

HHS Learning Portal

People Administrator



NIH Training Center
National Institutes of Health
OD/OM/OHR/WSDD

HHS LEARNING PORTAL PEOPLE ADMINISTRATOR

Version 2.0



National Institutes of Health Training Center

National Institutes of Health Training Center, Rockville 20852

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

TABLE OF CONTENTS

PEOPLE ADMINISTRATOR.....8

 Introduction8

 Learner Profile8

 Domains.....8

 Security Roles.....9

 People Administrator Role 10

 LMS Terms and Definitions 11

Working with Learner Profiles 14

 People - Internal..... 14

 Step-By-Step (View/Edit Learner Profiles)..... 14

 step-bystep (changing learner profile information)..... 15

 Step-By-Step (View a Learner’s Profile Snapshot)20

Managing Jobs and Roles26

 Jobs.....26

 Step-By-Step (View Jobs).....26

 Roles27

 Step-By-Step (View a Role)27

 Step-by-Step (Create a Role)28

Using Competencies, Surveys & Assessments30

 Competencies30

 Step-By-Step (View Learner Competencies)30

 Step-by-Step (Search for and View Competency Details)34

 Step-By-Step (Create Competency Groups).....35

 Step-By-Step (Create a New Competency)38

 Multi-Rater Assessments 43

 Step-By-Step (View Learner Assessments)..... 43

 Step-By-Step (Create a Multi-Rater Competency Assessment) 46

 Survey Management51

 Step-By-Step (Create and Distribute a Survey)51

 Step-By-Step (View a Survey)56

People Administrator

Managing Learning	57
Enrollments	57
Step-By-Step (View and Manage Enrollments).....	57
Transcripts	59
Step-By-Step (View a Learner Transcript)	59
Step-By-Step (Delete a Transcript Item).....	61
step-by-step (edit a transcript item)	62
Step-By-Step (Add Learning to a Transcript: Single Learner).....	65
Step-By-Step (Add Learning to a Transcript: Multiple Learners).....	70
Certifications	80
Step-By-Step (View Certifications).....	80
Step-By-Step (Grant Internal Certification)	82
Step-By-Step (Assign Internal Certification).....	84
Curricula.....	86
Step-By-Step (View Curricula)	86
Step-By-step (Grant Curriculum)	88
Step-By-step (Assign Curriculum).....	90
Continuing Education	92
Step-by-Step (View Status of Continuing Education Requirements)	92
Step-by-Step (Add a Continuing Education Requirement for a Learner)	94
Learning Plans	96
Step-By-Step (View/Add to Learning Plans: Method One).....	96
Step-By-Step (View/Add to Learning Plans: Method Two).....	99
Managing Prescriptive Rules	102
Prescriptive Rules	102
Step-By-Step (Create a Prescriptive Rule)	103
Step-By-Step (View/Edit a Prescriptive Rule)	109
Step-By-Step (Process a Prescriptive Rule)	113
Understanding Internal organizations	114
step-by-step (view internal organizations).....	114
Using External Organizations To Add Vendors.....	116
Step-By-Step (View External Organizations)	116
Step-by-Step (Add an External Organization).....	118

People Administrator

Generating Reports..... 120

 Reports..... 120

 Step-By-Step (Generate a Report) 120

 Step-By-Step (Export a Report) 122

 Step-By-Step (Print a Report) 124

 Step-By-Step (Email a Report) 126

 Step-By-Step (Subscribe to a Report)..... 127

Helpful Information..... 129

 Links and Resources..... 129

Appendix A – Organization Codes 130

Appendix B - Enterprise Human Resources Integration (EHRI) Fields 131

Appendix C – HHS Learning Portal Domain Structure..... 136

PEOPLE ADMINISTRATOR

INTRODUCTION

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

LEARNER PROFILE

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

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

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

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

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

- **E-mail:** Accurate email addresses in the LMS will ensure learners receive notifications generated in the LMS.
- **Manager:** Having the correct manager listed will allow managers to view their direct reports and access training and development information about them. An alternate manager can be assigned if the manager field cannot be changed due to a data feed.
- **Organization:** People are grouped in the LMS according to Organization/SAC Code. (See Appendix A.) This code is used to build audience types (which restrict access to courses), narrow the scope of reports, etc. This code must be correct or learners will neither show up in reports correctly nor have access to the correct training opportunities.

DOMAINS

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

People Administrator

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

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

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

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

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

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

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

SECURITY ROLES

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

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

Domain-Specific Security Roles include:

- Learning Administrator
- Content Administrator
- Domain System Administrator
- People Administrator

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

People Administrator

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

PEOPLE ADMINISTRATOR ROLE

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

With the People Administration role you will be able to:

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

With the HR Administration - Orgs & Jobs role you will be able to:

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

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

LMS TERMS AND DEFINITIONS

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

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

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

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

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

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

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

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

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

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

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

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

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

People Administrator

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

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

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

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

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

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

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

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

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

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

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

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

Ratee – The employee whose competencies are being rated.

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

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

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

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

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

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

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

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

WORKING WITH LEARNER PROFILES

PEOPLE - INTERNAL

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

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

IMPORTANT! Although you may view the security role privileges assigned to a learner, you are NOT authorized to add or delete security role privileges. If you feel it is necessary to change the security role privileges of a learner, you must submit a ticket to the HR Systems Support Help Desk at: <http://intrahr.od.nih.gov/helpdeskform.htm>.

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

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



2. Enter the learner's name in the search box and click **Search**.

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

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

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

Search button

Search for People

Advanced Search

Name(s)* NIH Learner

Search

Search Results New Internal Person | Print | Export | Modify Table

Showing 1 out of 1 results

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

Edit Profile Information link

STEP-BY-STEP (CHANGING LEARNER PROFILE INFORMATION)

The Main tab has just a few fields that can be changed and not overwritten by a data feed. These fields are: Manager (for contractors only), Email, Alternate Managers, Alternate Team Members, and Approvers.

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

Edit Profile Of NIH Learner

* = required

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

Title: -Select One-

First Name*: NIH

Middle Name: S

Domain*: NIH

Home Domain*: NIH

Organization*: HNAM6

Job:

Manager: NIH Supervisor

Additional Approver for Orders: 00041502

Location:

Start Date: 04/08/2008

Terminated On:

Manager Access:

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

Username*: NIHLEARNER

Last Name*: Learner

Suffix:

Status*: Other

Person No: 00165395

Business Card Title: JOB TITLE

E-mail: XX-lmssupport@mail.nih.gov

Type: Other

Discount: 0

Manager Pick button

Email field

Add Manager Link

Alternate Managers

Add Manager | Print | Export

Name	Actions
NIH DomainSysAdmin	X

People Administrator

Follow these steps to change a learner's profile information.

Manager field: (Steps apply to all fields with the pick button function)

1. Click the **Manager Pick button**.
2. Enter the search criteria for the manager then click **Search**.
3. Click the **Select Checkbox** for the person that will be designated as the manager.

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

First Name	NIH	Last Name	Supervisor
Person ID		Username	
Manager		Organization	
Location		Domain	
Person Type	-Select One-	Include All Suborganizations	<input type="checkbox"/>

Search button

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

Showing 1 out of 1 results

Select	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	Supervisor	NIHSUPERVISOR	Other	00165949	HNAM6		00064122

Select Checkbox

Close

4. Scroll to the bottom of the Edit Profile screen and click **Save**.

Email field:

1. Enter a valid NIH email address into the **Email field**.
2. Scroll to the bottom of the Edit Profile screen and click **Save**.

Alternate Managers, Alternate Team Members, and Approvers:

1. Click the **Add Manager** link (or Add Team Member/Add Approver links as appropriate)

Search Person, Internal

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

First Name	<input type="text" value="NIH"/>	Last Name	<input type="text" value="Supervisor"/>
Person ID	<input type="text"/>	Username	<input type="text"/>
Manager	<input type="text"/>	Organization	<input type="text"/>
Location	<input type="text"/>	Domain	<input type="text"/>
Person Type	<input type="text" value="-Select One-"/>	Include All Suborganizations	<input type="checkbox"/>

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

Showing 1 out of 1 results

Select	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	Supervisor	NIHSUPERVISOR	Other	00165949	HNAM6		00064122

Search button

Select Checkbox

2. Enter the search criteria for the manager then click **Search**.
3. Click the **Select Checkbox** for the person that will be designated as manager/alternate manager/approver.
4. Scroll to the bottom of the Edit Profile screen and click **Save**.

People Administrator

Contact Information: **This tab offers shows the contact information on record for the learner. This information can also be updated by the learner.**

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

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

1. Edit the learner's Contact Information then click **Save**.

Address: **This tab shows address information on record for the learner. This information can also be updated by the learner.**

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

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

1. Edit the Address information then click **Save**.

Password: This tab no longer provides functionality due to the use of the AMS single sign-on system and therefore cannot be used to reset a learner's password.

Preferences: This tab allows a few preferences to be set for a learner.

Edit Profile Of NIH Learner * = required

[Main](#) | [Contact Information](#) | [Address](#) | [Password](#) | **Preferences** | [Privileges](#)

Environment Settings

Locale* English

Notification Method E-mail

Catalog Search Preferences

Offering Language English

Delivery Type -Select One-

Continuing Education Compliance (No Active Continuing Education Requirement)

1. Change any of the settings and click **Save**.

Privileges: This tab shows LMS security roles that have been assigned to the learner.

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

Edit Profile Of NIH Learner * = required

[Main](#) | [Contact Information](#) | [Address](#) | [Password](#) | [Preferences](#) | **Privileges**

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

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

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

No items found

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

Audience Type	Audience Sub Types
NIH - all	NIH NHGRI

Profile Quicklinks

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

People Administrator

IMPORTANT! These roles are audited, and you are **NOT** authorized to change them. If you feel a security role is incorrect or missing, please submit a ticket to the HR Systems Support Help Desk at:
<http://intrahr.od.nih.gov/helpdeskform.htm>.

NOTE: There are Profile Quicklinks in the box to the right of the Profile. These links give you quick access to additional information about the learner. These functions are covered elsewhere in this manual.

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

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

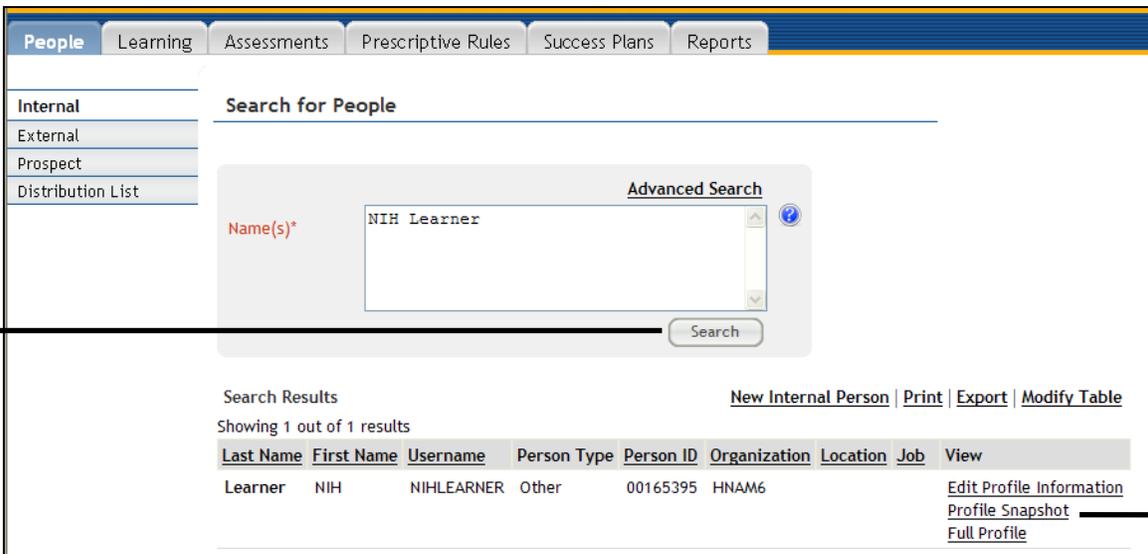
1. Select the **People Administration** role in the drop-down **Go To** menu.



2. Enter the learner's name in the search box and click **Search**.

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

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



Search button

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

Profile Snapshot link

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

Full Profile
tab

NIH Learner's Profile

Snapshot Full Profile Resource

NIH Learner [Edit Profile Snapshot](#)

Professional Profile Information

Username: NIHLEARNER	Person ID: 00165395
Organization: HNAM6	Job Type:
Business Card Title: JOB TITLE	
Manager: NIH Supervisor	Alternate Manager: NIH DomainSysAdmin Ann WITHINGTON
Status: Other	
Person Type: Other	

Official Contact Information

Office Phone: 301-496-6211

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

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

Personal Attributes

Start Date: 04/08/2008

Terminated Date:

Domain: NIH

Other Information

Preferred name: Tester	HSPD-12 ID: 8784
HHS ID: 1233	Sub-OPDIV: OD
OPDIV ID: 001111111	Is Supervisor:
Pay Plan: GS	User Type:
LCMS User Type:	Grouping:

Viewing the Full Profile:

1. Click the **Full Profile** tab.

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

People Administrator

NIH Learner's Profile

Snapshot Full Profile Resource

[Expand All](#) | [Collapse All](#) | [Resume View](#) | [Printer View](#) | [Export to PDF](#)

▼ Snapshot

NIH Learner [Edit Profile Snapshot](#)



Personal Objective

Professional Profile Information

Username: NIHLEARNER	Person ID: 00165395
Organization: HNAM6	Job Type:
Business Card Title: JOB TITLE	
Manager: NIH Supervisor	Alternate Managers: NIH DomainSysAdmin, Ann WITHINGTON
Status: Other	
Person Type: Other	

Official Contact Information

Office Phone: 301-496-6211

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

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

Personal Attributes

Start Date: 04/08/2008

Terminated Date:

Domain: NIH

Other Information

Preferred name: Tester	HSPD-12 ID: 8784
HHS ID: 1233	Sub-OPDIV: OD
OPDIV ID: 001111111	Is Supervisor:
Pay Plan: GS	User Type:
LCMS User Type:	Grouping:

Current Job Information

▶ Competencies

▶ Licenses and Certifications

▶ Languages

Expand All link

Expansion buttons

Current Job Information – includes job type, organization, manager and alternate manager, direct reports and alternate team members, and required and optional job roles (which you may add). (You will learn more about roles later.)

Current Job Information

Job Information	
Job Type:	Business Card Title: JOB TITLE
Organization: HNAM6	Job Responsibilities:
	Location:
Manager: NIH Supervisor	Direct Reports:
Alternate Managers: NIH DomainSysAdmin Ann WITHINGTON	Alternate Team Members:
Manager Access: No	Mentors:
Job Attachments:	Instant Message ID: Edit

Required Roles		Add Required Role
Name	Assigned By	Actions
NIH Information Technology	NIH Competency	Mark Optional Delete
Optional Roles		Add Optional Role
Name	Assigned By	Actions
NIH Administrative Officer	NIH Competency	Mark Required Delete

Competencies – lists the top three strengths and top three development needs of the learner.

Competencies

Strengths (Top three)				Go to All Held Competencies
Competency Name	Source	Source Name	Required Proficiency	Held Proficiency
NIH Process Management	Manager	NIH Supervisor	3	4
NIH Federal and Departmental Policies and Procedures Knowledge	Manager	NIH Supervisor	3	4
NIH Advisory Assistance	Self	NIH Learner	2	3
Developmental Needs (Top Three)				Go to All Development Needs
Competency Name	Source	Source Name	Required Proficiency	Held Proficiency
NIH Coaching	Self	NIH Learner	3	
NIH Solicitation	Manager	NIH Supervisor	5	3
NIH Project Management		NIH Information Technology	3	1

Licenses and Certifications – any certification earned within the LMS will be listed, and you may also add external certifications the learner has earned.

People Administrator

Licenses and Certifications				
Internal Licenses and Certifications				
Name	Acquired On	Expires On		
NIH EEO Laws & Regulations Certification - NIDDK	06/17/2010	06/17/2011		
NIH NoFEAR Act Training Certification	03/05/2012	03/05/2014		
NIH Environmental Management System (NEMS) Awareness Training Certification	09/29/2010	09/29/2011		
NIH Prevention of Sexual Harassment Training Certification	11/09/2011	11/08/2013		
NIH Online Orientation Certification	In Progress	N/A		
NIH Disability Awareness Training Certification	In Progress	N/A		
NIH Information Security Awareness Course Certification OBSOLETE	04/02/2009	N/A		
HHS Records Management for All Employees Certification	12/19/2010	05/03/2011		
NIH NIA Alternative Dispute Resolution Certification	03/02/2012	N/A		
NIH Diversity Management Training - NIDDK	06/17/2010	06/17/2011		
External Licenses and Certifications		Add Certification		
Showing 1 out of 1 results				
Name	Institution	Acquired On	Expires On	Actions
Systems Security Certified Practitioner (SSCP)	University of MD	11/12/2009	11/12/2010	

Languages – lists languages the learner has some experience with, and you may add to this list for the learner as well.

Languages					
					Add Language
Showing 1 out of 1 results					
Language	Speaking Level	Reading Level	Writing Level	Notes	Actions
English	High	High	High		

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

Snapshot Full Profile **Resource**

View Resource Schedule

Available as a resource (if available please specify a billing rate)

Yes

No

Rates [Add Rate](#)

No items found

Learning Group Administrator

No items found

Languages Spoken [Add Language](#)

No items found

Qualified Learning [Add Qualified Learning](#)

No items found

Attachments [Add Attachment](#)

No items found

Save Cancel

MANAGING JOBS AND ROLES

JOBS

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

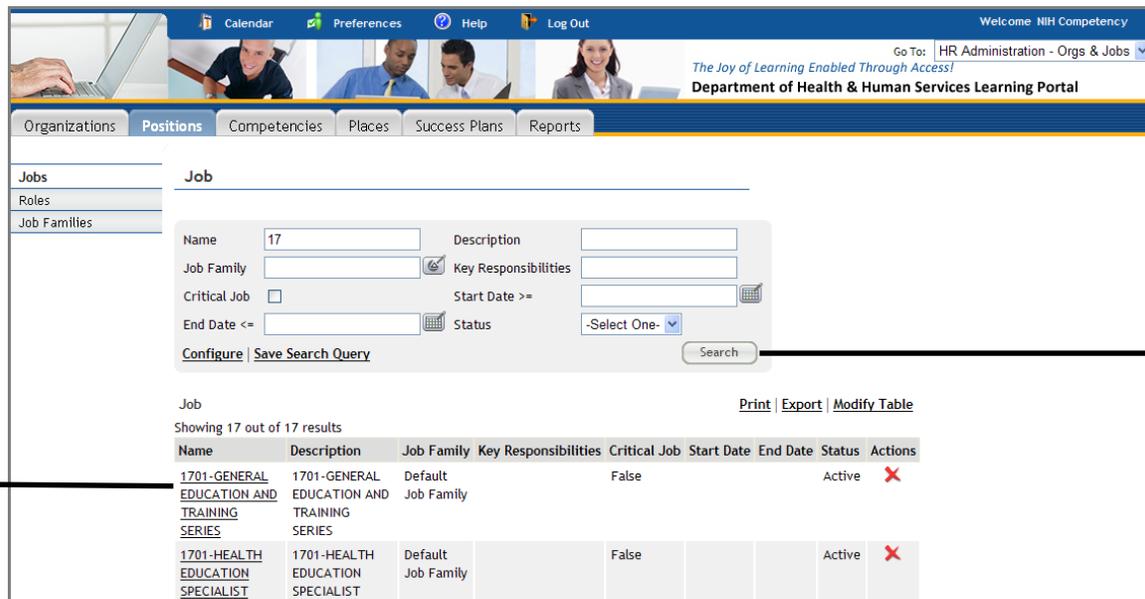
IMPORTANT! Jobs can be viewed for informational purposes only. Never create or delete them.

STEP-BY-STEP (VIEW JOBS)

1. Select the **HR Administration – Orgs & Jobs** role in the drop-down **Go To** menu.



2. Click on the **Positions** tab.
3. Enter criteria and select **Search**.



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

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

IMPORTANT! Do not edit any details of a job.

ROLES

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

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

STEP-BY-STEP (VIEW A ROLE)

1. Select the **HR Administration – Orgs & Jobs** role in the drop-down **Go To** menu.
2. Click on the **Positions** tab.
3. Select **Roles** from the menu on the left.
4. Enter search criteria in the Name field then click **Search**.

The screenshot shows the 'Role' search results page. The search criteria is 'NIH'. The results table is as follows:

Name	Actions
NIH Administrative Officer	✖
NIH Administrative Officer (GS-11)	✖

Role Name link

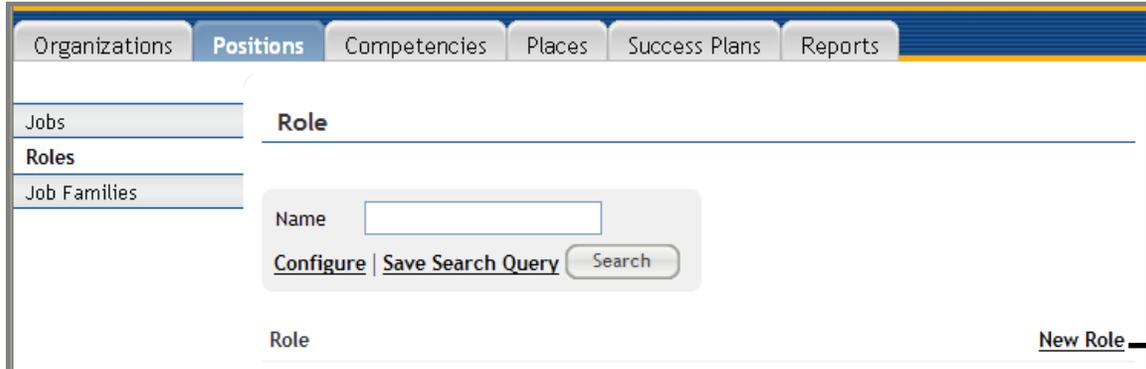
Go To menu

5. Click on the role **Name** link to see its details.
6. On the Role Details Main tab, the information as needed then click **Save** when you are finished.

People Administrator

STEP-BY-STEP (CREATE A ROLE)

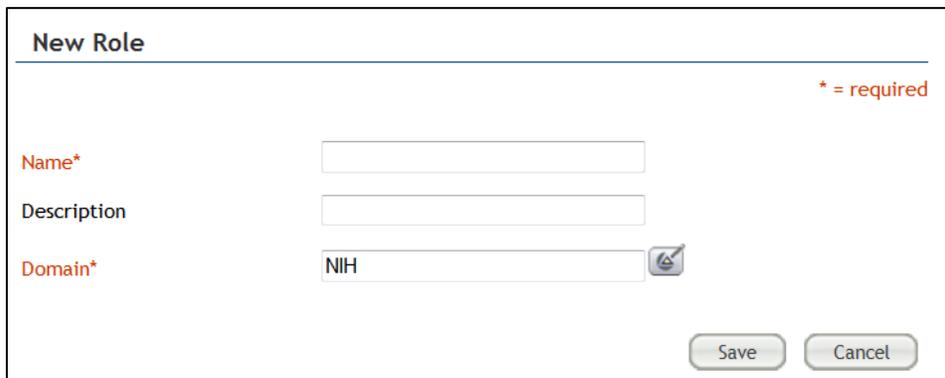
1. Select the **HR Administration – Orgs & Jobs** role in the drop-down **Go To** menu.
2. Click the **Positions** tab.
3. Select **Roles** from the menu on the left.



The screenshot shows the HR Administration interface. The top navigation bar includes tabs for Organizations, Positions, Competencies, Places, Success Plans, and Reports. The left sidebar has a menu with options for Jobs, Roles, and Job Families. The main content area is titled 'Role' and contains a search bar with a 'Name' input field, a 'Search' button, and links for 'Configure' and 'Save Search Query'. A 'New Role' link is visible in the bottom right corner of the main content area.

New Role link

4. Click the **New Role** link.



The screenshot shows the 'New Role' form. The form has a title 'New Role' and a legend '* = required'. The form contains three input fields: 'Name*' (required), 'Description', and 'Domain*' (required). The 'Domain*' field has 'NIH' selected. There are 'Save' and 'Cancel' buttons at the bottom right.

5. On the **New Role** screen enter the **Name** of the new role, add a **Description**, then select NIH for the **Domain**.
6. Click **Save**.

Role Details: NIH IT Project Manager  

* = required

[Create Community](#)

Name*

Description

Domain* 

Owner [Add Owner](#) Add Owner link

No items found

Competency Requirements [Add Competency](#)

No items found

Attachments [Add Attachment](#)

No items found

Certifications [Add Certification](#)

No items found

Curricula [Add Curriculum](#)

No items found

Learning Recommendations [Add Recommendations](#)

No items found

Continuing Education Requirements [Add Requirement](#)

No items found

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

USING COMPETENCIES, SURVEYS & ASSESSMENTS

COMPETENCIES

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

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

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

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

STEP-BY-STEP (VIEW LEARNER COMPETENCIES)

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



Go To menu

2. Click on the **Assessments** tab.
3. Select **Competencies** from the menu on the left.
4. Enter the learner’s name in the search box and click **Search**.

Competencies

Competencies

Assessment History

Multi-Rater Assessments

Survey Management

Name(s) NIH Learner

Advanced Search

Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results.

Example: Williams; Bob Smith; Jones, Sharon

Search

Search Results

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Required Competencies	Held Competencies
Learner	NIH	NIHLEARNER	Other	View Required	View Held

Modify Table

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

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

NOTE: View Required will list all competencies. View Held will only list competencies that have been assessed at least once.

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

NIH Learner: Required Competencies

Only show competencies that have never been assessed.

New MRA

Required Competencies

Showing 13 out of 13 results

Expert	Competency Name	Source	Required Level	Held Level	Gap	Actions
<input type="checkbox"/>	NIH Acquisition Planning	Person: JAIME MARTINEZ	5 - Expert	4 - Advanced	-1	Actions
<input type="checkbox"/>	NIH Adaptability	Self: NIH Learner	1 - Fundamental	1 - Fundamental	0	Actions

View By: All Required Competencies, All Required Competencies, Current Job, Active Plans, Career Interests, Print, Export, Modify Table

7. Click the **Competency Name** to view details about any competency in the list.
8. The **Source** column indicates how the competency was assigned, and **Required Level**, **Held Level**, and **Gap** are shown as well.

People Administrator

View training related to competencies: **As a People Administrator, you can view all training in the LMS that directly relates to the competency. Follow these steps to view the LMS courses related to the learner's competencies.**

1. Follow the steps to view a learner's competencies. (See page 30)
2. Click the **Actions** link in the **Actions** column.

NIH Learner: Required Competencies

Only show competencies that have never been assessed.

Required Competencies

Showing 13 out of 13 results

<input type="checkbox"/>	Expert	Competency Name	Source	Required Level	Held Level	Gap	Actions
<input type="checkbox"/>		NIH Acquisition Planning	Person: JAIME MARTINEZ	5 - Expert	4 - Advanced	-1	Actions

Close Gap link

Actions link

3. Click **Close Gap** to view all training in the LMS that is related to the competency.

Close Competency Gap: NIH Acquisition Planning

Competency Name [NIH Acquisition Planning](#)

Required Level 5 - Expert

Current Level 4 - Advanced

Recommended Learning

Learning	Type of Learning
NIH Negotiation Strategies for Simpl. Acquisitions	Course
NIH Price Reasonableness in Simpl. Acquisitions	Course
NIH Professional Services	Course
NIH Purchase Card Training (NBS)	Course
NIH Simplified Acq. & Delegated Procurement (NBS)	Course

Expert List

No items found

NOTE: As a People Administrator, you may select any of the listed courses and create an order to register the learner. (Orders are covered later in this manual.)

VIEWING ASSESSMENTS: As a People Administrator, you may view the results of any assessments done for learners' competencies. Follow these steps to view the assessment results of an assessed competency.

1. Follow the steps to view a learner's competencies. (See page 30)

NIH Learner: Required Competencies

Only show competencies that have never been assessed.

New MRA

Required Competencies

Showing 13 out of 13 results

<input type="checkbox"/>	Expert	Competency Name	Source	Required Level	Held Level	Gap	Actions
<input type="checkbox"/>		NIH Acquisition Planning	Person: JAIME MARTINEZ	5 - Expert	4 - Advanced	-1	Actions

View Assessments link

Actions link

2. While viewing required/held competencies, click the **Actions** link associated with the competency.

3. Select **View Assessments** from the Actions bubble.

NIH Qualitative/Quantitative Analysis: View All Assessments

Competency Name: NIH Qualitative/Quantitative Analysis

Description: Examines and evaluates data to manage and achieve results.

Current Required Level: 3 - Intermediate

Current Held Level: 2 - Novice

Assessments for Held Level

Print | Export | Modify Table

Showing 4 out of 4 results

Date	Method	Details	Assessed Level	In Calculation?	Comments	Actions
03/18/2010	Manager Assessment	NIH Supervisor	2 - Novice	Yes	You are really good at this.	Actions
03/16/2010	Manager Assessment	NIH Supervisor	3 - Intermediate	No	You are good tat this.	Actions
03/16/2010	Manager Assessment	NIH Supervisor	3 - Intermediate	No	You are good at this.	Actions
03/16/2010	Self Assessment	NIH Learner	2 - Novice	Yes	I'm good at this.	Actions

Expert List

No items found

Cancel

Actions link

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

5. Click the **Actions** link in the actions column.

NIH Qualitative/Quantitative Analysis: View All Assessments

Competency Name: NIH Qualitative/Quantitative Analysis

Description: Examines and evaluates data to manage and achieve results.

Current Required Level: 3 - Intermediate

Current Held Level: 2 - Novice

Assessments for Held Level

Showing 4 out of 4 results

Date	Method	Details	Assessed Level	In Calculation?	Comments	Actions
03/18/2010	Manager Assessment	NIH Supervisor	2 - Novice	Yes	You are really good at this.	Actions

View Assessment Detail link

Actions link

6. Click the **View Assessment Details** link in the *Actions* bubble.

People Administrator

NIH Qualitative/Quantitative Analysis: Self Assessment Details

Assessment Details	
Person Name	NIH Learner
Assessed On	03/18/2010
Competency	<u>NIH Qualitative/Quantitative Analysis</u>
Held Level	2 - Novice
Comments	You are really good at this.
Completed On	03/18/2010

Close

7. You will now see the details of the assessment shown in a new window.

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

1. Select the **HR Administration – Orgs & Jobs** role in the drop-down **Go To** menu.



2. Click on the Competencies tab.
3. From the Competency screen, enter the appropriate criteria and click **Search**.

Organizations Positions **Competencies** Places Success Plans Reports

Competencies

- > Competencies
- Assessment Methods
- Proficiency Levels
- Groups

Competency

Name Competency Group

Domain

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

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

Showing 5 out of 5 results

Competency Group	Name	Description	Actions
NIH Accounting (GS-510)	<u>NIH Project Management</u>	Creates and maintains an environment that guides a project to its successful completion.	X

Search

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

Competency Details: NIH Project Management

* = required

Main Proficiency Indicators Descriptors Weights Groups Attachments

Create Community

Name* NIH Project Management

Description Creates and maintains an environment that guides a project to its successful completion.

Domain* NIHTC

Save Cancel

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

STEP-BY-STEP (CREATE COMPETENCY GROUPS)

Competency Groups can be used to simplify searching for a set of related competencies.

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

- Select the **People Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.



Go To menu

- Click the **Competencies** tab.

People Administrator

Organizations Positions **Competencies** Places Success Plans Reports

Competencies
Competencies
Assessment Methods
Proficiency Levels
Groups

Competency

Name Competency Group

Domain

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

Competency [New Competency](#)

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

Organizations Positions **Competencies** Places Success Plans Reports

Competencies
Groups
Competency Groups

Search

Name

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

Competency Group [New Competency Group](#)

New Competency Group link

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

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

New Competency Group

* = required

Name*

Description

Parent Name

Domain*

5. In the **Name** field, enter “**NIH**” followed by a descriptive identifier for the group.
6. In the **Description** field, enter a brief explanation of the relationship between the competencies included in the group.
7. In the **Parent Name** field, only enter a value if the new Competency Group will be a sub-set of an existing Competency Group.

People Administrator

8. The **Domain** field defaults to “NIH” and should not be changed.
9. Click **Save**.
10. Click the **Add Competency** link to add competencies to the group.

New Competency Group

* = required

Name*

Description

Parent Name

Domain*

Subordinate Competency Groups [New Subordinate Competency Group](#)

No items found

Competencies [Add Competency](#)

No items found

Add Competency link

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

Add Competency

Name Competency Group

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

Competencies [Modify Table](#)

Showing 1 out of 1 results

<input type="checkbox"/>	Name
<input type="checkbox"/>	NIH Adaptability

Check box

Select button

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

People Administrator

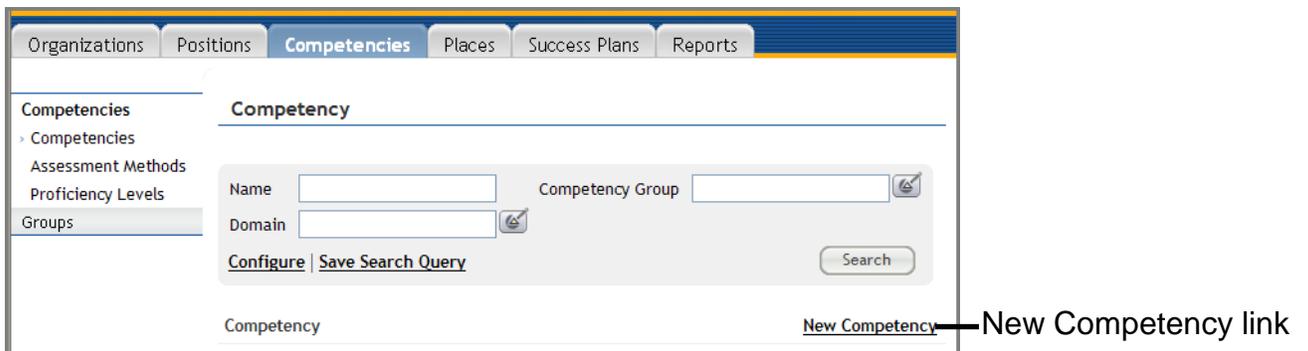
STEP-BY-STEP (CREATE A NEW COMPETENCY)

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

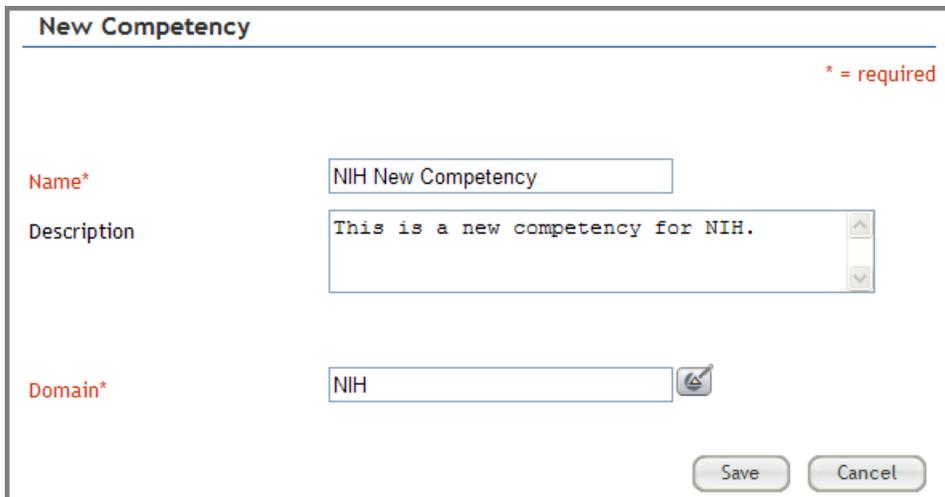
1. Select the **People Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.



2. Click on the **Competencies** tab.
3. Click the **New Competency** link.



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



5. In the **Description** field, enter a brief narrative of the competency.
6. The domain should be set to NIH which is the default setting.

7. Click **Save**.

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

Competency Details: NIH New Competency

* = required

Main Proficiency Indicators Descriptors Weights Groups Attachments

[Create Community](#)

Name* NIH New Competency

Description This is a new competency for NIH.

Domain* NIH

Save Cancel

Proficiency Indicators tab

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

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

People Administrator

Competency Details: NIH New Competency

Main Proficiency Indicators **Descriptors** Weights Groups Attachments

Rate Competency By:
 Proficiency Levels
 Behavioral Indicators

Proficiency Levels [New Proficiency Level](#) | [Import Levels](#) | [Print](#) | [Export](#)

Showing 5 out of 5 results

Name	Proficiency Level	Description	Actions
Awareness	1	You have no training or experience.	✗
Basic	2	Basic training has been received. The only experience gained has been in a classroom and/or experimental scenarios, or as a trainee on-the-job. You would be expected to need some help when performing the Skill.	✗
Intermediate	3	Repeated successful experiences have been completed. Help from an expert may be required from time to time, but you can usually perform the skill independently.	✗
Advanced	4	You can perform the actions associated with this skill without assistance. You are certainly recognized within your immediate organization as the person to ask when difficult questions arise regarding this skill.	✗
Expert	5	You are known inside and/or outside the organization as an expert. You can answer any question about the skill and most questions related to the field where the skill is used.	✗

Behavioral Indicators [Add Behavioral Indicator](#)

No items found

Save

Descriptors tab

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

Competency Details: NIH New Competency

Main Proficiency Indicators Descriptors **Weights** Groups Attachments

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

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

Description	Level	Actions
<u>You have no training or experience.</u>	Awareness	✗
<u>Basic training has been received. The only experience gained has been in a classroom and/or experimental scenarios, or as a trainee on-the-job. You would be expected to need some help when performing the Skill.</u>	Basic	✗
<u>Repeated successful experiences have been completed. Help from an expert may be required from time to time, but you can usually perform the skill independently.</u>	Intermediate	✗
<u>You can perform the actions associated with this skill without assistance. You are certainly recognized within your immediate organization as the person to ask when difficult questions arise regarding this skill.</u>	Advanced	✗
<u>You are known inside and/or outside the organization as an expert. You can answer any question about the skill and most questions related to the field where the skill is used.</u>	Expert	✗

10. Click the **Weights** tab.

11. Adjust the numbers in the **Rating Weight** field as needed and click **Save**.

Competency Details: NIH New Competency

Main Proficiency Indicators Descriptors Weights **Groups** Attachments

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

Weights

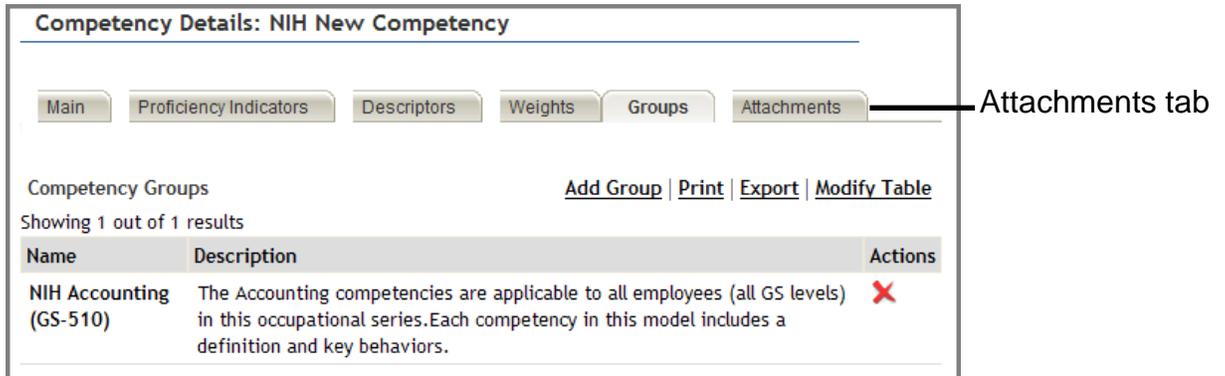
Method	Rating Weight
Informal Learning	<input type="text" value="1"/>
Manager Assessment	<input type="text" value="2"/>
Self Assessment	<input type="text" value="1"/>
Multi-Rater Assessment	<input type="text" value="3"/>
Learning Offering	<input type="text" value="1"/>
Custom-Direct Observation	<input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

Save Cancel

12. Weights are used to calculate the overall assessed proficiency level.

People Administrator

- Click the **Groups** tab.
- Click the **Add Group** link and select the appropriate group. Competencies may be organized into a group, but the group must be created first. (See instructions on how to [Create Competency Groups](#))



Competency Details: NIH New Competency

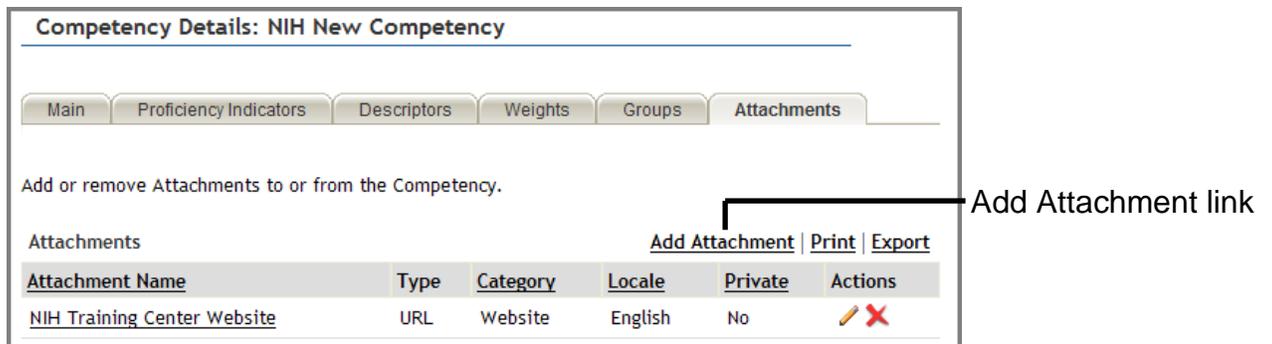
Main Proficiency Indicators Descriptors Weights Groups Attachments

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

Showing 1 out of 1 results

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

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



Competency Details: NIH New Competency

Main Proficiency Indicators Descriptors Weights Groups Attachments

Add or remove Attachments to or from the Competency.

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

Attachment Name	Type	Category	Locale	Private	Actions
NIH Training Center Website	URL	Website	English	No	

MULTI-RATER ASSESSMENTS

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

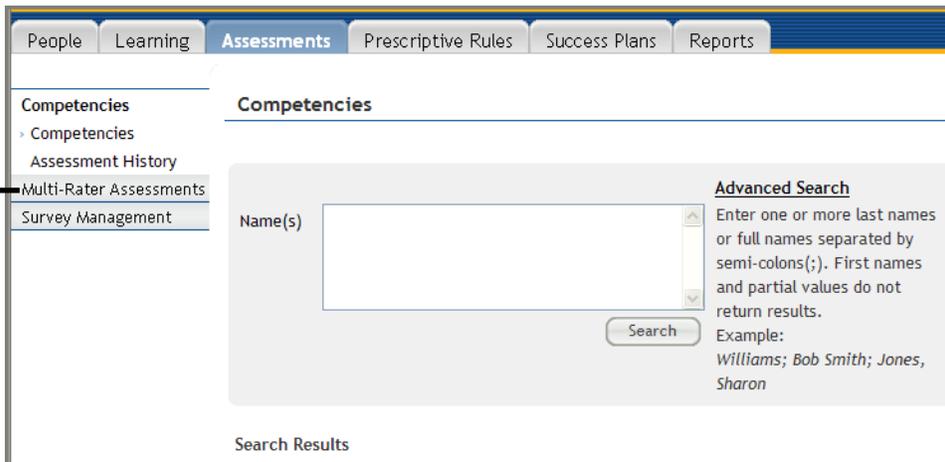
STEP-BY-STEP (VIEW LEARNER ASSESSMENTS)

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



2. Click the **Assessments** tab.
3. Select **Multi-Rater Assessments** from the left navigation menu.

Multi-Rater Assessments



4. Enter the learner's name in the search box and click **Search**.
5. Select **View Assessment** to the right of the correct learner.

People Administrator

The screenshot shows the 'Assessments' section of the People Administrator. A search box contains 'NIH Learner' and a 'Search' button. To the right, an 'Advanced Search' section provides instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search box, 'Search Results' shows 'Showing 1 out of 1 results'. A table lists the results:

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

View Assessment

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

6. Click on the **MRA Title** to see assessment details.

The screenshot shows the 'Assessments: NIH Learner' page. It has tabs for 'Current' and 'Completed'. Below the tabs, there are links for 'New Assessment', 'Print', 'Export', and 'Modify Table'. The page shows 'Showing 5 out of 5 results' in a table:

MRA Title	Closes On	MRA Status	Actions
Learner Test MRA for Approval Process	12/31/2014	In Progress	Edit
Second test MRA to approve raters	12/31/2014	In Progress	Edit
Test MRA	12/31/2014	In Progress	Edit
Test MRA		In Progress	Edit
User Manual Demo		In Progress	Edit

MRA Title

Assessment Details: Second test MRA to approve raters

Main Competencies

MRA Title: Second test MRA to approve raters
 Description: Second test MRA to approve raters
 Ratee: NIH Learner
 Closes On: 12/31/2014
 Type: Competency-based

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

Rater Name	Approval Status	Rater Acceptance
NIH DomainSysAdmin	Approved	Pending
NIH LocalLearningAdmin	Approved	Completed
NIH TrainingContentAdmin	Approved	Pending
NIH User	Approved	Pending

Rejected Raters
 No items found

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

MRA Details * = required

MRA Title: Test MRA
 Description:
 Ratee: NIH Learner
 Closes On:  **Closes On Date**
 Type: Competency-based
 Assessment Results: Show Individual Comments
 Show Individual Rating Levels

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

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

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

Rater Name	Person Type	Approval Status	Rater Acceptance	Actions
------------	-------------	-----------------	------------------	---------

People Administrator

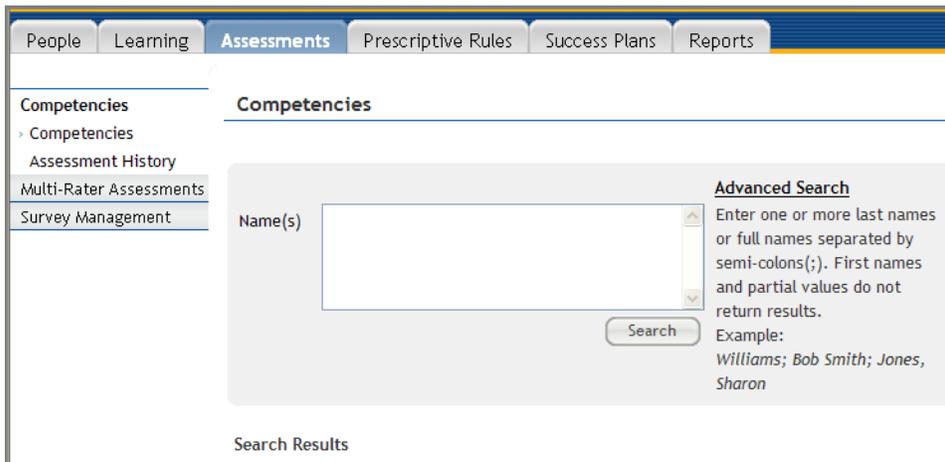
STEP-BY-STEP (CREATE A MULTI-RATER COMPETENCY ASSESSMENT)

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



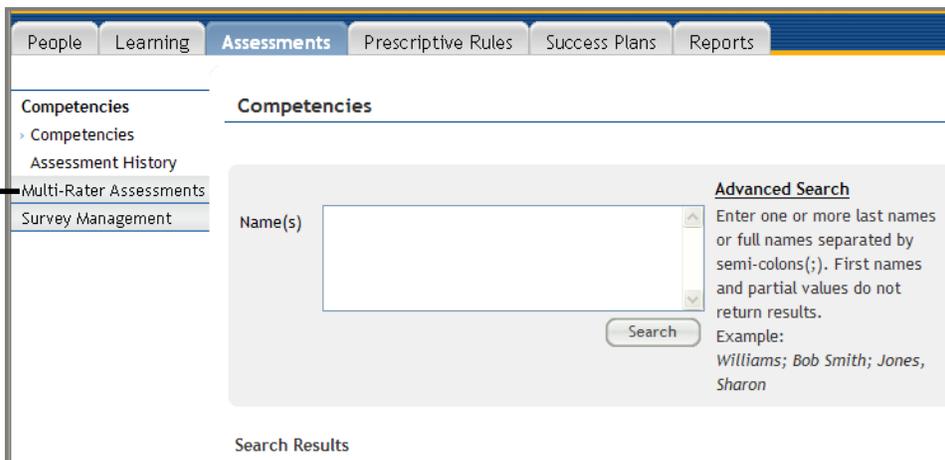
Go To menu

2. Click on the **Assessments** tab.



3. Select **Multi-Rater Assessments** from the left navigation menu.

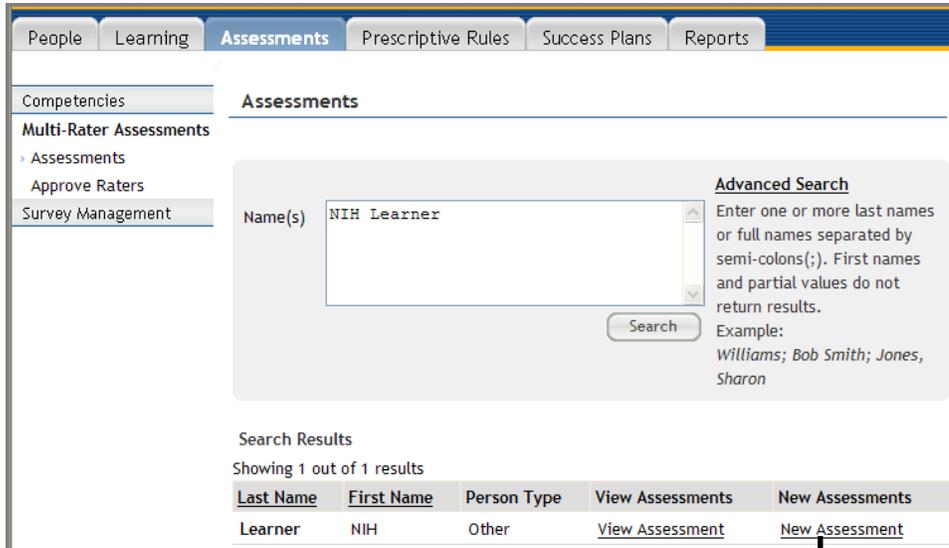
Multi-Rater Assessments



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

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

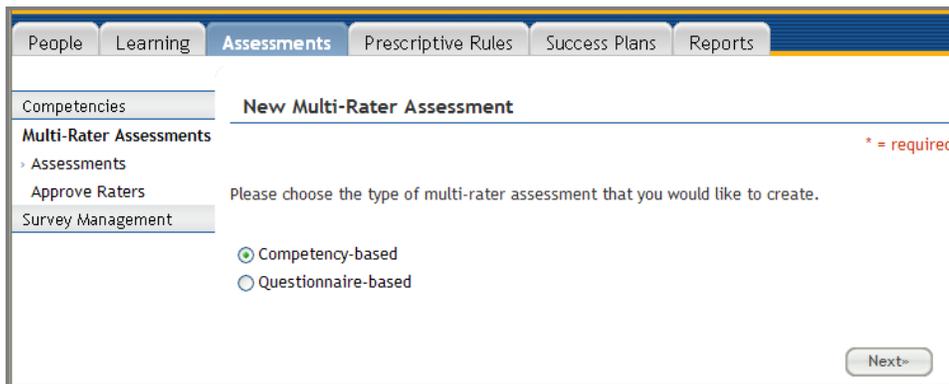
5. Select **New Assessment** to the right of the correct learner.



New Assessment

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

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



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

People Administrator

People Learning **Assessments** Prescriptive Rules Success Plans Reports

Competencies

New Multi-Rater Assessment * = required

Multi-Rater Assessments

Assessments

Approve Raters

Survey Management

MRA Title* New Multi-Rater Assessment

Description This is a new assessment for NIH Learner.

Ratee NIH Learner

Closes On 06/01/2012

Type Competency-based

Assessment Results Show Individual Comments Show Individual Rating Levels

Competencies to be Assessed [Add Competency](#)

No items found

Raters [Add Rater](#)

No items found

Save Cancel

Closes On date

Add Competency link

Add Rater link

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

14. When finished, click **Submit**.

Select Competencies

View By Held

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

Showing 14 out of 14 results

Competency Name

NIH Risk Analysis

NIH Resilience

NIH Process Management

NIH Reconciliation and Financial Reporting

NIH Federal and Departmental Policies and Procedures Knowledge

NIH Acquisition Planning

NIH Adaptability

NIH Qualitative/Quantitative Analysis

NIH Influence and Negotiation

NIH Solicitation

NIH Organizational Strategic Support

NIH Financial Budget and Program Analysis

NIH Project Management

NIH Advisory Assistance

Submit Close

View by menu

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

New Multi-Rater Assessment * = required

MRA Title*

Description

Ratee

Closes On

Type

Assessment Results Show Individual Comments
 Show Individual Rating Levels

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

Competency Name	Actions
NIH Risk Analysis	Remove Competency
NIH Resilience	Remove Competency
NIH Process Management	Remove Competency

Raters [Add Rater](#)

No items found

Add Rater link

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

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

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

Search for People

Name(s)

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

Search Results [Modify Table](#)

Showing 1 out of 1 results

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

People Administrator

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

New Multi-Rater Assessment * = required

MRA Title*

Description

Ratee

Closes On

Type

Assessment Results Show Individual Comments
 Show Individual Rating Levels

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

Competency Name	Actions
NIH Risk Analysis	Remove Competency
NIH Resilience	Remove Competency
NIH Process Management	Remove Competency

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

Rater Name	Person Type	Actions
NIH Supervisor	Other	Remove Rater

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

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

Submit for Rater Approval

Are you sure you want to submit this assessment for rater approval?

20. Click **Yes**.

SURVEY MANAGEMENT

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

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

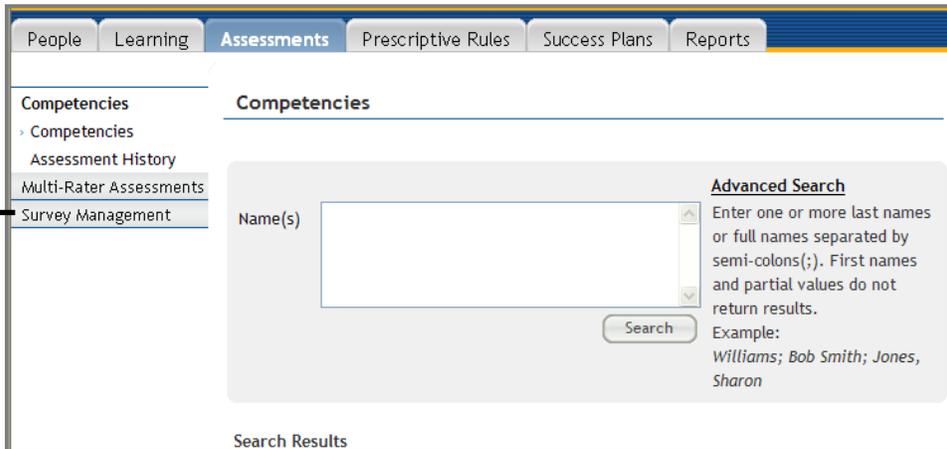
STEP-BY-STEP (CREATE AND DISTRIBUTE A SURVEY)

1. Select the **People Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.



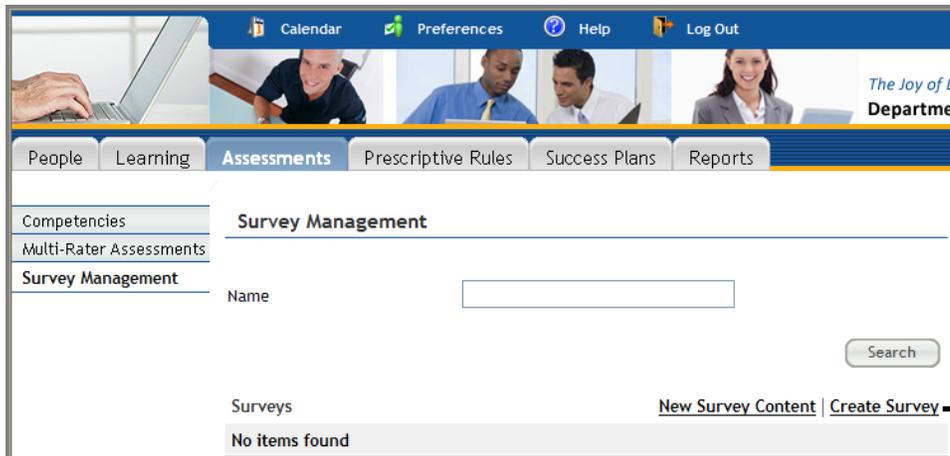
Go To menu

2. Click on the **Assessments** tab



Survey Management

3. Select **Survey Management** in the left navigation menu.
4. Click **Create Survey**.



Create Survey link

People Administrator

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

The screenshot shows a web form titled "Survey Creation and Distribution". In the top right corner, there is a red asterisk followed by the text "= required". The form contains the following fields:

- Name***: A text input field containing "New Survey".
- Description**: A text area containing "Survey for my IC." with up and down arrow icons on the right side.
- Closes On**: A date input field containing "06/01/2012" with a calendar icon to its right.
- Status**: A text input field containing "Draft".
- Domain***: A text input field containing "NIH" with a dropdown arrow icon to its right.

At the bottom right of the form, there are two buttons: "Next" and "Cancel".

9. Click **Add Questionnaire**.

The screenshot shows a web form titled "Survey Details and Distribution: New Survey". In the top right corner, there is a red asterisk followed by the text "= required". The form contains the following fields:

- Name***: A text input field containing "New Survey".
- Description**: A text area containing "Survey for my IC." with up and down arrow icons on the right side.
- Closes On**: A date input field containing "06/01/2012" with a calendar icon to its right.
- Status**: A text input field containing "Draft".
- Domain***: A text input field containing "NIH" with a dropdown arrow icon to its right.

Below these fields, there are two sections:

- Questionnaire Content**: A section with a grey background and the text "No items found". To its right is a link labeled "Add Questionnaire". An arrow points from the text "Add Questionnaire" to this link.
- Respondents**: A section with a grey background and the text "No items found". To its right is a link labeled "Add Respondents".

At the bottom of the form, there are two buttons: "Save For Later" and "Cancel".

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

The screenshot shows a web interface titled "Attach Evaluation:". At the top, there are two tabs: "Browse" and "Search". A line points to the "Search" tab with the label "Search tab". Below the tabs is a section titled "Production Repository" containing a table with two columns: "Select" and "Item". The table lists several items, each with a radio button in the "Select" column. A line points to the radio button for "Content Admin Demo [SCORM Package, Version: 1.0]" with the label "Radio button". At the bottom of the table, there is a radio button for "NIHTC Evaluation [SCORM Package, Version: FY2011]".

Select	Item
<input type="checkbox"/>	Production
<input type="checkbox"/>	HHS U
<input type="checkbox"/>	NIH
<input type="checkbox"/>	CC-NUR
<input type="checkbox"/>	CIT
<input type="radio"/>	Content Admin Demo [SCORM Package, Version: 1.0]
<input type="checkbox"/>	Drivers Overview
<input type="checkbox"/>	External course links
<input type="checkbox"/>	IT security
<input type="checkbox"/>	NBS WEBCONTENT
<input type="checkbox"/>	NEMS
<input type="checkbox"/>	NHGRI
<input type="checkbox"/>	NIEHS
<input type="checkbox"/>	NIH CSR
<input type="checkbox"/>	NIH-OER FCOI
<input type="checkbox"/>	NIHTC
<input type="radio"/>	NIHTC Evaluation [SCORM Package, Version: FY2011]

11. You may also click the Search tab to locate the survey using a name search.

12. Enter search criteria and click **Search**.

People Administrator

Attach Evaluation:

Browse Search

Name: Test Survey Version Number: []
Content Format: -Select One- Content Type: -Select One-
Language: [] Author: []
Keywords: [] Folder Name: []
Available From >=: [] Available From <=: []
Last Modified On >=: [] Last Modified On <=: []
Competency: [] Owner: []
Content Provider: -Select One- Delivery Vendor: -Select One-
Search

Contents
Showing 2 out of 2 results

Select	Name	Version Number	Content Format	Folder Name
<input type="radio"/>	Test Survey		SCORM Package	Test Content
<input type="radio"/>	Test Survey2		SCORM Package	Test Content

Finish Close

Radio button

Search tab

13. Click **Finish**.

Survey Details and Distribution: New Survey

* = required

Name*: New Survey
Description: Survey for my IC.
Closes On: 06/01/2012
Status: Draft
Domain*: NIH

Questionnaire Content

Questionnaire	Actions
Test Survey	Preview 

Respondents
No items found
Add Respondents

Save For Later Cancel

Delete

Preview

Add Respondents

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

15. Click the **Advanced Search** link.

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

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

Search for People

Name(s) **Advanced Search**

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

Search Results [Modify Table](#)

Showing 2 out of 2 results

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

Checkbox

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

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

17. Do one of the following:

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

People Administrator

Name*

Description

Closes On

Status

Domain*

Questionnaire Content

Questionnaire	Actions
COI	Preview

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

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

Save For Later
and Save and
Distribute

STEP-BY-STEP (VIEW A SURVEY)

1. Select the **People Administrator – People** role in the drop-down **Go To** menu.
2. Click on the **Assessment** tab
3. Select **Survey Management** from the menu on the left.
4. Enter the name of the survey you are looking for and click **Search**.
5. Under the **Actions** column, you will see various options, depending on the status of the survey.

People	Learning	Assessments	Prescriptive Rules	Success Plans	Reports		
Competencies	Survey Management						
Multi-Rater Assessments							
Survey Management	Name <input type="text" value="Test"/> <input type="button" value="Search"/>						
Surveys		New Survey Content Create Survey Modify Table					
Name	Status	Create Date	Distribution Date	Close Date	Domain	Number of Completions	Actions
test	Completed	07/02/2008	10/08/2008	11/01/2008	ORA	1	View Distribution
test2	Completed	10/08/2008	10/08/2008	10/16/2008	Global	1	View Distribution
Test Survey	Completed	07/15/2009	07/15/2009	09/30/2009	NIH	0	View Distribution
Test Survey 1	Completed	09/29/2009	09/29/2009		Global	1	View Distribution

Actions

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

MANAGING LEARNING

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

ENROLLMENTS

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

STEP-BY-STEP (VIEW AND MANAGE ENROLLMENTS)

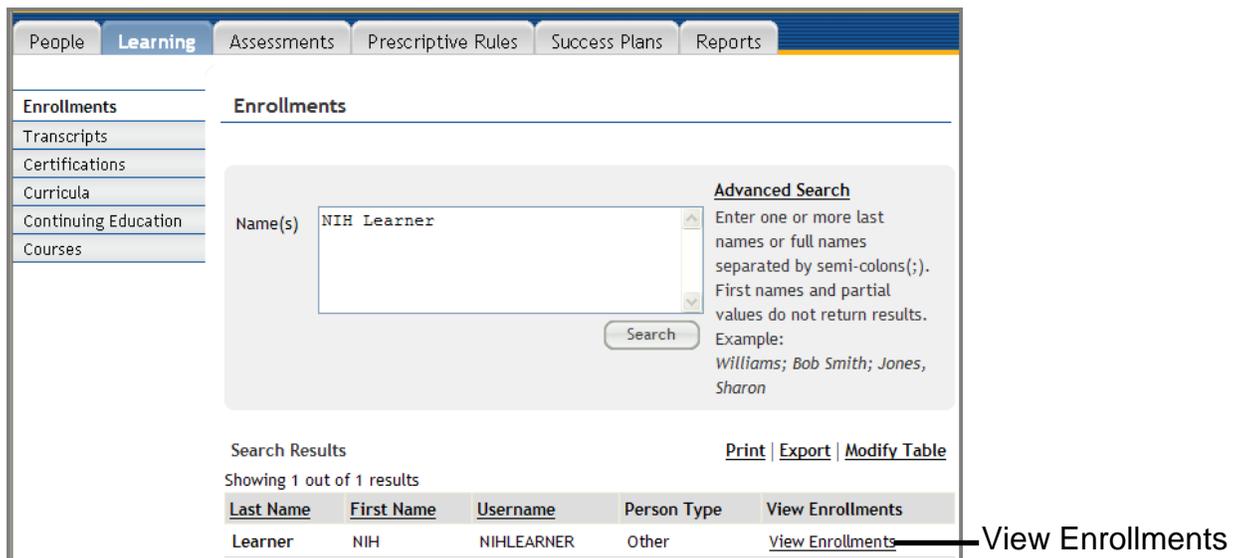
1. Select the **People Administrator – People** role in the drop-down **Go To** menu.



2. Click on the **Learning** tab.
3. Select **Enrollments** from the menu on the left.
4. Enter the learner’s name in the search field and click **Search**.

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

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



People Administrator

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

The screenshot shows the 'Enrollments: NIH Learner' page. The 'View Enrollments by' dropdown is set to 'All'. The table below shows the following data:

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Actions	Package
<input type="checkbox"/>	Books 24x7	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	
<input type="checkbox"/>	Leading Change from the Front Line	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	
<input type="checkbox"/>	NIH Clinical Center: Age-Specific Care	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	
<input type="checkbox"/>	NIH LMS Learning Administrator	Computer Laboratory	05/22/2012	NIH Training Center	6120 Executive Plaza South (EPS)	Pending Approval	Drop Reject as secondary approver Approve as secondary approver	
<input type="checkbox"/>	Performance Management Appraisal Program (PMAP) for Employees	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	
<input type="checkbox"/>	Requirements Planning and Management	Online Training				Confirmed	View Learning Assignments Mark Complete Drop	

Buttons at the bottom: Approve Selected, Approve All, Reject Selected, Reject All.

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

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

- **View Learning Assignments** - allows you to view any learning assignments for a course, attempts on learning content, the learner's completion status and score.
- **Mark Complete**- allows you to indicate the completion status of a course. This functionality can be used if an online course does not automatically complete successfully. Instructor-led classes should be marked complete by the Training Administrator responsible for the class.

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

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

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

- **Approve/Reject as secondary approver** – Allows you to approve or reject the training the learner is registering for.

TRANSCRIPTS

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

NOTE: Because the LMS is still a relatively new system and not all historic training has been migrated, some records may not appear on the LMS transcript. If you have a question about whether something should be appearing on the LMS transcript, please submit a ticket to the HR Systems Support Help Desk at:

<http://intrahr.od.nih.gov/helpdeskform.htm>.

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

STEP-BY-STEP (VIEW A LEARNER TRANSCRIPT)

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



2. Click the **Learning** tab.
3. Click **Transcripts** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

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

People Administrator

5. Click **View Completed Courses** to the right of the correct learner.

People Learning Assessments Prescriptive Rules Success Plans Reports

Enrollments Transcripts Certifications Curricula Continuing Education Courses

Completed Courses

Name(s) NIH Learner **Advanced Search**

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

Search

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

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	View Completed Courses
Learner	NIH	NIHLEARNER	Other	View Completed Courses

View Completed Courses

6. Set the date range for transcript items to be displayed and click **Search**.

Completed Courses: NIH Learner

Active Inactive

Completion Date after 01/20/2012 *Completion Date after*

Completion Date before 04/19/2012

Delivery Type All

Search

Completed Courses [Add Completed Course](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 6 out of 6 results

Title	Version	Delivery Type	Registration Date	Completion Status	Date Marked Complete	Marked Complete by	Score	Grade	Duration(HH:MM)	Credits	Actions
CLP TEST 03-06-2012			03/06/2012	Successful	03/06/2012		0		02:00		Actions
GP Test				Successful	03/08/2012		0		00:00	0.5	Actions

Title

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

Additional Tips:

- You can view details of a training item by clicking on its title.

STEP-BY-STEP (DELETE A TRANSCRIPT ITEM)

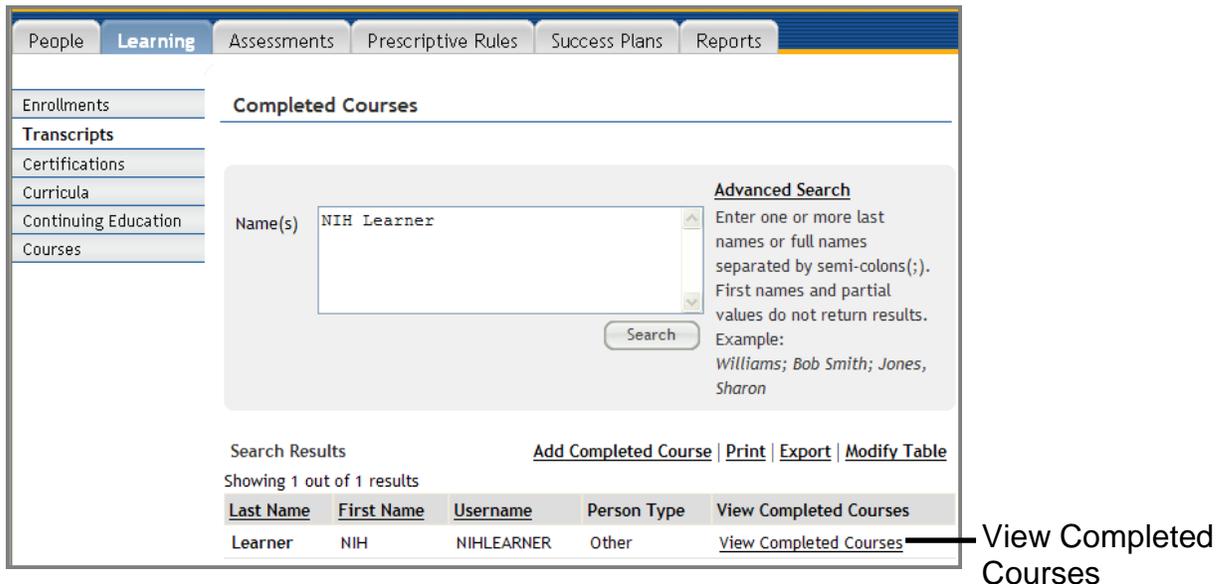
1. Select the **People Administrator – People** role in the drop-down **Go To** menu.



2. Click the **Learning** tab.
3. Click **Transcripts** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

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

5. Click **View Completed Courses** to the right of the correct learner.



6. Click **Actions** link on the right for the transcript item being deleted.
7. Click **Delete** in the Actions popup window.

People Administrator

Completed Courses: NIH Learner

Active Inactive

Completion Date after: 01/20/2012
Completion Date before: 04/19/2012
Delivery Type: All

Search

Completed Courses
Showing 6 out of 6 results

Title	Version	Delivery Type	Registration Date	Completion Status	Date Marked Complete	Marked Complete by	Score	Grade	Duration(HH:MM)	Crew	Actions
CLP TEST 03-06-2012			03/06/2012	Successful Print Certificate of Completion	03/06/2012		0		02:00		Actions
GP Test				Successful Print Certificate of Completion	03/08/2012		0		00:00	0.5	Actions

- If you are sure this is the item you want to delete, click **OK** from the dialog box. The screen will refresh and deleted transcript items will move to the Inactive tab.



NOTE: A copy of deleted transcript items is permanently kept on the **Inactive** tab.

STEP-BY-STEP (EDIT A TRANSCRIPT ITEM)

- Select the **People Administrator – People** role in the drop-down **Go To** menu.



- Click the Learning tab.
- Click Transcripts in the left navigation menu.
- Enter the learner's name in the search field and click Search.

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

- Click View Completed Courses to the right of the correct learner.

The screenshot shows the 'Completed Courses' search page. A search box contains 'NIH Learner'. Below the search box, there are links for 'Add Completed Course', 'Print', 'Export', and 'Modify Table'. The search results show 'Showing 1 out of 1 results'. A table lists the results with columns: Last Name, First Name, Username, Person Type, and View Completed Courses. The first row shows 'Learner', 'NIH', 'NIHLEARNER', 'Other', and a 'View Completed Courses' link.

Last Name	First Name	Username	Person Type	View Completed Courses
Learner	NIH	NIHLEARNER	Other	View Completed Courses

View Completed Courses

- Click **Actions** link on the right for the transcript item being updated.
- Click **Edit** in the Actions popup window.

The screenshot shows the 'Completed Courses: NIH Learner' details page. It includes filters for 'Completion Date after', 'Completion Date before', and 'Delivery Type'. Below the filters is a table of completed courses. An 'Actions' popup menu is open over the 'Actions' link of the second row, showing 'Edit' and 'Delete' options.

Title	Version	Delivery Type	Registration Date	Completion Status	Date Marked Complete	Marked Complete by	Score	Grade	Duration(HH:MM)	Cre...	Actions
CLP TEST 03-06-2012			03/06/2012	Successful	03/06/2012		0		02:00		Actions
GP Test				Successful	03/08/2012		0		00:00	0.5	Actions

Edit
Actions

- Change any of the fields that need to be corrected and click **Save**.

NOTE: You should be able to provide documentation to verify any changes made to a transcript of a learner. Be sure you complete all the EHRI required fields in **red**.

People Administrator

Transcript Details Print | Export | Modify Table

Transcript Details

Course Name: **Telework 101 For Employees**

Learner Name: Aurangzeb NISAR

ID: TELEWORK

Description: Telework training agreement

Completion Status: Successful

Marked Complete by:

Delivery Type: Online Training

Offering Start Date:

Ended/Completed On Date: 09/10/2013

Registration Date: 09/10/2013

Date Marked Complete: 09/10/2013

Start Time(HH:MM):

End Time(HH:MM):

Duration(HH:MM): 02:30

Location:

Score: 0

Grade:

Default Credits: 0

Training Course Data

Training Duty Hours*:

Training Non Duty Hours*:

Training Purpose Type Code*: Improve/Maintain Present Performance

Continued Service Agreement Required Indicator*: No

Continued Service Agreement Expiration Date*: 01/01/1900

Direct Costs and Appropriation / Fund Chargeable

Training Tuition and Fees Cost*: USD

Training Materials Cost*: USD

Training Nongovernment Contribution Cost*: USD

Indirect Costs / Fund Chargeable

Training Per Diem Cost*: USD

Training Travel Indicator*: No

Training Travel Cost*: USD

Results by Module Print | Export | Modify Table

Module	Requirement	Completion Status	Details	Results
Telework Training	Required	Successful	Attempts Allowed: Unlimited	View

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

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

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

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



2. Click the **Learning** tab.
3. Click **Transcripts** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

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

People Administrator

- Click **View Completed Courses** to the right of the correct learner.

People Learning Assessments Prescriptive Rules Success Plans Reports

Enrollments
Transcripts
Certifications
Curricula
Continuing Education
Courses

Completed Courses

Name(s) NIH Learner

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

Search

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

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	View Completed Courses
Learner	NIH	NIHLEARNER	Other	View Completed Courses

View Completed Courses

- Click **Add Completed Course**.

Completed Courses: NIH Learner

Active Inactive

Completion Date after 01/20/2012

Completion Date before 04/19/2012

Delivery Type All

Search

Completed Courses [Add Completed Course](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 6 out of 6 results

Title	Version	Delivery Type	Registration Date	Completion Status	Date Marked Complete	Marked Complete by	Score	Grade	Duration(HH:MM)	Credits	Actions
CLP TEST 03-06-2012			03/06/2012	Successful	03/06/2012		0		02:00		Actions
GP Test				Successful	03/08/2012		0		00:00	0.5	Actions

Add Completed Course

- Click **Use Existing Item** to add courses to the learner's transcript that already exist on someone else's transcript or in the course catalog.

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

Use Existing Item

8. Enter the course **Name** in the name field and click **Search**.

NOTE: You may also search by the course **ID**.

Title	Version	Description	ID
NIH LMS Learning Administrator	FY12	This two-day course will provide an introduction to the LMS and the permissions associated with Training Administrators and Content Administrators. During this course, hands-on exercises are performed in a training environment to simulate basic LMS functions, which include creating and modifying courses and their offerings as a Training Administrator, and working with online courses as a Content Administrator. All materials will be provided to the learner in classand support for administrators is available after training via tip sheets, help desk, and access the NIH LMS Implementation team.	NIHTC1003

Checkbox

NOTE: Remember that you can use the percent symbol (%) as a wildcard. You may also search for courses that are not in the LMS catalog but may have been added to a learner’s transcript by clicking the **Search Existing Completed Course Items** radio button.

9. Click on the checkbox to the left of the course you wish to add to the learner’s transcript. This will close the window and take you back to the previous screen.

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

People Administrator

10. Enter additional data into all appropriate fields.

Edit Item Added to Completed Course

* = required

[Use Existing Item](#)

Item/Event Name	NIH LMS Learning Administrator
Version	FY12
Description	<p>This two-day course will provide an introduction to the LMS and the permissions associated with Training Administrators and Content Administrators. During this course, hands-on exercises are performed in a training environment to simulate basic LMS functions, which include creating and modifying courses and their offerings as a Training Administrator, and working with online courses as a Content Administrator. 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.</p> <p>**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.</p> <p>Requirements for obtaining NIH LMS Administrator permissions, see http://trainingcenter.nih.gov/lms_courses.html</p>
Offering Start Date	<input type="text"/> 
Ended/Completed On Date	<input type="text"/> 
Registration Date	<input type="text"/> 
Date Marked Complete*	<input type="text"/>  — REQUIRED FIELD
Start Time (HH:MM)	<input type="text"/>
End Time (HH:MM)	<input type="text"/>
Duration(HH:MM)	<input type="text"/>
Delivery Type	<input type="text" value="-Select One-"/>
ID	NIHTC1003

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

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

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

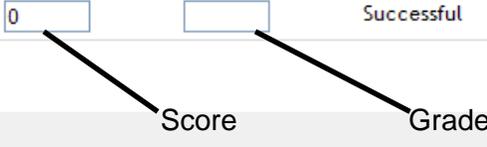
People Administrator

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

Learners Modify Table			
Name	Score	Grade	Completion Status
NIH Learner	<input type="text" value="0"/>	<input type="text"/>	Successful

Competencies
No items found

Notes
No items found



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

People Administrator

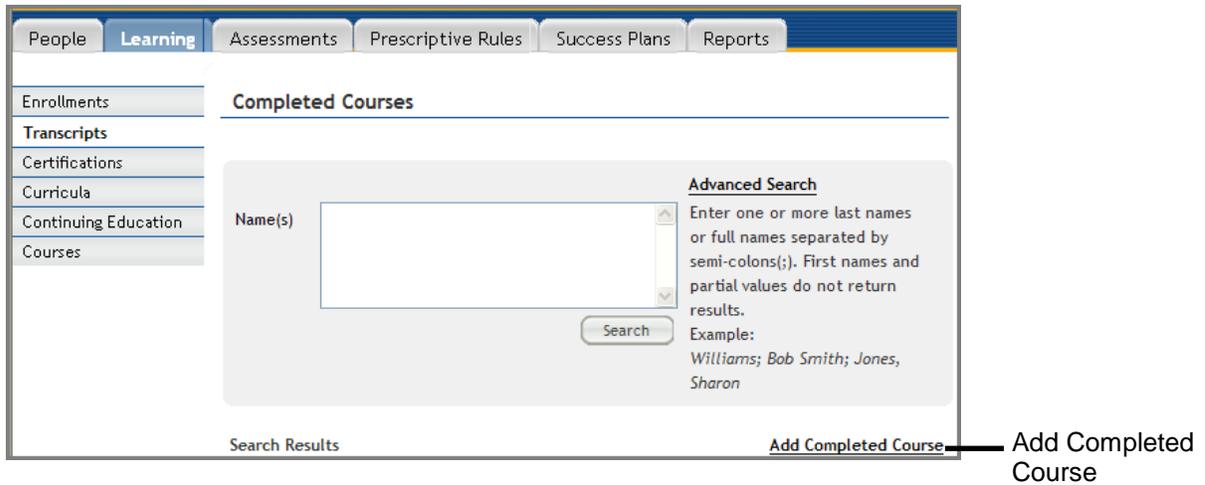
STEP-BY-STEP (ADD LEARNING TO A TRANSCRIPT: MULTIPLE LEARNERS)

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

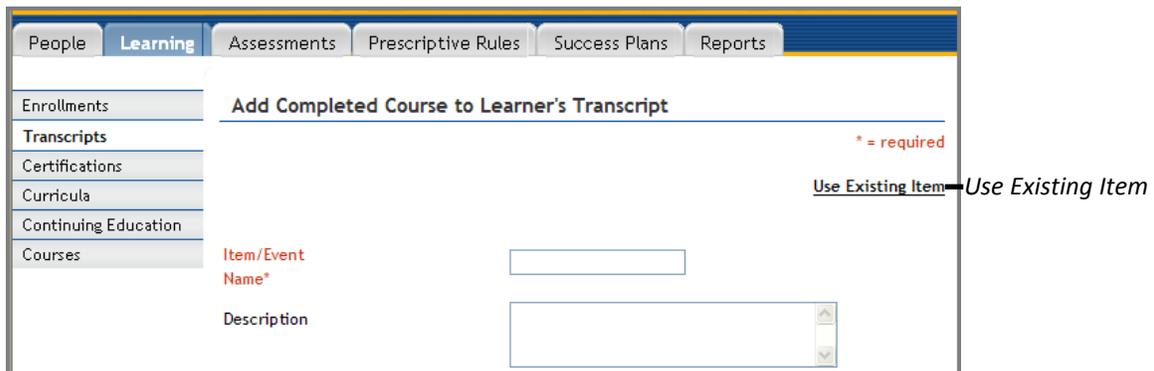
1. Select the **People Administrator – People** role in the drop-down **Go To** menu.



2. Click the **Learning** tab.
3. Click **Transcripts** in the left navigation menu.
4. Click **Add Completed Course**.



5. Click **Use Existing Item**.



6. Enter the course **Name** in the name field and click **Search**.

NOTE: You may also search by the course **ID**.

Search for Items to Add a Completed Course to Learn's Transcript

Name

ID

Search Existing Completed Course Items
 Search Catalog

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

Showing 3 out of 3 results

<input type="checkbox"/>	Title	Version	Description	ID
<input type="checkbox"/>	NIH LMS Learning Administrator	FY12	This two-day course will provide an introduction to the LMS and the permissions associated with Training Administrators and Content Administrators. During this course, hands-on exercises are performed in a training environment to simulate basic LMS functions, which include creating and modifying courses and their offerings as a Training Administrator, and working with online courses as a Content Administrator. 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.	NIHTC1003

Checkbox

NOTE: Remember that you can use the percent symbol (%) as a wildcard. You may also search for courses that are not in the LMS catalog but may have been added to a learner's transcript by clicking the **Search Existing Completed Course Items** radio button.

NOTE: If the course cannot be found in the LMS catalog or another learner's transcript; close the window and manually input the course information.

7. Click on the checkbox to the left of the course you wish to add to the transcript of the learners. This will close the window and take you back to the previous screen.

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

People Administrator

8. Enter additional data into all appropriate fields.

Edit Item Added to Completed Course

* = required

[Use Existing Item](#)

Item/Event Name	NIH LMS Learning Administrator
Version	FY12
Description	<p>This two-day course will provide an introduction to the LMS and the permissions associated with Training Administrators and Content Administrators. During this course, hands-on exercises are performed in a training environment to simulate basic LMS functions, which include creating and modifying courses and their offerings as a Training Administrator, and working with online courses as a Content Administrator. 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.</p> <p>**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.</p> <p>Requirements for obtaining NIH LMS Administrator permissions, see http://trainingcenter.nih.gov/lms_courses.html</p>
Offering Start Date	<input type="text"/> 
Ended/Completed On Date	<input type="text"/> 
Registration Date	<input type="text"/> 
Date Marked Complete*	<input type="text"/>  — REQUIRED FIELD
Start Time (HH:MM)	<input type="text"/>
End Time (HH:MM)	<input type="text"/>
Duration(HH:MM)	<input type="text"/>
Delivery Type	<input type="text" value="-Select One-"/>
ID	NIHTC1003

9. Complete all fields manually for the course being added.

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

(See Appendix B for examples of the proper values that should be entered in fields that are prefixed with the label EHRI.

For courses entered manually, use the ID number that the training entity has assigned to it. If no ID has been assigned, you need to create one. Begin all IDs with NIH followed by a logical numbering system. Each ID must be unique in the LMS.

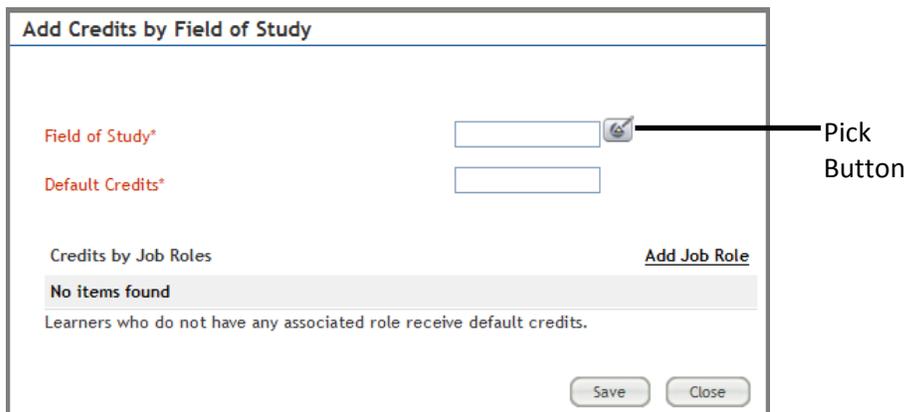
Adding a Field of Study to the New Transcript Item: (OPTIONAL)

This is required for courses that have credits associated with them such as supervisor training.

1. Click Add Field of Study.



2. Click the **Field of Study pick button** to open the Select Field of Study screen.



3. Enter the name of the field of study you wish to add then click Search.
4. Click the **checkbox** to the left of the Field of Study name.

People Administrator

Select Field of Study

Name Description

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

Select Field of Study [Print](#) | [Export](#) | [Modify Table](#)

Showing 2 out of 2 results

	Name	Description
<input type="checkbox"/>	NIH Acquisition CLPs	This field of study is to track CLPs that can be used toward acquisition certifications
<input type="checkbox"/>	NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH

5. Enter the number of credits that will be given by default in the **Default Credits** field.

6. To add credits based on Job Roles, click **Add Job Role**. (OPTIONAL)

Add Credits by Field of Study

Field of Study*

Default Credits*

Credits by Job Roles [Add Job Role](#)

No items found

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

7. Click the **Job Role pick button**.

Define Credits by Job Roles

* = required

Job Role*

Credits*

8. Enter the name of the job role you wish to add then click **Search**.
9. Click the **checkbox** to the left of the job role name then click OK in the popup window.

Select Role

Name

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

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

Showing 1 out of 1 results

Select	Name
<input checked="" type="checkbox"/>	NIH-Buyer

10. Enter the number of credits in the **Credits field**.
11. Click **Save**.

Define Credits by Job Roles

* = required

Job Role*

Credits*

12. You may continue to add additional job roles and related credits by repeating steps 6 through 11.

13. Click **Save**.

Add Credits by Field of Study

* = required

Field of Study*

Default Credits*

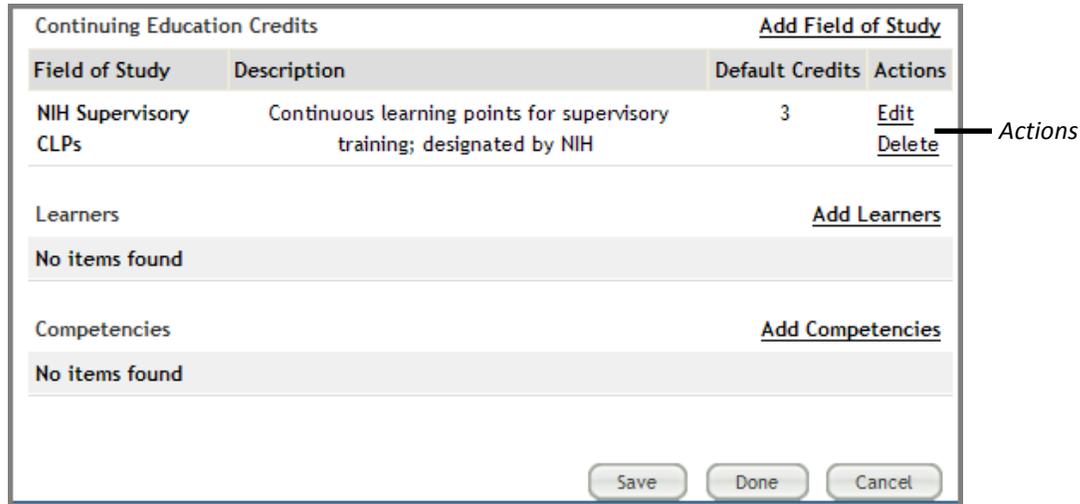
Credits by Job Roles [Add Job Role](#)

Job	Credits	Actions
NIH-Buyer	2	Edit Delete

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

People Administrator

14. Your Field of Study will now appear on the Add Completed Course to Learner's Transcript screen.



The screenshot shows a web interface titled "Continuing Education Credits" with a link "Add Field of Study" in the top right. Below the title is a table with the following data:

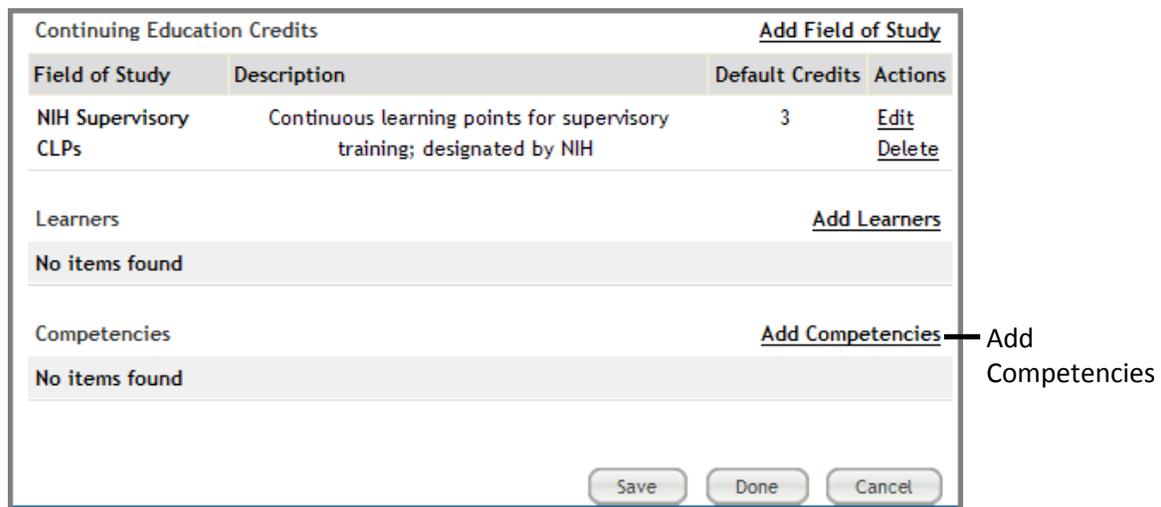
Field of Study	Description	Default Credits	Actions
NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH	3	Edit Delete

Below the table are three sections: "Learners" with "Add Learners" link and "No items found" message; "Competencies" with "Add Competencies" link and "No items found" message. At the bottom are "Save", "Done", and "Cancel" buttons. An arrow labeled "Actions" points to the "Edit" and "Delete" links in the table.

15. You may Edit or Delete the Field of Study by selecting the appropriate link in the **Actions** column.

Adding a Competency to the New Transcript Item: (OPTIONAL)

16. Click **Add Competencies** found toward the bottom of the screen.



This screenshot is identical to the previous one, but with an arrow labeled "Add Competencies" pointing to the "Add Competencies" link in the "Competencies" section.

17. Enter the name of the competency in the **Competency Name** field.

18. Click **Search**.

19. Set the **Competency Level** from the drop-down menu.

20. Click the **checkbox** to the left of the Competency Name.

Add Competencies

No Competencies are attached to Offering:

No items found

Choose Competencies from the Search

Competency Name: Search

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

Competency Name	Competency Level
<input type="checkbox"/> NIH Communications	Fundamental Awareness ▼

Done

Annotations: "Competency Name" points to the input field; "Competency Level" points to the dropdown menu; "Checkbox" points to the checkbox in the table row.

21. Click Done.

Add Competencies

No Competencies are attached to Offering:

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

Competency Name	Competency Level	Actions
NIH Communications	Fundamental Awareness	Delete

Choose Competencies from the Search

Competency Name: Search

Done

22. The competency has now been added to the transcript item.

People Administrator

Continuing Education Credits			Add Field of Study
Field of Study	Description	Default Credits	Actions
NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH	3	Edit Delete
Learners			Add Learners
No items found			
Competencies			Add Competencies Modify Table
Name	Competency Level		
NIH Communications	Fundamental Awareness		

Assigning the Learners to Receive the Transcript Item:

23. Click **Add Learners** towards the bottom of the screen.

Continuing Education Credits			Add Field of Study
Field of Study	Description	Default Credits	Actions
NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH	3	Edit Delete
Learners			Add Learners
No items found			
Competencies			Add Competencies Modify Table
Name	Competency Level		
NIH Communications	Fundamental Awareness		

Add Learners

24. Enter criteria to search for a learner then click **Search**.

25. Click the **checkbox** to the left of the learner's name.

26. Click **Select**.

NOTE: You may add multiple learners at one time by selecting multiple checkboxes.

Search Person, Internal * = required

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

Population* First Name

Last Name Person ID

Username Manager

Organization Location

Domain Person Type

Include All Suborganizations

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

Showing 3 out of 3 results

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	Learner1BAH	NIHLEARNER1BAH	Federal	00342942	HNAM6		NIHSUPERVISORBAH
<input checked="" type="checkbox"/>	NIH	Learner2BAH	NIHLEARNER2BAH	Federal	00342943	HNAM6		NIHSUPERVISORBAH
<input checked="" type="checkbox"/>	NIH	Learner3BAH	NIHLEARNER3BAH	Contractor	00342944	HNAM6		NIHSUPERVISORBAH

Checkbox

27. Verify that the Start Date, Date Marked Complete, Score, and Grade fields are showing the correct information.

NOTE: Remove zeros from the Score field if no assessment was given.

28. Click **Done**.

Continuing Education Credits [Add Field of Study](#)

Field of Study	Description	Default Credits	Actions
NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH	3	Edit Delete

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

Name	Start Date	Date Marked Complete	Score	Grade	Completion Status	Actions
NIH Learner1BAH	<input type="text" value="04/02/2012"/>	<input type="text" value="04/30/2012"/>	<input type="text"/>	<input type="text"/>	Successful	Delete
NIH Learner2BAH	<input type="text" value="04/02/2012"/>	<input type="text" value="04/30/2012"/>	<input type="text"/>	<input type="text"/>	Successful	Delete
NIH Learner3BAH	<input type="text" value="04/02/2012"/>	<input type="text" value="04/30/2012"/>	<input type="text"/>	<input type="text"/>	Successful	Delete

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

Name	Competency Level
NIH Communications	Fundamental Awareness

29. After all available course data is entered, click **Done**.

People Administrator

CERTIFICATIONS

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

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

STEP-BY-STEP (VIEW CERTIFICATIONS)

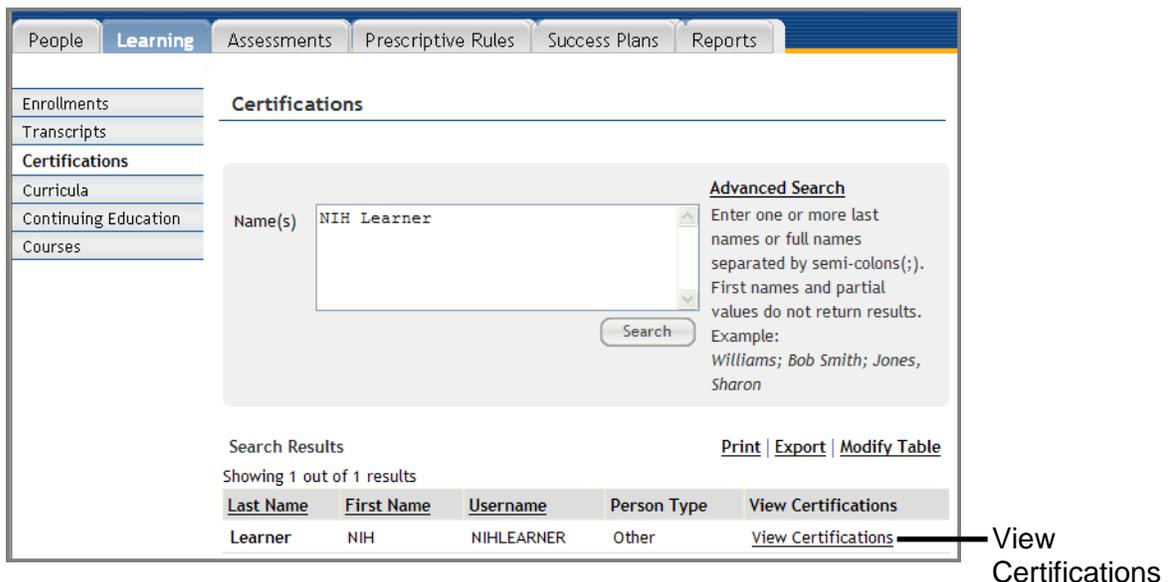
1. Select the **People Administrator – People** role in the drop-down **Go To** menu.



2. Click the **Learning** tab.
3. Select **Certifications** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

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

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

A screenshot of the 'Certifications' search results page. The 'Learning' tab is selected in the top navigation. On the left, a sidebar menu has 'Certifications' highlighted. The main content area shows a search for 'NIH Learner' with one result. A callout arrow points to the 'View Certifications' link in the result table with the text 'View Certifications'.

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

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

Showing 1 out of 1 results

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

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

Certifications : NIH Learner

Certifications External Certifications

Name Show Required Certifications Only

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

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

Showing 10 out of 10 results

Name	Version	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
HHS Records Management for All Employees Certification	1.0	Recertification for HHS Records Management for All Employees	Discontinued	NIH Records Management reminder test (More)	12/19/2011	Actions

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

Action Associated With Certifications:

Clicking the Actions link in the Actions column will list a number of actions available depending on the status of the certification. The actions are outlined below:

- **View Certification History** – Shows all of the events, in chronological order, which took place during the acquisition of the certification.
- **View Progress for All Paths** – Shows a completion percentage bar indicating how far along the learner is in the certification.
- **View Acquisition History** – Shows the certification acquisition date, the completed learning elements, and their respective dates of completion.
- **Delete** – Allows the certification requirements to be deleted from learner.
- **Change Completion Status** – Allows the expiration date to be changed or the certification to be revoked.

Actions

- [View Certification History](#)
- [View Progress for All Paths](#)
- [View Acquisition History](#)
- [Delete](#)
- [Change Completion Status](#)

People Administrator

STEP-BY-STEP (GRANT INTERNAL CERTIFICATION)

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

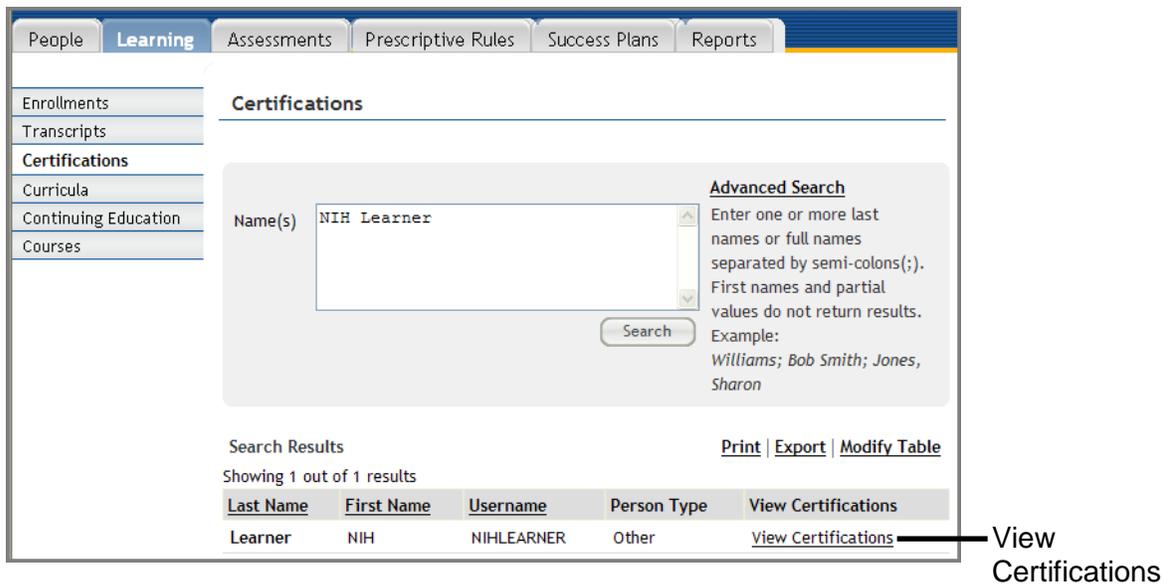
1. Select the **People Administrator – People** role in the drop-down **Go To** menu.



2. Click the **Learning** tab.
3. Select **Certifications** from the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

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

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

A screenshot of the LMS 'Certifications' page. The top navigation bar has tabs for People, Learning, Assessments, Prescriptive Rules, Success Plans, and Reports. The 'Learning' tab is active. On the left is a navigation menu with options: Enrollments, Transcripts, Certifications, Curricula, Continuing Education, and Courses. The main content area is titled 'Certifications' and contains a search box with 'NIH Learner' entered. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search box is a 'Search' button. Underneath the search box, it says 'Search Results' and 'Showing 1 out of 1 results'. There are links for 'Print', 'Export', and 'Modify Table'. A table displays the search results:

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

A black arrow points from the text 'View Certifications' to the 'View Certifications' link in the table.

6. Click **Grant Certification**.

Certifications : NIH Learner

Certifications External Certifications

Name Show Required Certifications Only

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

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

Showing 10 out of 10 results

Name	Version	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
HHS Records Management for All Employees Certification	1.0	Recertification for HHS Records Management for All Employees	Discontinued	NIH Records Management reminder test (More)	12/19/2011	Actions

7. Enter the name of the certification in the **Name** field then click **Search**.

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

Grant Certification

...> 2.Grant Certification

Name

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

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

Showing 1 out of 1 results

Select	Name	Version	Description
<input type="radio"/>	HHS Appropriations Law Certification	1.0	This certification requires HHS Appropriations Law to be completed within 30 days of assignment. This certification is required for specific NIH staff across NIH, including Contract Admin, Purchasers, Procurement, Budget, COTR, etc.

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

People Administrator

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

Learner Name	Acquired On	Expiration Date
NIH Learner	04/02/2012	04/02/2013

STEP-BY-STEP (ASSIGN INTERNAL CERTIFICATION)

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

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



2. Click the **Learning** tab.
3. Select **Certifications** from the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

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

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

Certifications

Name(s) NIH Learner Advanced Search

Search

Search Results Print | Export | Modify Table

Showing 1 out of 1 results

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

View Certifications

6. Click **Add Certification**.

Certifications : NIH Learner

Certifications External Certifications

Name Show Required Certifications Only

Configure | Save Search Query Search

Certifications Grant Certification | Add Certification | Print | Export | Modify Table

Showing 10 out of 10 results

Name	Version	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
HHS Records Management for All Employees Certification	1.0	Recertification for HHS Records Management for All Employees	Discontinued	NIH Records Management reminder test (More)	12/19/2011	Actions

Add Certification

7. Enter the name of the certification in the **Name** field then click **Search**.

8. Click the **checkbox** to the left of the certification.

People Administrator

Name

Checkbox

Select	Name	Version	Available From	Discontinued From	Target Days	Expire In (days)	Notify Before (days)
<input checked="" type="checkbox"/>	HHS Appropriations Law Certification	1.0	03/09/2011		30		

CURRICULA

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

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

STEP-BY-STEP (VIEW CURRICULA)

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



2. Click the **Learning** tab.
3. Select **Curricula** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

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

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

People | **Learning** | Assessments | Prescriptive Rules | Success Plans | Reports

Enrollments | Transcripts | Certifications | **Curricula** | Continuing Education | Courses

Curricula

Name(s) NIH Learner

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

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

Showing 1 out of 1 results

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

View Curricula

6. You will now see all of the curricula associated with the learner.

Curricula : NIH Learner

Name Show Required Curricula Only

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

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

Showing 4 out of 4 results

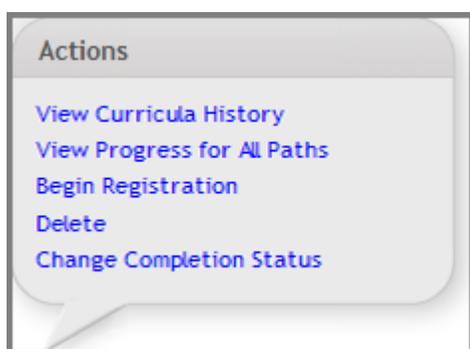
Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
LMS Training	● <input type="text"/> Path 1 - 0% Completed	Assigned	NIH Learner		Actions

People Administrator

Action Associated With Curricula:

Clicking the Actions link in the Actions column will list a number of actions available depending on the status of the certification. The actions are outlined below:

- **View Curricula History** – Shows all of the events, in chronological order, which took place during the acquisition of the curriculum.
- **View Progress for All Paths** – Shows a completion percentage bar indicating how far along the learner is in the curriculum.
- **Begin Registration** – Allows the administrator to register the learner for courses associated with the curriculum.
- **Delete** – Allows the curriculum requirements to be deleted from learner.
- **Change Completion Status** – Allows the expiration date to be changed or the certification to be revoked.



STEP-BY-STEP (GRANT CURRICULUM)

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

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



2. Click the **Learning** tab.
3. Select **Curricula** in the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

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

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

People Learning Assessments Prescriptive Rules Success Plans Reports

Enrollments Transcripts Certifications **Curricula** Continuing Education Courses

Curricula

Name(s) NIH Learner

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

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

Showing 1 out of 1 results

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

View Curricula

6. You will now see all of the curricula associated with the learner.

7. Click **Grant Curriculum**.

Curricula : NIH Learner

Name Show Required Curricula Only

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

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

Showing 4 out of 4 results

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
LMS Training	<input type="radio"/> Path 1 - 0% Completed	Assigned	NIH Learner		Actions

Grant Curriculum

8. Enter the name of the curriculum into the **Name** field then click **Search**.

9. Select the radio button to the left of the curriculum you would like to grant and click **Next**.

People Administrator

Grant Curriculum

2. Grant Curriculum

Name: LMS

Configure | Save Search Query | Search

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

Showing 1 out of 1 results

Select	Name	Version	Description
<input type="radio"/>	LMS Training		Training Administrator

Next Close

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

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

Grant Curriculum

1. Select Curriculum

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

Learner Name	Acquired On
NIH Learner	04/20/2012

Finish Back Close

11. Click **Finish**.

STEP-BY-STEP (ASSIGN CURRICULUM)

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

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



2. Click the **Learning** tab.
3. Select **Curricula** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

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

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

The screenshot shows the 'Learning' tab with the 'Curricula' sub-tab selected. A search box contains the text 'NIH Learner' and a 'Search' button is located below it. To the right of the search box is an 'Advanced Search' section with instructions. Below the search results, a table displays one result:

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

View Curricula

6. Click **Add Curriculum**.

The screenshot shows the 'Learning' tab with the 'Curricula' sub-tab selected for 'NIH Learner'. The 'Add Curriculum' button is highlighted with a black box. Below the search results, a table displays four curriculum entries:

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
LMS Training	Path 1 - 0% Completed	Assigned	NIH Learner		Actions
NIAID Art of Leadership Cohort 21	Art of Leadership - 0% Completed	Assigned	Ann WITHINGTON		Actions
NIH NIBIB Budget Analysis	3 Courses in this Module - 33% Completed	Acquired	THOMAS HOLSCHER		Actions

Add Curriculum

7. Enter the name of a curriculum in the **Name** field then click **Search**.

People Administrator

Select Curriculum

Name Discontinued From >=

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

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

Showing 1 out of 1 results

Select	Name	Available From	Discontinued From	Target Days
<input type="checkbox"/>	LMS Training	10/01/2009		0

8. Select the checkbox in front of the curriculum you would like to add, and it will automatically populate to the learner's list of curricula.

CONTINUING EDUCATION

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

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

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



2. Click the **Learning** tab.
3. Select **Continuing Education** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

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

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

The screenshot shows the 'Continuing Education' section of the system. A search box labeled 'Name(s)' contains the text 'NIH Learner'. To the right of the search box is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search box is a 'Search' button. Underneath, it says 'Search Results' and 'Showing 1 out of 1 results'. A table displays the results:

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

An arrow points from the 'View Status' link in the table to the text 'View Status' on the right side of the image.

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

The screenshot shows the 'Continuing Education Requirement: NIH Learner' screen. It features a search box for 'Start Date' and 'End Date' with a 'Search' button. Below the search box, there are radio buttons for 'Group By': 'Field of Study', 'Courses', and 'Continuing Education Requirements' (which is selected). Underneath, it says 'Continuing Education Requirements' and 'Showing 1 out of 1 results'. A table displays the requirement:

Name	Status	Completion Status	Start Date	End Date	Grace Period (days)	View Details
NIH Supervisory Refresher Training (2011-2013)	Active	In Progress	01/01/2011	12/31/2013	35	View Details

An arrow points from the 'View Details' link in the table to the text 'View Details' on the right side of the image.

6. Click **View Details** to see more information about the requirement.

People Administrator

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

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



2. Click the **Learning** tab.
3. Select **Continuing Education** from the menu on the left.
4. Enter the learner's name in the search field and click **Search**.

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

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

Search Results

Showing 1 out of 1 results

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

View Status

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

6. Click the **Add Requirement** link.

People Learning Assessments Prescriptive Rules Success Plans Reports

Enrollments
Transcripts
Certifications
Curricula
Continuing Education
Courses

Continuing Education Requirement: NIH Learner

Start Date >= [] End Date <= [] Search

Group By Field of Study Courses Continuing Education Requirements

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

Showing 1 out of 1 results

Name	Status	Completion Status	Start Date	End Date	Grace Period (days)	View Details
NIH Supervisory Refresher Training (2011-2013)	Active	In Progress	01/01/2011	12/31/2013	35	View Details Delete

7. Enter search parameters in the fields and click **Search**.
8. Click the **checkbox** to the left of the appropriate Continuing Education Requirement.

Select Continuing Education Requirements

Name Description

Start Date = End Date =

Domain

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

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

Showing 1 out of 1 results

<input type="checkbox"/>	Name	Description	Status	Start Date	End Date
<input checked="" type="checkbox"/>	NIH Supervisory Refresher Training (2011-2013)	This Continuing Education Plan is to track refresher training required of NIH supervisors. (16 CLPs every 3 years) If a person began working on this requirement in 2011, use this Continuing Education Plan to track 16 CLPs by December 31, 2013.	Active	01/01/2011	12/31/2013

Checkbox

Select Close

9. Click **Select** to add the Continuing Education Requirement.

People Administrator

LEARNING PLANS

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

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

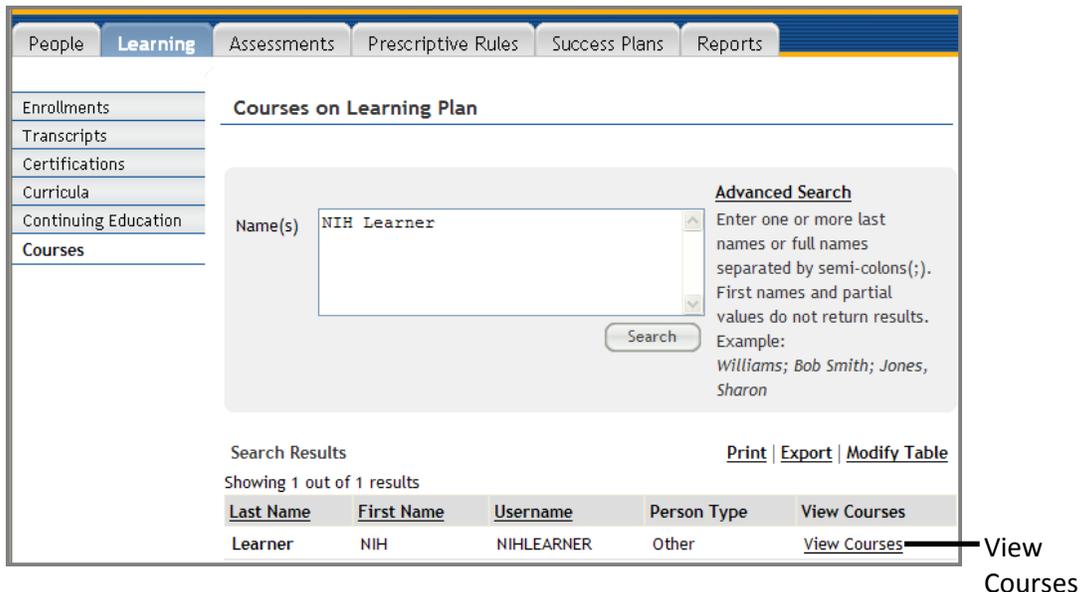
1. Select the **People Administrator – People** role in the drop-down **Go To** menu.



2. Click the **Learning** tab.
3. Select **Courses** from the left navigation menu.
4. Enter the learner's name in the search field and click **Search**.

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

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



The screenshot shows the 'Courses on Learning Plan' search results page. The 'Learning' tab is selected in the top navigation. On the left, the 'Courses' menu item is highlighted. The search field contains 'NIH Learner' and the 'Search' button is visible. To the right of the search field, there is an 'Advanced Search' section with instructions: 'Enter one or more last names or full names separated by semi-colons(;). First names and partial values do not return results. Example: Williams; Bob Smith; Jones, Sharon'. Below the search results, there is a table with one row of results. An arrow points from the text 'View Courses' to the 'View Courses' link in the table.

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

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

6. Click **Add Course**.

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

The screenshot shows the 'Courses : NIH Learner' page. The interface includes a navigation bar with tabs for People, Learning, Assessments, Prescriptive Rules, Success Plans, and Reports. On the left, there is a sidebar with links for Enrollments, Transcripts, Certifications, Curricula, Continuing Education, and Courses. The main content area displays a table of courses with the following data:

Title	Assigned By	Target Date	Status	Related Links	Actions
Learning With Saba	NIH Supervisor	07/22/2010	In Progress	- View Community - View Progress - Mark Complete - Add to Plan	
Alternative Dispute Resolution (ADR)	Test Prescriptive Rule		In Progress	- Register - Add to Plan	
NIAID OWER ELD Working with Contractors at NIAID	Ann WITHINGTON	06/01/2012	New	- Register - Add to Plan	

An arrow points to the 'Add Course' button located above the table header.

7. Click the **Course Pick Button**.

The 'Add Course' form includes the following fields and controls:

- Course***: A text input field with a search icon (magnifying glass) to its right.
- Notes**: A large text area for entering additional information.
- Due Date***: A date input field with a calendar icon to its right.
- Buttons**: 'Save' and 'Cancel' buttons at the bottom right.
- Legend**: '* = required' in the top right corner.

8. Enter the search criteria for the course and click **Search**.

9. Click the **Checkbox** for the course to be added.

People Administrator

Select Course

Title ID

Domain 

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

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

Showing 3 out of 3 results

Select	Version	ID	Title
<input type="checkbox"/>	FY12	NIHTC1001	NIH LMS Local Learning Administrator
<input type="checkbox"/>	FY12	NIHTC1002	NIH LMS People Administrator
<input type="checkbox"/>	FY12	NIHTC1003	NIH LMS Learning Administrator

10. Enter any applicable **notes**.

11. Enter a **due date** for the course to be completed by the learner.

Add Course

* = required

Course* 

Notes

Due Date* 

12. Click **Save**.

Courses : NIH Learner

Current Completed

Courses [Add Course](#) | [Print](#) | [Export](#) | [Modify Table](#)

Title	Assigned By	Target Date	Status	Related Links	Actions
Learning With Saba	NIH Supervisor	07/22/2010	In Progress	- View Community - View Progress - Mark Complete - Add to Plan	✗
Alternative Dispute Resolution (ADR)	Test Prescriptive Rule		In Progress	- Register - Add to Plan	
NIAID OWER ELD Working with Contractors at NIAID	Ann WITHINGTON	06/01/2012	New	- Register - Add to Plan	✗
NIH LMS People Administrator	NIH Competency	09/30/2012	New	- Edit - Register - Add to Plan	✗

13. The course will now be displayed with the status **New**.

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

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



Go To menu

2. Click the **Success Plans** tab.
3. Select **Plans** from the left navigation menu.
4. Click the **Assignee pick button**.

People Administrator

People Learning Assessments Prescriptive Rules **Success Plans** Reports

Plan Types Plans
Plan Forms

Plans

This table provides a list of existing Plans.

Plan Form Assignee
Start Date >= End Date <=
Status -Select One- Plan Type
Assignee's Organization Include All Suborganizations

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

Plans

5. Enter search criteria for the learner then click **Search**.

6. Select the **checkbox** to the left of the learner's first name.

Search Person, Internal

* = required

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

Population* Internal First Name NIH
Last Name Learner Person ID
Username Manager
Organization Location
Domain Person Type -Select One-
Include All Suborganizations

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

Showing 19 out of 19 results

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

7. Click **Search**.

8. Click **Learning Plan** next to learner's name.

Plans

This table provides a list of existing Plans.

Plan Form Assignee
 Start Date >= End Date <=
 Status Plan Type
 Assignee's Organization Include All Suborganizations

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

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

Showing 1 out of 1 results

Plan Name	Assignee	Person Type	Plan Form	Plan Type	Status	Actions
Learning Plan	NIH Learner	Other	Learning Plan	Learning Plan	Activated	

Learning Plan

9. From the learning plan **Activities/Critical Elements** tab, click the title of any item to access details about it. You can also see what **Type** of item it is, when it is due, and progress made (if applicable). Depending on the type of item, you will be able to take various actions using the pop-up links that appear when you hold your mouse over the **Actions** link to the right of each item.
10. Click **Add Element or Activity**.
11. Select a link from the Add Element or Activity popup bubble.

People Learning Assessments Prescriptive Rules **Success Plans** Reports

Plan Details: Learning Plan

Activities/Critical Elements Details/Instructions Change Log

Plan Name Learning Plan Status Activated
 Assignee NIH Learner Approval Policy No Approval

View Current Activities View Closed Activities

Assigned Learning [Add Element or Act...](#) | [Modify Table](#)

Name	Version	Type	Due Date	Completed On	Status	Source	Actions
Learning With Saba	1.0	Course	07/22/2010		In Progress	NIH Supervisor	Actions

Popup bubble

Add Element or Activity

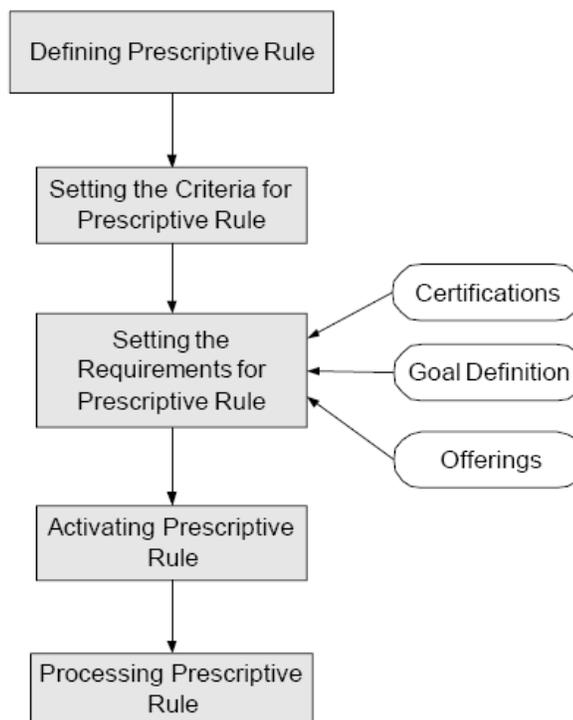
12. Follow the prompts for the type of activity you chose to add the specific learning item you want to add to the learning plan. You will see a confirmation message that the item has been added to the plan. Click **Close** to exit the message pop-up and return to the **Plan Details** screen. You should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

MANAGING PRESCRIPTIVE RULES

PRESCRIPTIVE RULES

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

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



The following points are **VERY IMPORTANT!**

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

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

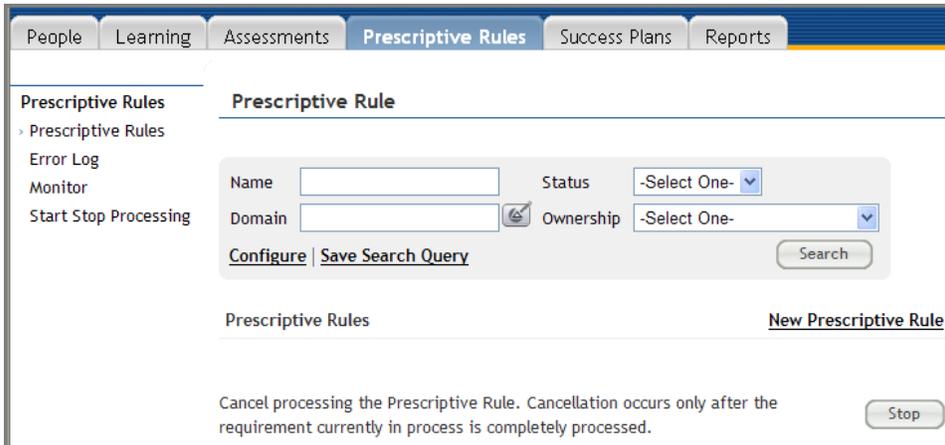
STEP-BY-STEP (CREATE A PRESCRIPTIVE RULE)

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



Go To menu

2. Click on the **Prescriptive Rules** tab.
3. Click on the **New Prescriptive Rule** link.



New Prescriptive Rule

4. Add a name to the prescriptive rule in the **Name** field.
5. Add a description in the **Description** field.
6. Choose how members will be selected:
 - a. Select **Members Manually** – Select this option to identify all of the members that will be affected by the prescriptive rule. Use this option only if the members will not change.
 - b. Define selection criteria based on which members will be selected dynamically – Use this option for the prescriptive rule to update the affected members that may change based on certain criteria.

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

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

People Administrator

People | Learning | Assessments | **Prescriptive Rules** | Success Plans | Reports

Prescriptive Rules
Prescriptive Rules * = required
Error Log
Monitor
Start Stop Processing

2.Member Selection 3.Requirements 4.Preview 5.Activate
Switch to Standard Mode

Note: The scheduling of the prescriptive rule is based on the time zone of the application server
Application server time zone :Eastern Daylight Time

Name* New LMS Admins

Description Prescriptive Rule for adding LMS course to learners.

Member Selection
Member Selection*
 Select members manually
 Define selection criteria based on which members will be selected dynamically

Domain* NIH

Processing Schedule
Processing Schedule
Process this rule
 Once Recurring
 Daily
recurs every 1 days
 Weekly
recurs every 2 weeks on
 Sun Mon Tue Wed Thu Fri Sat
Start Date* 04/02/2012
End Date 09/30/2012
Start Time* 11 : 59 a.m. p.m.

Created By nihcompetencyadmin
This rule must run with
 Creator's privileges
 Administrator's privileges

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

NOTE: The following screens show what is seen if members are selected dynamically.

10. Select the member search criteria you plan to use for your prescriptive rule by clicking the appropriate checkboxes.

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

Prescriptive Rule Details: New LMS Admins

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

1.Rule Details >>> >>> 3.Requirements >>> 4.Preview >>> 5.Activate

Member Information

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

Job and Role Information

- Job
- Role

Organization and Community Information

- Organization
- Community

Skill Information

- Certification
- Curriculum
- Competency

Cancel Back Step 2b: Define Search Criteria >>>

Step 2b: Define Search Criteria

11. Click **Step 2b: Define Search Criteria** at the bottom of the screen.

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

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

NOTE: Your screen may vary depending on the criteria selected on previous screens.

People Administrator

Prescriptive Rule Details: New LMS Admins

1. Rule Details >>> 3. Requirements >>> 4. Preview >>> 5. Activate

Show All Available Criteria

Member Information

Population Both Internal External

Person Type [Add Person Type](#)

Name	Actions
Contractor	X

Organization [Add Organization](#)

Name	Actions
HNAM4A2	X

Include Sub-Organizations

Cancel Back Save And Preview Members Save Step 3: Set Requirements >>

Show All Available Criteria

Add link

Add link

Save and Preview Members

Step 3: Set

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

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

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

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

The screenshot shows a web interface titled "Prescriptive Rule Details: New LMS Admins". At the top, there is a progress bar with five steps: "1. Rule Details", "2. Member Selection", "4. Preview", and "5. Activate". Below this, several categories are listed, each with a "No items found" message and an "Add" link:

- Certifications**: Add Certification
- Curricula**: Add Curriculum
- Competencies**: Add Competency
- Courses**: Add Course (An arrow points from this link to the text "Add link" on the right)
- Offerings**: Add Offering
- Plan Forms**: Add Plan Form
- Continuing Education Requirements**: Add Requirement

Under the "Offerings" section, there are three checkboxes:

- Check for existing registrations
- Create learning request on failure
- Apply drop charges when deleted

At the bottom of the form, there are three buttons: "Cancel", "Save", and "Step 4: Preview >>". An arrow points from the "Step 4: Preview >>" button to the text "Preview" on the right.

16. Click **Step 4: Preview** at the bottom of the page.
17. Review all of the details, and when you are certain everything is correct, click **Step 5: Activate** at the bottom of the page. Choosing this activate button will make the prescriptive rule run according to the settings you entered.

People Administrator

Prescriptive Rule Details: New LMS Admins

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

Details

Name	New LMS Admins
Description	Prescriptive Rule for adding LMS course to learners.
Member Selection	Define selection criteria based on which members will be selected dynamically
Domain	NIH
Start Date	04/02/2012
Start Time	11 : 59 p.m.
End Date	09/30/2012
Member List Update Frequency	Daily
Refresh Rate	1
Created By	nihcompetencyadmin
This rule must run with	<input checked="" type="radio"/> Creator's privileges <input type="radio"/> Administrator's privileges

Member Selection

Person Type	Both
Member Type	Contractor
Organization(s)	HNAM4A2

[Preview Members](#)

Requirements

Courses	NIH LMS People Administrator
---------	------------------------------

Cancel Back Step 5: Activate >>>

Step 5: Activate

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

Prescriptive Rule Details: New LMS Admins

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

New LMS Admins is activated successfully

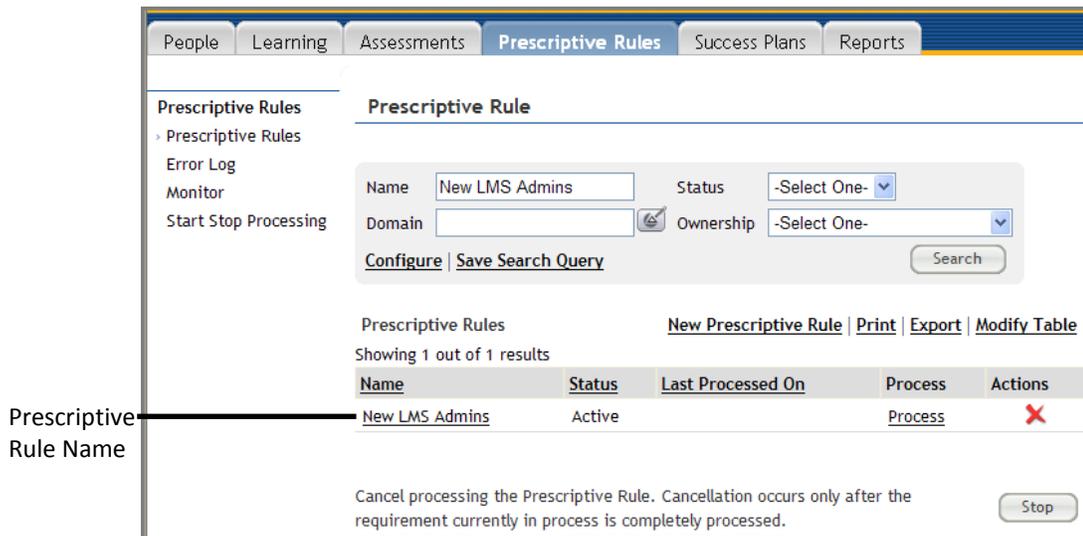
New Prescriptive Rule Finish

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

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



2. Click the **Prescriptive Rules** tab.
3. Enter the search criteria and click **Search**.
4. Select the prescriptive rule **Name** that you want to view and edit.



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

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

People Administrator

Prescriptive Rule Details: New LMS Admins

* = required

Main Member Selection Requirements Error Log Processing History

Note: The scheduling of the prescriptive rule is based on the time zone of the application server
Application server time zone :Eastern Daylight Time

Name*

Description

Member Selection
 Select members manually
 Define selection criteria based on which members will be selected dynamically

Domain* 

Processing Schedule
Process this rule
 Once Recurring
 Daily
recurs every days
 Weekly
recurs every weeks on
 Sun Mon Tue Wed Thu Fri Sat

Start Date* 

End Date 

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

Status* 

Created By nihcompetencyadmin

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

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

Prescriptive Rule Details: New LMS Admins

Main Member Selection Requirements Error Log Processing History

Personal Criteria Profile Criteria

[Show All Available Criteria](#)

Member Information

Population Both Internal External

Person Type [Add Person Type](#)

Name	Actions
Contractor	

Organization [Add Organization](#)

Name	Actions
HNAM4A2	

Include Sub-Organizations

Save And Preview Members Save Cancel

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

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

People Administrator

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

Prescriptive Rule Details: New LMS Admins

Main Member Selection **Requirements** Error Log Processing History

Certifications [Add Certification](#)
No items found

Curricula [Add Curriculum](#)
No items found

Competencies [Add Competency](#)
No items found

Courses [Add Course](#)

Name	Version	ID	Target Days	Due Date	Actions
NIH LMS People Administrator	FY12	NIHTC1002	0	No Due Date	Edit Due Date Delete

Offerings [Add Offering](#)
No items found

Check for existing registrations
 Create learning request on failure
 Apply drop charges when deleted

Plan Forms [Add Plan Form](#)
No items found

Continuing Education Requirements [Add Requirement](#)
No items found

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

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

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

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

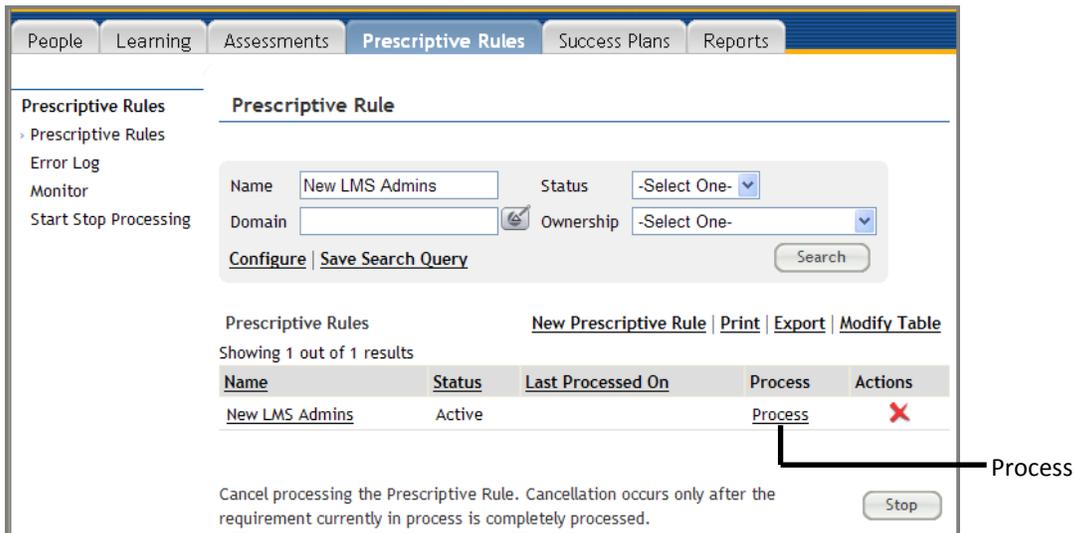
STEP-BY-STEP (PROCESS A PRESCRIPTIVE RULE)

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

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



2. Click the **Prescriptive Rules** tab.
3. Enter the search criteria and click **Search**.
4. Select the prescriptive rule **Name** that you want to view and edit.
5. Select **Process** next to the prescriptive rule.



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

People Administrator

The screenshot shows the 'Prescriptive Rules' section of the People Administrator. The 'Name' field is set to 'New LMS Admins', and the 'Status' is 'Active'. The 'Last Processed On' date is '04/23/2012 12:04 PM'. A table below shows one result for this rule. A callout line points to the 'Last Processed On' column header.

Name	Status	Last Processed On	Process	Actions
New LMS Admins	Active	04/23/2012 12:04 PM	Process	✖

Last Processed On

UNDERSTANDING INTERNAL ORGANIZATIONS

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

STEP-BY-STEP (VIEW INTERNAL ORGANIZATIONS)

1. Select the **People Administrator – Orgs & Jobs** role in the drop-down **Go To** menu.

The screenshot shows the top navigation bar with the 'Go To' dropdown menu open, showing 'HR Administration - Orgs & Jobs' selected. A callout line points to this menu.

Go To menu

2. Enter the organization code into the **Internal Organization** field then click **Search**.

The screenshot shows the 'Internal Organization' search form. The 'Internal Organization' field contains 'HNAM6'. Below the form is a table with one result. A callout line points to the 'Internal Organization' field.

Internal Organization	Internal Organization Number	City	Actions
HNAM6	00007229		✖

Organization Name

People Administrator

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

- **Profile** tab:
 - **Create Community** through which people in your organization may share documents and other information through the LMS
 - Add **Contact** information for your organization ONLY
 - **IMPORTANT!** Do not alter data in any of the required fields marked in red with an asterisk (*). These are populated automatically and referenced by several functions throughout the LMS.
 - View the names of any **Local Learning Registrars** in your organization
 - **IMPORTANT!** You are not authorized to add Local Learning Registrar permission to anyone. Doing so would be grounds for removing your administrative access to the LMS.

Profile Tab

Internal Organization Details: HNAM6

* = required

Profile Members

[Create Community](#)

Internal Organization* HNAM6

Mission Statement Ofc Strategic Mgmt Planning

Internal Organization Number 00007229

Learning Contact

Secondary Contact Person

Parent Organization* HNAM

- **Members** tab: view all learners in the LMS assigned to your org/SAC code. This list can be exported to an Excel file in order to verify names and designated supervisors. This can be a good way to ensure the appropriate people are designated to your organization and identify any learner accounts that should not be designated to your organization. (Remember: Incorrect org/SAC codes must be corrected in the source HR system.) You will need to access individual user profiles to edit incorrect or missing supervisor names.
- Do not use the **Prescriptive Rules** tab for Internal Organizations.

People Administrator

Internal Organization Details: HNAME6

Profile Members

Members 12

Print | Export | Modify Table

Showing first 25 out of 43 results

Name	Manager Name	Job
JANICE GONZALEZ	CHARLES FRITZ	0343-MANAGEMENT AND PROGRAM ANALYSIS SERIES
JONATHAN MATHIS	CHARLES FRITZ	0301-MISCELLANEOUS ADMINISTRATION AND PROGRAM SERIES
Karie MULKOWSKY	Edsson CONTRERAS	

USING EXTERNAL ORGANIZATIONS TO ADD VENDORS

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

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

STEP-BY-STEP (VIEW EXTERNAL ORGANIZATIONS)

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

The screenshot shows the 'Organizations' tab in the People Administrator interface. The 'External Organization' section is active. A search form is visible with fields for 'External Organization' and 'External Organization Number', and a 'City' field. Below the search form is a table of external organizations. A text label 'External Organization names' with an arrow points to the first row of the table.

External Organization	External Organization Number	City	Actions
Action Centered Training (ACT)	00003285	Eagleville	✗
Bill Redeem	00001024	Bethesda	✗
Business Management Research Assoc., Inc. (BMRA)	00001066	Fairfax	✗
Capitol Benefits Seminars Yehuda Fishkind, CFA, CFP	00003286	Townson	✗
Creative Approaches Unlimited	00001086	Rockville	✗
Defense Acquisition University	00003285	Fort Belvoir	✗

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

The screenshot shows the 'External Organization Details' page for 'Action Centered Training (ACT)'. The 'External Organization' tab is active. The page displays various fields for the organization, including 'External Organization Number', 'Learning Contact', 'Parent Organization', 'Type of Business', 'Address 1', and 'Address 2'. A 'Create Community' button is also visible.

External Organization* Action Centered Training (ACT)

Mission Statement

External Organization Number 00003285

Learning Contact

Parent Organization HHS University

Type of Business Training Delivery

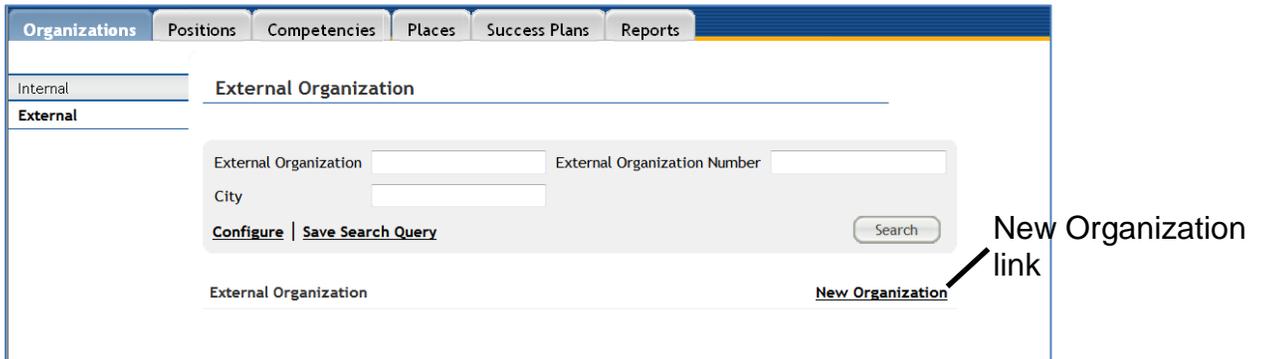
Address 1 528 Elizabeth Drive

Address 2

People Administrator

STEP-BY-STEP (ADD AN EXTERNAL ORGANIZATION)

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



The screenshot shows the 'External Organization' form in the People Administrator interface. The form is titled 'External Organization' and is located under the 'Organizations' tab. The form includes the following fields and links:

- External Organization (text input)
- External Organization Number (text input)
- City (text input)
- Configure (link)
- Save Search Query (link)
- Search (button)
- New Organization (link, highlighted with an arrow)

5. You will see a **New External Organization** screen. Enter all data you have about the external organization, especially the required fields marked with a red asterisk (*).

New External Organization

* = required

External Organization*

Mission Statement

External Organization Number

Parent Organization 

Type of Business

Address 1

Address 2

Address 3

City

State/Province

Country

ZIP/Postal Code

Primary Phone

Secondary Phone

Fax

E-mail

Web Server

Default Currency* 

Security Keyword

Is Active

Domain* 

Objectives Administrator 

Billing Address

Billing Address 2

Billing City

Billing State/Province

Billing Country

Billing ZIP/Postal Code

Learning Vendor

Learning Manufacturer

Discount

Training Unit Agreements [Transfer](#) | [Combine](#)

No items found

6. Click **Save** at the bottom of the screen when you are finished to save the external organization in the LMS.

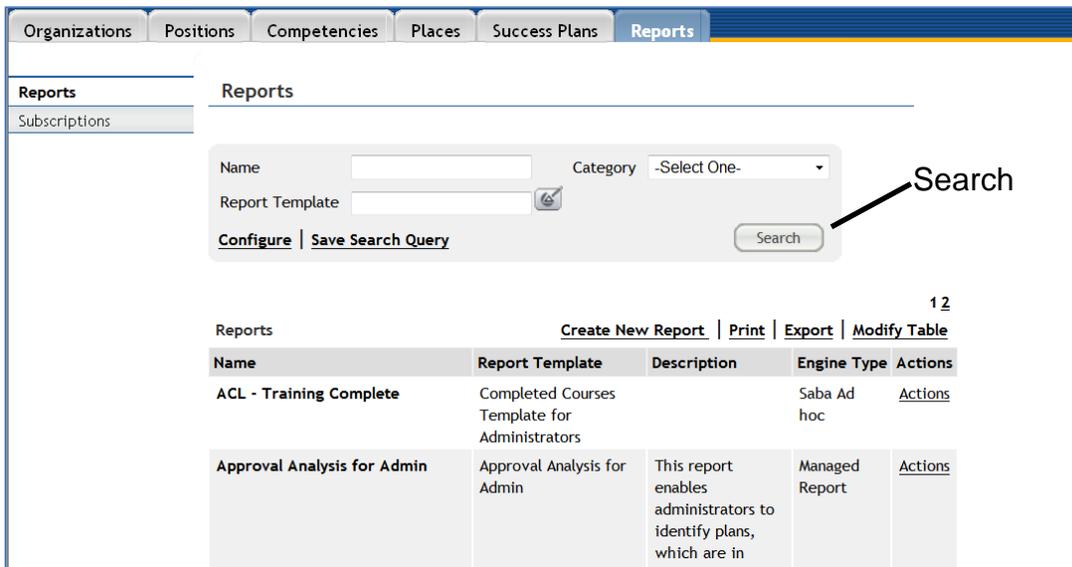
GENERATING REPORTS

REPORTS

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

STEP-BY-STEP (GENERATE A REPORT)

1. Select the **People Administrator – People** or **Registrar** role in the drop-down **Go To** menu.
2. Click on the **Reports** tab.
3. You can see all reports available by clicking **Search**.



The screenshot shows the LMS interface for the Reports section. At the top, there are navigation tabs: Organizations, Positions, Competencies, Places, Success Plans, and Reports. The Reports tab is active. Below the tabs, there is a search form with fields for Name, Report Template, and Category. A Search button is highlighted with an arrow and the word "Search". Below the search form, there is a table of reports. The table has columns for Name, Report Template, Description, Engine Type, and Actions. The first row is "ACL - Training Complete" and the second row is "Approval Analysis for Admin".

Name	Report Template	Description	Engine Type	Actions
ACL - Training Complete	Completed Courses Template for Administrators		Saba Ad hoc	Actions
Approval Analysis for Admin	Approval Analysis for Admin	This report enables administrators to identify plans, which are in ..	Managed Report	Actions

4. To run a report click on **Actions** and then select **Execute**.

Reports

Name Category -Select One-

Report Template

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

Reports [Create New Report](#) | [Print](#) | [Export](#) | [Modify Table](#)

Name	Report Template	Description	Engine Type	Actions
ACL - Training Complete	Completed Courses Template for Administrators		Saba Ad hoc	Actions
Approval Analysis for Admin	Approval Analysis for Admin	This report enables administrators to identify plans, which are in ..	Managed Report	Actions

Actions

- Email
- Execute
- Subscribe
- Execute

5. Enter criteria into appropriate fields.

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

Report Parameters - Approval Analysis for Admin

Plan Form*

Organization

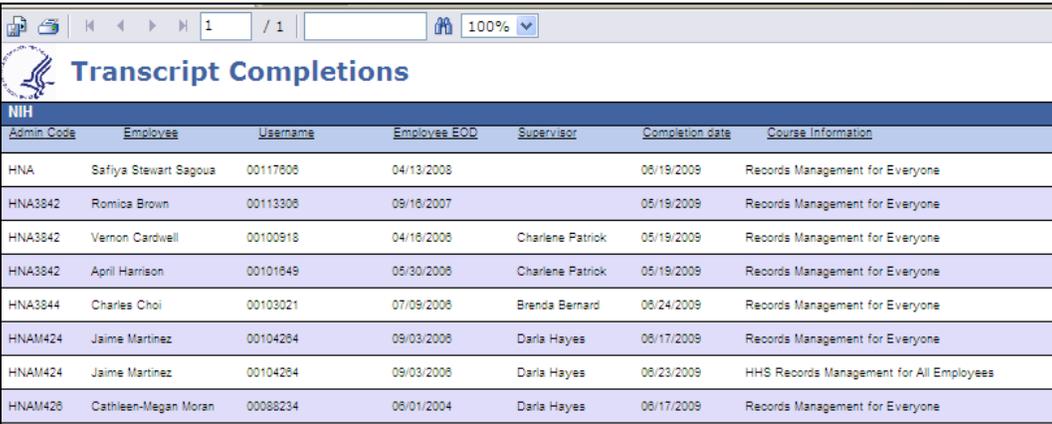
6. Click **Generate Report**.

STEP-BY-STEP (EXPORT A REPORT)

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

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

Export

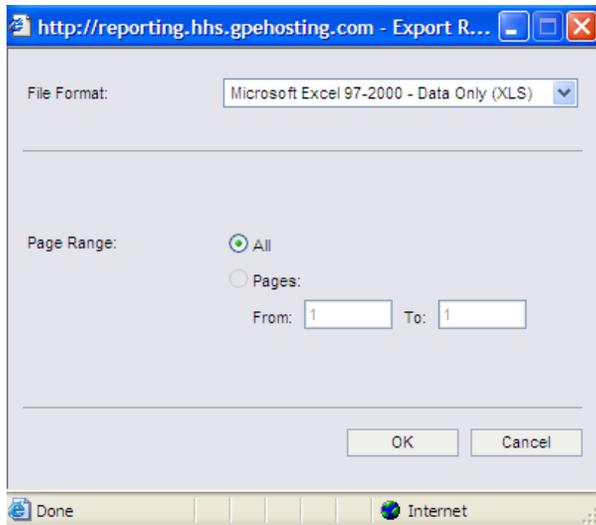


The screenshot shows a web browser window displaying a report titled "Transcript Completions" from NIH. The report is presented as a table with the following columns: Admin Code, Employee, Username, Employee EOD, Supervisor, Completion date, and Course Information. The table contains eight rows of data. In the top left corner of the report area, there is an export icon (a document with a downward arrow) and a 100% zoom level indicator.

Admin Code	Employee	Username	Employee EOD	Supervisor	Completion date	Course Information
HNA	Safiya Stewart Sagoua	00117808	04/13/2008		08/19/2009	Records Management for Everyone
HNA3842	Romica Brown	00113308	09/16/2007		05/19/2009	Records Management for Everyone
HNA3842	Vernon Cardwell	00100918	04/16/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3842	April Harrison	00101649	05/30/2008	Charlene Patrick	05/19/2009	Records Management for Everyone
HNA3844	Charles Choi	00103021	07/09/2008	Brenda Bernard	08/24/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104284	09/03/2008	Darla Hayes	08/17/2009	Records Management for Everyone
HNAM424	Jaime Martinez	00104284	09/03/2008	Darla Hayes	08/23/2009	HHS Records Management for All Employees
HNAM426	Cathleen-Megan Moran	00088234	08/01/2004	Darla Hayes	08/17/2009	Records Management for Everyone

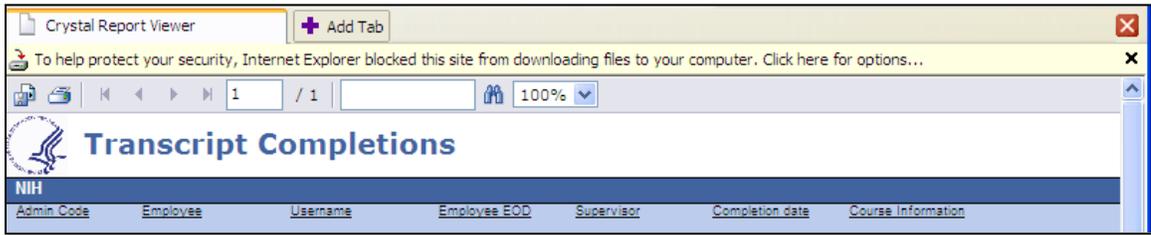
3. Select the **File Format** you want, indicate the **Page Range**, and click **OK**. The following two formats are the most commonly used:
 - The **Adobe Acrobat (PDF)** format will export a report ready for printing.
 - The **Microsoft Excel 97-2000 – Data Only (XLS)** format will export a report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

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

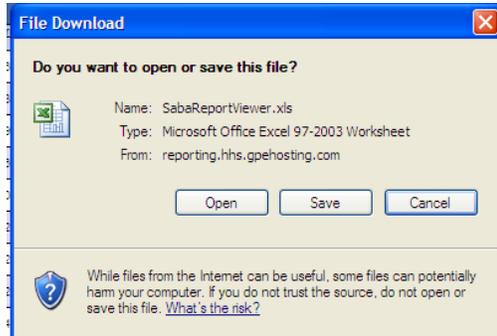


People Administrator

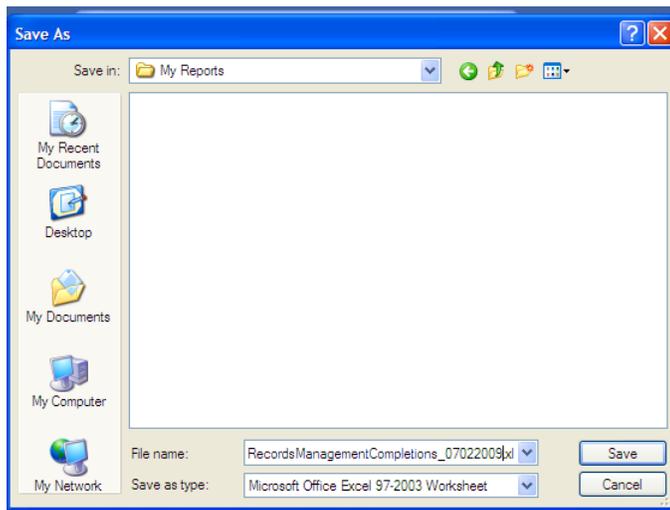
- You may see the following browser warning. Click the **yellow warning bar** and select **Download File**. Repeat Step 2.



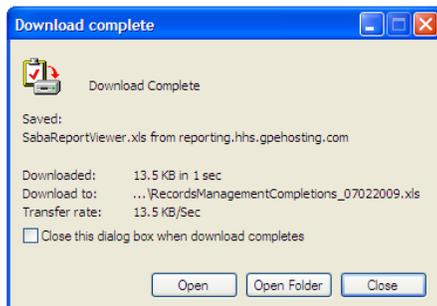
- You will be prompted to open or save the file. Click **Save**.



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



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

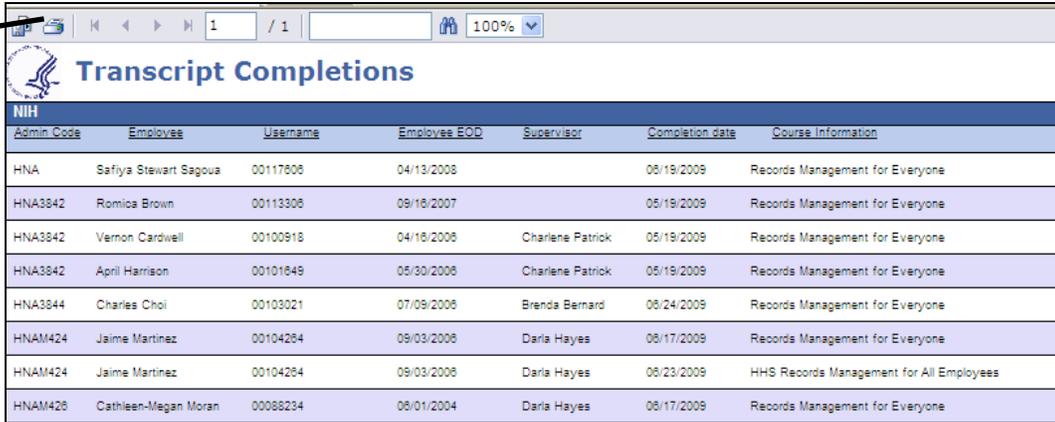


People Administrator

STEP-BY-STEP (PRINT A REPORT)

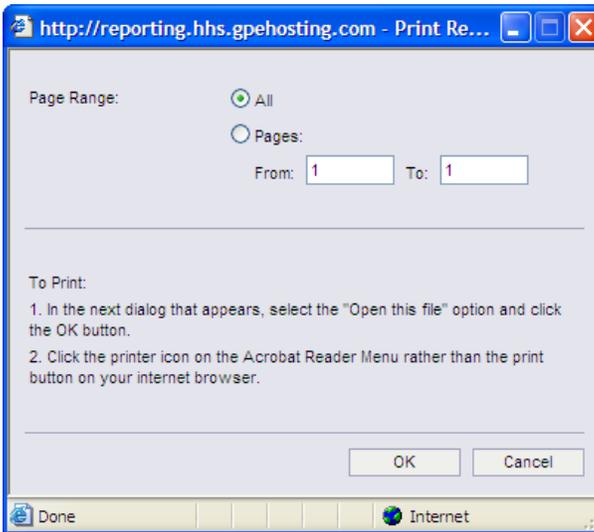
1. Complete the steps in section **Step-By-Step (Generate a Report)**.
2. Click the **Print icon** in the upper left corner of the report.

Print icon



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

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



Page Range:

All

Pages:

From: To:

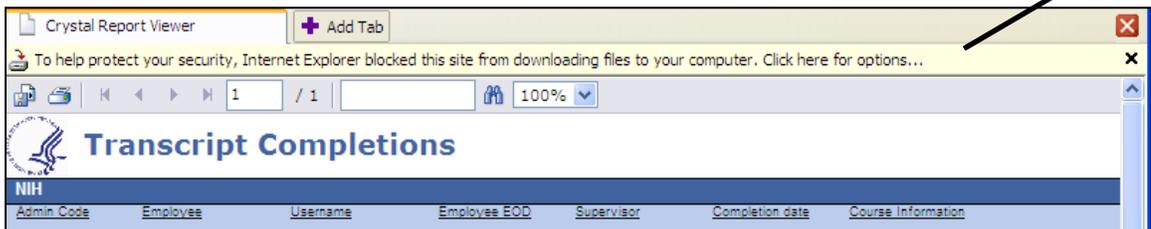
To Print:

1. In the next dialog that appears, select the "Open this file" option and click the OK button.
2. Click the printer icon on the Acrobat Reader Menu rather than the print button on your internet browser.

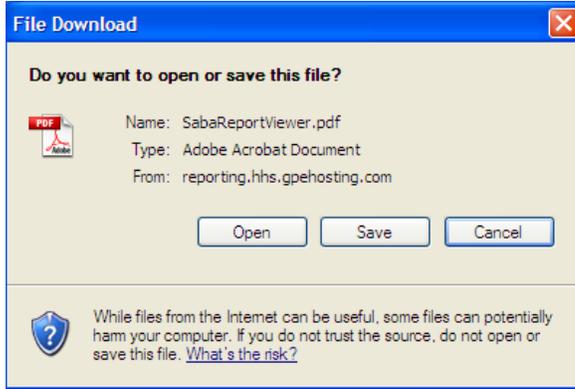
OK Cancel

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

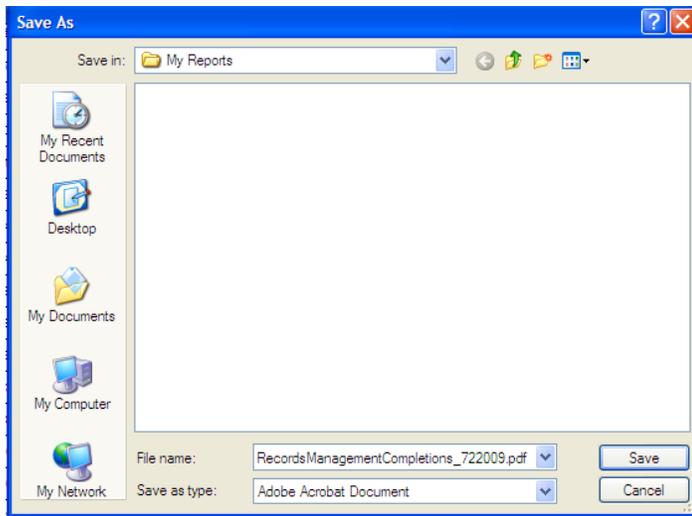
Browser warning



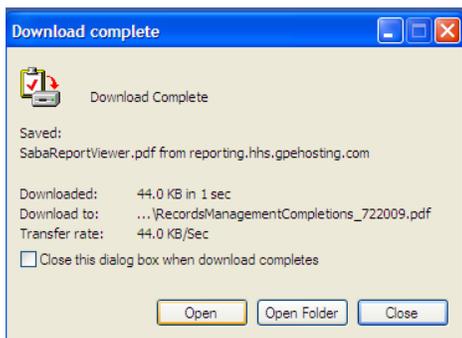
5. You will be prompted to open or save the file. Click **Save**.



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



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

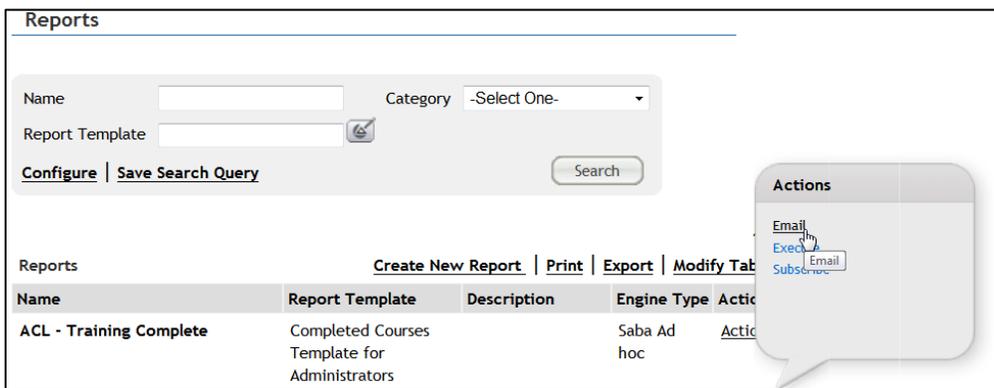


8. Click the **Adobe Reader print icon** to send the report to your printer.

STEP-BY-STEP (EMAIL A REPORT)

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

1. Select the **People Administrator – People** or **Registrar** role in the drop-down **Go To** menu.
2. Click on the **Reports** tab.
3. Click **Search**.
4. Click **Actions** and then the **Email** link to the right of the report description of the report you want to send via email.



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

Email ACL - Training Complete

Run Reports > Email ACL - Tr... * = required

To Email Address (es) (Enter one or more email addresses separated by semi-colons (;). Example: jdoe@email.com; msmith@email.com) *

Subject* ACL - Training Complete

Mail Text*

Course - Course ID (Equals)

Preview Report Send Cancel

6. Modify the **Subject** and **Mail Text** (the email body) fields to appear as you want them in the email.
7. Choose a **Report Format** (if applicable) from the drop-down choices.
8. Click **Send** to email the report to recipients.

STEP-BY-STEP (SUBSCRIBE TO A REPORT)

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

1. Select the **People Administrator – People** or **Registrar** role in the drop-down **Go To** menu.
2. Click on the **Reports** tab.
3. Click **Search** for list of reports available.
4. Click **Actions** and then click the **Subscribe** link to the right of the report description of the report for which you want to create a subscription.

Reports

Name Category Report Template

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

Reports [Create New Report](#) | [Print](#) | [Export](#) | [Modify Tab](#)

Name	Report Template	Description	Engine Type	Actions
ACL - Training Complete	Completed Courses Template for Administrators		Saba Ad hoc	Actions
Approval Analysis for Admin	Approval Analysis for Admin	This report enables administrators to identify plans, which are in	Managed Report	Actions

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

Report Subscription for ACL - Training Complete

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

Report Subscription [New Report Subscription](#)

No items found

6. Enter a **Name** for the report subscription and a meaningful **Description**.
7. Enter the **Course ID**.

People Administrator

Report Subscription for ACL - Training Complete

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

Report Subscription Name*

Description*

Course - Course ID (Equals)

To Email Address (es) (Enter one or more email addresses separated by semi-colons (;). Example: jdoe@email.com; msmith@email.com) *

Subject*

Mail Text*

Occurs Daily Weekly Monthly

Occurs Daily Every* day(s)

Frequency Once Every Hour(s)

Frequency-Once Start Time* : a.m. p.m.

Start Date* 

8. Enter one or more recipient email addresses in the **To Email** field.
9. Modify the **Subject** and **Mail Text** fields to appear as you want them in the email.
10. Choose a **Report Format (if applicable)** from the drop-down choices.
11. Select whether you want the report to email **Daily**, **Weekly**, or **Monthly**, and indicate the number for each.
12. Set corresponding options for **Frequency**.
13. Click **Preview Report** to see the report as it will appear.
14. Click **Save** to activate the report subscription. The report will send at the times you designated, to email recipients you entered.

HELPFUL INFORMATION

LINKS AND RESOURCES

- HHS Learning Portal log on page
<https://lms.learning.hhs.gov>
- HRSS Help Desk
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>

~~HHS Learning Portal log on page~~
~~<https://lms.learning.hhs.gov>~~

~~NIH LMS Help Desk~~

~~Submit your LMS Help Desk Tickets to:~~
~~<http://intrahr.od.nih.gov/helpdeskform.htm>~~

~~NIH Training Center web site~~
~~<http://trainingcenter.nih.gov>~~

~~NIH LMS Information and support information~~
~~http://trainingcenter.nih.gov/lms_courses.html~~
~~<http://hr.od.nih.gov/hrsystems/benefits/lms/lmssupport.htm>~~

~~LMS Administrators in the ICs~~

~~<http://hr.od.nih.gov/hrsystems/benefits/lms/documents/ListofICLMSAdministrators.pdf>~~

~~NIH CIT Help Desk~~
~~<http://itservicedesk.nih.gov/>~~

APPENDIX A – ORGANIZATION CODES

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

HN	All of NIH
HNA	(OD) Immediate Office of the Director
HNB	(NIAMS) National Institute of Arthritis and Musculoskeletal and Skin Diseases
HNC	(NCI) National Cancer Institute
HND	(NCCAM) National Center for Complementary and Alternative Medicine
HNE	(NCMHD) National Center on Minority Health and Health Disparities
HNF	(FIC) John E. Fogarty International Center for Advanced Study in the Health Sciences
HNG	(CSR) Center for Scientific Review
HNH	(NHLBI) National Heart, Lung, and Blood Institute
HNJ	(CC) Clinical Center
HNK	(NIDDK) National Institute of Diabetes and Digestive and Kidney Diseases
HNL	(NLM) National Library of Medicine
HNM	(NIAID) National Institute of Allergy and Infectious Diseases
HNN	(NIA) National Institute on Aging
HNP	(NIDCR) National Institute of Dental and Craniofacial Research
HNQ	(NINDS) National Institute of Neurological Disorders and Stroke
HNR	(NCRR) National Center for Research Resources
HNS	(NIGMS) National Institute of General Medical Sciences
HNT	(NICHD) National Institute of Child Health and Human Development
HNU	(CIT) Center for Information Technology
HNV	(NIEHS) National Institute of Environmental Health Sciences
HNW	(NEI) National Eye Institute
HN2	(NINR) National Institute of Nursing Research
HN3	(NIDCD) National Institute on Deafness and Other Communication Disorders
HN4	(NHGRI) National Human Genome Research Institute
HN5	(NIAAA) National Institute on Alcohol Abuse and Alcoholism
HN6	(NIDA) National Institute on Drug Abuse
HN7	(NIMH) National Institute of Mental Health
HN8	(NIBIB) National Institute of Biomedical Imaging and Bioengineering

APPENDIX B - ENTERPRISE HUMAN RESOURCES INTEGRATION (EHRI) FIELDS

LEGEND

 LMS Required Fields

 EHRI Required Fields

 Non Required Fields

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

People Administrator

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

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

People Administrator

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

APPENDIX C – HHS LEARNING PORTAL DOMAIN STRUCTURE

