criteria) in the search fields and click **Search**.
7. Click the **checkbox** to the left of the learner's name.



8. The learner will now be added to the order for the course that was selected.

SEARCHING FOR AND MODIFYING ORDERS

Local Learning Administrators can modify orders that were created by administrators in their organization. Modifying orders includes the following:

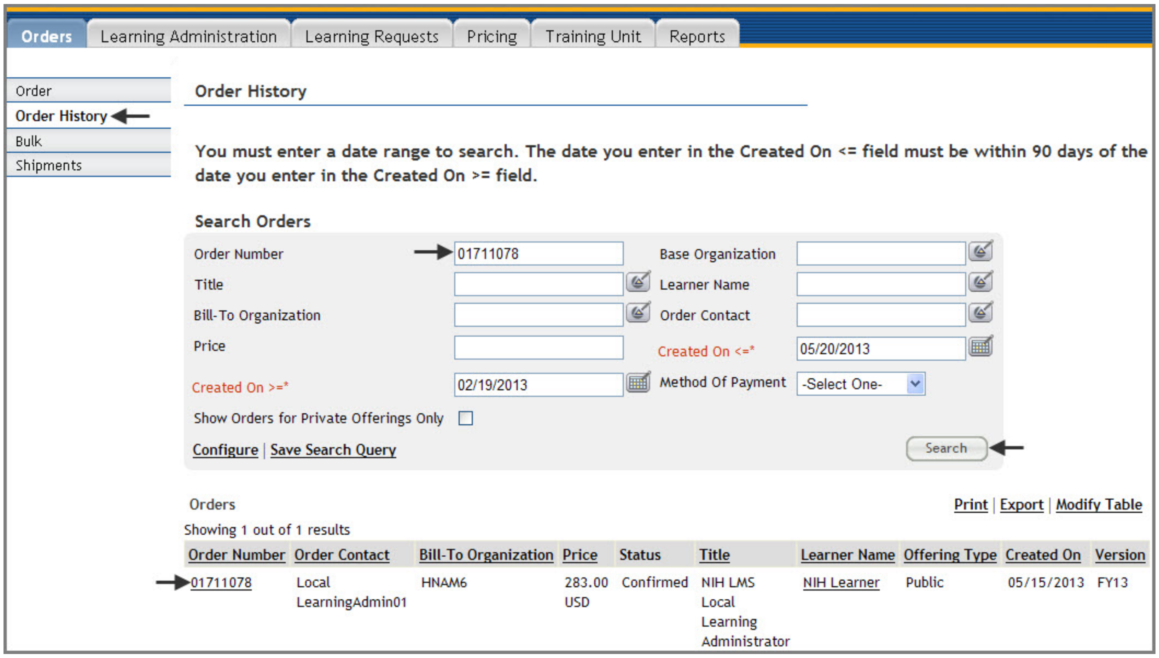
- Updating or entering a CAN.
- Substituting one learner for another learner.
- Rescheduling a learner from one offering date to another offering date.
- Cancelling a learner's registration.

Follow the instructions below search for and modify an existing LMS order.

1. Select **Registrar's Desk** from the Go To pull-down menu.

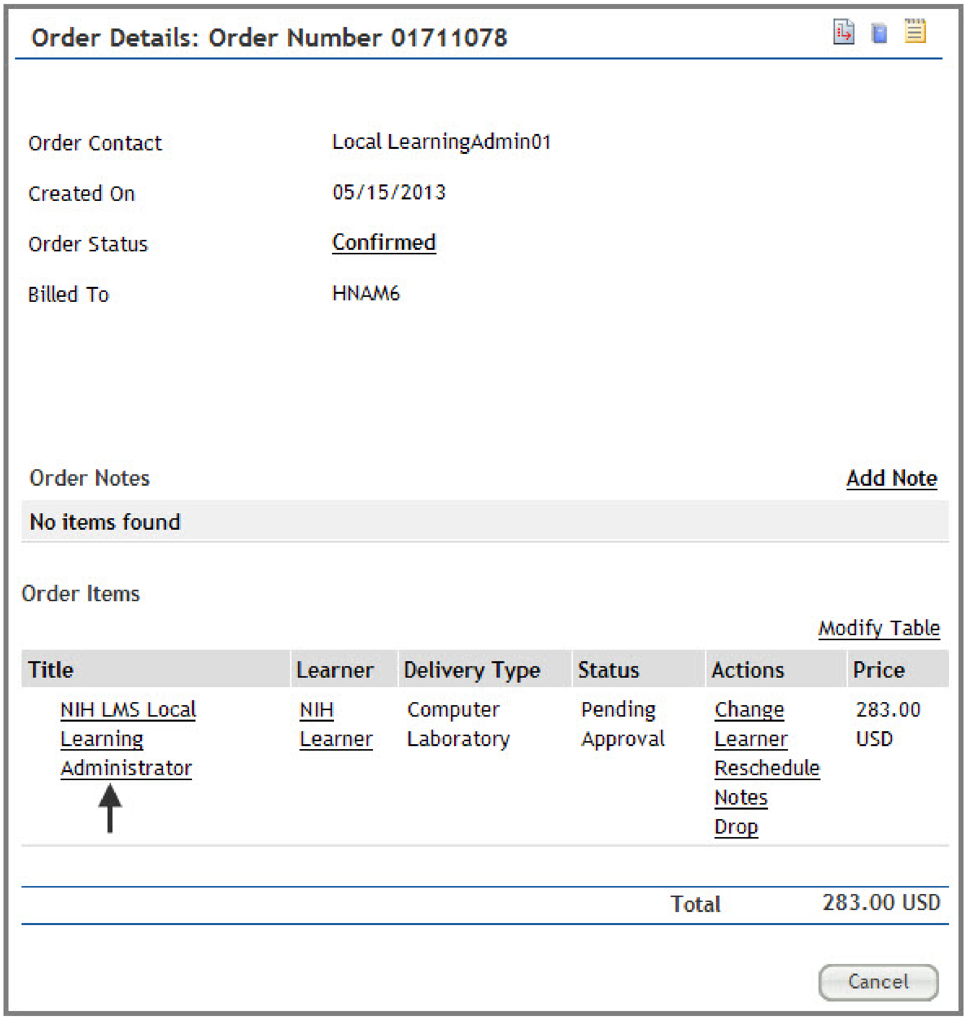
2. Click **Order History** from the left vertical navigation menu.
3. Enter search criteria in the appropriate fields and click **Search**.

4. Using the Order Number is the most accurate way to find an existing order. The Order Number may be found in confirmation and approval notifications sent by the LMS.
5. Click on the **Order Number** link for the order that will be modified.



Local Learning Administrator

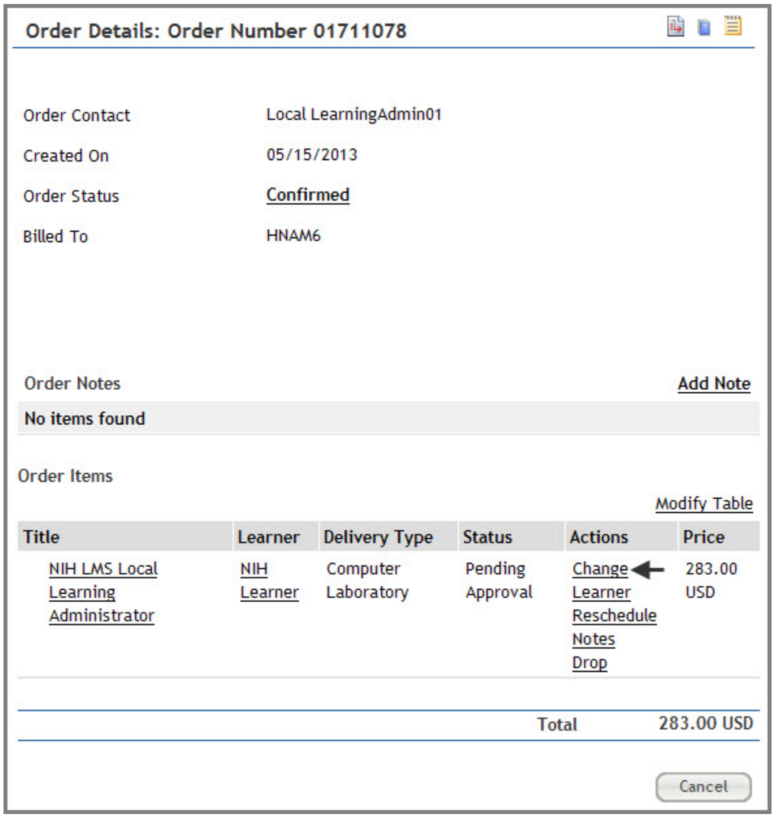
6. From the Order Details page, you may view more details about the following:
   - Click the **Title** link to get more information about the course.
   - Click the **Learner** link to view details about the learner.



CHANGE A LEARNER ON AN ORDER

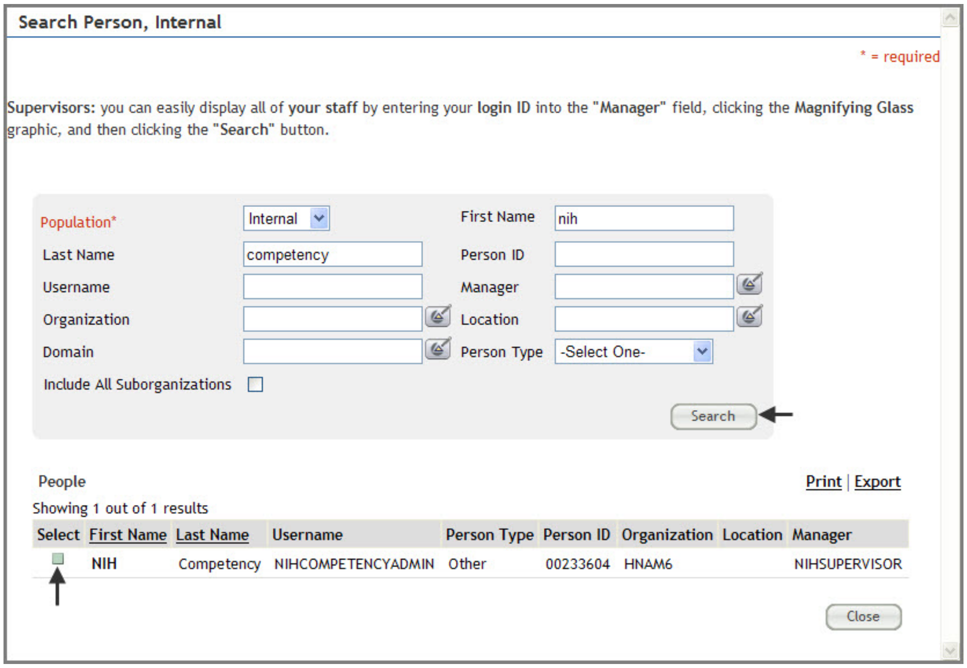
You may substitute a learner for another on an order by using the Change Learner action. Changing the learner will not trigger any notifications for the old learner and therefore the Local Learning Administrator should send a notification to them. Both participants should be notified.

1. While viewing an order, click the **Change Learner link** in the Actions column.

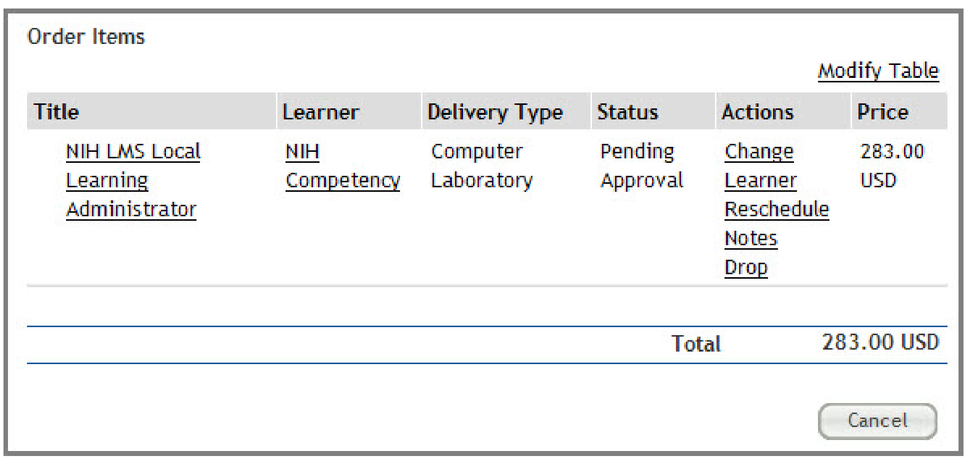


Local Learning Administrator

2. Enter search criteria for the new learner then click **Search**.
3. Click the **checkbox** located to the left of the new learner's first name.



4. The new learner will now be located on the order in the Order Items section of the Order Details screen.



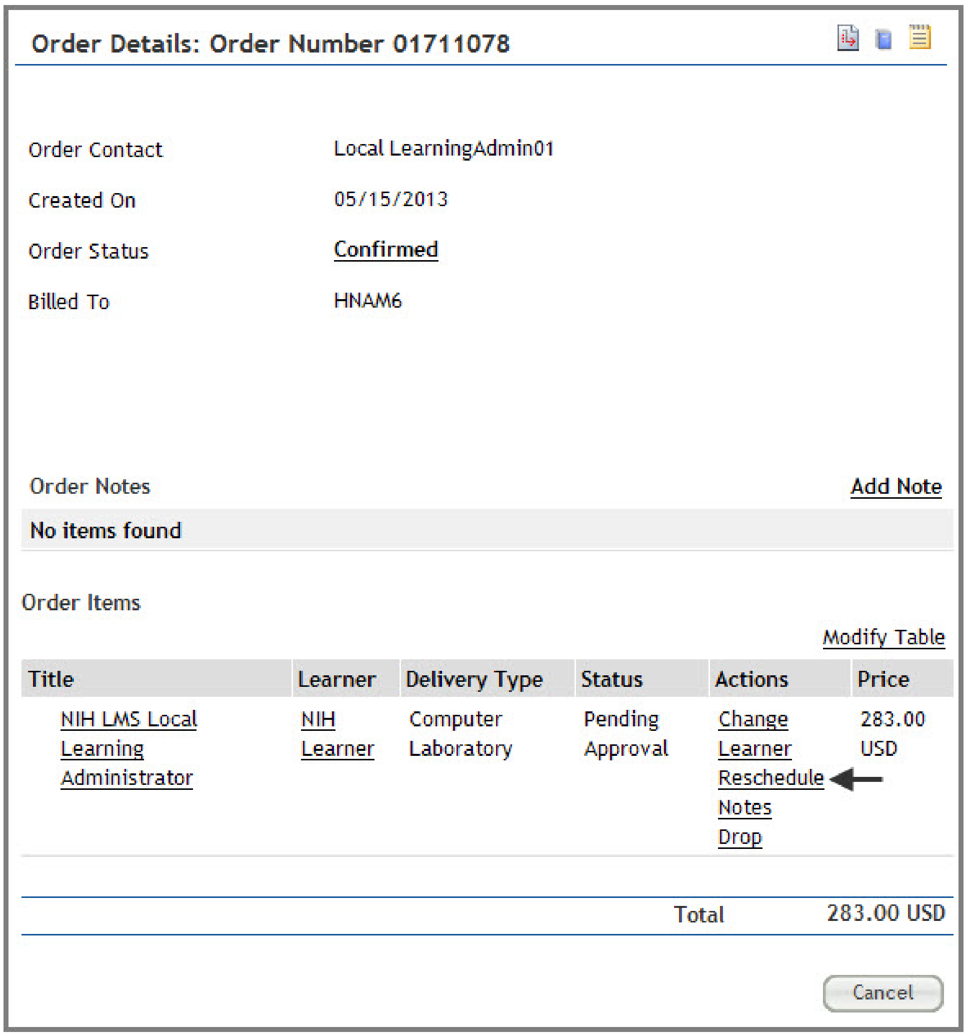
NOTE: If manager approval is required for the offering, the registration will have a pending status and the approval chain cycle will be started.

RESCHEDULE A LEARNER FROM ONE OFFERING TO ANOTHER

Local Learning Administrators can reschedule a learner from one offering to another offering as long as there are no rescheduling restrictions put in place by the course owner.

> IMPORTANT! NIH Training Center courses may have rescheduling restrictions on their courses preventing Local Learning Administrators from using the reschedule function. Contact the course owner for details on how to complete the reschedule function.

1. While viewing the Order Details screen, click the **Reschedule link** in the Actions column.



Order Details: Order Number 01711078

Order Contact: Local LearningAdmin01
Created On: 05/15/2013
Order Status: Confirmed
Billed To: HNAM6

Order Notes — Add Note

No items found

Order Items

Modify Table

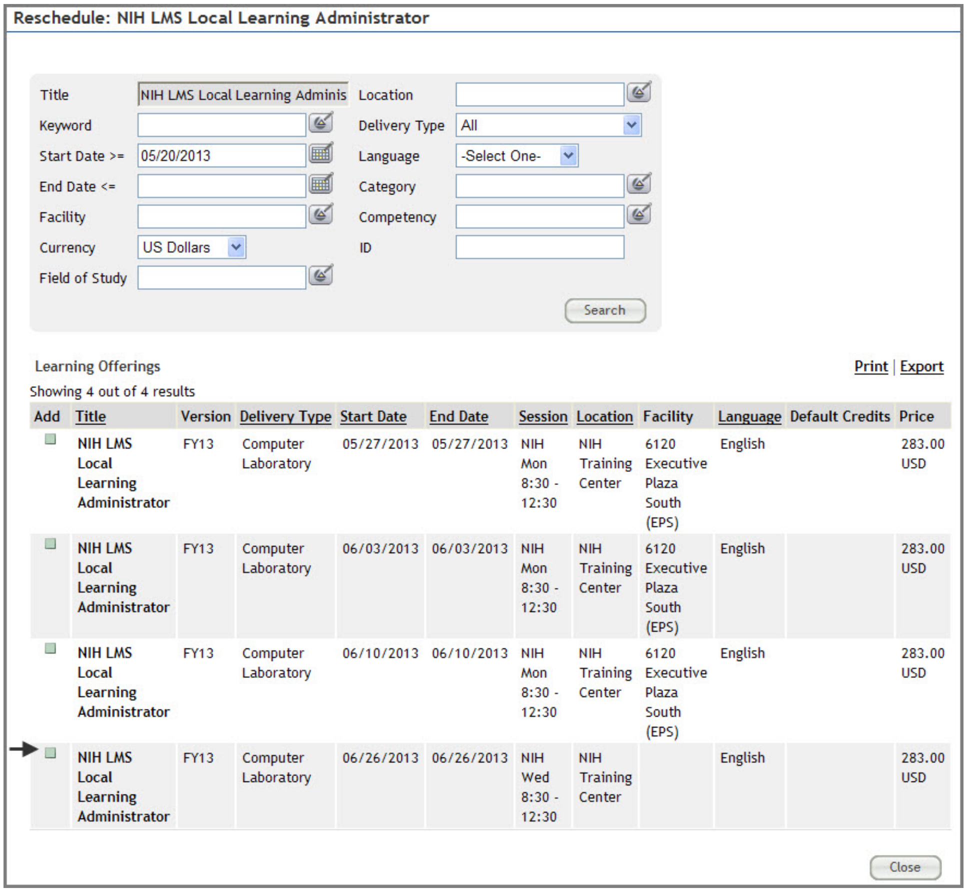
Title	Learner	Delivery Type	Status	Actions	Price
NIH LMS Local Learning Administrator	NIH Learner	Computer Laboratory	Pending Approval	Change Learner Reschedule Notes Drop	283.00 USD

Total 283.00 USD

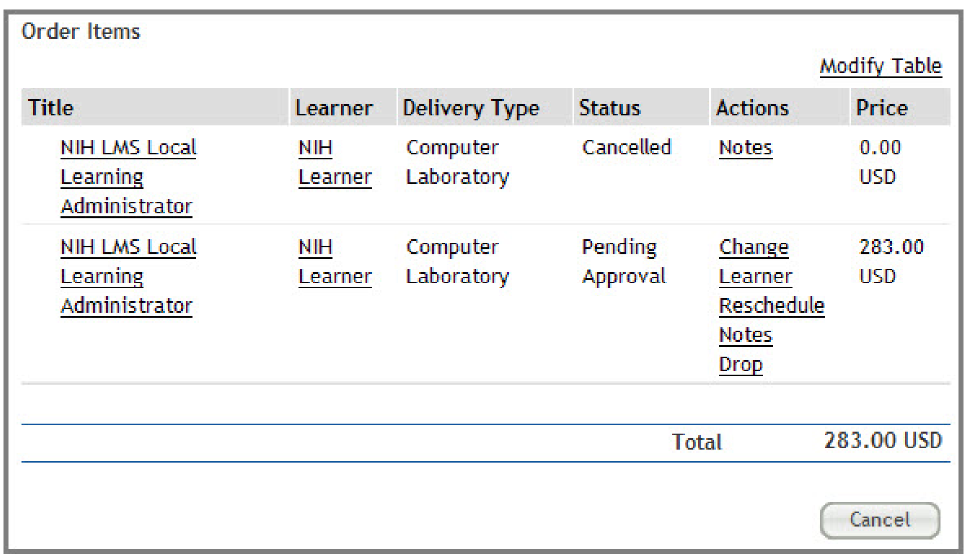
Cancel

Local Learning Administrator

2. Click the **checkbox** associated with the offering the learner will be rescheduled to.



3. The learner is now rescheduled to the new offering.



NOTE: The LMS will send the learner (managers and approvers when appropriate) a cancellation notification for the old offering followed by a registration notification for the new offering.

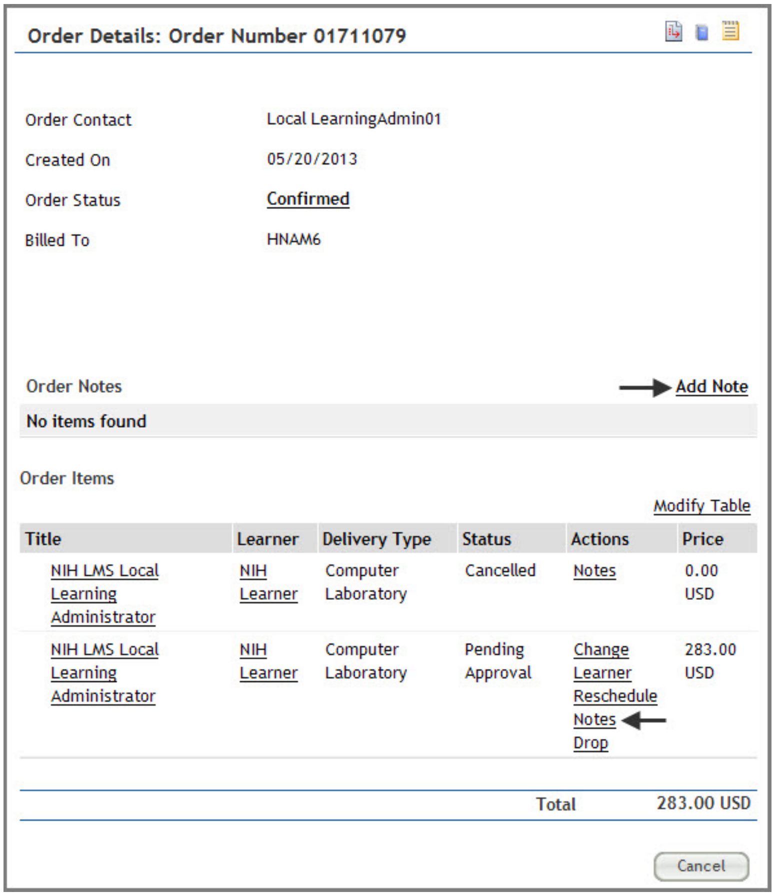
It is recommended that learners and Local Learning Administrators contact the NIH Training Center to reschedule courses offered by the NIHTC.

ADDING A CAN TO AN ORDER

Local Learning Administrators may add notes to an order at any time. All notes are viewable by administrators and learners that are or the order. It is important to note that the CAN used for payment of NIH Training Center courses is entered as a note.

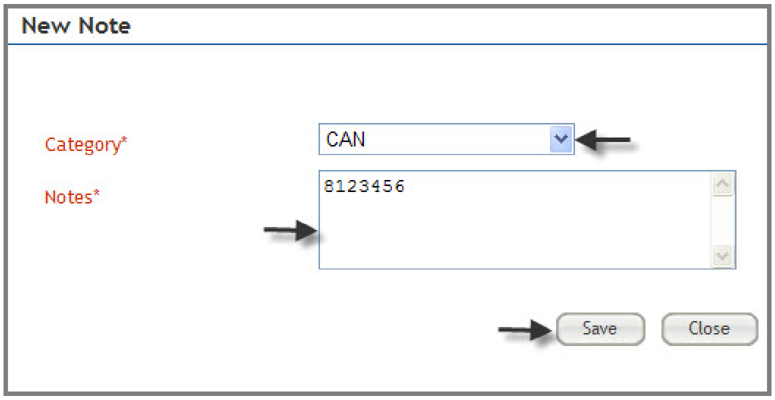
Follow the instructions below to add a note, including a CAN, to an order.

1. While viewing an order, click the **Add Note link** in the Order Notes section of the Order Details screen.



Local Learning Administrator

2. Select CAN from the **Category pull-down menu**.
3. Enter the 8-digit CAN that will be charged for this course in the **Notes field**.
4. Click **Save**.

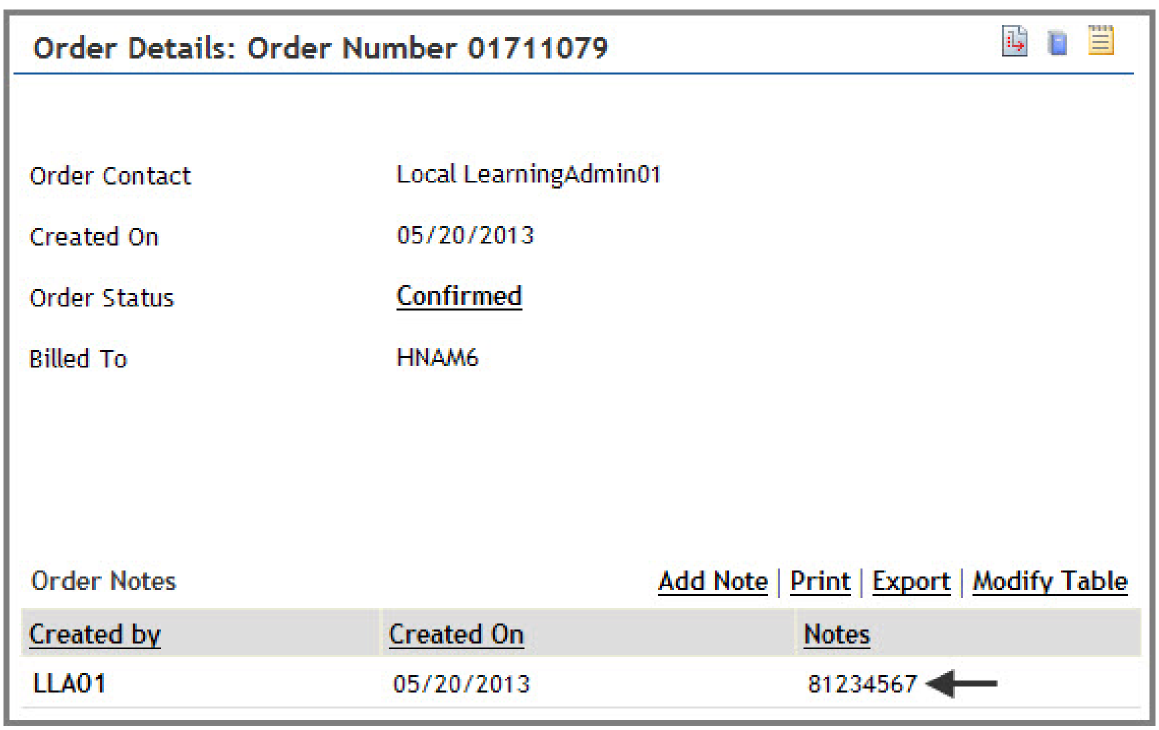


NOTE: Other notes can be entered under different categories as needed.

5. The CAN will be displayed in the Order Notes section of the Order Details screen.

NOTE: If the CAN was entered incorrectly or needs to be changed, repeat steps 1 - 5 to make the correction.

IMPORTANT! The CAN will apply to all learners on the order. If a specific CAN for one or more learners is to be designated, please refer to the Specifying a CAN by Individual Learner section of this manual.

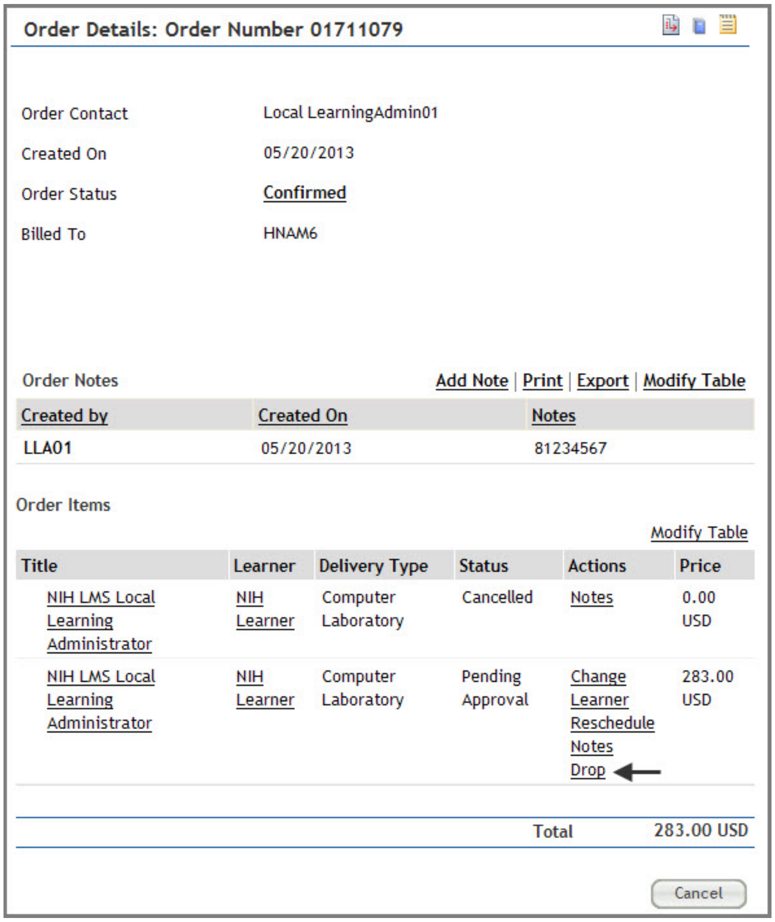


CANCEL A LEARNER'S REGISTRATION

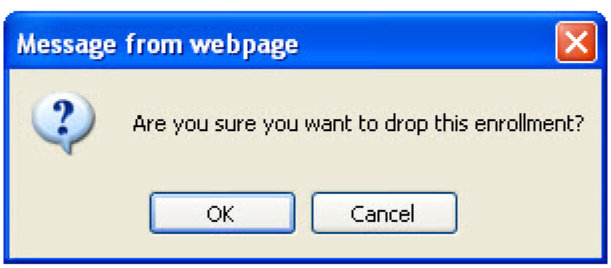
Local Learning Administrators can cancel a registration for a learner as long as the course owner has not placed any cancellation restrictions on the offering.

Follow the instructions below to cancel an offering.

1. While viewing the Order Details Screen, click the **Drop link** in the Actions column.



2. Click the **OK** button on the confirmation popup window.



Local Learning Administrator

3. The learner's registration will now be cancelled and the LMS will send a notification to the learner. (Managers and approvers will also be notified for offerings that require approval.)

Order Items

Modify Table

Title	Learner	Delivery Type	Status	Actions	Price
NIH LMS Local Learning Administrator	NIH Learner	Computer Laboratory	Cancelled	Notes	0.00 USD
NIH LMS Local Learning Administrator	NIH Learner	Computer Laboratory	Cancelled	Notes	0.00 USD
			Total		0.00 USD

Cancel

REPORTS

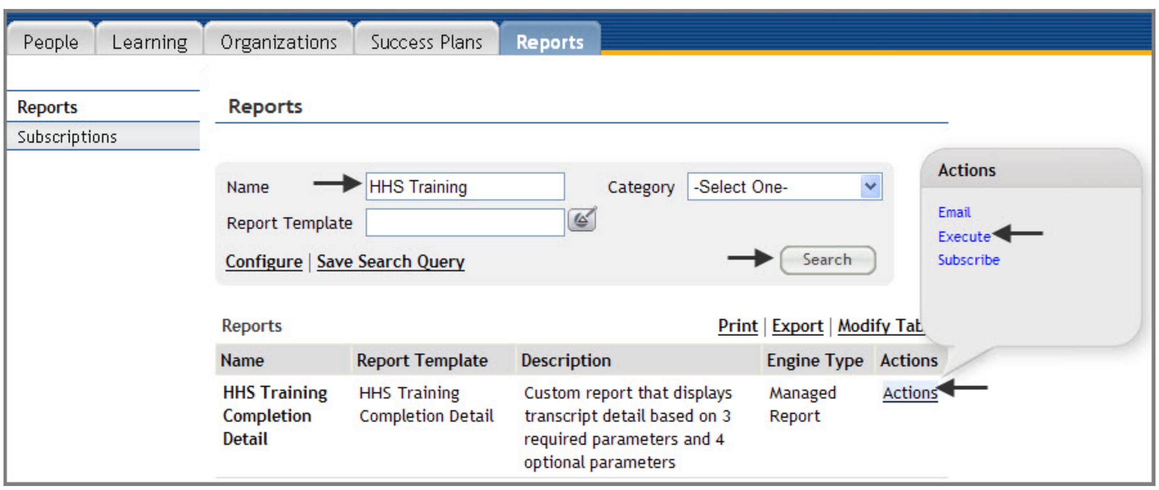
Local Learning Administrators have access to a variety of reports in the LMS. Reports can be generated, exported, printed, emailed and subscribed to if desired. The reports that are available vary slightly between the roles of Human Capital Administrator – People and Registrar's Desk.

Follow the instructions below to run a report in the LMS.

GENERATE A REPORT

1. Select the **Human Capital Administrator – People** or **Registrar** role in the drop-down **Go To** menu.

2. Click on the **Reports** tab.
3. Enter the name of the report in the **Name field.**
4. Click **Search**.
5. Click the **Actions link** in the Actions column.
6. Click **Execute** in the popup window.



NOTE: To see a list of all the available reports in the LMS, click the Search button without entering any other criteria.

All reports are assigned to categories. To view all of the reports in a category, select the category from the category pull-down menu and then click the Search button.

The HHS Custom Reports Category contains all of the reports that have been custom designed for NIH and all of HHS.

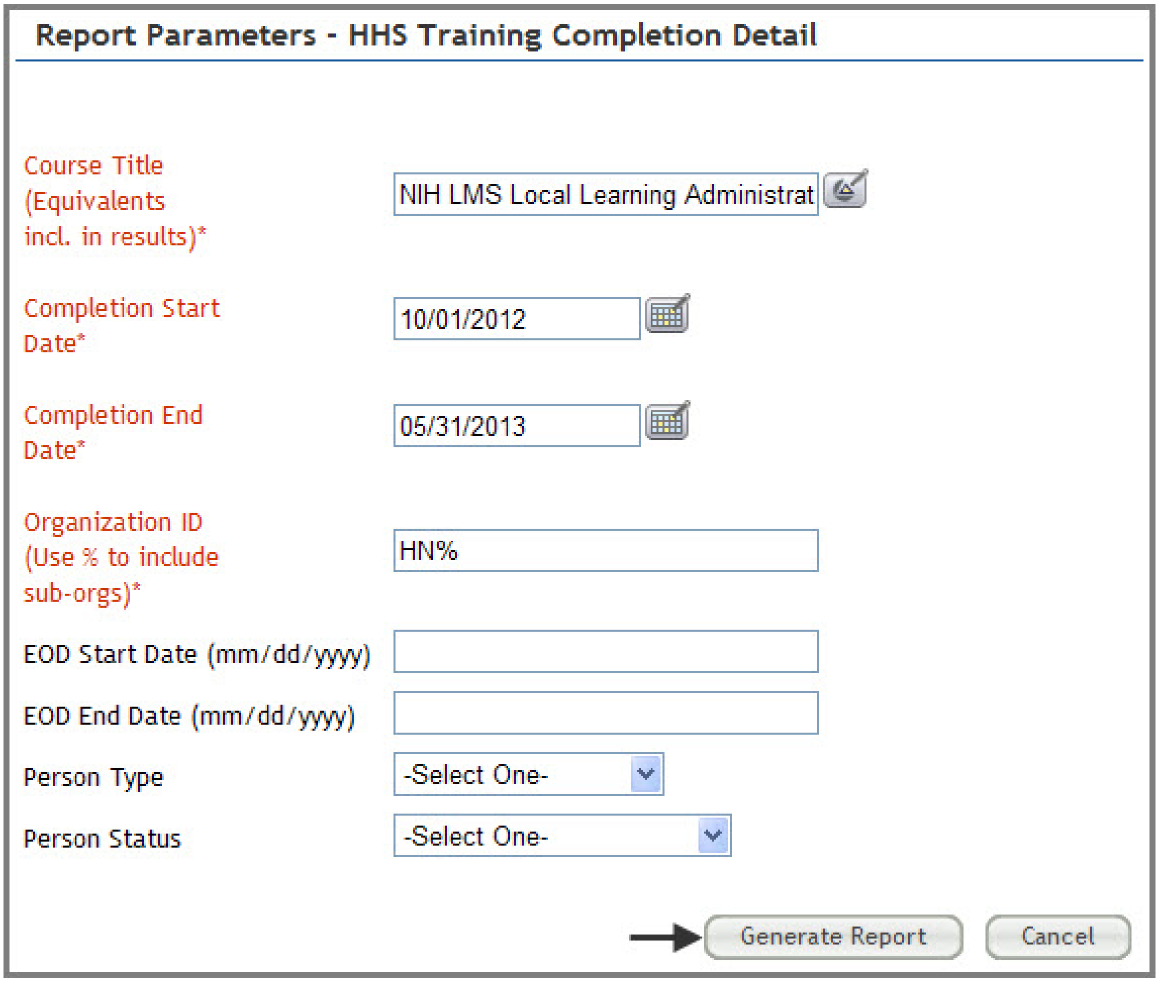
Local Learning Administrator

7. Enter report parameters into the appropriate fields.

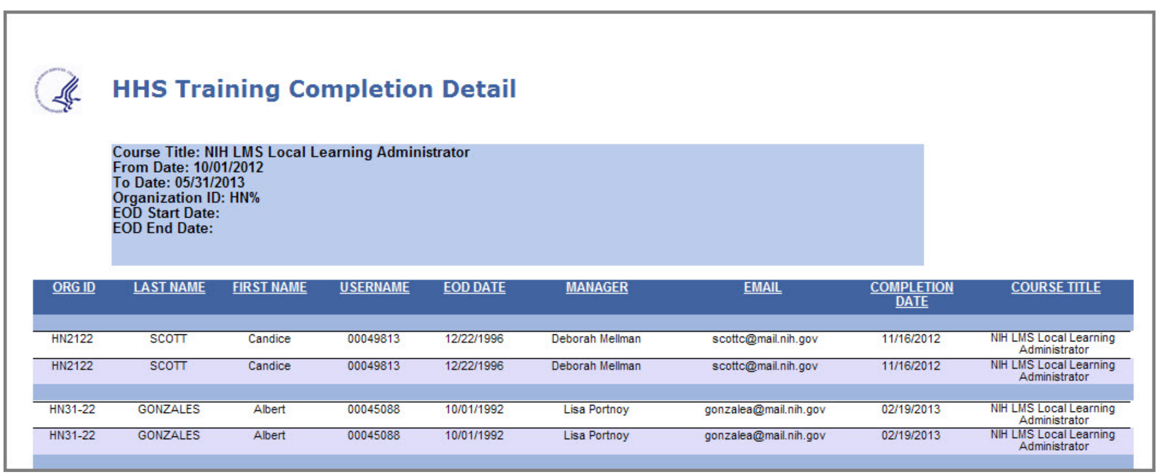
   IMPORTANT! Fields labeled with red letters are required in order to run the report.

   NOTE: Many reports will use the organization code as a required parameter. Use the % symbol to include sub-organizations.

8. Click **Generate Report**.



9. You will now see a report similar to what is shown in the graphic below.



HHS Training Completion Detail

Course Title: NIH LMS Local Learning Administrator
From Date: 10/01/2012
To Date: 05/31/2013
Organization ID: HN%
EOD Start Date:
EOD End Date:

ORG ID	LAST NAME	FIRST NAME	USERNAME	EOD DATE	MANAGER	EMAIL	COMPLETION DATE	COURSE TITLE
HN2122	SCOTT	Candice	00049813	12/22/1996	Deborah Mellman	scottc@mail.nih.gov	11/16/2012	NIH LMS Local Learning Administrator
HN2122	SCOTT	Candice	00049813	12/22/1996	Deborah Mellman	scottc@mail.nih.gov	11/16/2012	NIH LMS Local Learning Administrator
HN31-22	GONZALES	Albert	00045088	10/01/1992	Lisa Portnoy	gonzalea@mail.nih.gov	02/19/2013	NIH LMS Local Learning Administrator
HN31-22	GONZALES	Albert	00045088	10/01/1992	Lisa Portnoy	gonzalea@mail.nih.gov	02/19/2013	NIH LMS Local Learning Administrator

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.

Follow the instructions below to export an LMS report.

1. While viewing an LMS report, click the Export button in the Reports Menu Bar in the upper left-hand corner.

2. Select the file format you want to export the report data into from the **File Format pull-down menu**.

   NOTE: The following two formats are the most commonly used:

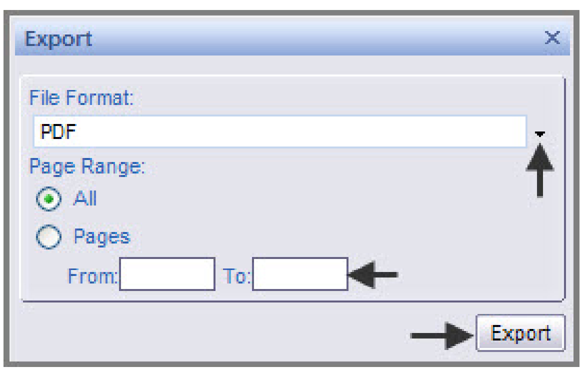
   - The **Adobe Acrobat (PDF)** format will export a report ready for printing or to be saved and emailed.
   - The **Microsoft Excel 97-2000 – Data Only (XLS)** format will export a report ready to open in MS Excel so you can work with the data.

3. Select the range of pages that should be exported.

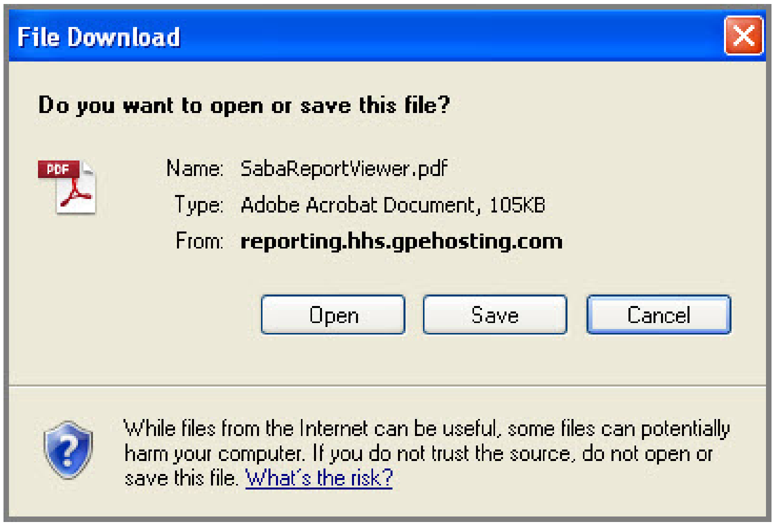
   a. All pages in the report will be exported unless a specific page range is defined.

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

4. Click **Export**.

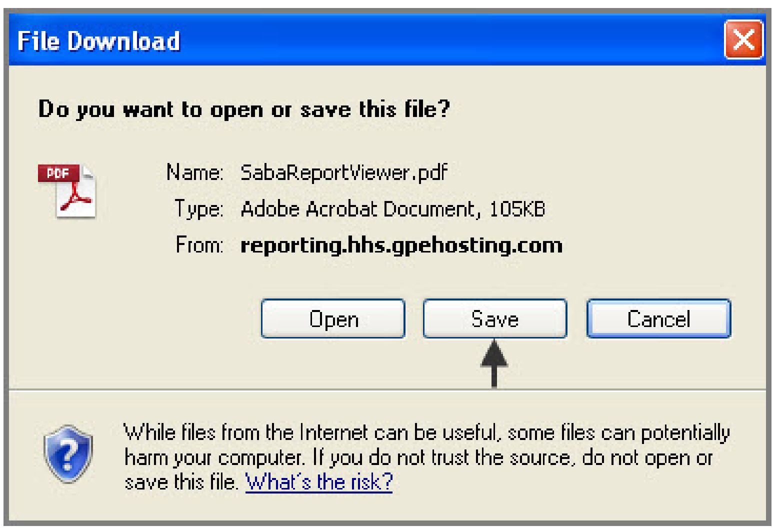


5. You will be prompted to open or save the file.
    a. Clicking **Save** will allow you to save the file before opening.
    b. Clicking **Open** will open the data in the chosen format.

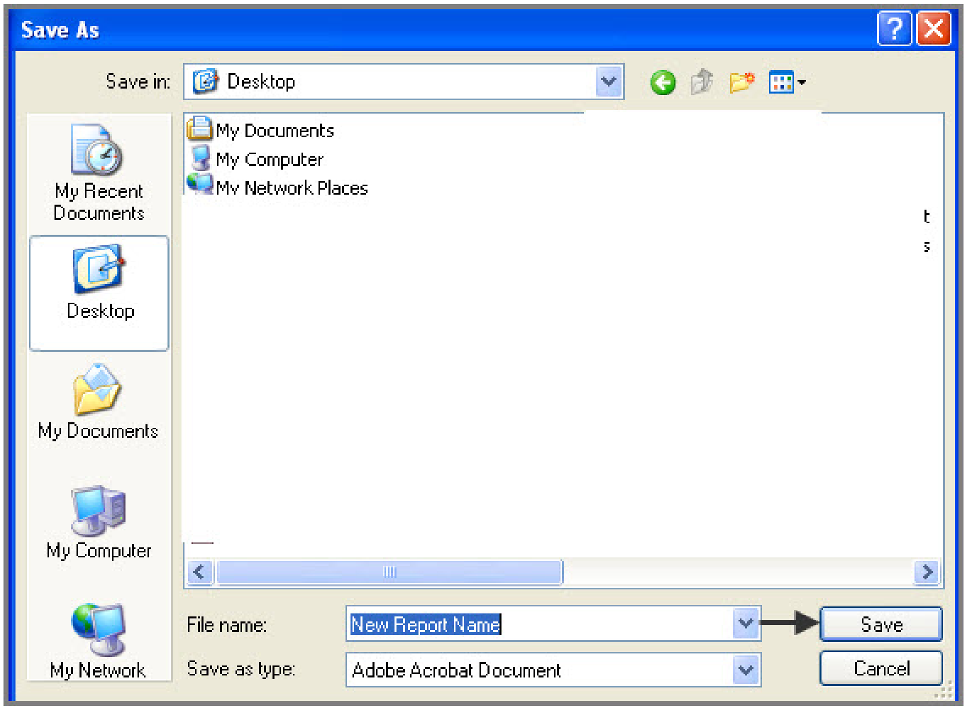


SAVING AN EXPORTED REPORT

1. While viewing the File Download popup window, click Save.



2. Select a location in which to save the file and give it a meaningful name.
3. Click **Save**.

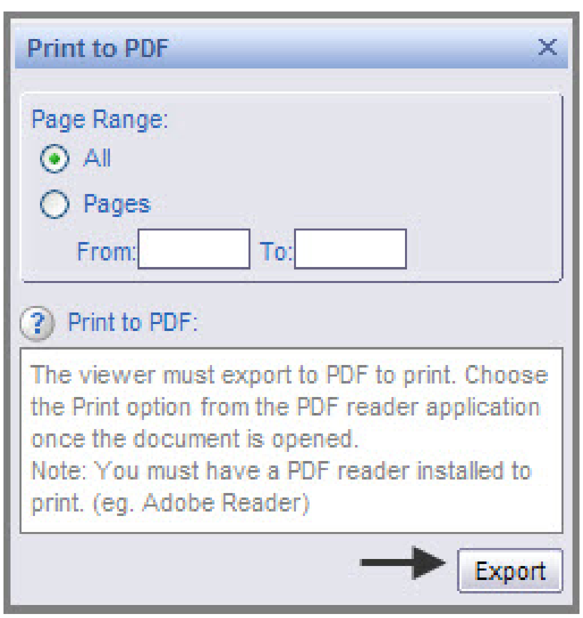


4. You will receive a prompt when the download is complete. Click Open to open the report file you just downloaded.

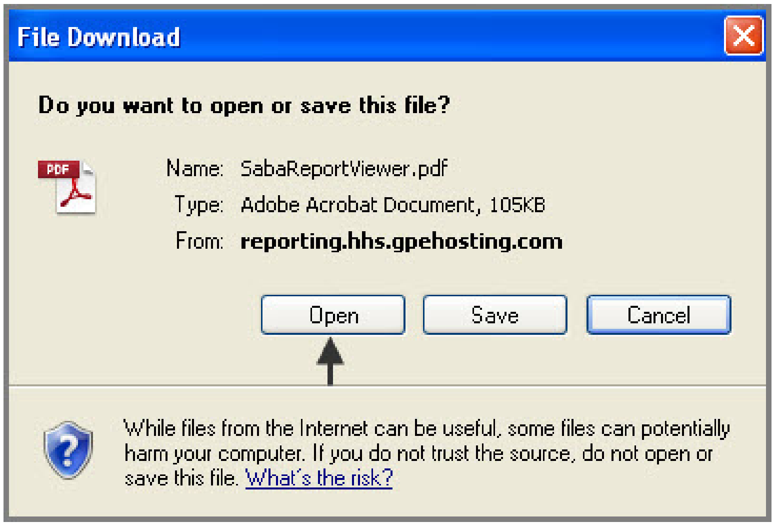
PRINT A REPORT

1. While viewing an LMS report, click the **printer icon** in the Reports Menu Bar.

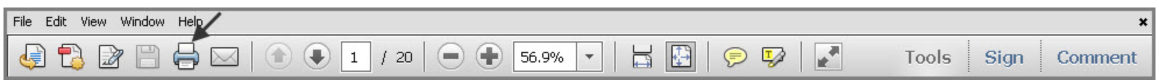
2. Click **Export**.



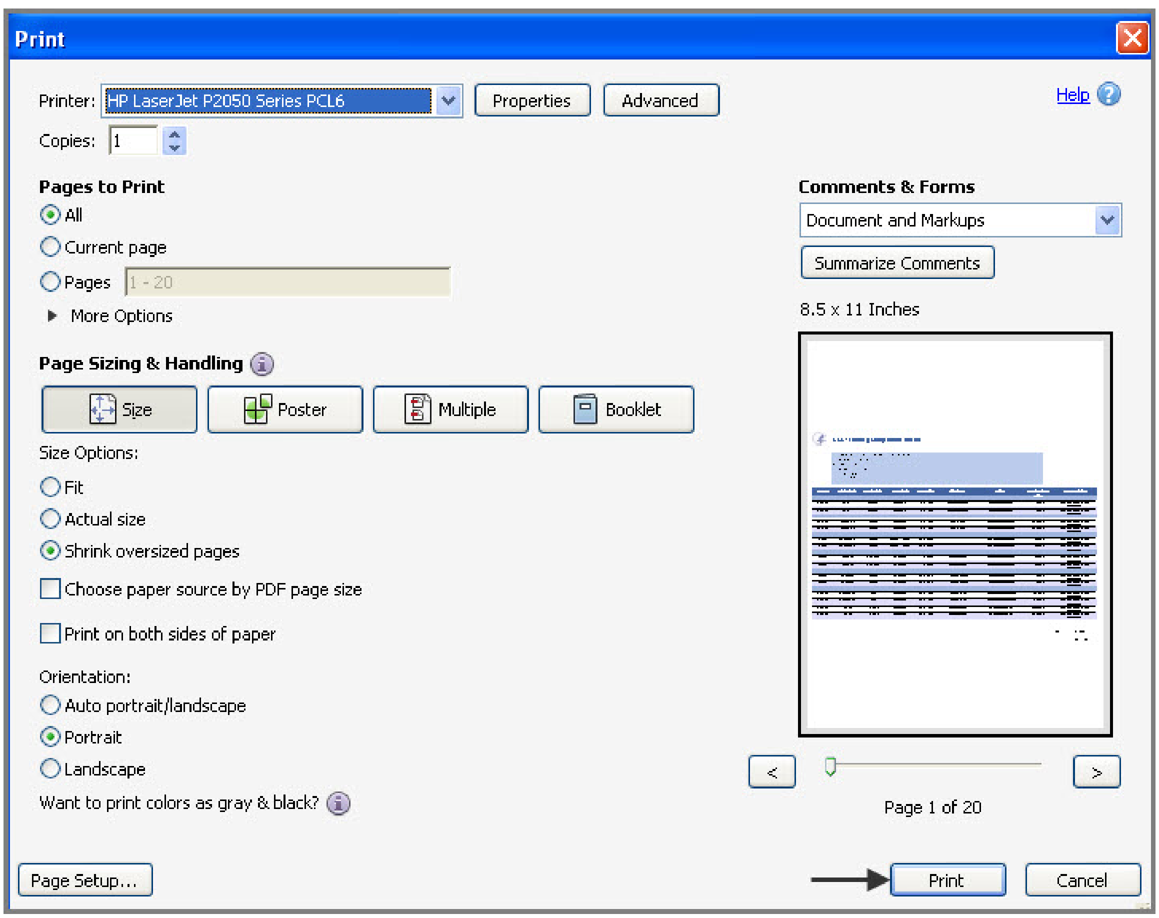
3. Click **Open**.



4. Click the Printer button in the PDF Menu Bar.



5. Set up all printer parameters in the Print window then click **Print**.

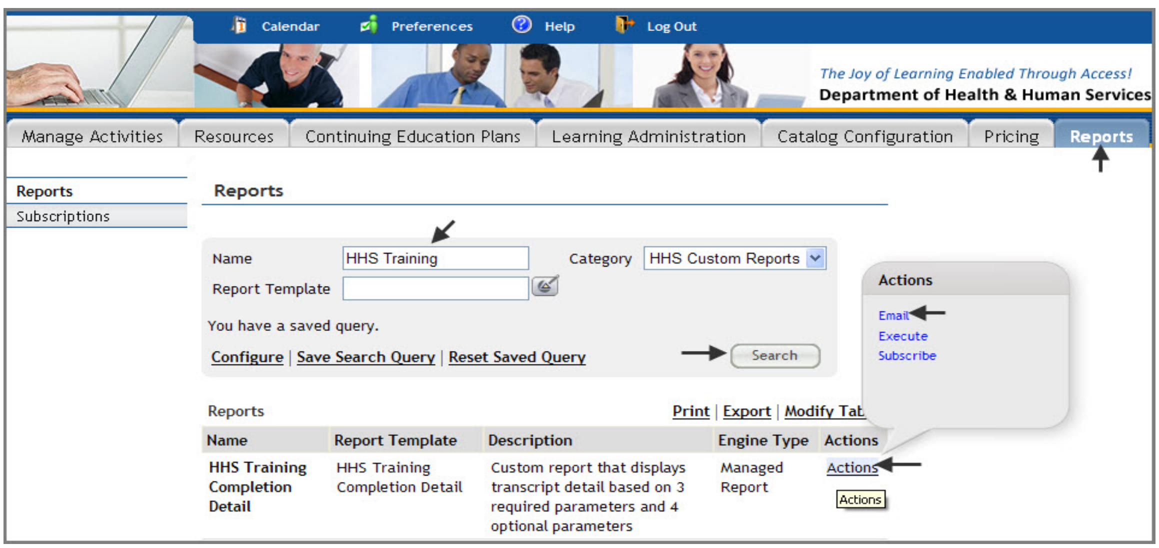


EMAIL A REPORT

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. Enter the name of the report in the **Name field.**
4. Click **Search**.
5. Click the **Actions link** in the Actions column.
6. Click the **Email link** in the Actions popup window.



7. Enter one or more recipient email addresses in the **To** field. (Separate multiple emails with either a comma or semi-colon)
8. Modify the **Subject** and **Mail Text** (the email body) fields to appear as you want them in the email.
9. Choose a **Report Format** from the report format pull-down menu.
10. Enter all remaining report parameters.

    NOTE: The remaining parameters will vary by report. All fields labeled with red letters are required to email the report.

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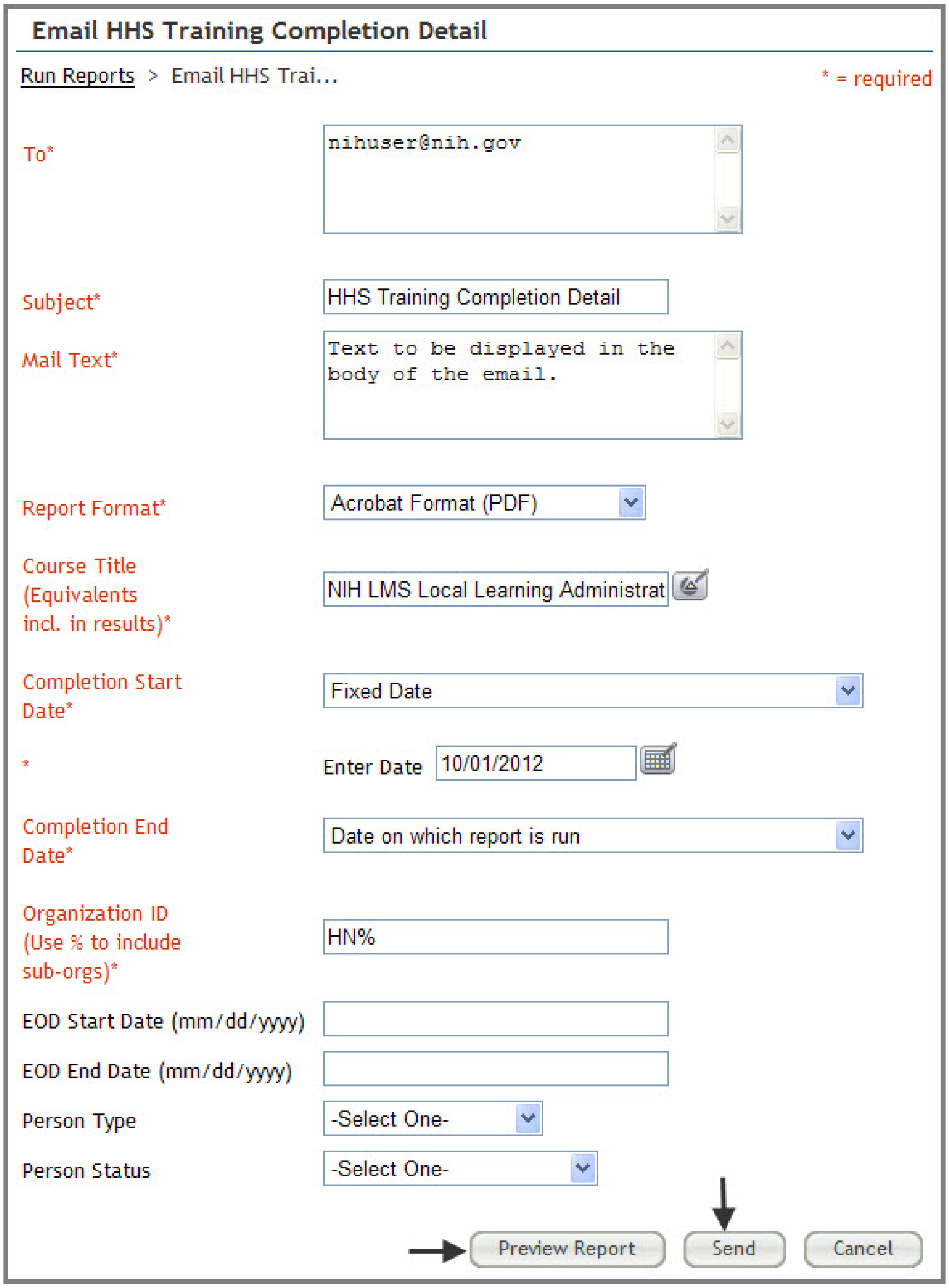
12. Click **Preview** to see the report based with the parameters you entered.
13. Click **Send** to send the report to the email recipients.



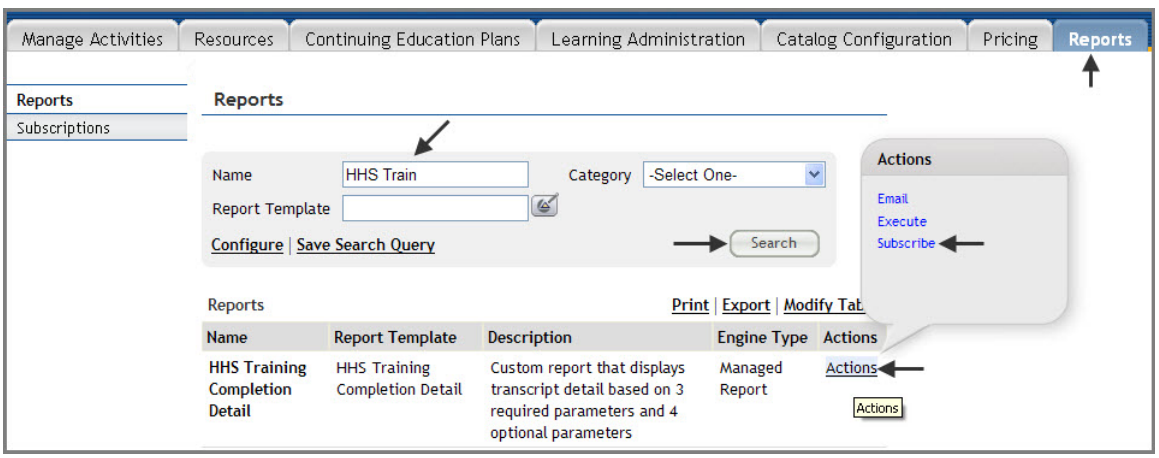
14. The report will be sent to all people with valid emails in the To field.

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.

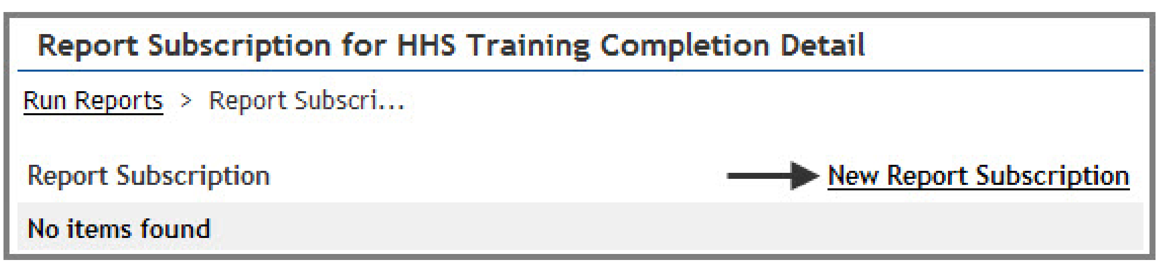
1. Select the **Human Capital Administrator – People** or **Registrar** role in the drop-down **Go To** menu.

2. Click on the **Reports** tab.
3. Enter the name of the report in the **Name field.**
4. Click **Search**.
5. Click the **Actions link** in the Actions column.
6. Click the **Subscribe link** in the Actions popup window.



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

   NOTE: Any previously created subscriptions for this report will be listed in the table.



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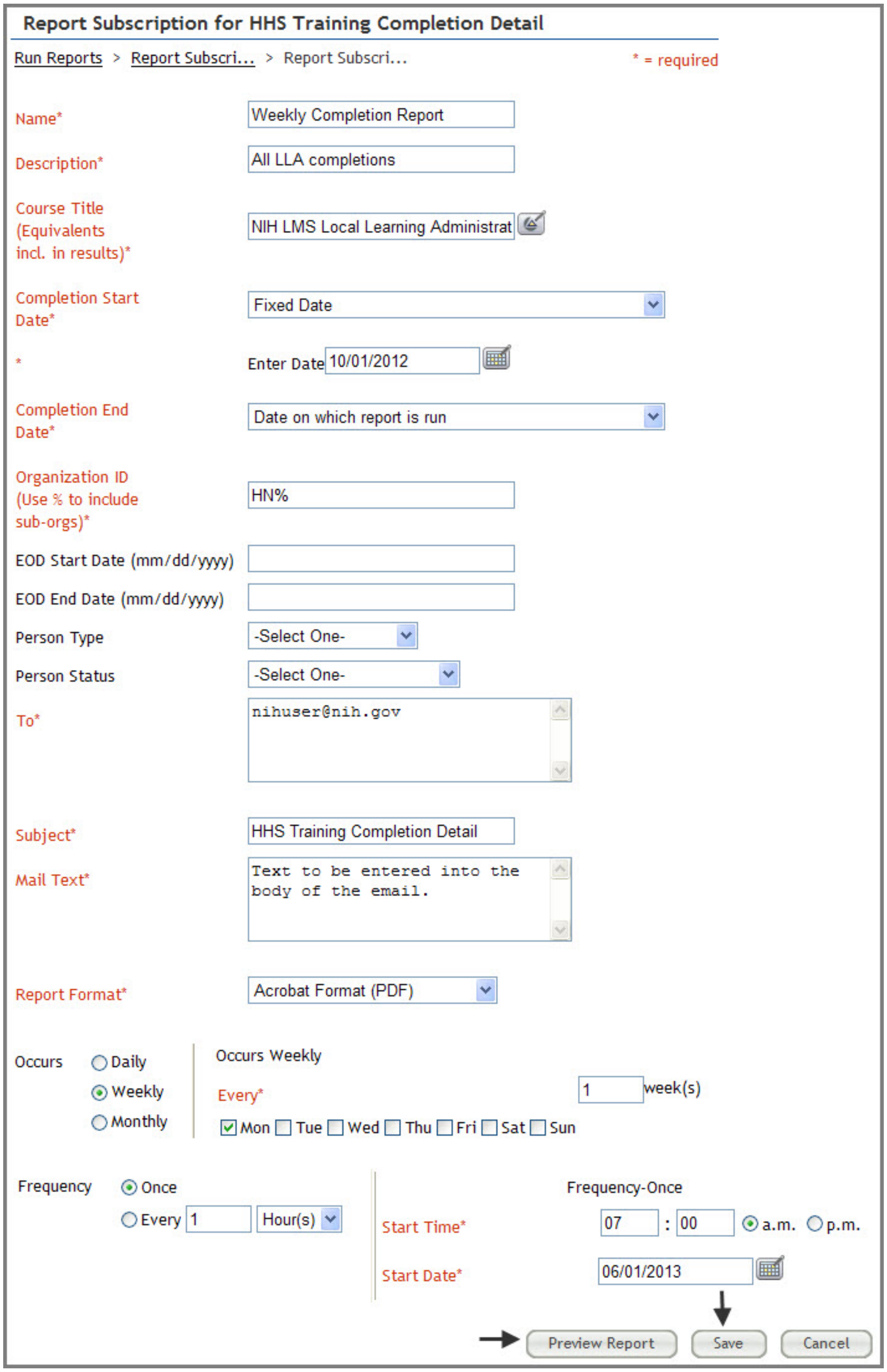
8. Enter parameters for at least all fields that are required. These fields are labeled with red letters. It is recommended that you include yourself as a recipient to ensure the subscription is running at the designated intervals.

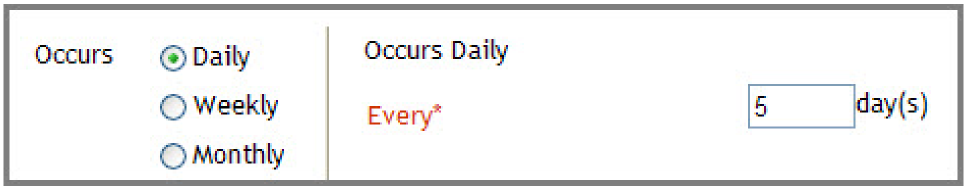


NOTE: It is recommended that you include your name in the Mail Text section so that the recipients know who the report came from. Reports are sent automatically by the LMS and will not have the creator's information attached to it.

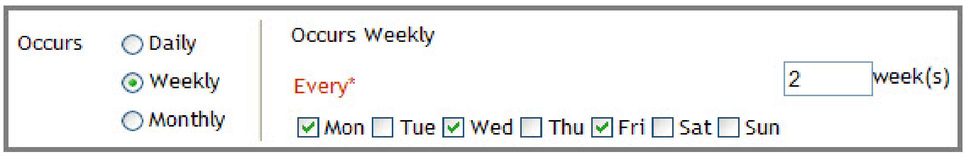
SELECTING THE OCCURRENCE OF A REPORT SUBSCRIPTION

Report subscriptions can be set up to send the report at various intervals of occurrence. They are Daily, Weekly and Monthly. Make your selection based on the information below.

Daily Occurrence – This option allows the report to be sent out by a specific number of days. The picture below shows a report subscription set to run every five days.



Weekly Occurrence – This option allows the report to be sent out on specific days of the week on a weekly cycle.



Monthly Occurrence – This option allows the report to be sent out on a specific date within a month on a monthly basis.

SELECTING THE FREQUENCY OF A REPORT SUBSCRIPTION

Reports can be sent at various frequencies however it is recommended to use the default setting of “Once” for all report subscriptions.

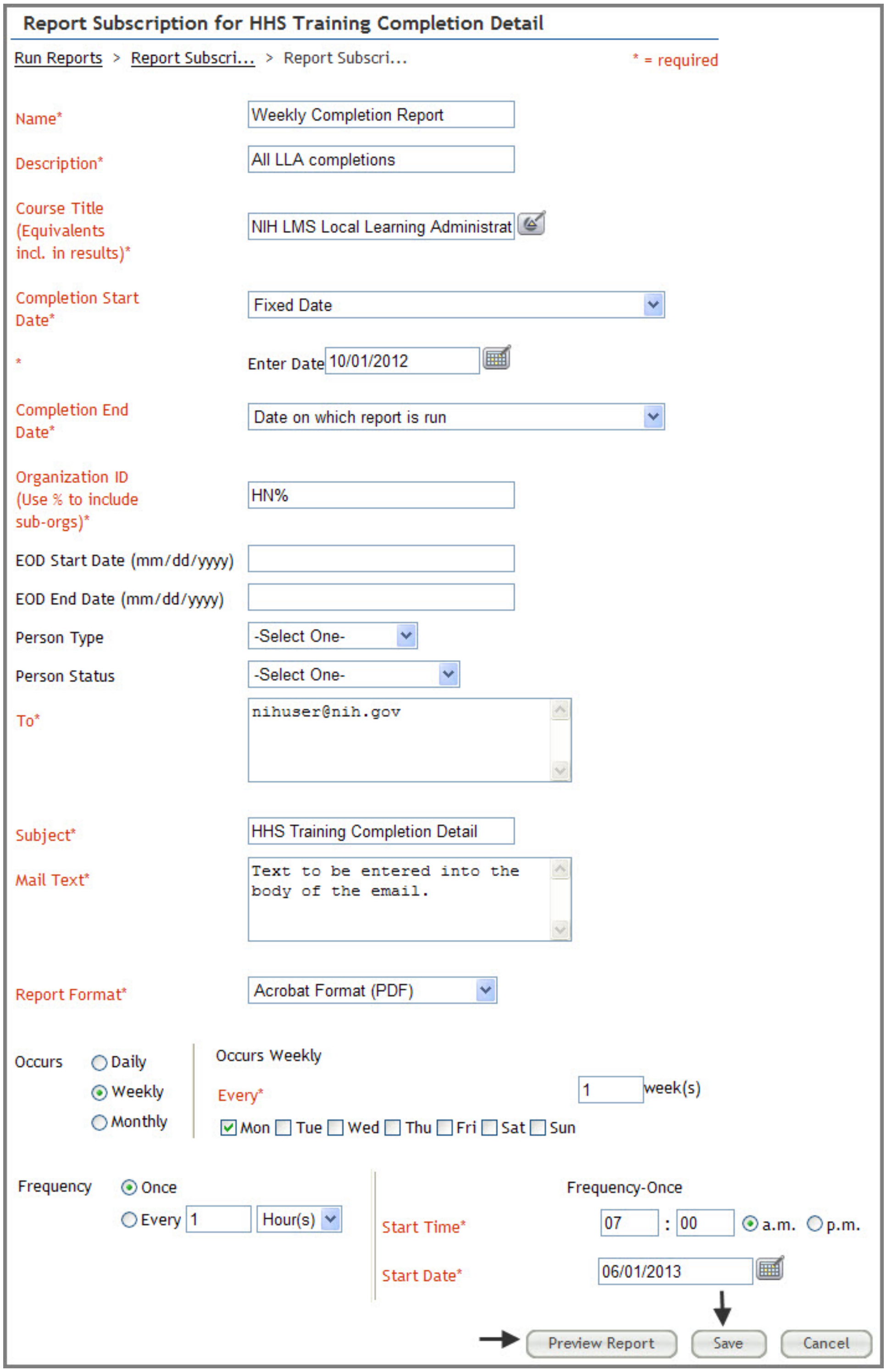
The Start Time should be set to off-peak hours. It is recommended that subscriptions be set to run before 8AM or after 5PM.

Following these guidelines for setting the frequency of a report subscription will help to improve the overall LMS responsiveness for all users during normal business hours.

The Start Date is the date that the report subscription becomes active. It is not the date that the report will be sent. Those parameters are determined in the occurrence section.

SAVING A REPORT SUBSCRIPTION

1. After all report subscription parameters have been entered, click **Preview Report** to see the report as it will appear. Verify that the report contains the correct data. If not, close the report and adjust the parameters that were previously entered.
2. Click **Save** to activate the report subscription. The report will be sent to email recipients entered at the times designated.


Report Subscription for HHS Training Completion Detail

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

Name* Weekly Completion Report

Description* All LLA completions

Course Title (Equivalents incl. in results)* NIH LMS Local Learning Administrat

Completion Start Date* Fixed Date

* Enter Date 10/01/2012

Completion End Date* Date on which report is run

Organization ID (Use % to include sub-orgs)* HN%

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Person Type -Select One-

Person Status -Select One-

To* nihuser@nih.gov

Subject* HHS Training Completion Detail

Mail Text* Text to be entered into the body of the email.

Report Format* Acrobat Format (PDF)

Occurs: Daily / Weekly / Monthly

Occurs Weekly

Every* 1 week(s)

Mon Tue Wed Thu Fri Sat Sun

Frequency: Once / Every 1 Hour(s)

Frequency-Once

Start Time* 07 : 00 a.m. p.m.

Start Date* 06/01/2013

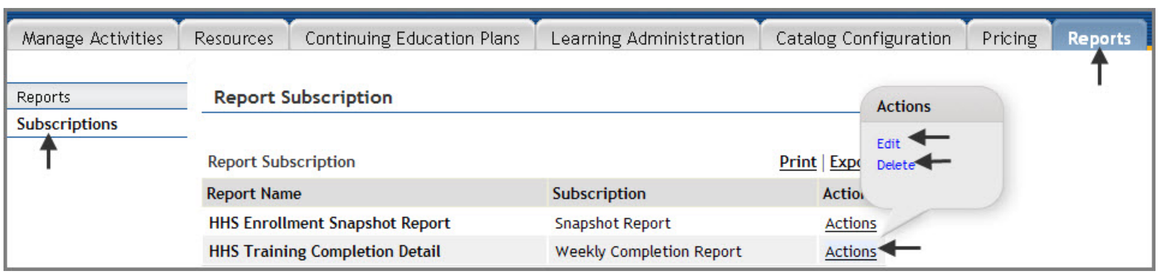
Preview Report Save Cancel

LOCATE AND EDIT A SUBSCRIPTION

Once a subscription is created, it can be edited or deleted at any time. Follow the instructions below to locate your subscriptions for edits or to delete them.

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 **Subscriptions** in the left menu.
4. All the subscriptions you have created will be displayed in the Report Subscription table.
5. Click the **Actions link** in the Actions column associated with the report subscription.
    a. Click **Edit** to return back the Report Subscription Parameters screen and make edits to the subscription.
    b. Click **Delete** to cancel the subscription.



HELPFUL INFORMATION

LINKS AND RESOURCES

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

- HRSS Help Desk
  Phone: 301-451-1436
  Submit a help ticket: http://intrahr.od.nih.gov/helpdeskform.htm
  HRSS Hours of Operation: Monday through Friday: 8:00 AM to 4:30 PM

- NIH Training Center website
  http://trainingcenter.nih.gov

- HRSS LMS Support website (Tip sheets, Online Manuals, LMS Resources, etc.)
  http://hr.od.nih.gov/hrsystems/benefits/lms/lmssupport.htm

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
HN9 (NCATS) National Center for Advancing Transitional Sciences

APPENDIX B - ENTERPRISE HUMAN RESOURCES INTEGRATION (EHRI) FIELDS

LEGEND

LMS Required Fields

EHRI Required Fields

Non Required Fields

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Item/Event Name*	Item or Event Title	Microsoft Excel 2007 for PC Users
Description	Description of the Item or Event entering Character limit: 1000	This class will expand the learner's knowledge of Microsoft Excel 2007.
Offering Start Date	Date the class started	MM/DD/YYYY
Ended/Completed On Date	Date the class ended	MM/DD/YYYY
Registration Date	Date the learner registered for the Item/Event	MM/DD/YYYY
Date Marked Complete*	Date the Item/Event was marked complete by an administrator	MM/DD/YYYY
Start Time (HH:MM)	Start time of the Item/Event	08:30
End Time (HH:MM)	End time of the Item/Event	16:30
Duration (HH:MM)	How many hours and minutes the class lasted	07:30
Delivery Type	Method the Item/Event was delivered in	Auditorium, Book, Coaching, Computer Laboratory, Conference, Correspondence Course, DVD/CD, Instructor led, Mentoring, Online Training, On the Job Training, Recorded Online Offering, Satellite, Scientific Laboratory, TeleConferencing, Traditional

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
		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 record (yourself).	At first your username will display but once the record is saved the field will display your name.
Continued Service Agreement Required Indicator (1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Accreditation Indicator (1102)	Indicates that the course has been accredited by an accreditation body.	N => No NA => Non Applicable Y => Yes
Training Accreditation Organization Type (1103)	The name and description of the accreditation organization	**Leave empty** if unknown.
Course ID From Vendor (1105)	The course ID as assigned by the vendor	**Leave empty** if unknown.
EHRI: Training Source Type (1120)	Source of the training which has been completed by the employee.	Foreign Governments and Organizations; Government External; Government Internal; Government State/Local; Non-government
EHRI: Default Training Purpose (1122)	Code representing the purpose of the training completed by the employee	Develop Unavailable skills; Future Staffing Needs; Improve Present Performance; Mandatory Training; New Work Assignment; Program/Mission Change; Retention

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
EHRI: Default Training Type (1124)	Code for the type of training which has been completed by the employee.	Acquisition; Adult Basic Education; Agency Required Training; Basic Computer Training; etc. ***There are more options available in this drop-down***
EHRI: Training Credit (1126)	Amount of academic credit hours or continued education units earned by the employee for the completed training. This should match either credit hours or CPE hours. This value is used for reporting to EHRI.	If amount of credit is known, input the number. If not available or not applicable input 0.
EHRI: Training Credit Designation Type (1127)	Code for the type of academic credit hours or continued education units earned by the employee for the completed training course.	Continuing Education Units, Graduate Credit; NA; Post Graduate Credit; Undergraduate Credit
EHRI: Training Delivery Type (1129)	Code for the type of training delivery for the training course completed by the employee.	Blended; Conference or Retreat; Correspondence; Instructor Lead; On the Job; Technology based
EHRI: Training Credit Type Code (1131)	Code representing the type of credit hours the employee received for the completed training.	CPEs; Continuing Education Unit; NA; Quarter Hours; Semester Hours
Instructor Competencies (1200)	Description of areas the instructor should be competent in to teach the class.	If don't have any particular information on competencies for the instruction, leave empty.
Multilingual Course (1201)	List of alternate languages for the course	Input the name of the other language the course was provided in. If not known or if it wasn't delivered in another language, **leave empty.**
Internal or External Course (1202)	Determine if the course is external or internal to the organization	External, Internal
Training Certification	Enter the type of certification earned after	If any available enter the name of the

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Type (1211)	completing the course.	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	Should be entered as a dollar amount for the individual, with two decimal places. If unknown

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

APPENDIX C – HHS LEARNING PORTAL DOMAIN STRUCTURE