RUNNING THE HHS COURSE COMPLIANCE/EXCEPTION REPORT BY ORGANIZATION

This report delivers data on Learners in an Organization (or its Sub-Orgs) to determine whether or not the Learner completed a specific course during a specified date range. This report returns only the last, most recent completion for a Learner (in the event the Learner completed the course more than once in that timeframe). The results can be further refined using the Employee EOD Date, Course Domain, and Person Type.

1. Log into the LMS.

2. Click the Admin icon.

Figure 1 – Admin icon
3. Click the **Reports** link in the left navigation menu.

![Figure 2 – Reports link](image)

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

![Figure 3 – Category pull-down menu and Search button](image)
5. Click the **Actions** link for HHS Course Compliance/Exception Report by Organization.

![Actions link](image-url)

<table>
<thead>
<tr>
<th>HHS Competency Summary by Job Series/Organization</th>
<th>Description</th>
<th>Actions</th>
<th>Managed Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>This report will provide competency assessment information on learners by job series and/or organization.</td>
<td></td>
<td></td>
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</tbody>
</table>

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<tr>
<th>HHS Course Catalog Report</th>
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<th>Description</th>
<th>Actions</th>
<th>Managed Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>This report enables an administrator to pull a Course Catalog by Domain, Course Title, Category, Delivery Type, Competency and/or Job.</td>
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<th>HHS Course Compliance/Exception Report by Organization</th>
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<tr>
<td>Report on people in an organization (or its sub-organization) who have, or have not completed a specific course or equivalent during the date range you specify. The results can be further refined using the employee EID, Course Domain, and Person Type. This report was custom developed by NIH.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 4 – Actions link
6. Click the **Execute** link on the Actions activity menu.

![Figure 5 – Execute link on the Actions activity menu](image)

7. Click the **Course Title** pick icon and then select the course title name into the appropriate title field.

![Figure 6 – Course Title pick icon](image)
8. Use the Title, Course ID, Domain, and/or Audience Type/Subtype fields and the **Search** button to search for the course.

![Select Course](image)

Figure 7 – Title, Course ID, Domain, and Audience Type/Subtype fields and the Search button

9. Click the Select checkbox to select the course.

![Select Course](image)

Figure 8 – Select checkbox
10. 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.

Figure 9 – From Date and To Date pick icons
11. Enter the Organization ID in the Organization ID field. Alternately, you can use the Organization ID pick icon to select the Organization ID.

![Organization ID field](image)

Figure 10 – Organization ID field

12. Use the Name field and the Search button to search for an Organization ID.

![Name field and Search button](image)

Figure 11 – Name field and Search button
13. Click the Select checkbox to select the Organization.

**Figure 12 – Select checkbox**
14. By default, the Include Child Organizations checkbox is selected. To only view results for a single Organization ID, remove the checkbox.
15. Select the Person Status pull-down menu and select Active Accounts Only, All Accounts, or Deactivated Accounts only.

![Figure 14 – Person Status pull-down menu](image)

Figure 14 – Person Status pull-down menu
16. 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. Select All to view both Compliance and Exception information in the same report.

![Figure 15 – Report Type pull-down menu](image)

**NOTE:** A Compliance report will show Learners who completed the Course within the specified date range. An Exception report will show Learners who did not complete the Course within the specified date range.
17. Select the **Generate Report** button.

![Generate Report button](image16.png)

**Figure 16 – Generate Report button**

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

![Print this report icon](image17.png)

**Figure 17 – Print this report icon**
19. Click the **Export** button on the Print to PDF message box.

![Export button](image1.png)

Figure 18 – Export button

20. 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.

![Open button](image2.png)

Figure 19 – Open button

21. 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](http://intrahr.od.nih.gov/helpdeskform.htm)