



LEARNING MANAGEMENT SYSTEM (LMS) **RUNNING THE HHS CERTIFICATION/CURRICULUM COMPLIANCE/EXCEPTION REPORT**

This report delivers data on Learners in an Organization (or its Sub-Orgs) to determine whether or not the Learner has completed a specific certification or curriculum during a specified date range. The results can be further refined using the Employee EOD Date, Certification/Curriculum Domain, and Person Type.

1. Log into the LMS.
2. Click the **Admin** icon.



Admin icon

Figure 1 – Admin icon

3. Click the **Reports** link in the left navigation menu.

Reports link

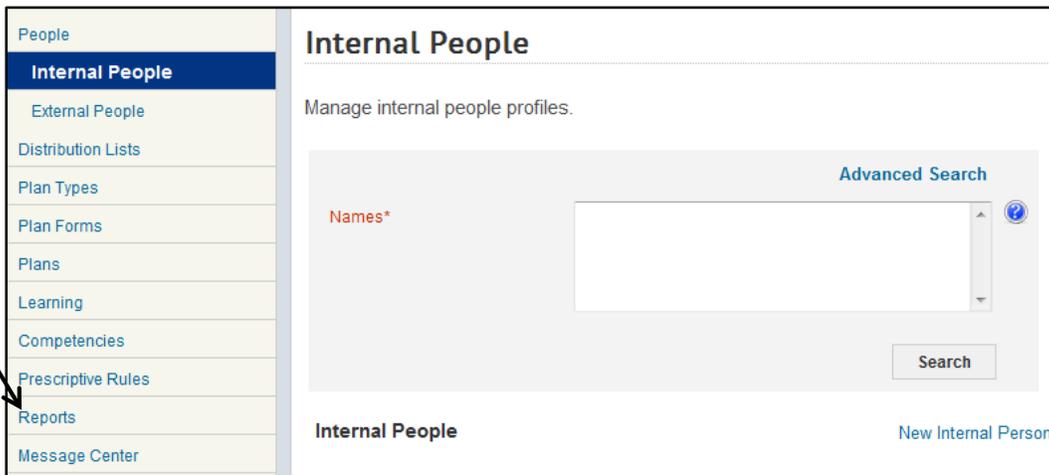


Figure 2 – Reports link

- Select **HHS Custom Reports** from the Category pull-down menu and click the **Search** button.

Reports

Reports contain data that you can use for analysis and decision-making. They can be printed or exported (hover over the Actions link for options).

Name Category **-Select One-**

Report Template

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

Reports

Figure 3 – Category pull-down menu and Search button

- Click the **Actions** link for the HHS Certification/Curriculum Compliance/Exception Report.

Reports

Reports contain data that you can use for analysis and decision-making. They can be printed or exported (hover over the Actions link for options).

Name Category **HHS Custom Reports**

Report Template

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

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

Name	Report Template	Description	Engine Type	Actions
HHS All Approvers by Org Report	HHS All Approvers by Org Report	This report returns all the learners in an org and lists their Manager, Additional Approver on Orders and Alternate Manager(s).	Managed Report	Actions
HHS Certification/Curriculum Compliance/Exception Report	HHS Certification/Curriculum Compliance/Exception Report	Report on people in an organization (or its sub-orgs) who have, or have not, completed a specific certification/curriculum during the date range you specify. The results can be further refined using the employee EOD Date, Certification/Curriculum Domain, and Person Type. This report was custom developed by NIH.	Managed Report	Actions

Figure 4 – Actions link

- Click the **Execute** link on the Actions activity menu.

TS46-A: Running the HHS Certification/Curriculum Compliance/Exception Report

Reports

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Name Category **HHS Custom Reports**
 Report Template

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

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

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HHS Certification/Curriculum Compliance/Exception Report	HHS Certification/Curriculum Compliance/Exception Report	Report on people in an organization (or its sub-orgs) who have, or have not, completed a specific certification/curriculum during the date range you specify. The results can be further refined using the employee EOD Date, Certification/Curriculum Domain, and Person Type. This report was custom developed by NIH.	Managed Report	Actions Actions

Execute link

Figure 5 – Execute link on the Actions activity menu

- For a Certification, click the **Certification Title** pick icon.

Figure 6 – Certification Title pick icon

- Use the Name, Update On >=, Target Completion Duration <=, Past Credit Duration <=, and/or Audience Type/Subtype fields and the **Search** button to search for the Certification.

Figure 7 – Name, Update On >=, Target Completion Duration <=, Past Credit Duration <=, and Audience Type/Subtype fields, and the Search button

9. Click the **Select** checkbox to select the Certification.

Select Certifications

Name Updated On >=

Target Completion Duration <= Past Credit Duration <=

Audience Type/Subtype

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

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

Showing 17 out of 17 results

Select	Name	Version	Available From	Discontinued From	Target Completion Duration	Expires In
<input checked="" type="checkbox"/>	NIH Disability Awareness Training Certification	1.0	01/22/2010	12/13/2010	30 Days	365 Days
<input type="checkbox"/>	NIH Diversity Management Training - NIDDK	1.0	03/31/2010	03/09/2011	39 Days	365 Days
<input type="checkbox"/>	NIH EEO Laws & Regulations Certification - NIDDK	1.0	03/31/2010	03/09/2011	39 Days	365 Days

Select checkbox



Figure 8 – Select checkmark

10. For a Curriculum, click the **Curriculum Title** pick icon.

Report Parameters - HHS Certification/Curriculum Compliance/Exception Report

Select One of the following :
Certification Title

Curriculum Title

From Date*

To Date*

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

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Certification/Curriculum Domain

Person Type

Report Type*

Figure 9 – Curriculum Title pick icon

11. Use the Name, Update On >=, Discontinued From >=, Updated On >=, and/or Target Completion Duration <= fields and the **Search** button to search for the Curriculum.

Select Curricula

Name

Updated On >=

Discontinued From >=

Target Completion Duration <=

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

Curricula

Figure 10 – Name, Update On >=, Discontinued From >=, Updated On >=, and Target Completion Duration <= fields, and the Search button

12. Click the **Select** checkbox to select the Curriculum.

Select Curricula

Name Discontinued From >= 

Updated On >=  Target Completion Duration <=

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

Curricula

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

Showing 2 out of 2 results

Select	Name	Available From	Discontinued From	Target Completion Duration
<input type="checkbox"/>	NIH Communication Skills Curricula	07/11/2011	09/15/2016	0 Days
<input type="checkbox"/>	NIH Core Curriculum	07/06/2011		0 Days

**Select
checkbox**

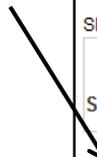


Figure 11 – Select checkbox

13. Enter the From Date and To Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the **From Date** and **To Date** pick icons to select the date.

Report Parameters - HHS Certification/Curriculum Compliance/Exception Report

Select One of the following :
Certification Title: NIH Disability Awareness Training (🔍)

Curriculum Title: (🔍)

From Date*: (📅) ← *From Date pick icon*

To Date*: (📅) ← *To Date pick icon*

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

EOD Start Date (mm/dd/yyyy): ()

EOD End Date (mm/dd/yyyy): ()

Certification/Curriculum Domain: (🔍)

Person Type: -Select One- ▾

Report Type*: -Select One- ▾

Generate Report Cancel

Figure 12 – From Date and To Date pick icons

14. Enter the Organization ID in the Organization ID field. You can use a percent symbol (%) as a wildcard field to capture all of the sub-Organizations.

Report Parameters - HHS Certification/Curriculum Compliance/Exception Report

Select One of the following :
Certification Title: NIH Disability Awareness Training (🔍)

Curriculum Title: (🔍)

From Date*: 01/01/2010 (📅)

To Date*: 12/31/2010 (📅)

Organization ID (Use % to include sub-orgs)*: () ← *Organization ID field*

EOD Start Date (mm/dd/yyyy): ()

EOD End Date (mm/dd/yyyy): ()

Certification/Curriculum Domain: (🔍)

Person Type: -Select One- ▾

Report Type*: -Select One- ▾

Generate Report Cancel

Figure 13 – Organization ID field

15. To run a Compliance report, select Compliance from the Report Type pull-down menu. Select Exception from the Report Type pull-down menu to run an Exception report.

Report Parameters - HHS Certification/Curriculum Compliance/Exception Report

Select One of the following :
Certification Title: NIH Disability Awareness Training C

Curriculum Title:

From Date*: 01/01/2010

To Date*: 12/31/2010

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

EOD Start Date (mm/dd/yyyy):

EOD End Date (mm/dd/yyyy):

Certification/Curriculum Domain:

Person Type: -Select One-

Report Type*:
Compliance
-Select One-
Compliance
Exception

Generate Report Cancel

Report Type pull-down menu

Figure 14 – Report Type pull-down menu

NOTE: A Compliance report will show Learners who completed the Certification/Curriculum within the specified date range. An Exception report will show Learners who did not complete the Certification/Curriculum within the specified date range.

16. Click the **Generate Report** button.

Report Parameters - HHS Certification/Curriculum Compliance/Exception Report

Select One of the following :
Certification Title: NIH Disability Awareness Training C

Curriculum Title:

From Date*: 01/01/2010

To Date*: 12/31/2010

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

EOD Start Date (mm/dd/yyyy):

EOD End Date (mm/dd/yyyy):

Certification/Curriculum Domain:

Person Type: -Select One-

Report Type*: Compliance

Generate Report Cancel

Generate Report button

Figure 15 – Generate Report button

NOTE: The total Completion/Exception percentage appears at the bottom of the last page of the report. Depending on the number of records in the report, it may be necessary to click the **Go to Last Page** icon.

17. To print the report, click the **Print this report** icon.

HHS Certification/Curriculum Compliance/Exception Report

Certification/Curriculum: NIH Disability Awareness Training Certification

From Date: 01/01/2010	EOD Start Date:	Organization ID: HN%
To Date: 12/31/2010	EOD End Date:	Certification/Curriculum Domain:
Report Type: Compliance	Person Status:	

ORG ID	LAST NAME	FIRST NAME	HHSID	EOD DATE	PERSON TYPE	PERSON STATUS	MANAGER	EMAIL	COMPLETION DATE
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Print this report icon

Figure 16 – Print this report icon

18. Click the **Export** button on the Print to PDF message box.

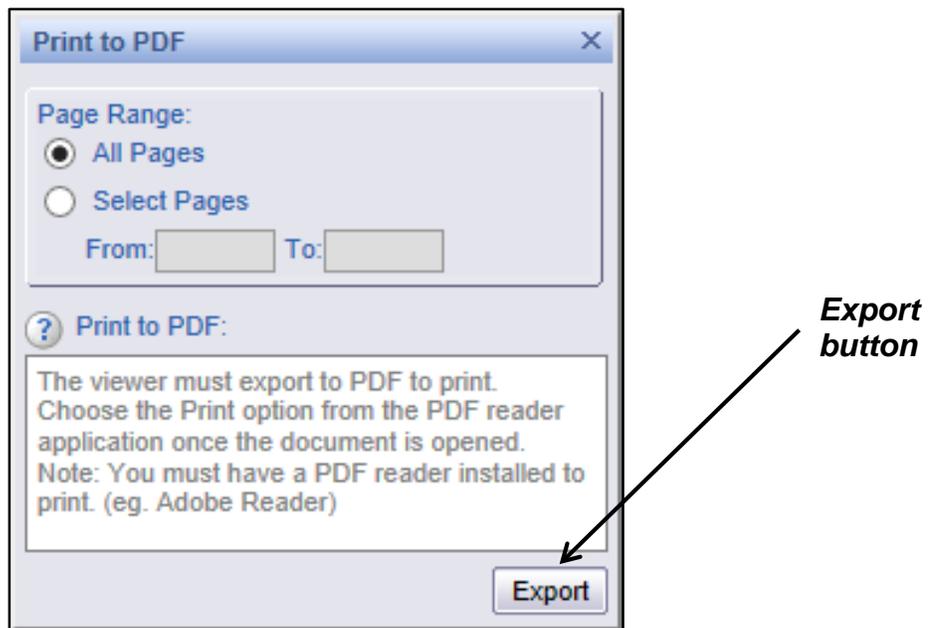


Figure 17 – Export button

19. Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification bar will display at the bottom of the screen in the Internet Explorer browser when the pdf has been created. Click the **Open** button on the notification bar to open the pdf file in Adobe Reader/Acrobat.

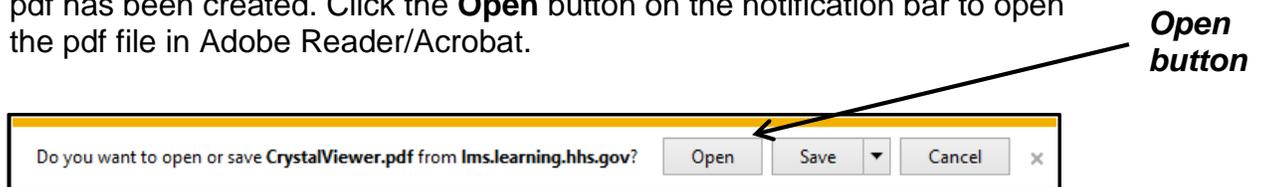


Figure 18 – Open button

20. Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please submit a helpdesk ticket at: <http://intrahr.od.nih.gov/helpdeskform.htm>