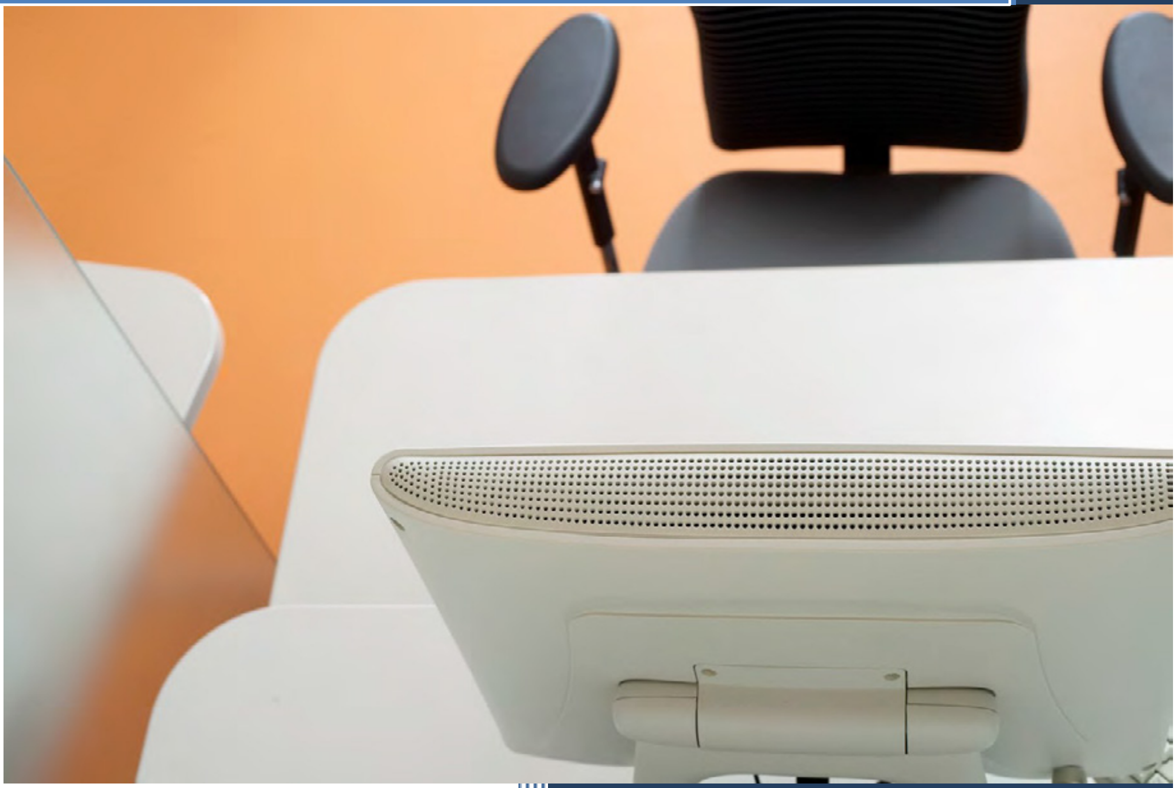
HHS Learning Portal

Learning Administrator



NIHTraining Center

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HHS LEARNING PORTAL
LEARNING ADMINISTRATOR
Version 6.0

NIH Training Center

National Institutes of Health Training Center

National Institutes of Health Training Center, Bethesda 20817

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Version Number	Revision Date	Approved By	Approval Date	Description of Change
1.0	1/11/2010	NIH LMS Implementation Team	1/11/2010	Initial publication
2.0	5/7/2012			
3.0	6/4/2013			
4.1	2/24/2014	Jesus Bonet	2/21/2014	Updated HRSS contact info
5.0	6/1/2015	Michele Schwartzman	6/15/2015	Updated manual for Saba
6.0	7/22/2019	Tom Holscher	7/22/2019	Updated URLs

Please submit any questions or suggestions for changes to https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx.

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LEARNING ADMINISTRATOR

INTRODUCTION

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

LEARNER PROFILE

The Learner Profile contains information about the learner such as employee status, start date, name, and organization. The profile does not contain personally identifiable information (PII) 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 and account code.

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 by the LMS.
- **Manager**: Manager data is generated by the last timecard approved for all Federal employees. Non-Federal employees do not have managers assigned however they can be updated by Local Learning Registrars and People Administrators.
- **Organization**: LMS learner accounts are grouped in the system according to Organization/SAC Code. (See Appendix A.) Errors in this data must be corrected in the HR system for the learner. Once the data is updated in the HR system, it will be updated in the LMS the following day.

SECURITY DOMAINS

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

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

Component	***Example…***
Business rules	NIH offerings with tuition require manager approval prior to registration confirmation.
Notifications	NIH email notifications include NIH-specific information and logos.
Locations, facilities, and rooms	NIH resources are only available to NIH administrators in the LMS.
User accounts	Only NIH administrators may access and modify the accounts of NIH staff.

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

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

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

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

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

SECURITY ROLES

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

Every user in the LMS has the Learner security role. If a learner designated as the Manager in someone's LMS profile, they will automatically have the role of Manager/Supervisor assigned to them.

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 which is the Local Learning Registrar (LLR). This restricts the LLR to performing actions associated with learners within a specific organization or SAC code.

LEARNING ADMINISTRATOR ROLE

The LMS Learning Administrator role is for those who manage courses, offerings, resources, certifications, and curricula. With Learning Administrator privileges you will be able to do the following:

- Create/edit locations, facilities, rooms, equipment, and inventory items
- Create/edit courses
- Create/edit offerings
- Create/edit catalog categories
- Manage a roster
- Manage learning requests
- Register learners for offerings
- Place orders for multiple learners
- View enrollments, curricula, certifications and/or courses assigned to others
- View and edit transcripts for other learners
- Add external learning to transcripts
- Create/edit certifications and curricula
- Generate various reports

This user manual will guide you through the process of using the privileges assigned to you as a Learning Administrator.

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
- by attaching audience types with seat percentages at the delivery type level
- by specifying seat numbers for audience subtypes at the offering level.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Ratee – The employee whose competencies are being rated.

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

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

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

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

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

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

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

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

CATALOG CONFIGURATION

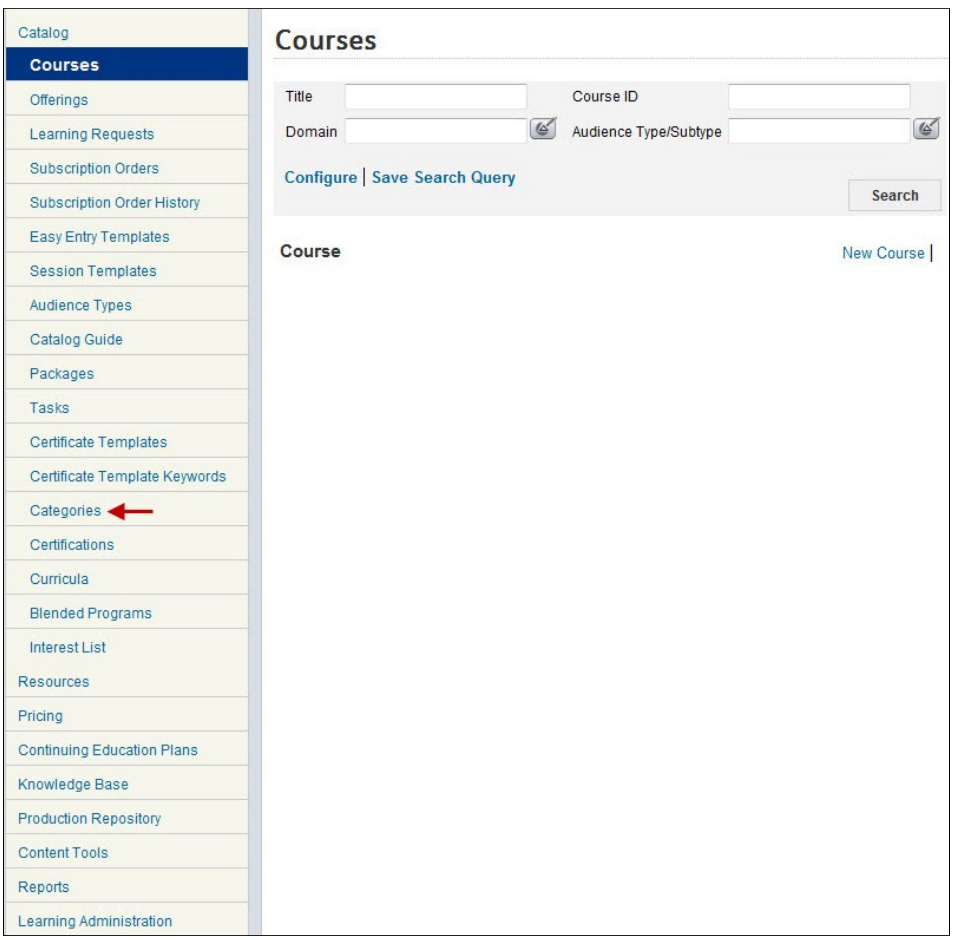
CATEGORIES

Categories are used to group courses so that learners can find them easily when searching the catalog by category. It is beneficial for your IC to have its own category. Subcategories can be created to further organize courses into logical groups.

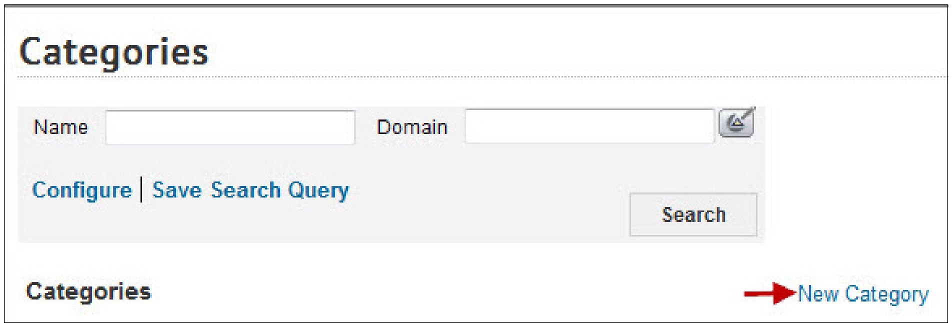
CREATING CATEGORIES

1. Select the **Admin Icon**.

2. Select **Categories** in the left navigation menu.

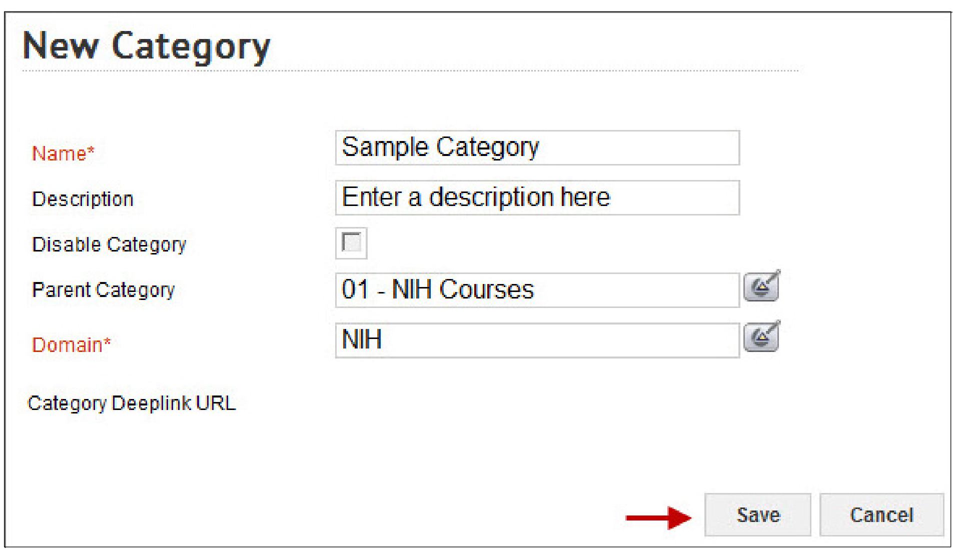


3. Click the **New Category link**.

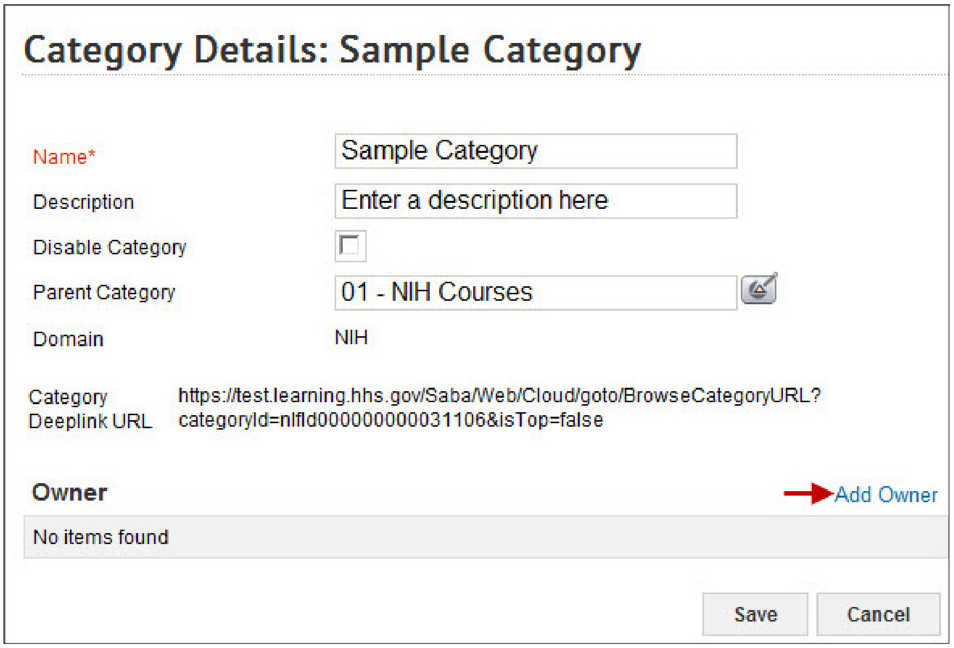


4. In the **Name field**, enter the name of your category.
5. In the **Description field**, enter a brief explanation of the types of courses that will be found in the category. (optional)
6. From the **Parent Category field**, select the category under which you want your category to appear in the catalog (e.g., “01 – NIH Courses”).

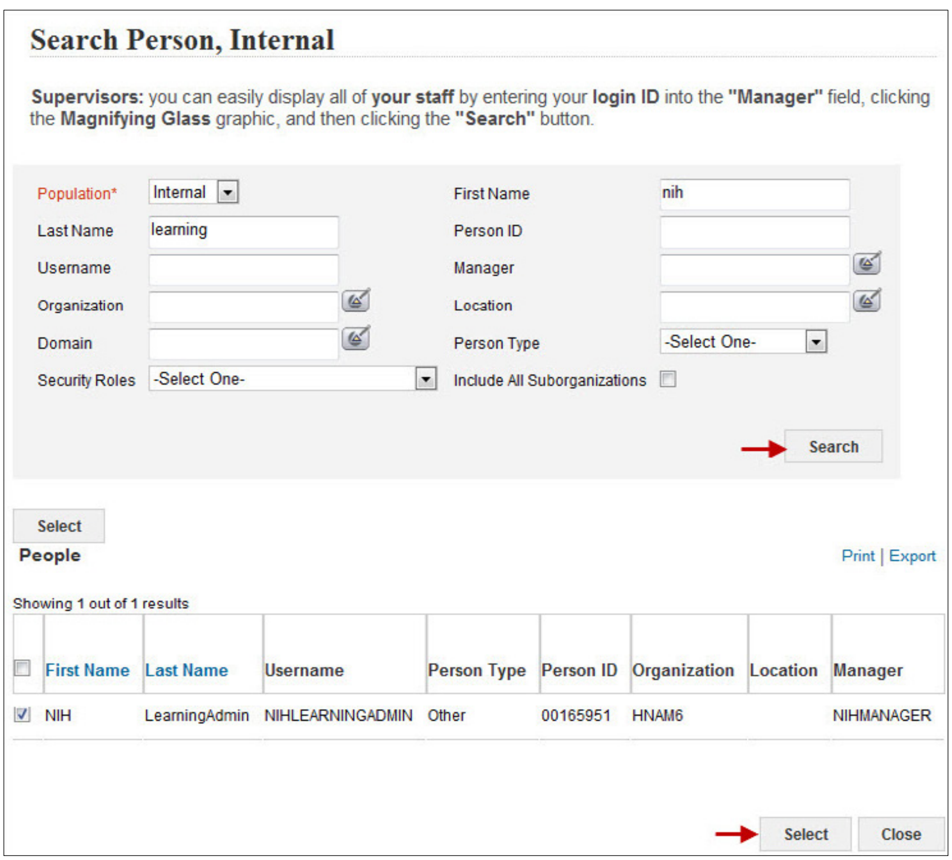
   NOTE: It is recommended that new categories have the “01 – NIH Courses” category as their parent category. This will ensure that your courses will be found when a learner browses the LMS catalog for all NIH related training.
7. Click the **Save button**.



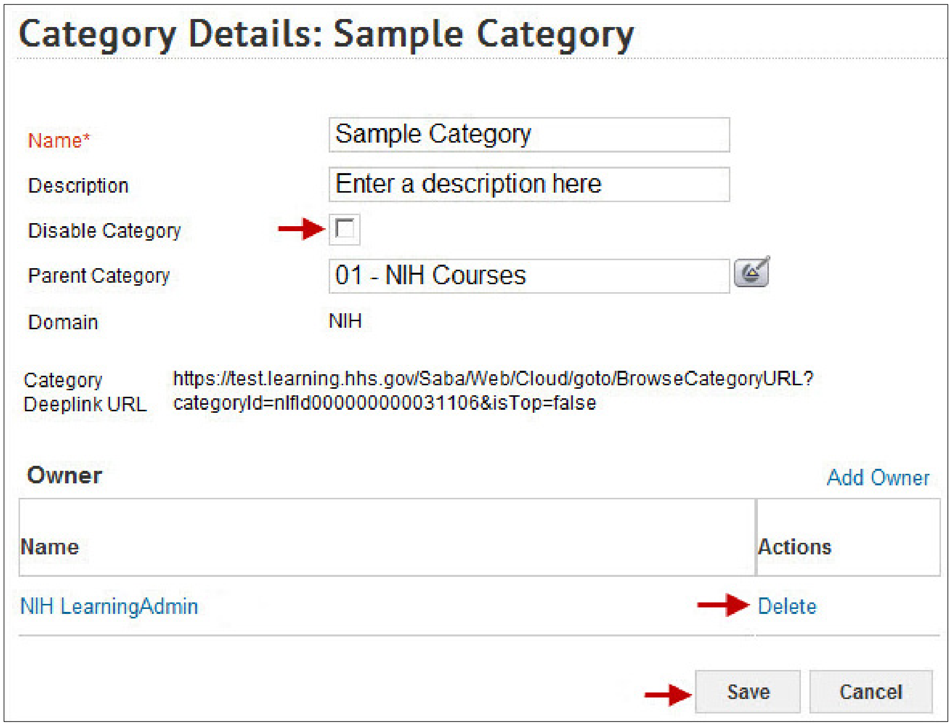
8. Click the **Add Owner link**.



9. Enter search criteria for an owner and click the **Search button**.
10. Click the **checkbox** associated the owner's name.
11. Click the **Select button**.
12. The owner will now be displayed on the **Category Details screen**.



NOTE: You may disable a category at any time by clicking the **Disable Category checkbox**.



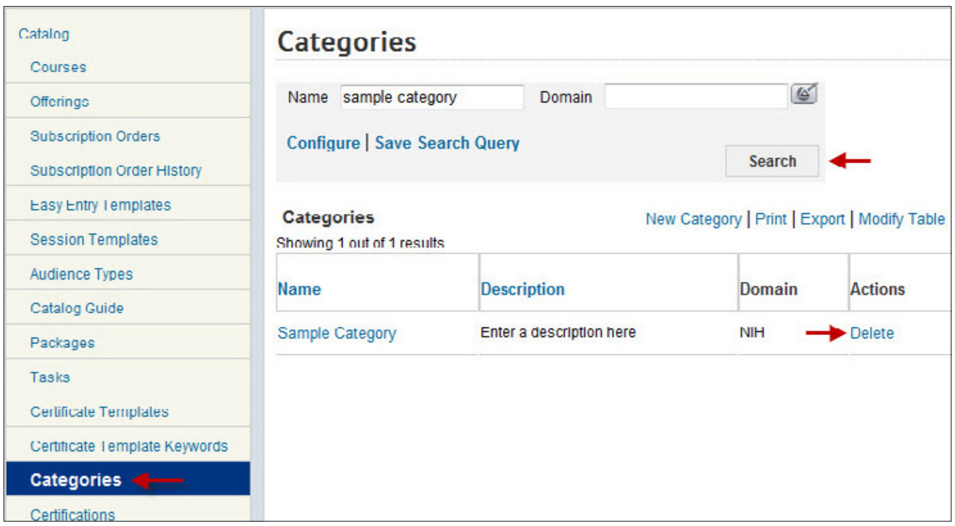
NOTE: You may delete an owner at any time by clicking the **Delete** link in the Actions column.

13. Click the **Save button**.

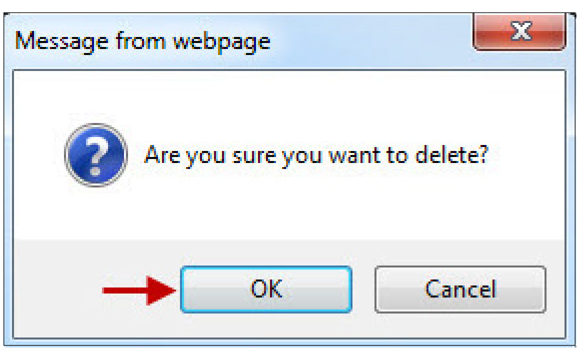
DELETING CATEGORIES

1. Select the **Admin Icon**.

2. Select **Categories** in the left navigation menu.
3. Enter the name of the category in the **Name field**.
4. Click the **Search button**.
5. Click the **Delete link** in the Actions column.



6. Click **OK** in the confirmation popup.



7. The category is now deleted.

IMPORTANT! It is recommended that you disable categories that you don't wish to use rather than delete them. Other courses that you are unaware of may also use the category.

MANAGING RESOURCES

LOCATIONS

Locations are used in the system primarily to deliver learning in your education services operation and optimize the use of learning resources in your organization. Use locations to define places where scheduled offerings are delivered and where resources are located.

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

Some examples of locations are:

NIH Training Center

Center for Information Technology

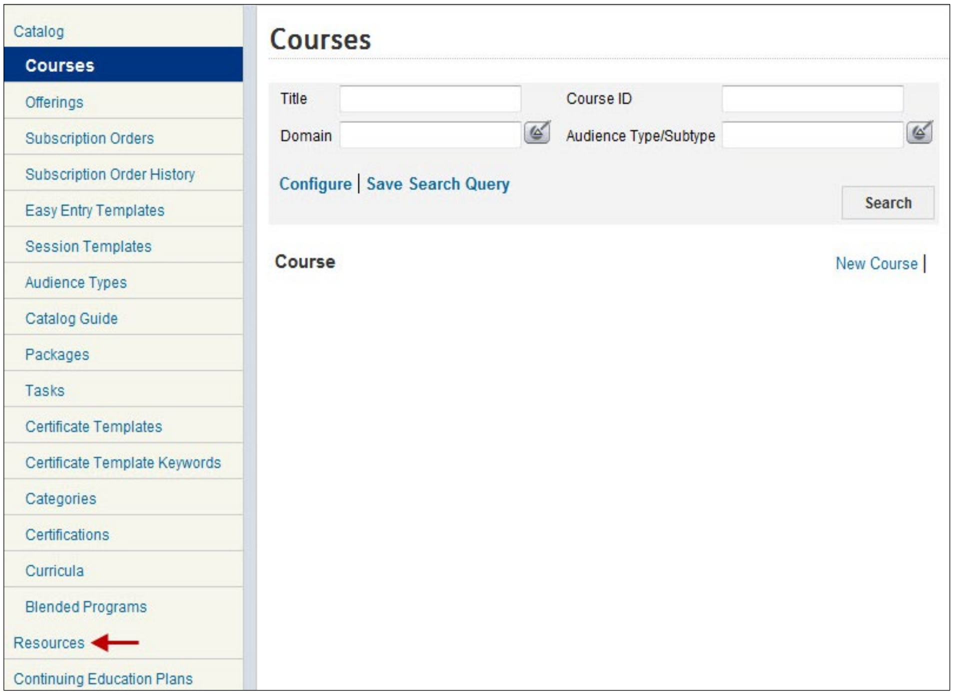
Your IC…?

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

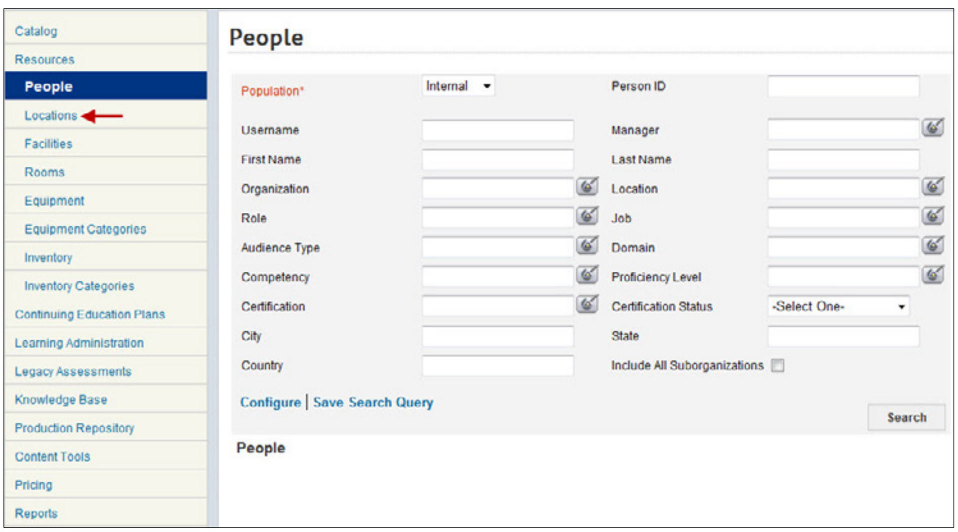
CREATING LOCATIONS

1. Click the **Admin Icon**.

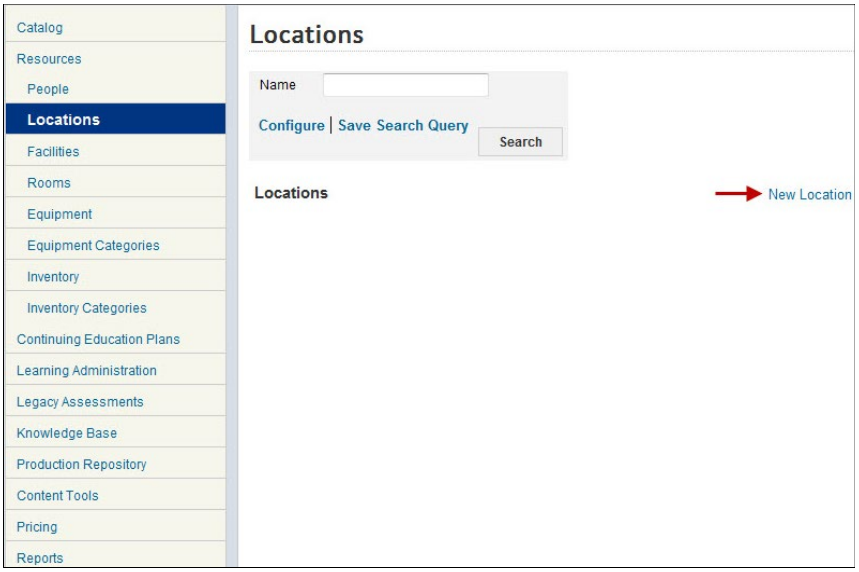
2. Click the Resources **link**.



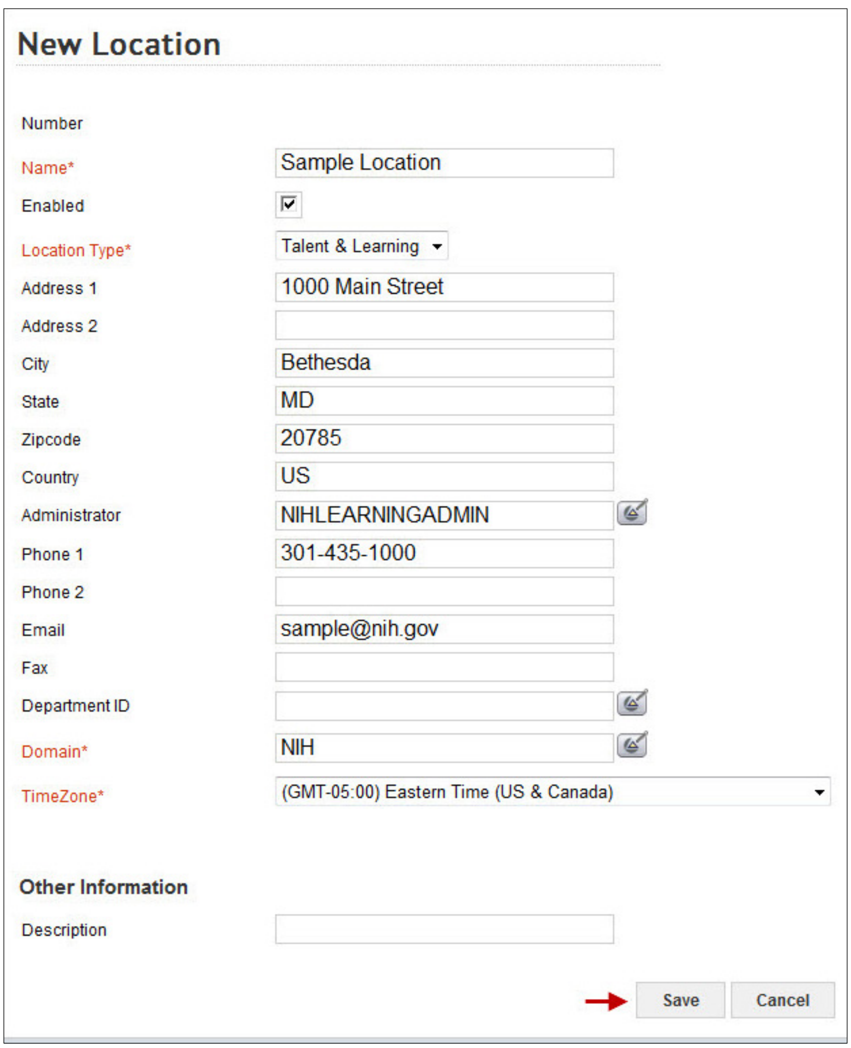
3. Click the **Locations** link.



4. Click the **New Location** link.

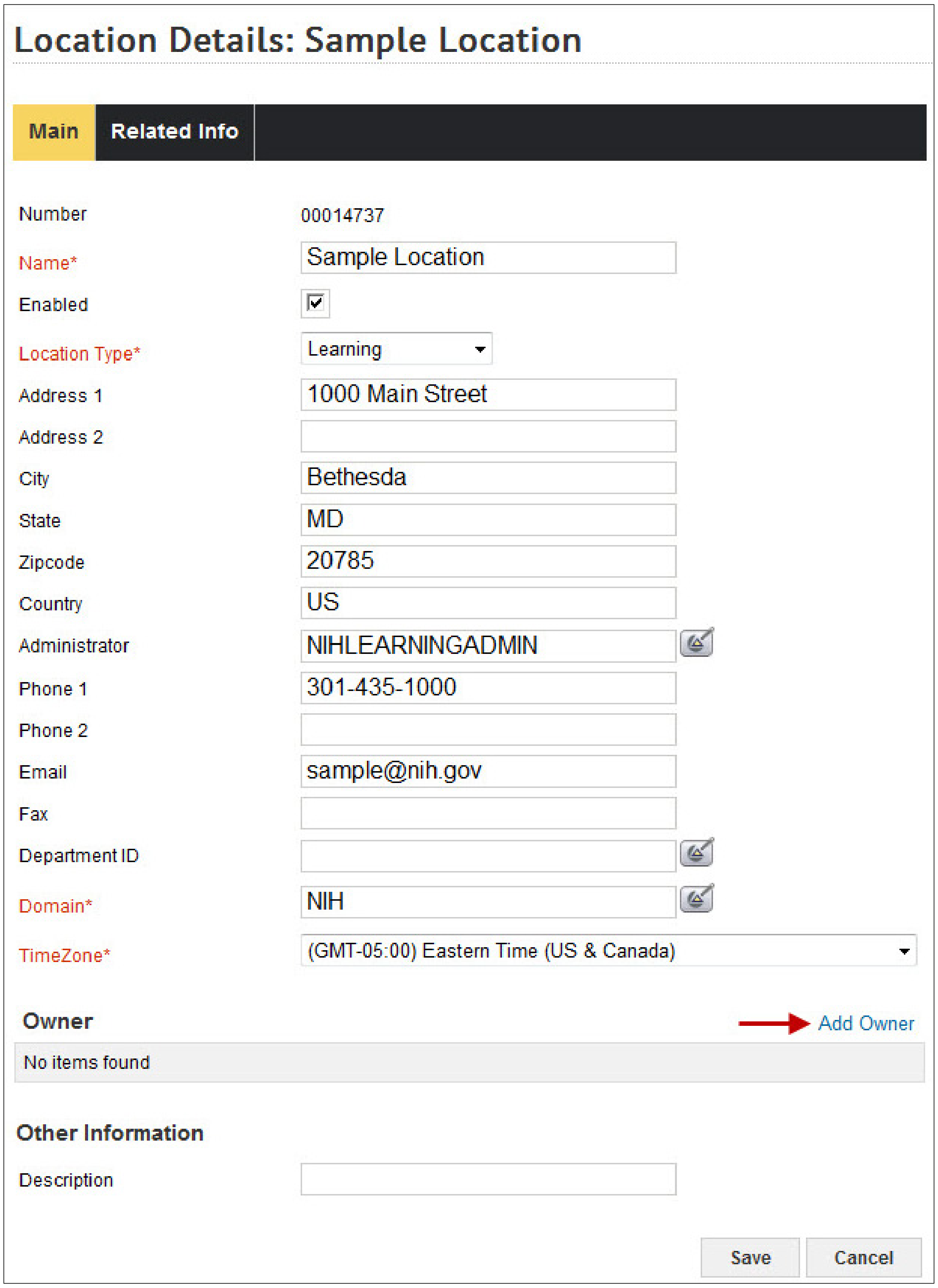


5. Enter all available information for the new location then click the **Save button**.



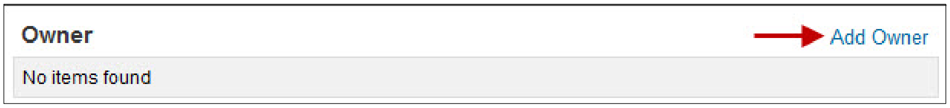
NOTE: All fields in RED are required to save.

6. The screen will refresh displaying the Related Info tab and the Owner section.

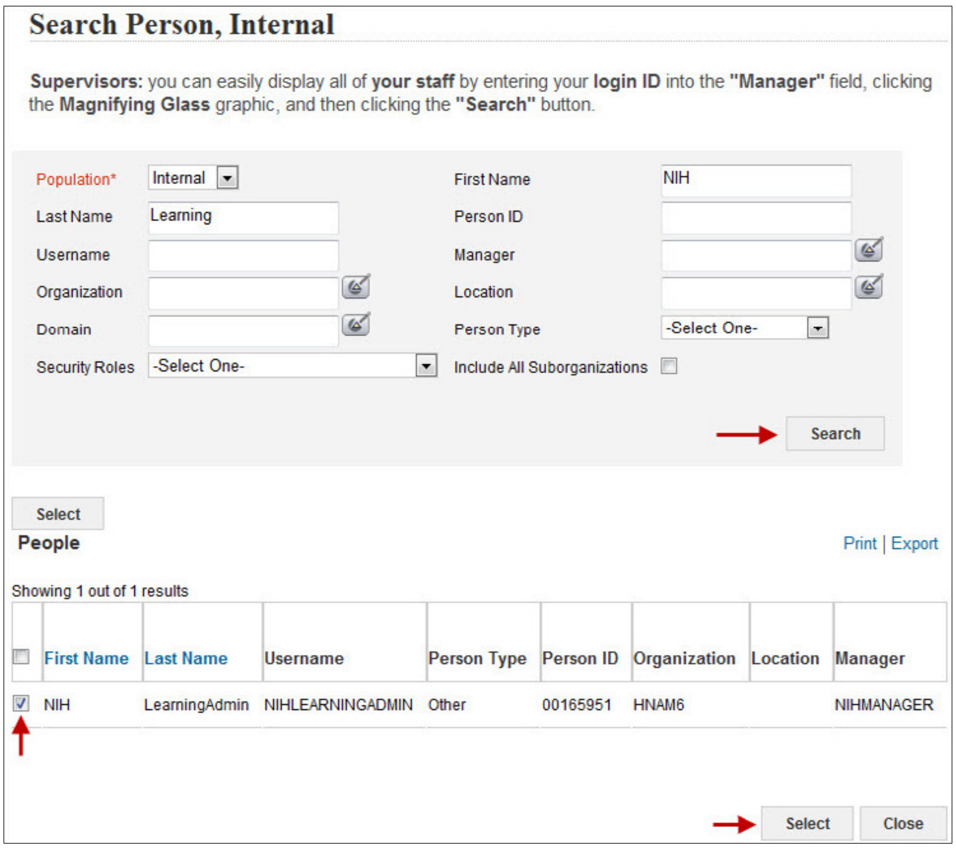


ADDING AN OWNER TO A LOCATION

1. After saving the location, click the **Add Owner link** to add the person responsible for managing the location.



2. Enter the search criteria for the owner and click Search.
3. Click the Checkbox next to the name of the owner.
4. Click the Select button.



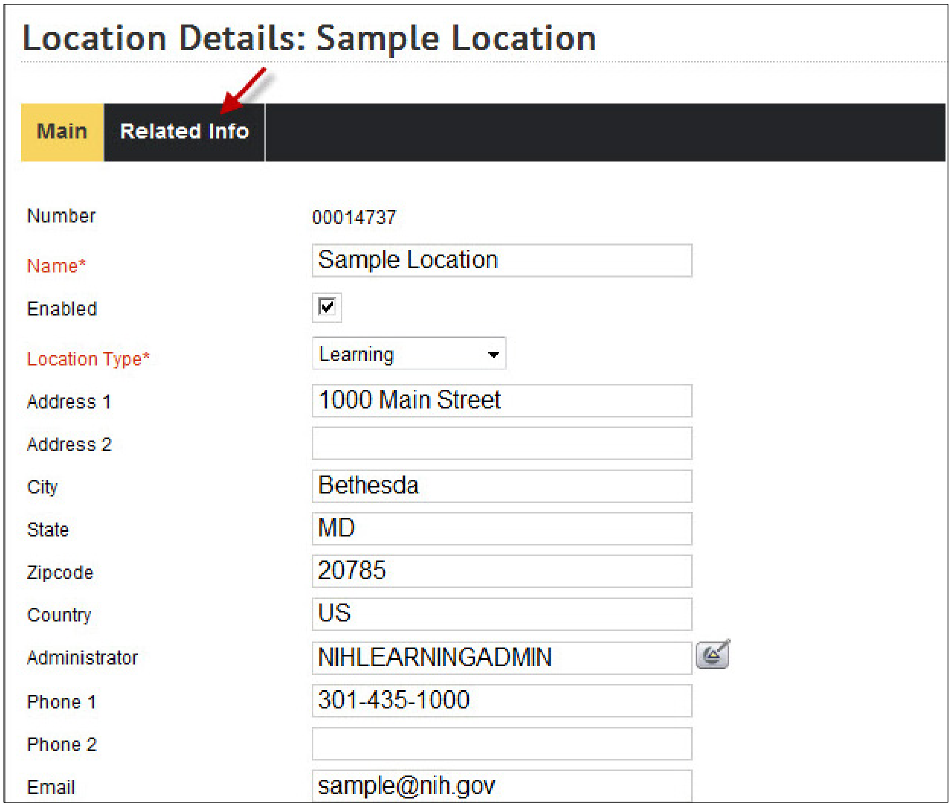
5. The owner will now appear at the bottom of the Location Details screen.

   NOTE: You may delete an owner by clicking the **Delete link** in the Actions column for the appropriate owner.

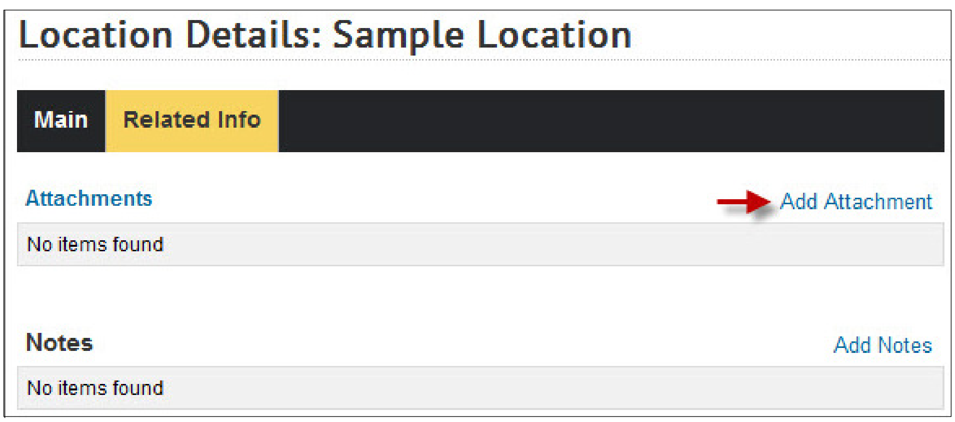
NOTE: You may add multiple owners by repeating these steps.

ADDING ATTACHMENTS TO LOCATIONS

1. Click the **Related Info tab**.

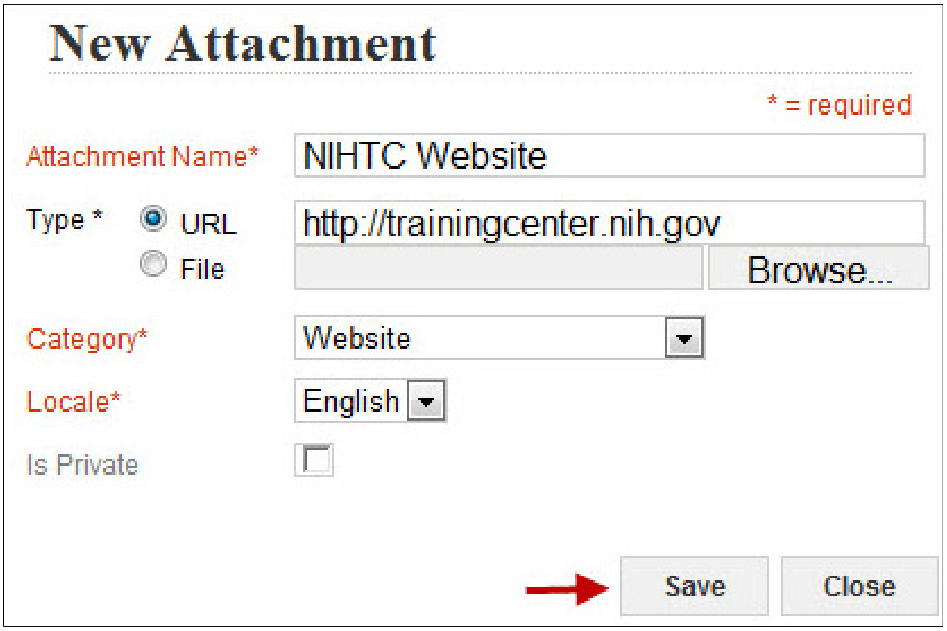


6. Click the **Add Attachment link**.

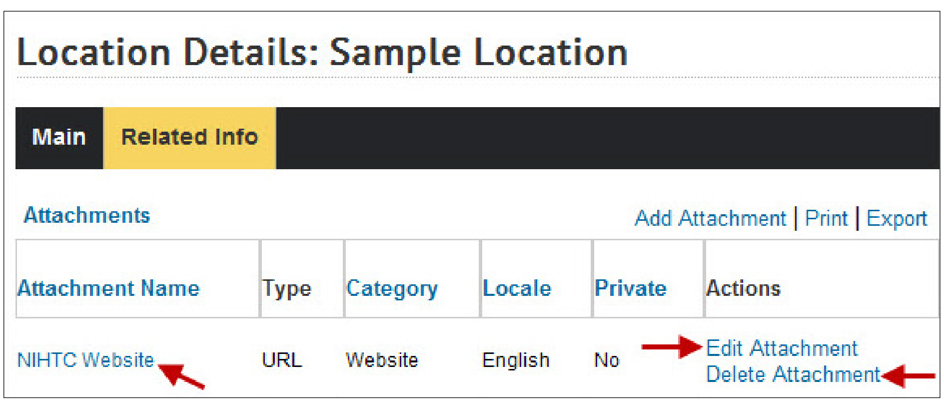


7. **Attachment Name** - Enter a name for the attachment in this field.
8. **Type** - Select the radio button that describes the type of attachment.
9. **URL** – enter a valid URL for the website.
10. **File** – Click Browse to search your computer for the file to be attached.
11. **Category** - Select a Category for the attachment from the pull-down menu.
12. **Locale** – This should be set to English which is the default setting.
13. **Is Private** – Check this checkbox if you would like to restrict visibility of the attachment to users registered for an offering at the location.

14. Click the **Save button**.



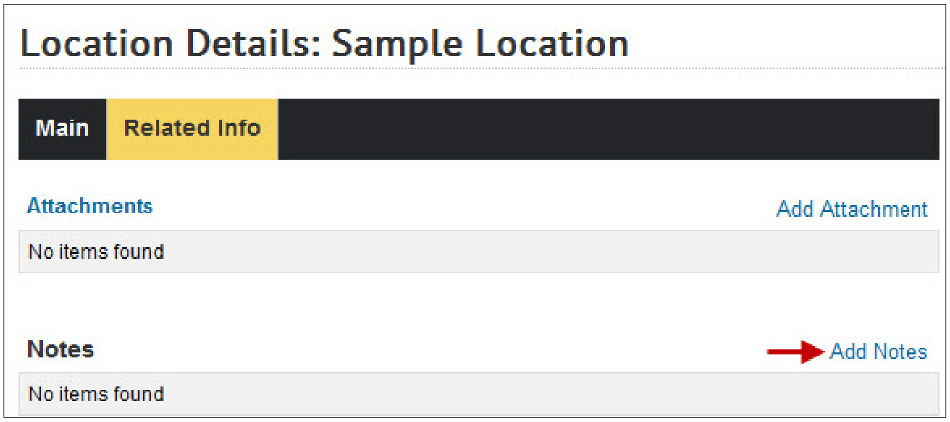
Your attachment will now appear on the Location Details screen.
Click the **Attachment Name link** to open it and verify that the file/URL works properly.
Click the **Edit Attachment link** in the Actions column to return to the attachment details and make changes.
Click the **Delete Attachment link** in the Actions column to remove the attachment from the location.



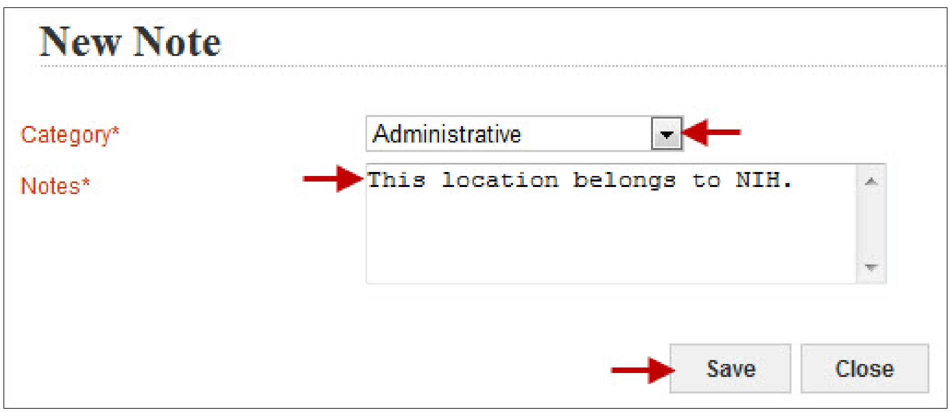
NOTE: You may add as many attachments as needed by repeating these steps.

ADDING NOTES TO LOCATIONS

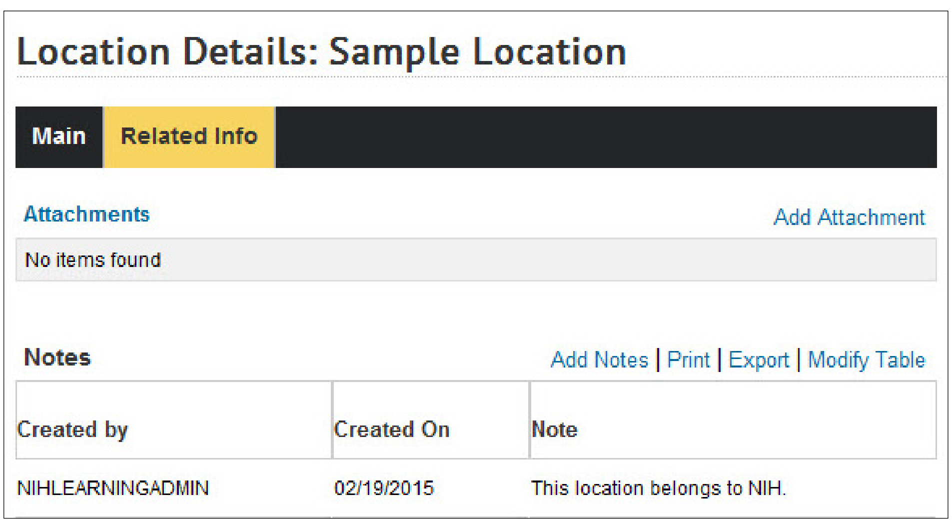
1. Click the **Add Notes link**.



2. Select a Category for the note from the **Category drop-down menu**.
3. Enter the note in the **Notes field**.
4. Click the **Save button**.



5. Notes will appear on the **Related Info tab** of the Location Details screen.

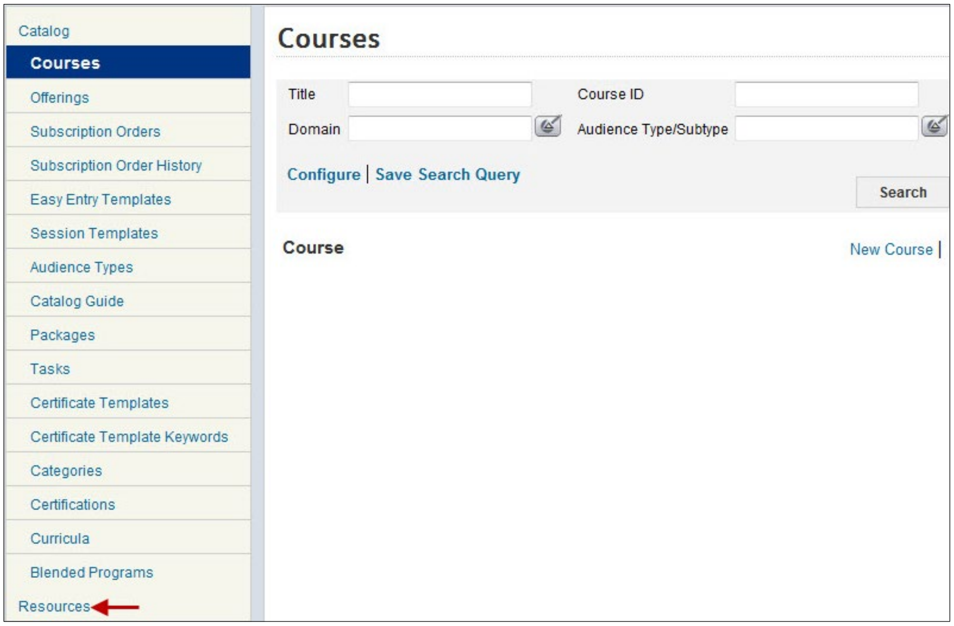


NOTE: Notes are permanent and cannot be deleted or edited. You may add additional notes as needed.

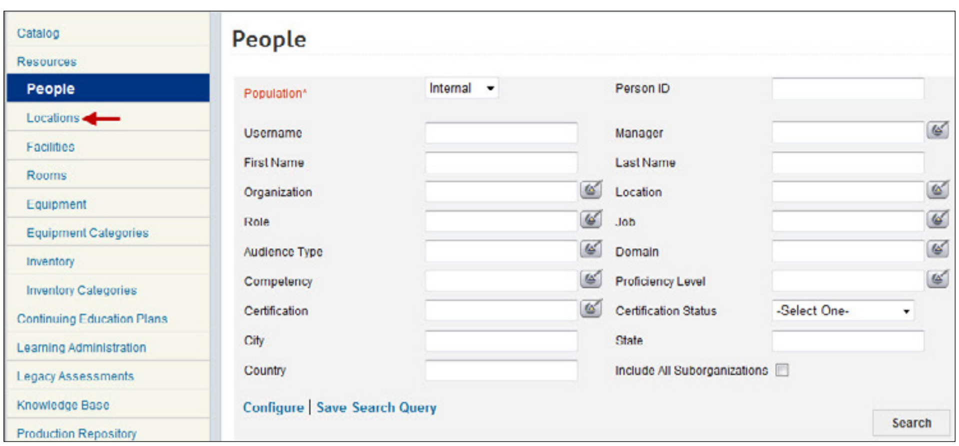
MODIFYING LOCATIONS

1. Select the **Admin Icon**.

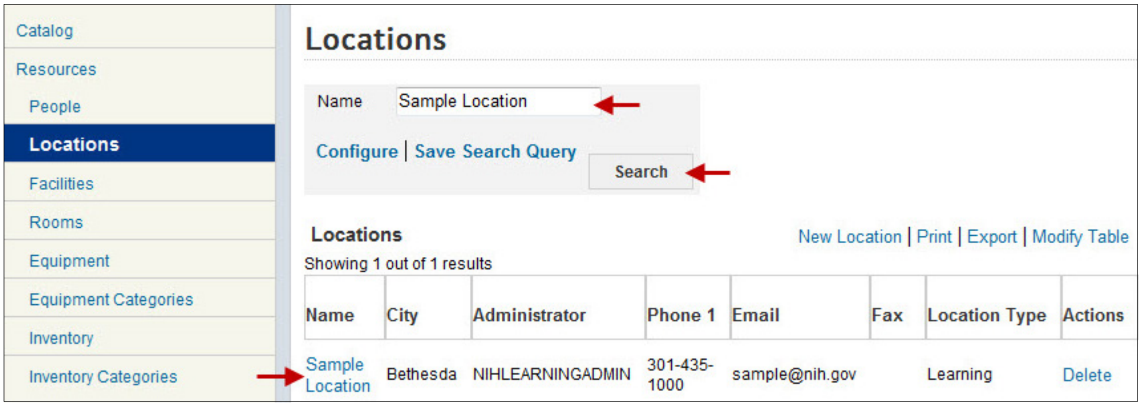
2. Click the **Resources** in the left menu.



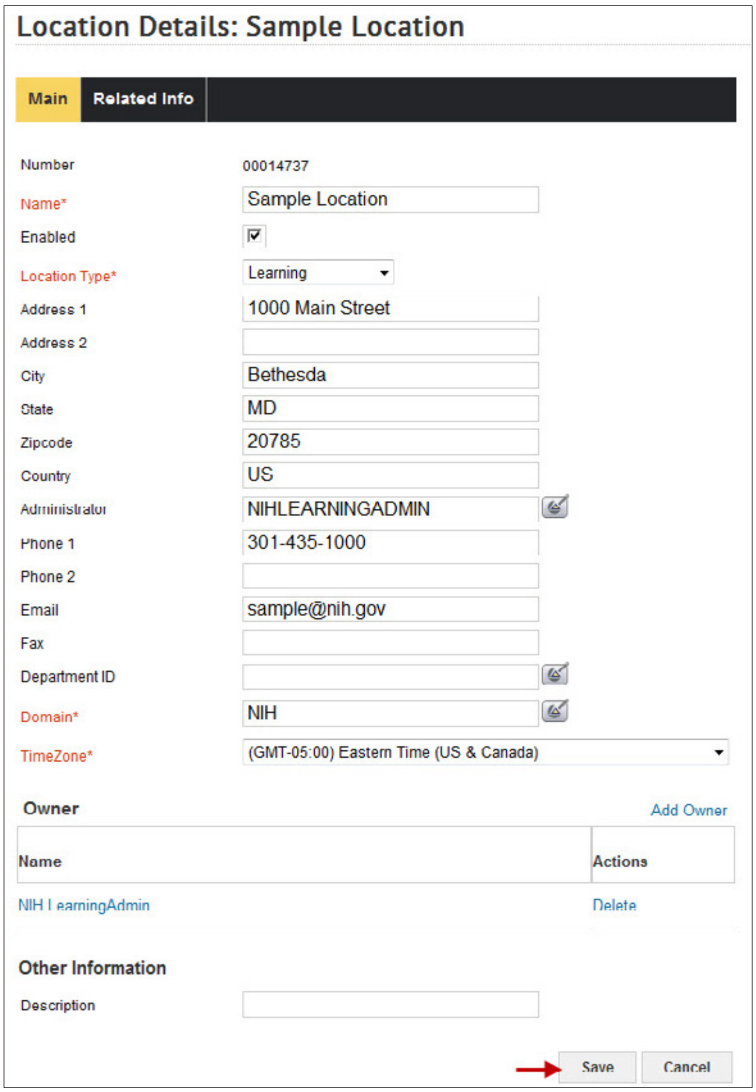
3. Select **Locations** in the left navigation menu.



4. Enter the name of the location in the **Name field**.
5. Click the **Search button**.
6. Click the **location name**.



7. Modify the location details as needed then click the **Save button**.

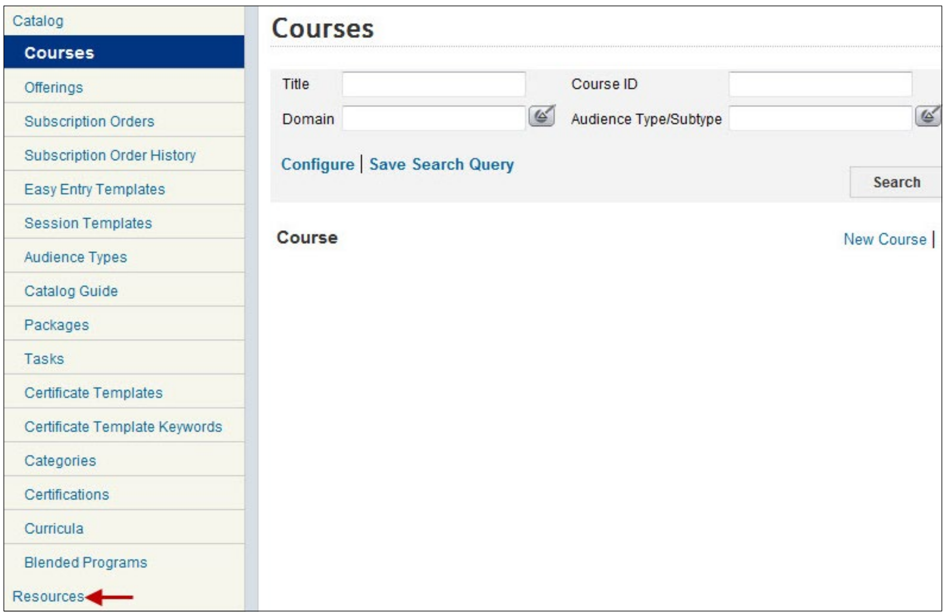


DELETING LOCATIONS

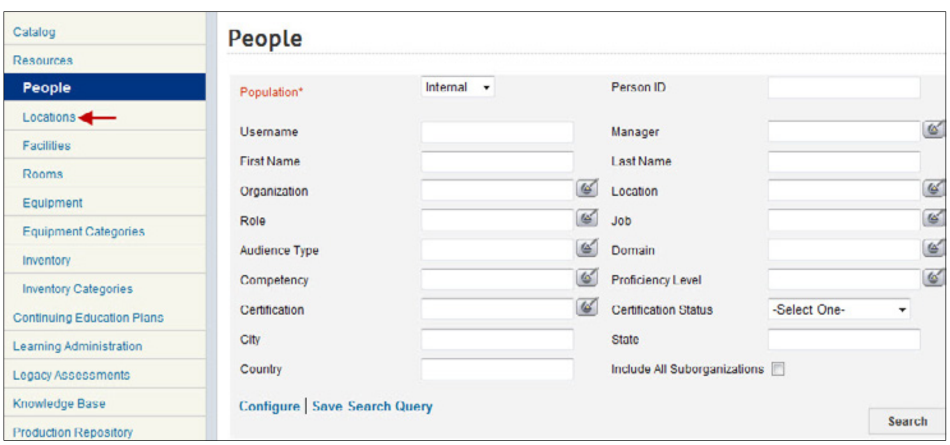
IMPORTANT! You should only delete Locations that you created. Once a location is associated with an offering or delivery type, the location cannot be deleted until that relationship is broken.

1. Select the **Amin Icon**.

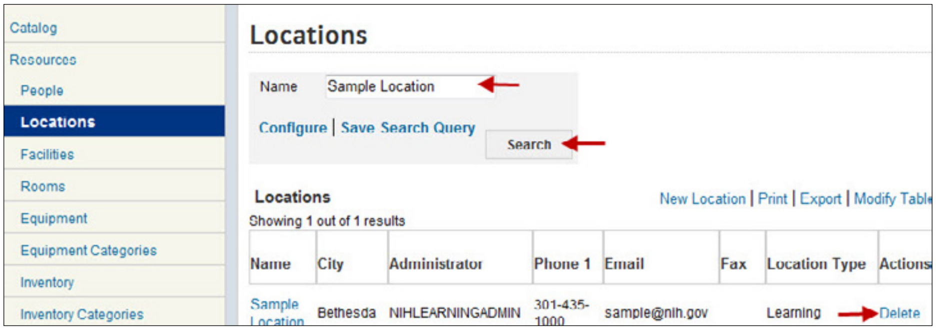
2. Click the **Resources** in the left menu.



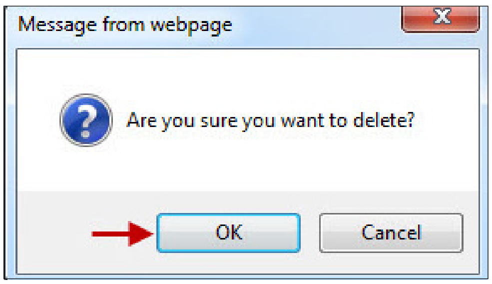
3. Select **Locations** in the left navigation menu.



4. Enter the name of the location in the **Name field**.
5. Click the **Search button**.
6. Click the **location name**.



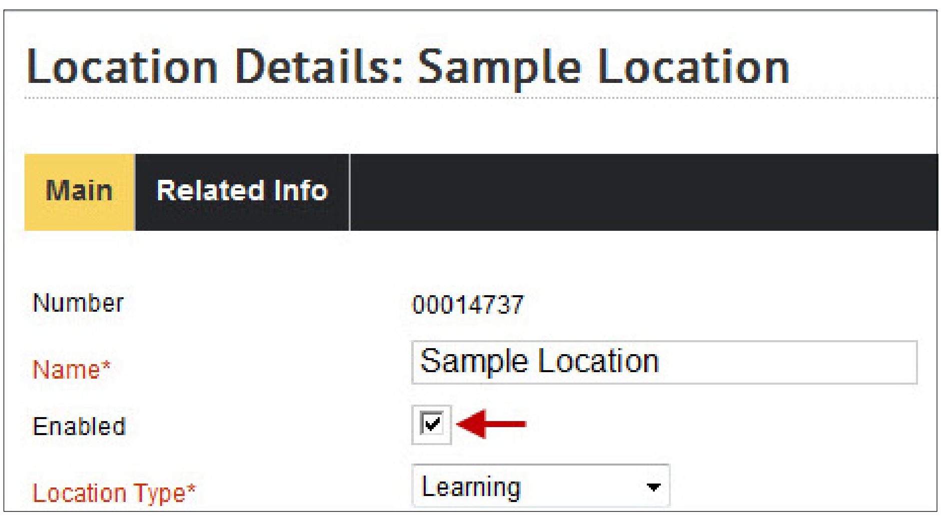
7. Click **OK** in the confirmation dialog box.



8. The location is now deleted from the LMS.

NOTE: If you cannot delete a location because it has been associated with an offering, you can alternatively disable the location so it can no longer be used.

Disable a location: In step 6, click the title of the location, then uncheck the Enable checkbox on the Location Details screen.



6. Click the **Save button** at the bottom of the page.

FACILITIES

Facilities are the actual buildings or units used to deliver scheduled offerings associated with a location. The facilities contain the rooms that will be used to hold the training classes. The facilities must be set up in advance, prior to creating and assigning them to scheduled offerings.

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

IMPORTANT! Please search for and modify existing facilities before creating new ones.

Some examples of Facilities at NIH are:

Building 31 (NIH Main Campus)

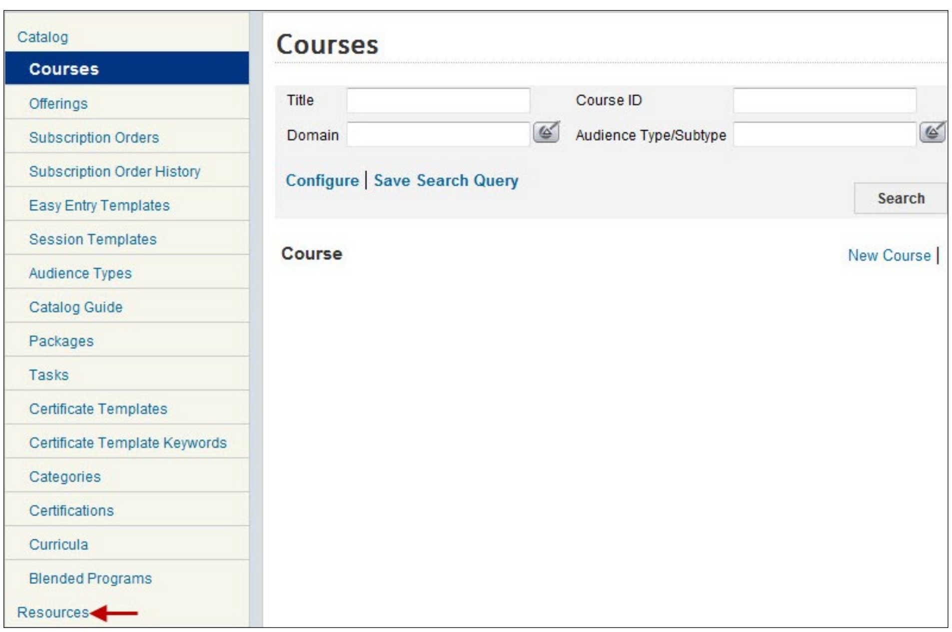
Parklawn Building (Fishers Lane – Bethesda, MD)

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

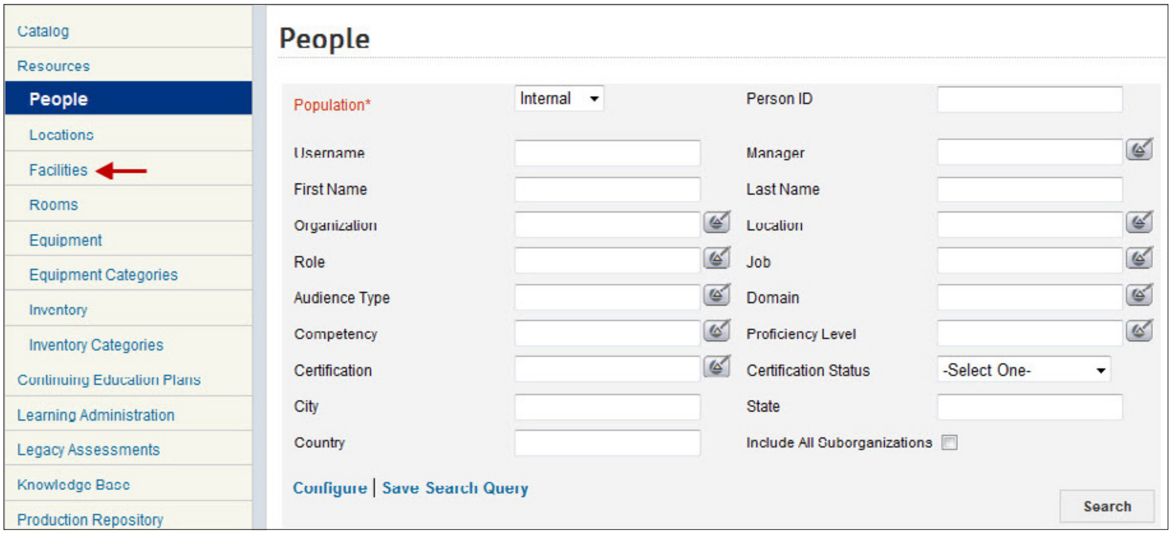
CREATING FACILITIES

1. Select the **Admin Icon**.

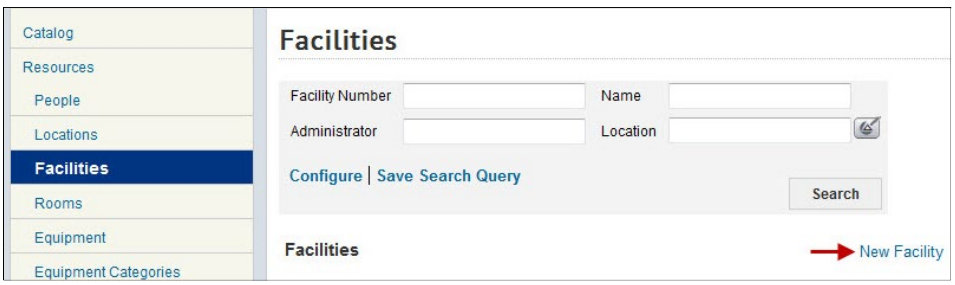
2. Click the **Resources** in the left menu.



3. Select **Facilities** in the left navigation menu.

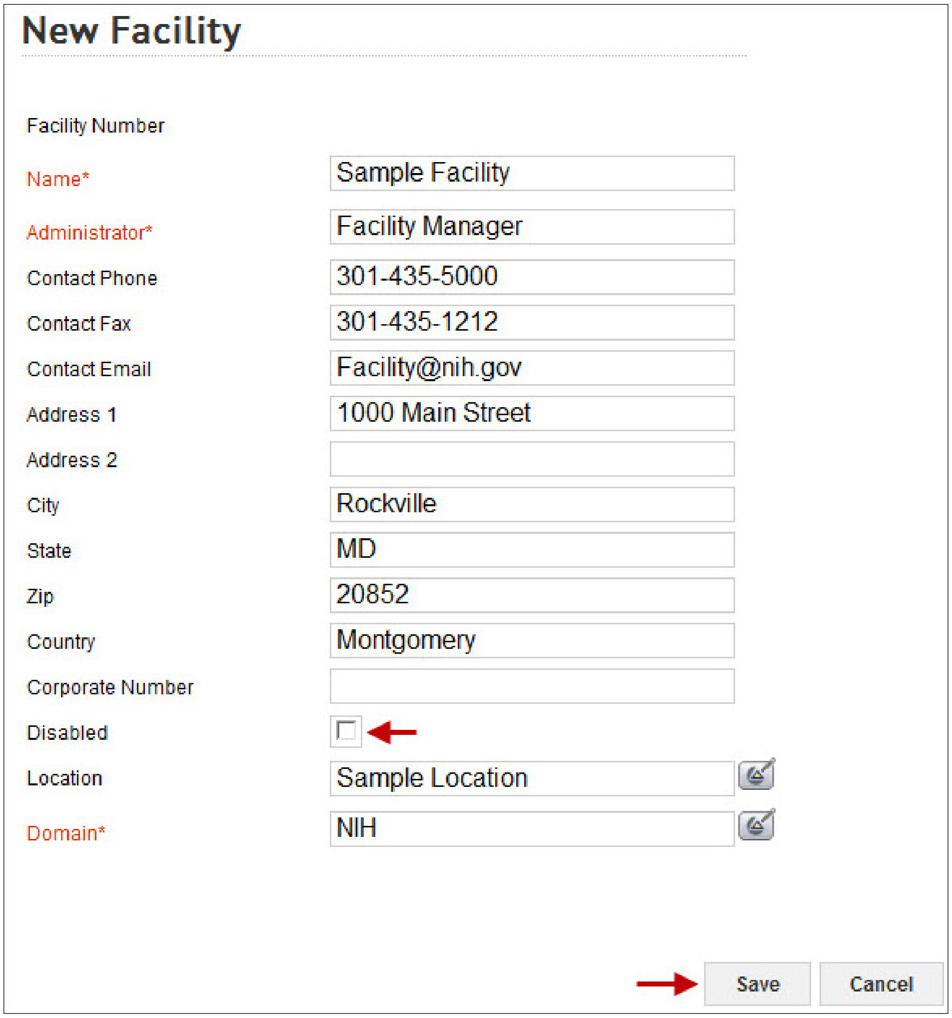


7. Click the New Facility link.



8. Enter all available information for the new facility.
9. The **Domain** field should be set to **NIH**.
10. Click the **Save button** at the bottom of the screen.

NOTE: All fields in RED are required to save.



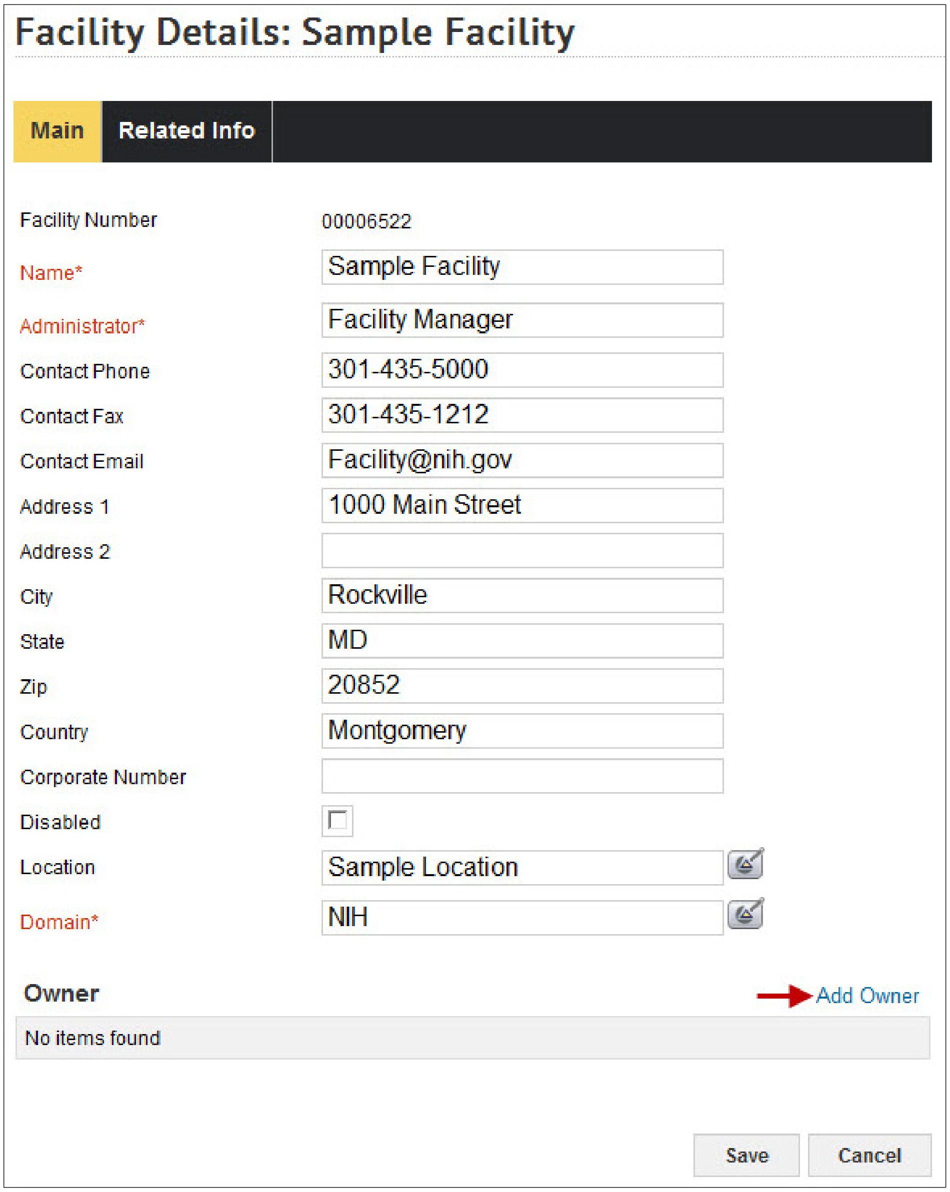
IMPORTANT! You must select a Location at which this Facility resides in order for the facility to become available for administrators to assign it to an offering.

11. Click the **Save button**.

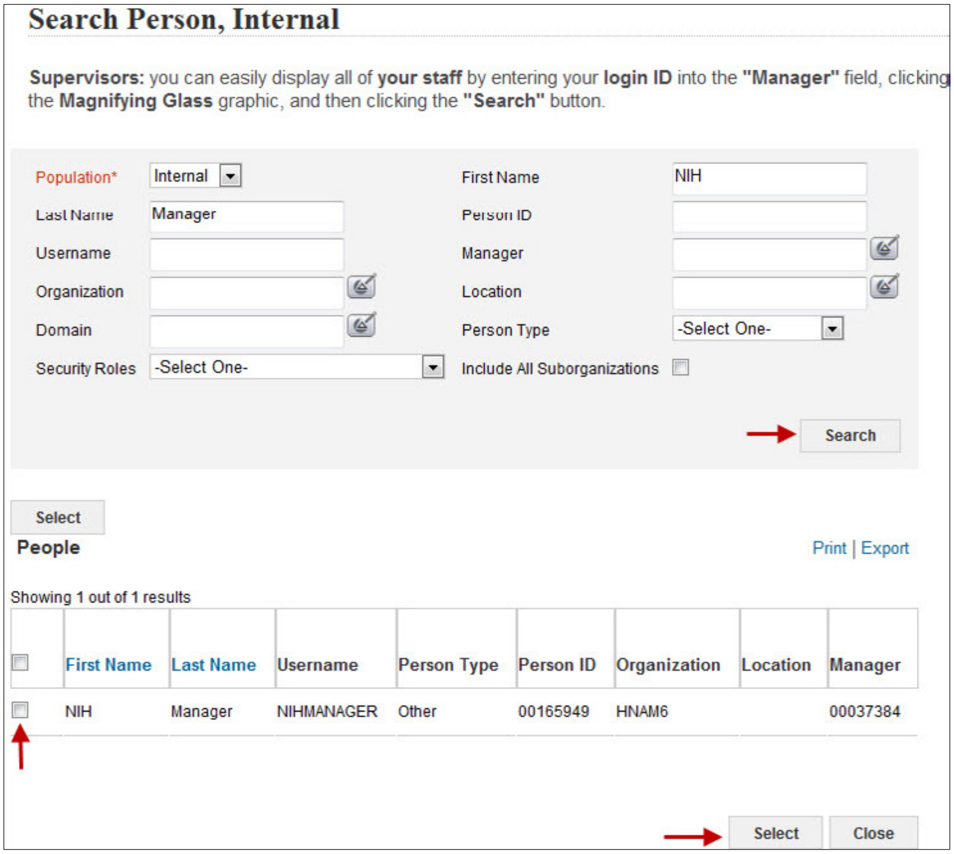
NOTE: From this screen, you may also check the Disabled checkbox to disable the facility. You can enable the facility again at a later date by un-checking the Disabled checkbox.

ADDING AN OWNER TO YOUR FACILITY

1. After saving your facility, click the **Add Owner link** to add the person responsible for managing the facility.



4. Enter the search criteria for the owner and click **Search**.
5. Click the **Checkbox** next to the name of the owner.
6. Click the **Select button**.

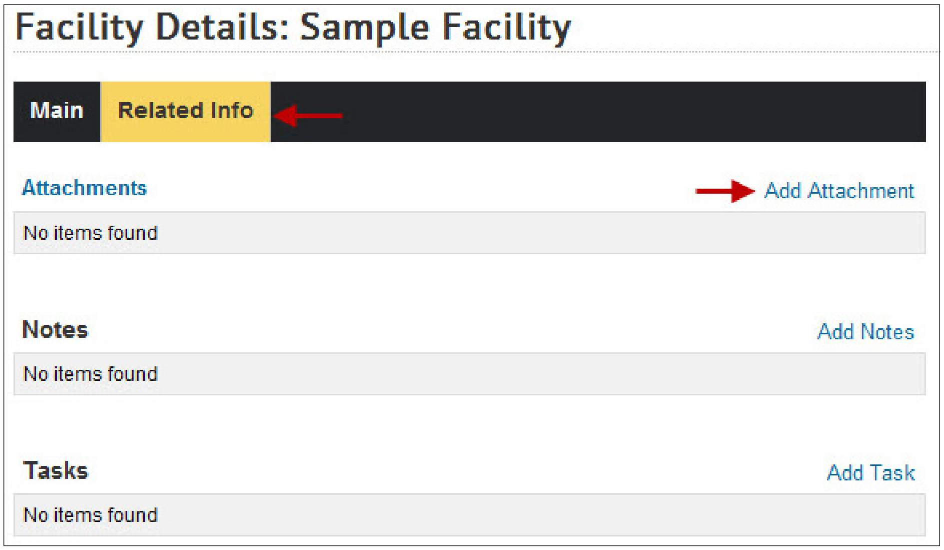


7. The owner will now appear at the bottom of the Facility Details screen.

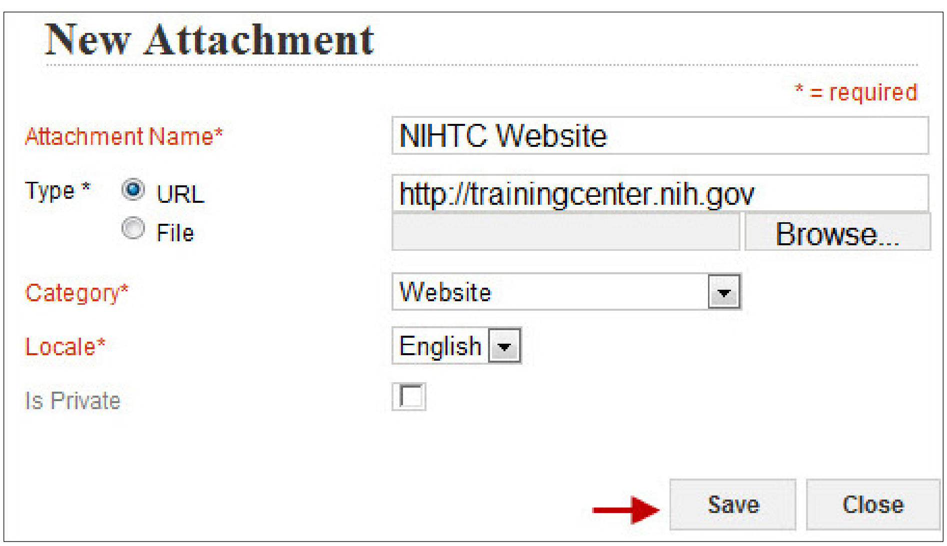
NOTE: You may add multiple owners by repeating these steps and may delete an owner at any time by clicking the **Delete link** in the Actions column for the appropriate owner.

ADDING ATTACHMENTS TO FACILITIES

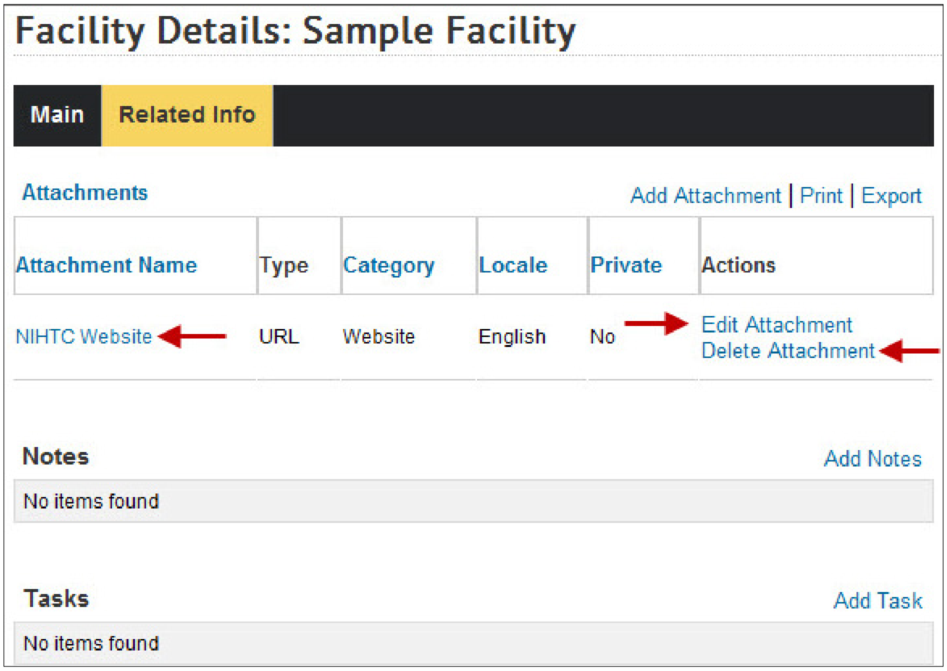
1. Click the Related Info tab.
2. Click the Add Attachment link.



3. Enter a name for the attachment in the **Attachment Name field**.
4. Select the **Type** of attachment.
    - URL – enter a valid URL for the website.
    - File – Click **Browse** to search your computer for the file to be attached.
5. Select a **Category** for the attachment.
6. **Locale** should be set to English which is the default setting.
7. **Is Private** – Check this checkbox is you would like to restrict visibility of the attachment to users registered for an offering at the facility.
8. Click the **Save button**.



9. Your attachment will now appear on the Facility Details screen.
    a. Click **Attachment Name** to open it and verify that the file/URL works properly.
    b. Click **Edit Attachment** in the Actions column to return to the attachment details and make changes.
    c. Click **Delete Attachment** in the Actions column to remove the attachment from the Facility.

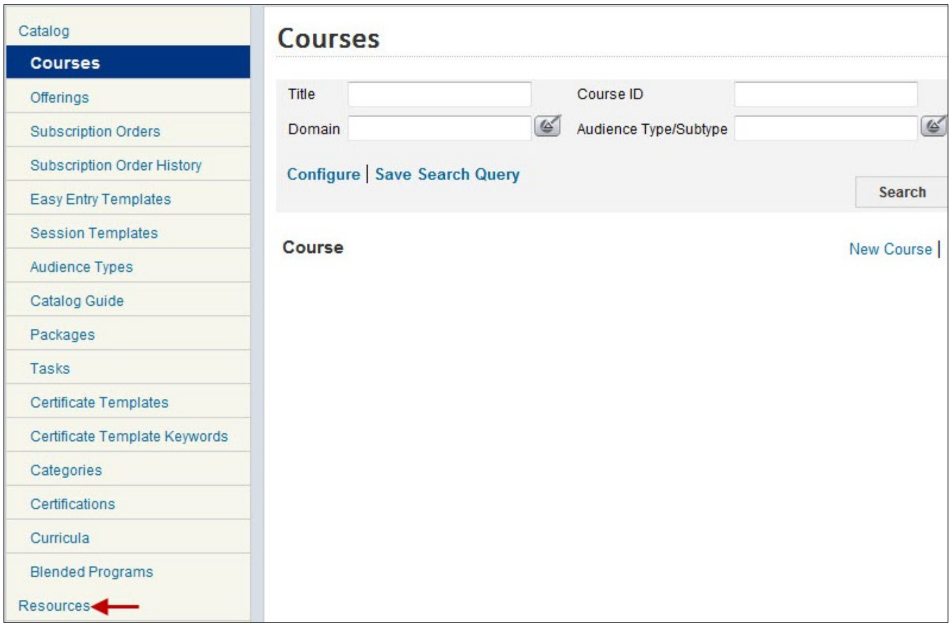


NOTE: You may add as many attachments as needed.

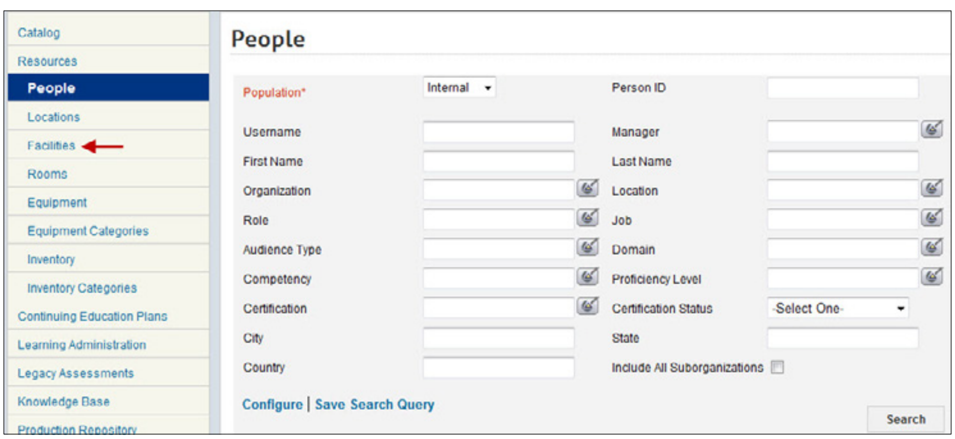
MODIFYING FACILITIES

1. Select the **Admin Icon**.

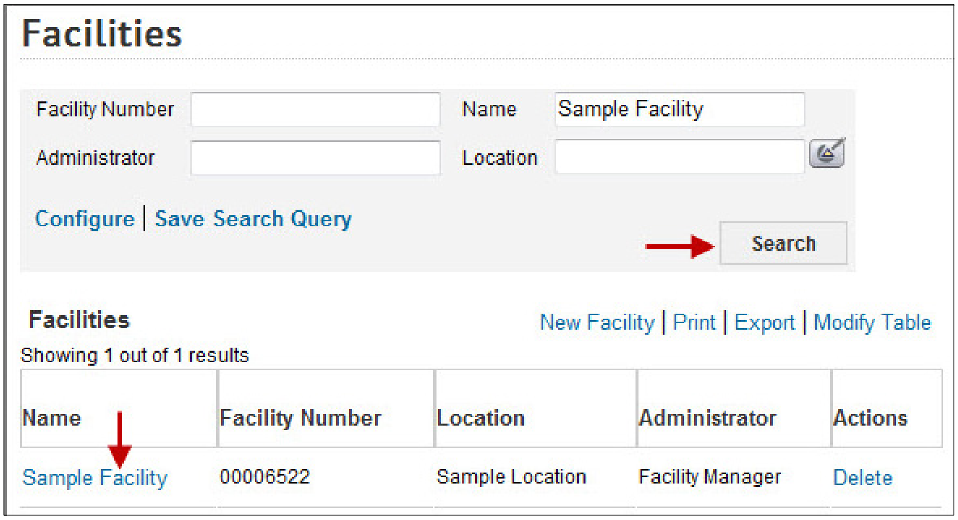
2. Click the **Resources** in the left menu.



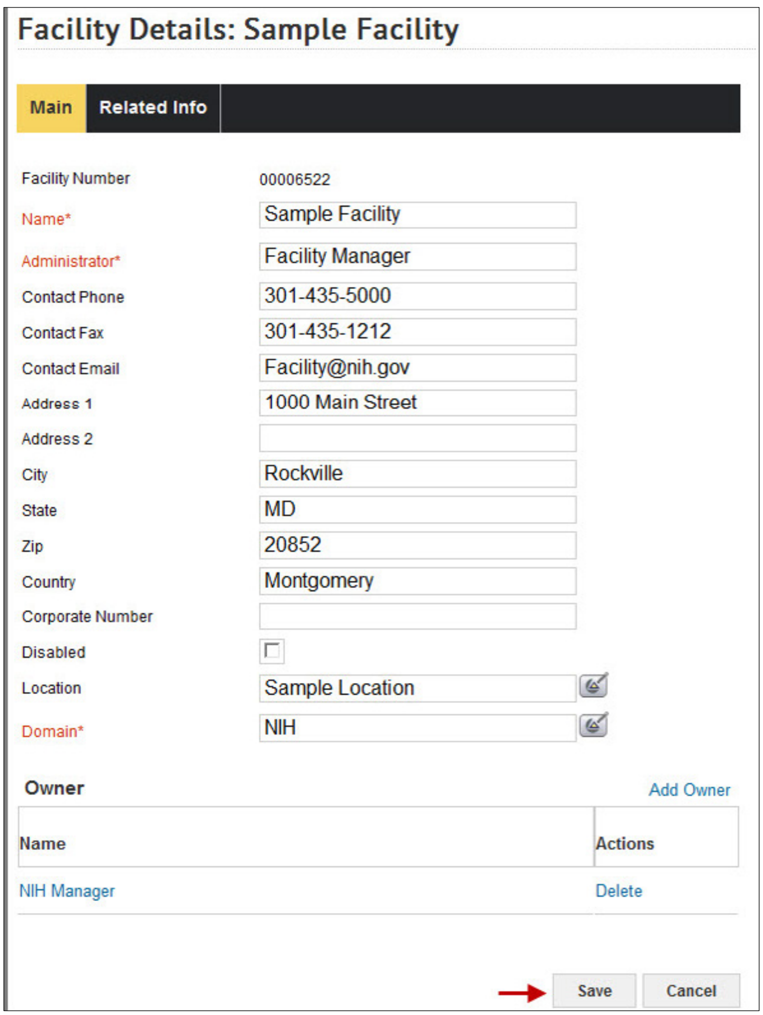
3. Select **Facilities** in the left navigation menu.



4. Enter search criteria for the facility then click **Search**.
5. Click the **name link** of the facility you want to edit.



6. Modify the facility details as needed.
7. Click **Save**.

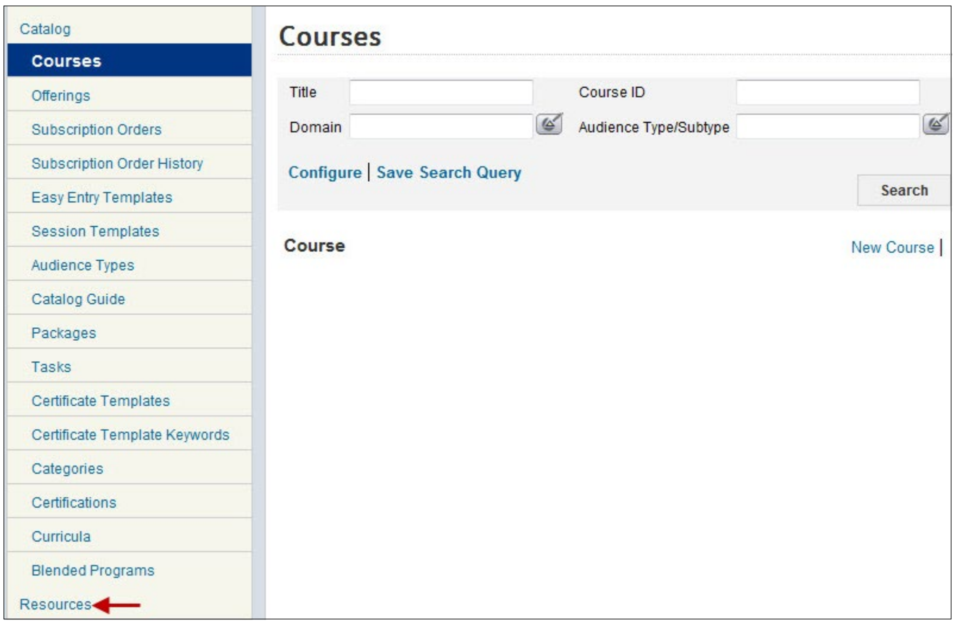


DELETING FACILITIES

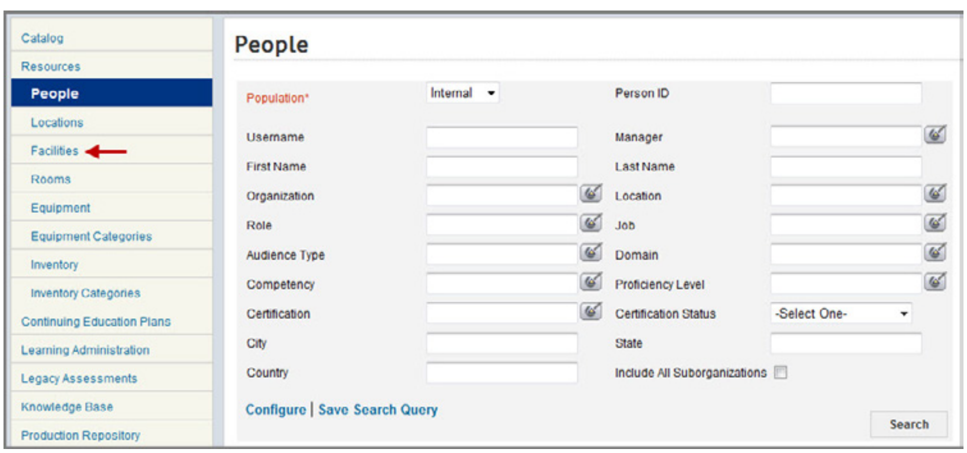
IMPORTANT! You should only delete Locations that you created. Once a location is associated with an offering or delivery type, the location cannot be deleted until that relationship is discontinued.

1. Select the **Admin Icon**.

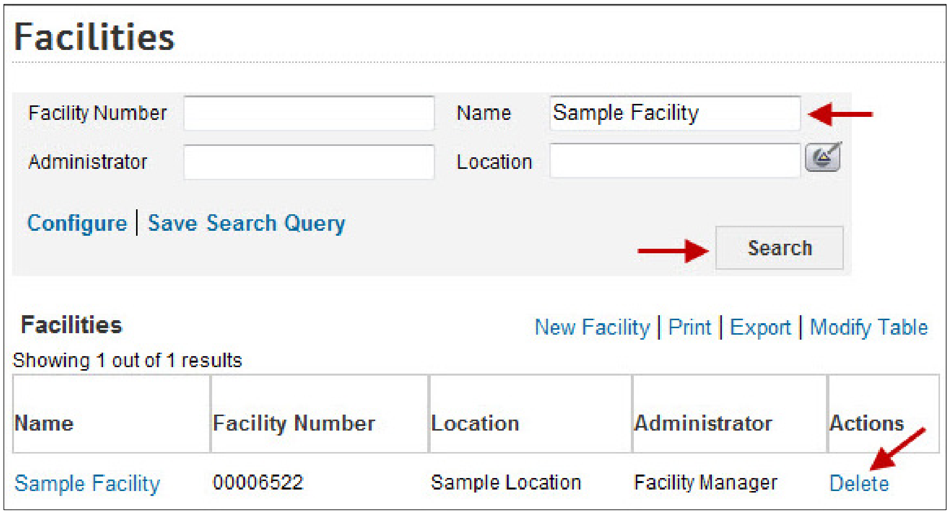
2. Click the **Resources** in the left menu.



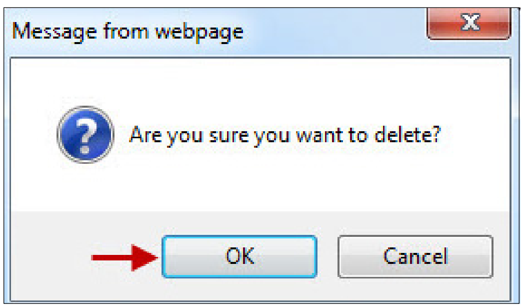
3. Select **Facilities** in the left navigation menu.



4. Enter search criteria for the facility then click **Search**.
5. Click the **Delete link** of the facility you want to remove.



6. Click **OK** in the confirmation dialog box.



7. The facility is now deleted from the LMS if it is not associated with an offering.

ROOMS

Rooms are one of the learning resources used to deliver learning in your education services operation. Rooms are always associated with a facility. You assign rooms as resources to instructor-led offerings.

Eligible rooms for an offering are determined by the location of the offering. When you assign a room to an offering you can specify additional reservation information for the room. Rooms must be set up prior to assigning them to scheduled offerings.

IMPORTANT! Please search for and modify existing rooms before creating new ones.

Some examples of rooms are:

Conference room

Classroom 1

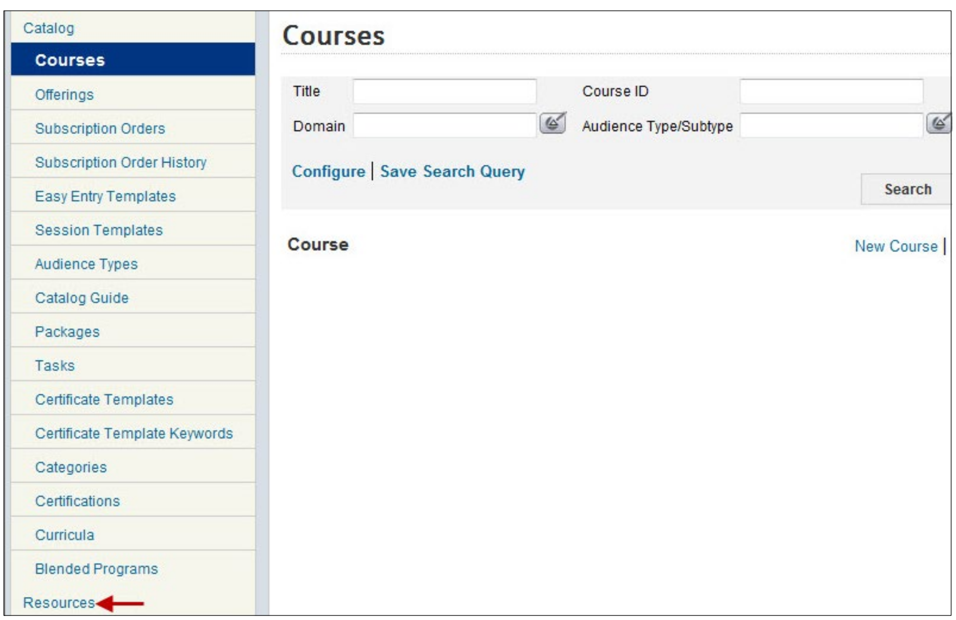
Classroom 2

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

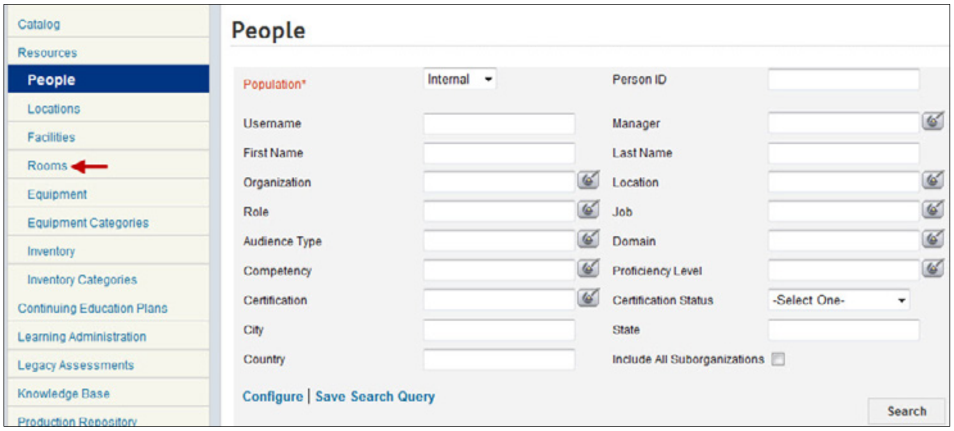
CREATING ROOMS

1. Select the **Admin Icon**.

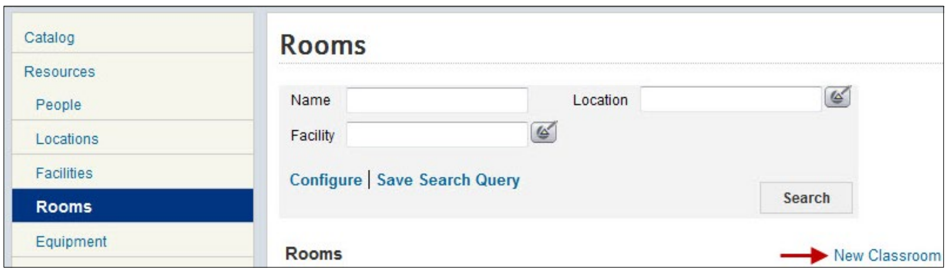
2. Click the **Resources** in the left menu.



3. Select **Rooms** in the left navigation menu.

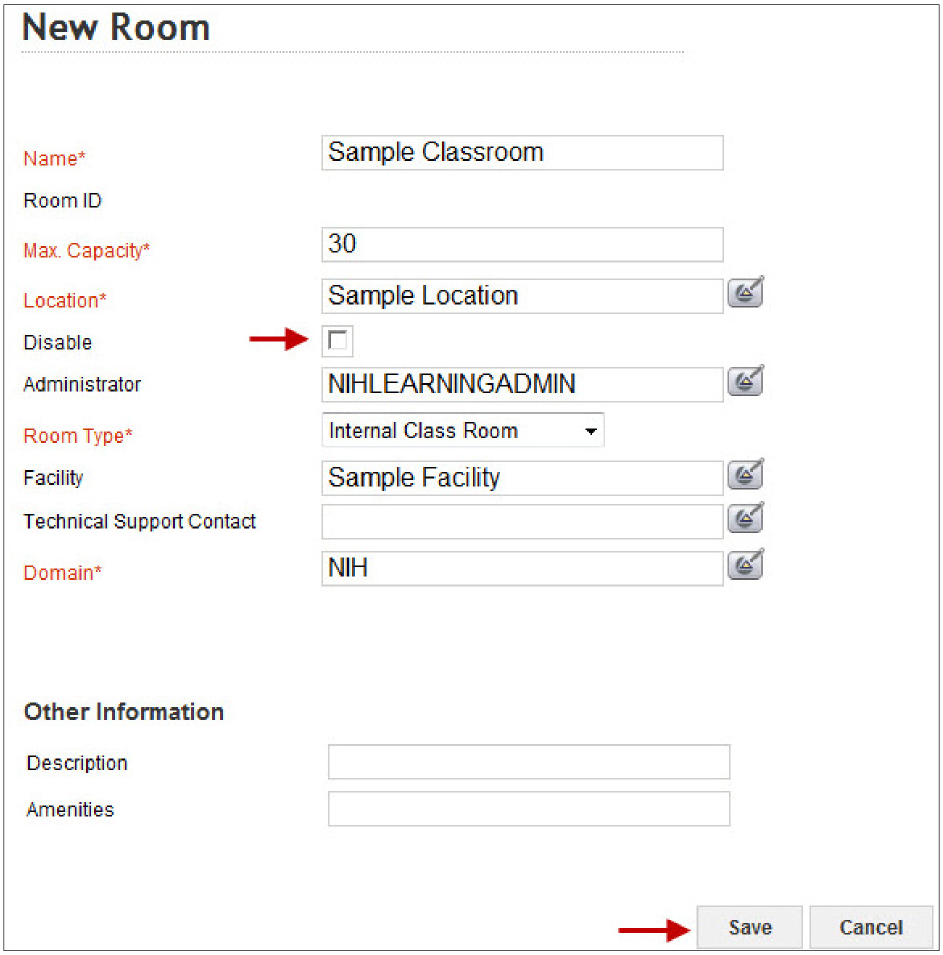


4. Click the **New Classroom link**.



5. Enter all available information for the new room.
6. The **Domain** field should be set to **NIH**.
7. Click the **Save button** at the bottom of the screen.

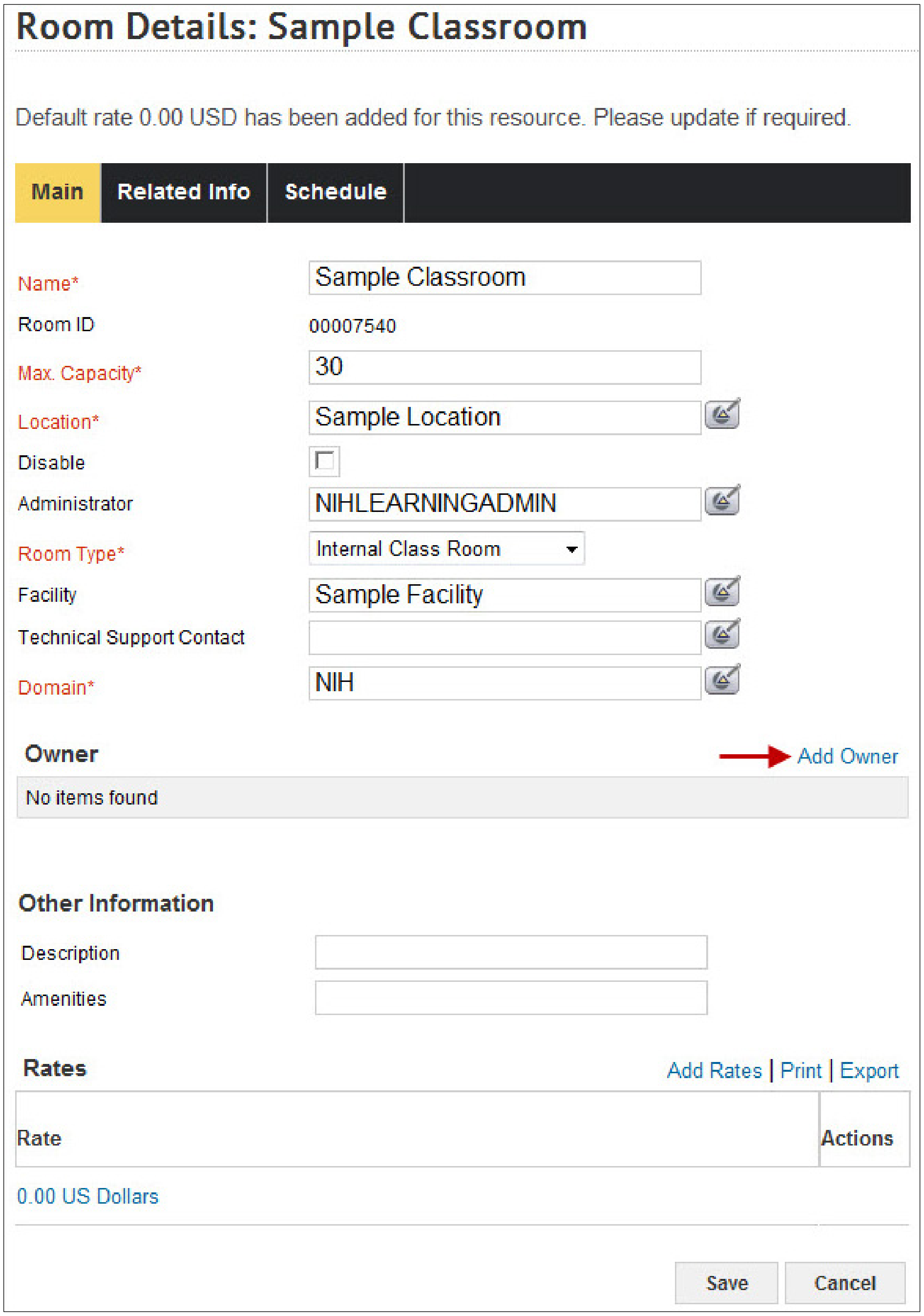
NOTE: All fields in RED are required to save.



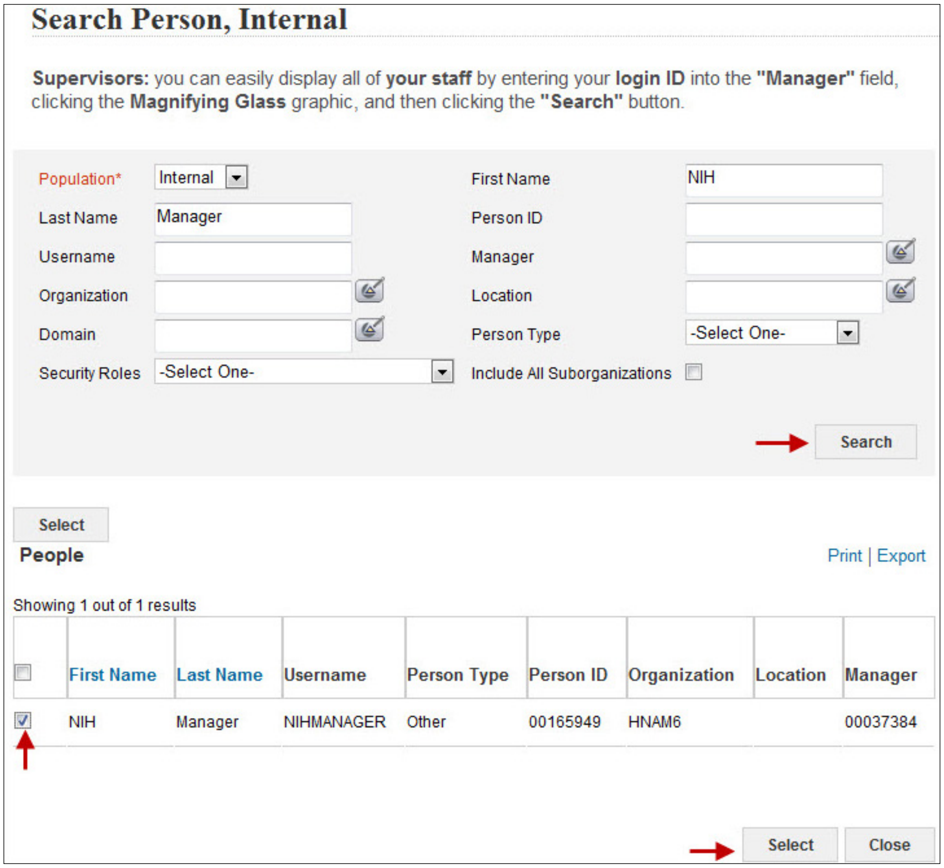
NOTE: From this screen, you may also check the **Disable** checkbox to disable the room. You can enable the room again at a later date by un-checking the **Disable** check box.

ADDING AN OWNER TO YOUR ROOM

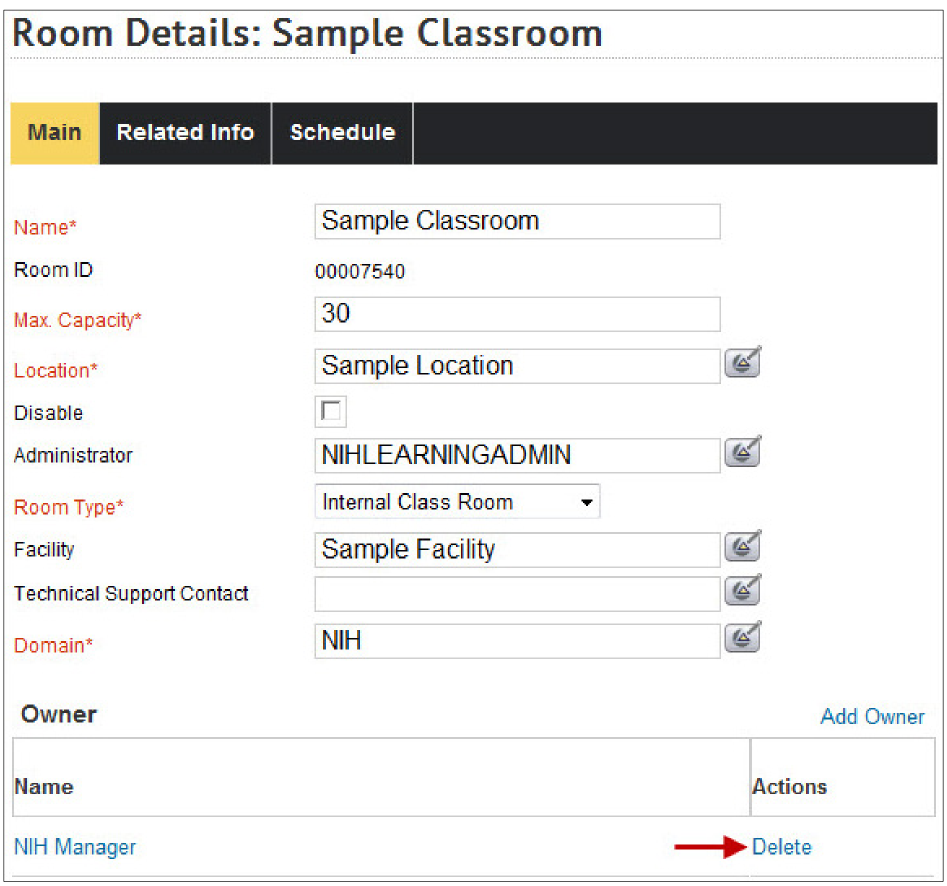
1. Click the **Add Owner link** to add the person responsible for managing the room.



2. Enter the search criteria for the owner the click the **Search button**.
3. Click the **Checkbox** next to the name of the owner.
4. Click the **Select button**.



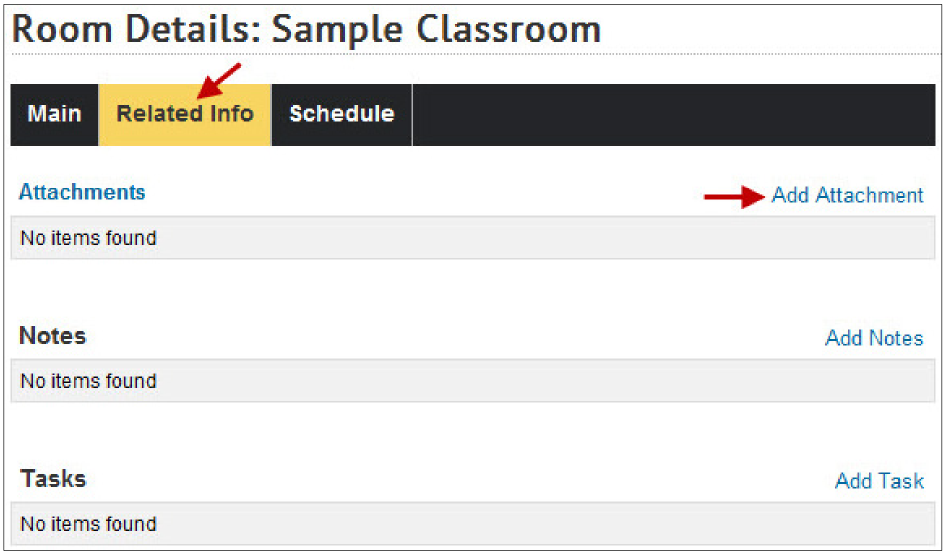
5. The owner will now appear near the bottom of the Room Details screen.



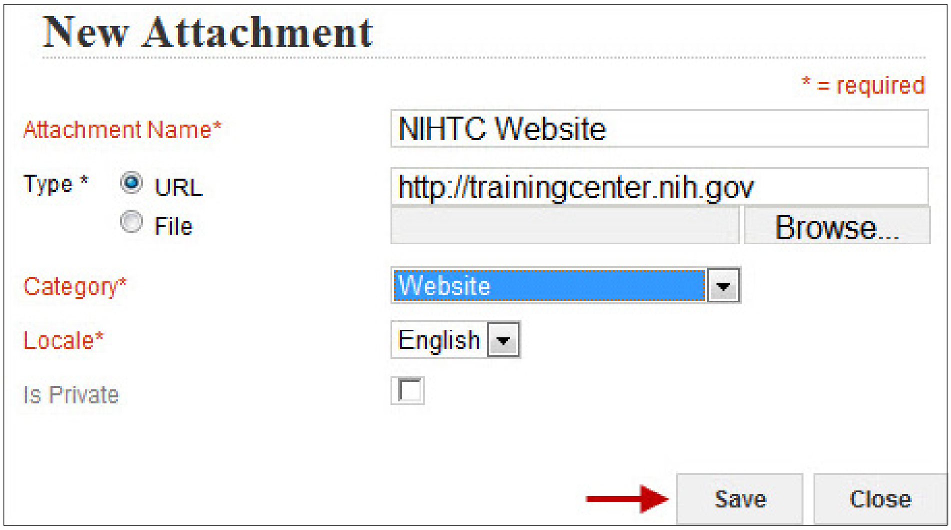
NOTE: You may add multiple owners by repeating these steps and may delete an owner at any time by clicking the **Delete link** in the Actions column for the appropriate owner.

ADDING ATTACHMENTS TO ROOMS

1. Click the Related Info tab.
2. Click the Add Attachment link.



3. Enter a name for the attachment in the **Attachment Name field**.
4. Select the **Type** of attachment.
    - URL – enter a valid URL for the website.
    - File – Click **Browse** to search your computer for the file to be attached.
5. Select a **Category** for the attachment.
6. **Locale** should be set to English which is the default setting.
7. **Is Private** – Check this checkbox is you would like to restrict visibility of the attachment to users registered for an offering in the room.
8. Click the **Save button**.



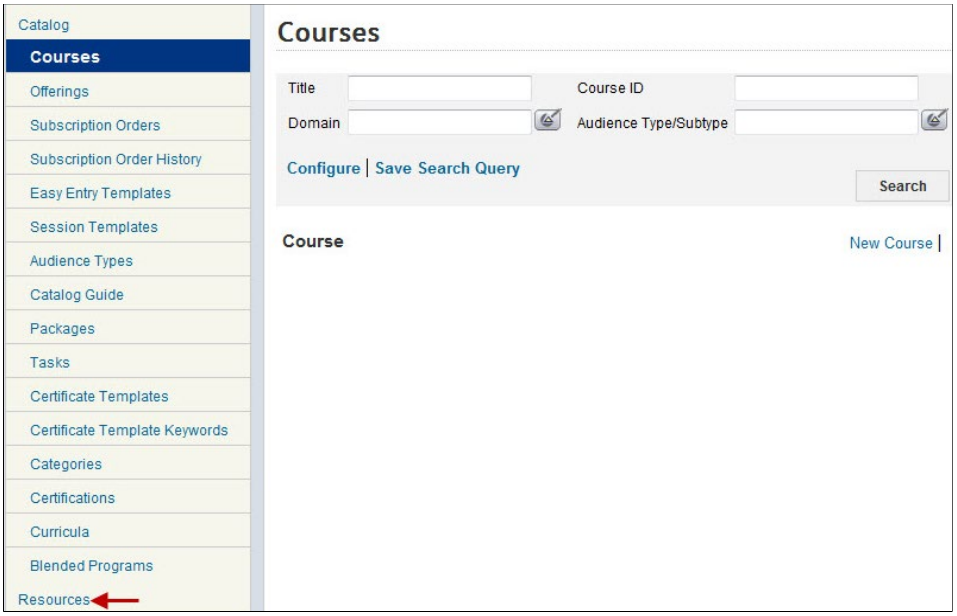
9. Your attachment will now appear on the Room Details screen.
    - Click **Attachment Name** to open it and verify that the file/URL works properly.
    - Click **Edit Attachment** in the Actions column to return to the attachment details and make changes.
    - Click **Delete Attachment** in the Actions column to remove the attachment from the room.

NOTE: You may add as many attachments as needed.

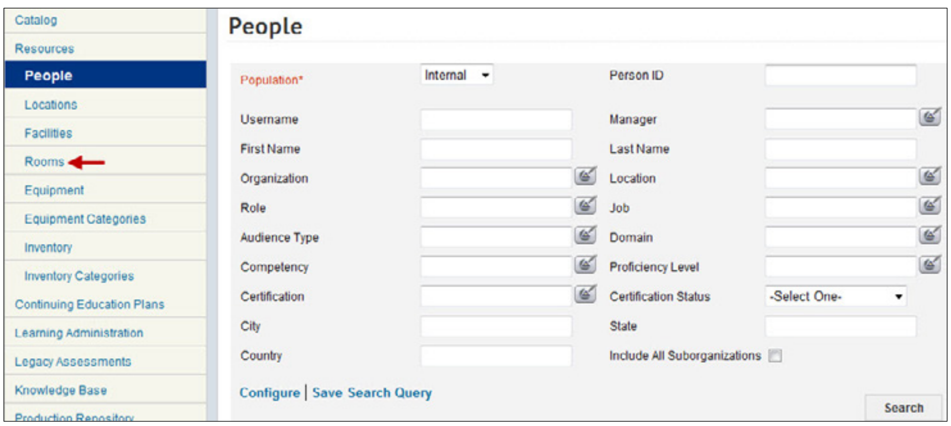
MODIFYING ROOMS

1. Select the **Admin Icon**.

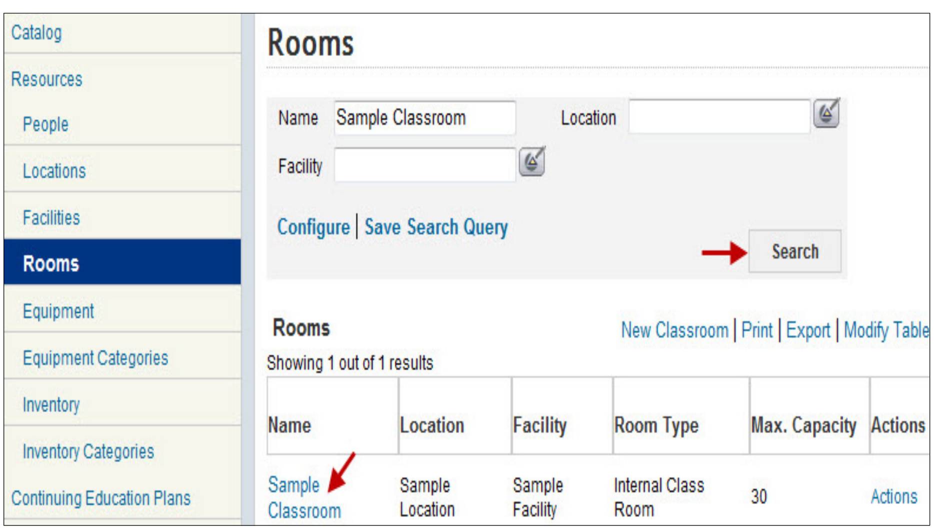
2. Click the **Resources** in the left menu.



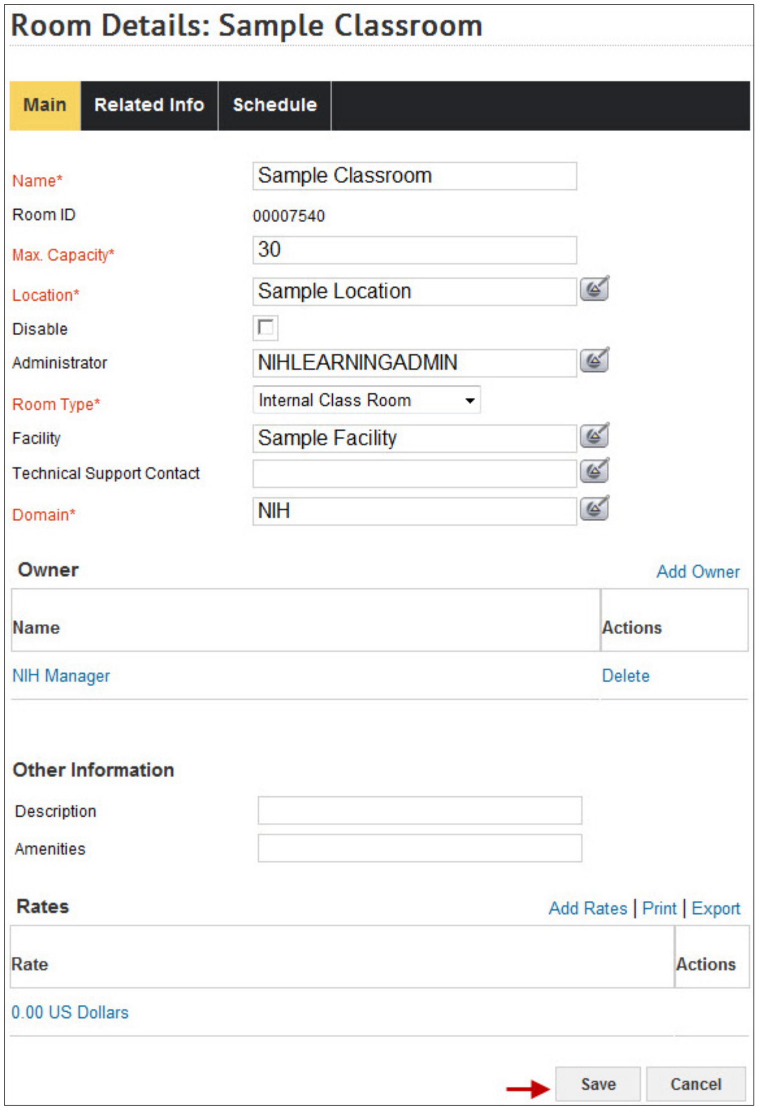
3. Select **Rooms** in the left navigation menu.



4. Enter search criteria for the room then click **Search**.
5. Click the **name link** of the room you want to edit.



6. Modify the room details as needed.
7. Click the **Save button**.

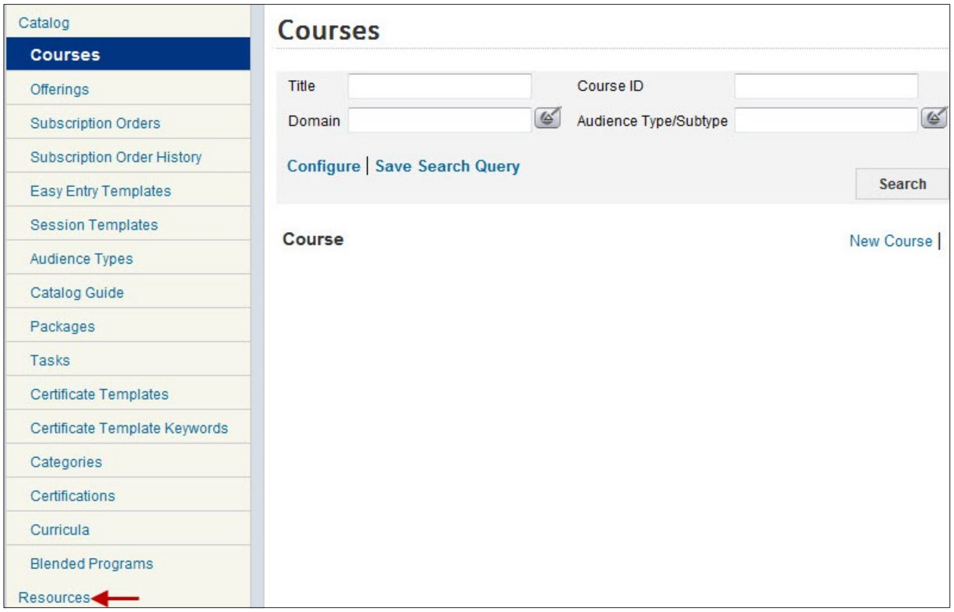


DELETING ROOMS

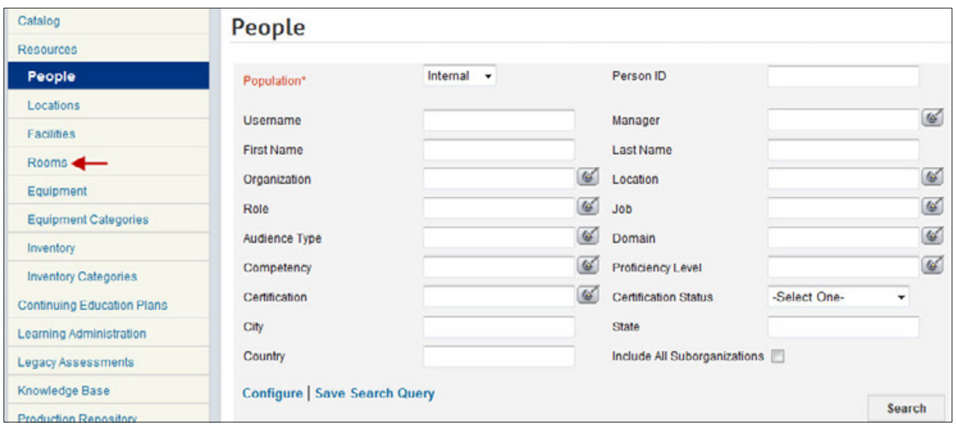
IMPORTANT! You should only delete Rooms that you manage.

1. Select the **Admin Icon**.

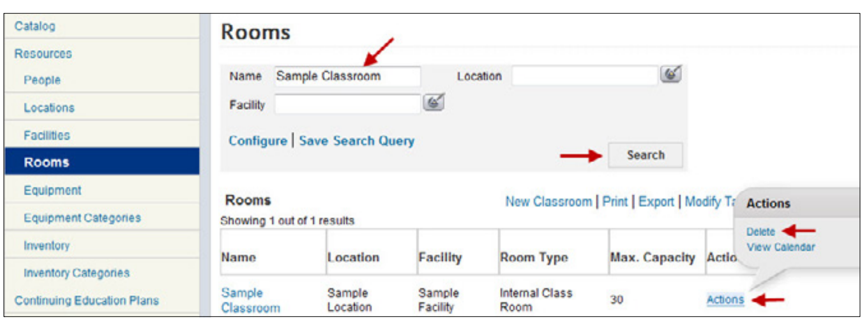
2. Click the **Resources** in the left menu.



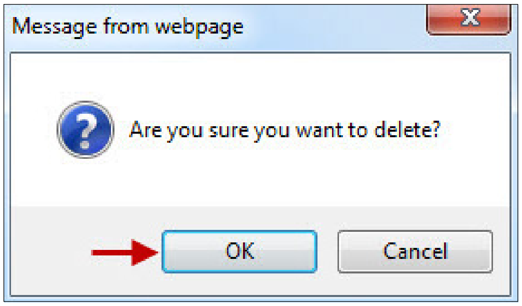
3. Select **Rooms** in the left navigation menu.



4. Enter search criteria for the room then click **Search**.
5. Click the **Actions link** in the Actions column for the room you want to permanently remove from the system.
6. Click the **Delete link**.



7. Click **OK** in the confirmation dialog box.



8. The room is now deleted from the LMS.

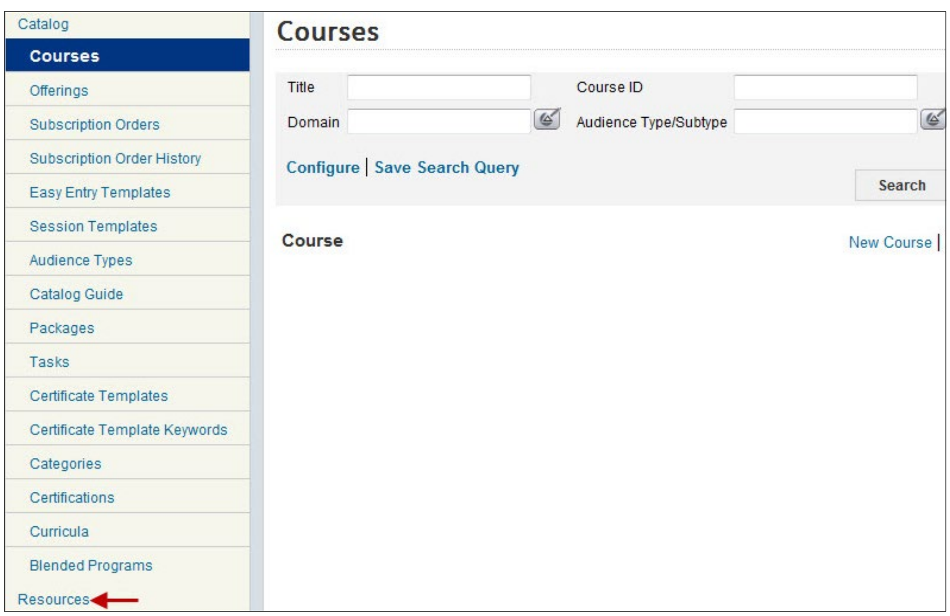
VIEWING ROOM AVAILABILITY

NOTE: The inclusion of location, facility, and room information in the LMS is for the purpose of communicating class location to Learners.

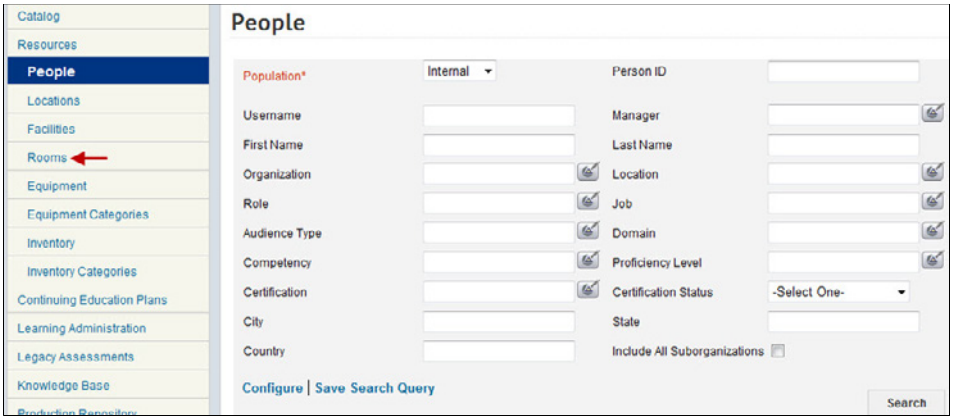
IMPORTANT! Designating a Room in the LMS does NOT reserve your room through NIH Events Management or the room owner. You will still need to reserve your resource as required outside of the LMS.

1. Select the **Admin Icon**.

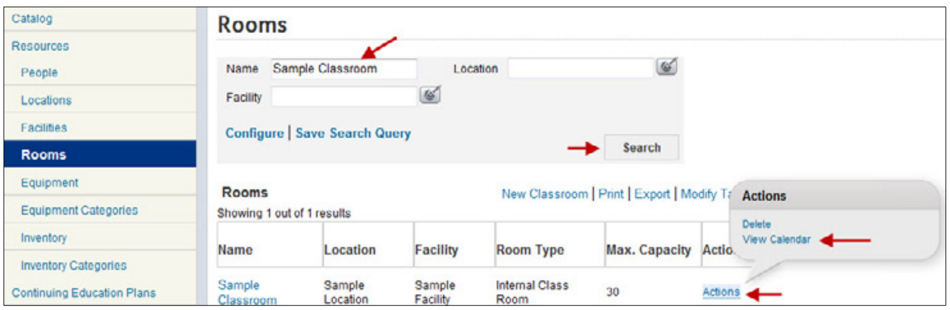
2. Click the **Resources link** in the left menu.



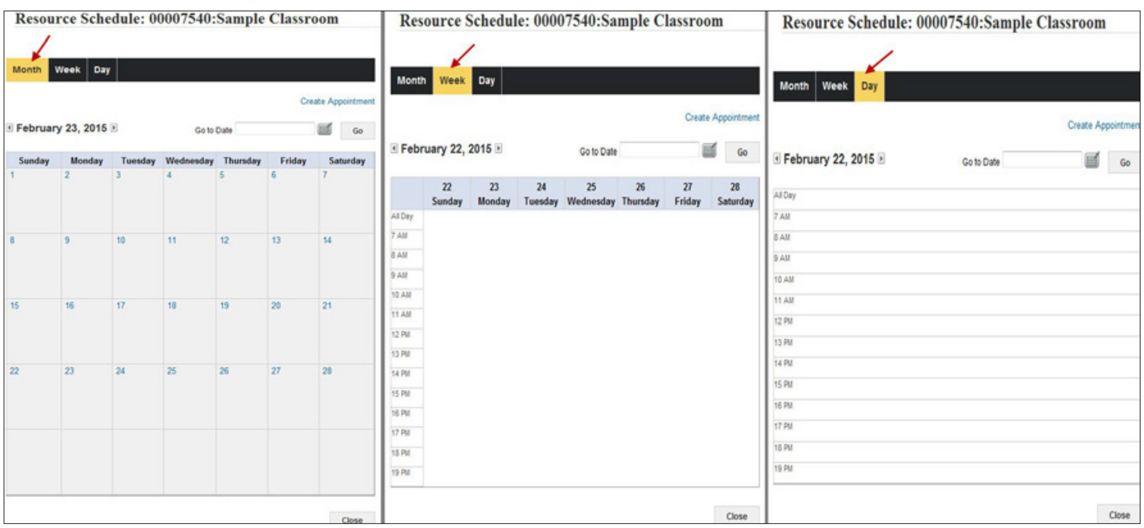
3. Select **Rooms** in the left navigation menu.



4. Enter search criteria for the room then click the **Search button**.
5. Click the **View Calendar link** in the Actions column.

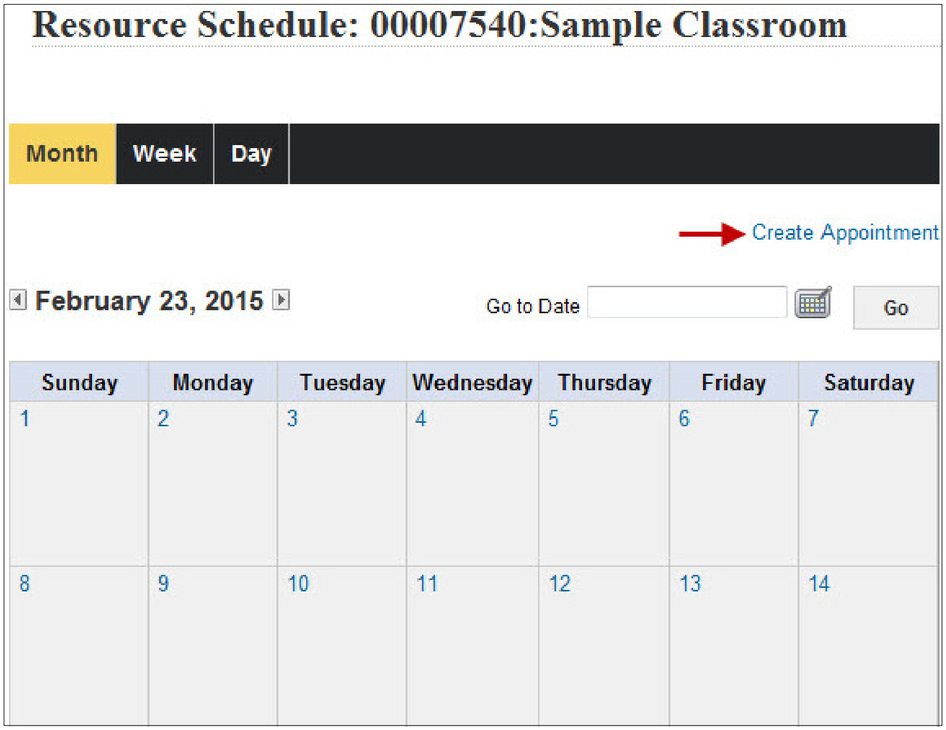


6. You may toggle views by clicking the Month, Week, and Day tabs at the top of the screen.

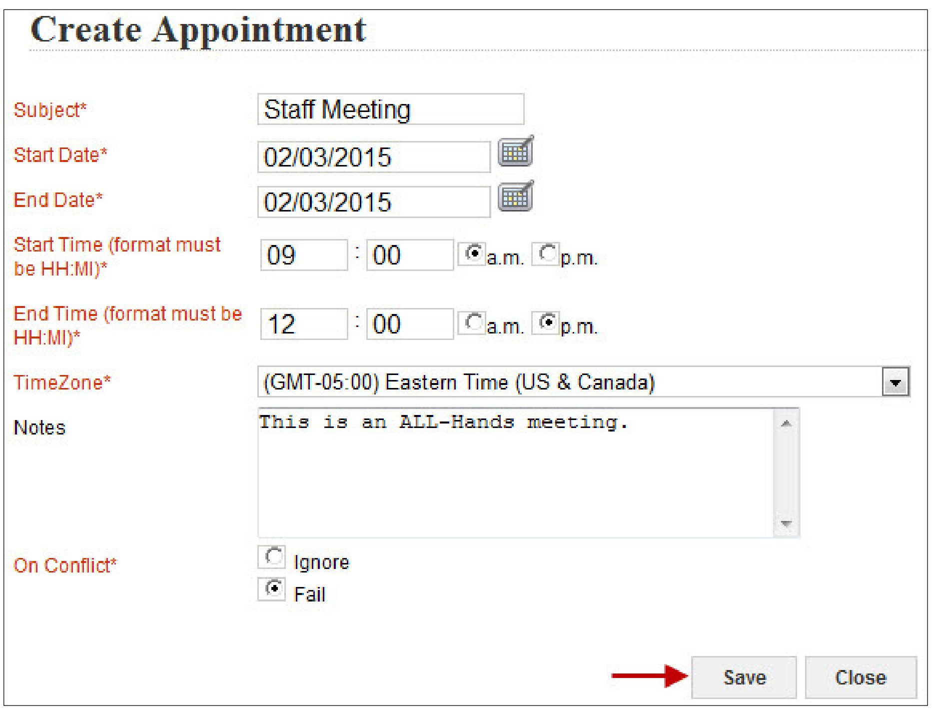


CREATING A CALENDAR APPOINTMENT

7. Click the Create Appointment link.

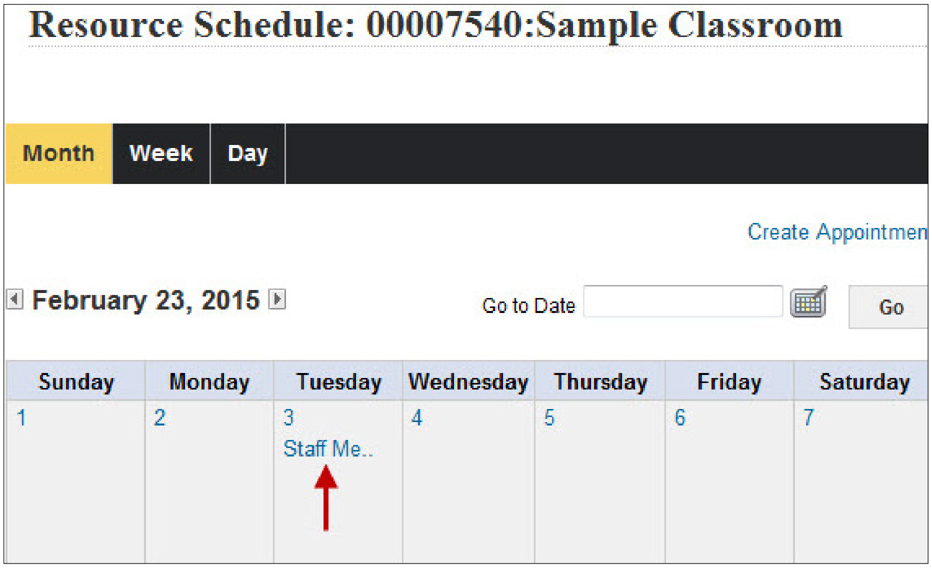


8. Enter data in all required fields then click the **Save button**.



NOTE: It is advised to leave the On Conflict setting to “Fail”. This will help to ensure that meetings are not double-booked with previously scheduled meetings.

9. The meeting will now appear on the calendar schedule.
10. Click the **meeting link** to edit the details of the meeting if needed.


Resource Schedule: 00007540:Sample Classroom
Month
Week
Day
Create Appointmen
February 23, 2015
Go to Date
Go
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
1
2
3
Staff Me..
4
5
6
7

AUDIENCE TYPES

Audience Types are used in the LMS 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

by attaching audience types with seat percentages at the delivery type level by specifying seat numbers for audience subtypes at the offering level.

The Audience Type **NIH-all** has already been created and all LMS accounts are automatically added to it. Many IC-specific Audience Sub Types already exists in the LMS as well. You may, however, wish to create an Audience Sub Type of a different grouping that will be used to aid with the registration of Learners.

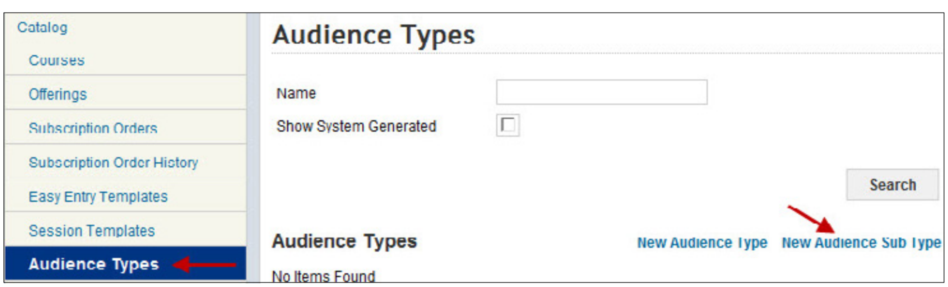
IMPORTANT!

- New audience types should **not** be created.
- New groups should be created as audience sub-types and they should appear under NIH-all or one of its sub-types.
- Audience Types and sub-types can only be deleted if they are unpopulated and not referenced by a course or offering.

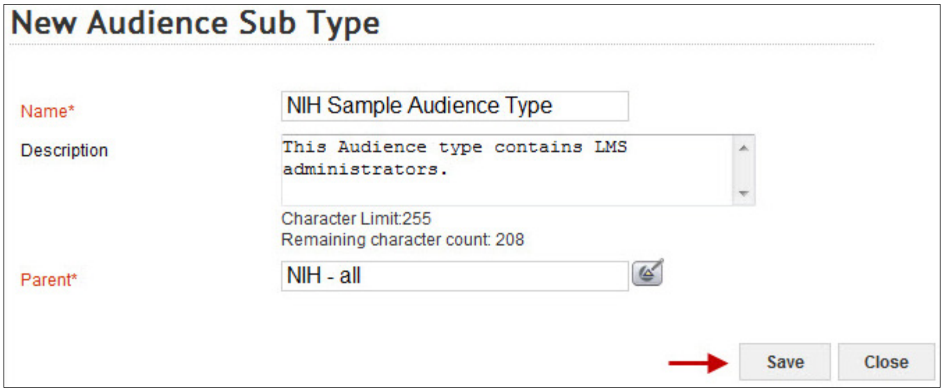
CREATE AN AUDIENCE SUB-TYPE

1. Click the **Admin Icon**.

2. Select **Audience Types** in the left navigation menu.
3. Click the **New Audience Sub Type link**.



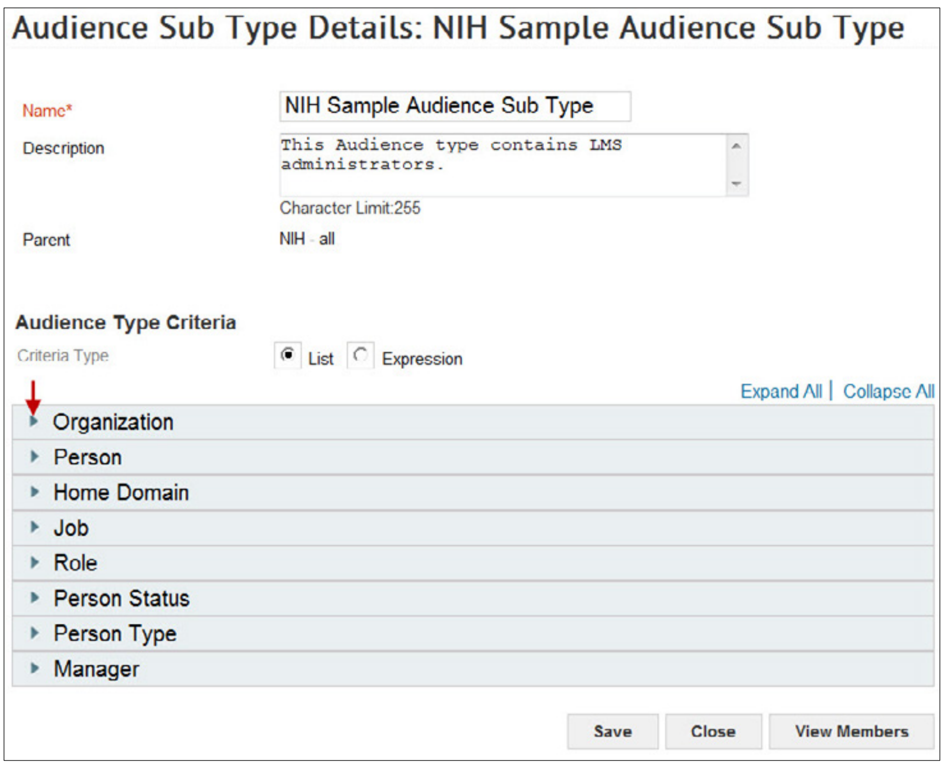
4. In the **Name field**, Type “NIH” + a concise, descriptive name for the new Audience Sub Type.
5. In the **Description field**, enter a description of what this Audience Sub Type is being used for.
6. In the **Parent field**, enter the name of the Audience (or Sub) Type under which the new Audience Sub Type should fall such as NIH - all.
7. Click the **Save button**.



IMPORTANT! Any newly created NIH Audience Types should be Sub Types of at least the NIH-all Audience Type.

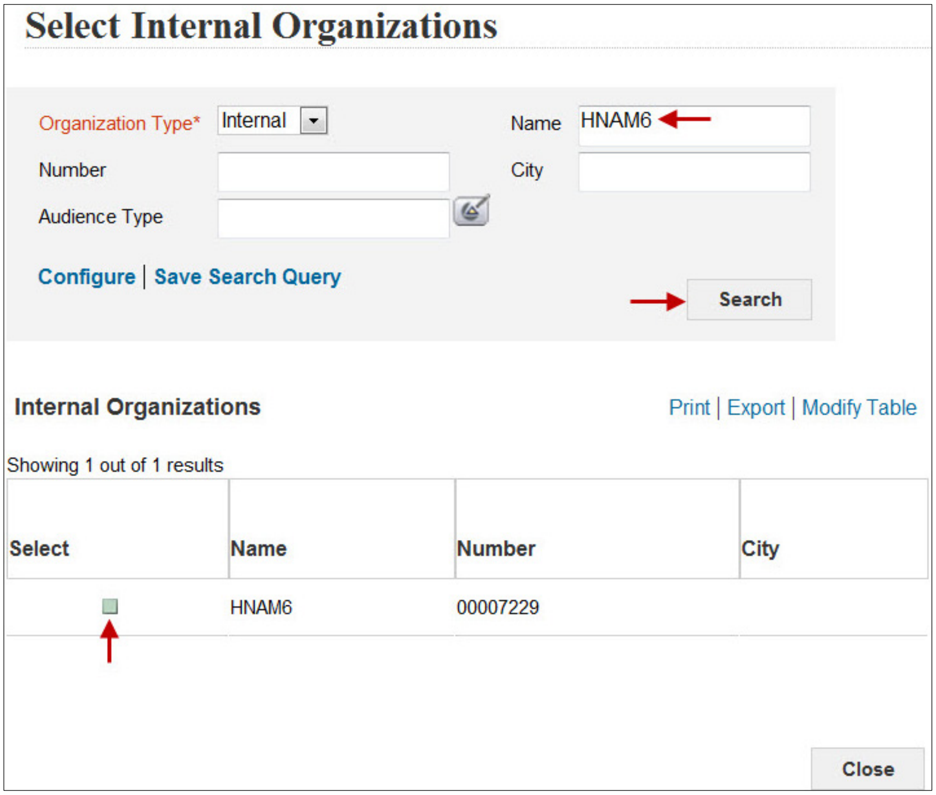
ADD ALL USERS IN A SPECIFIC ORGANIZATION/SAC CODE

1. Click the expansion arrow for Organization.

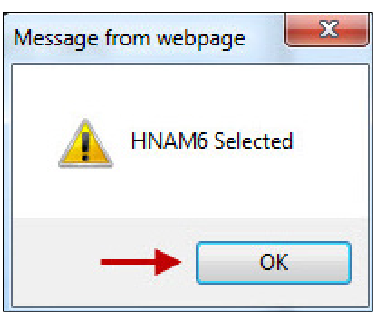


2. Click the **Add link** in the Audience Type Criteria section.

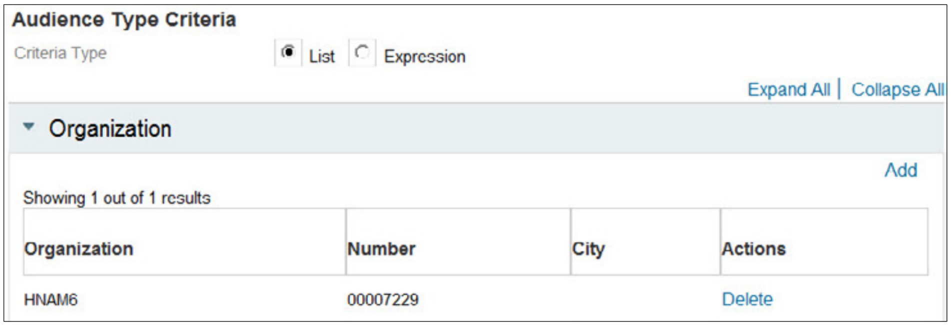
3. Enter search criteria for the organization then click the **Search button**.



4. Click the OK button in the confirmation window.



5. The organization will now be a part of the audience sub type.

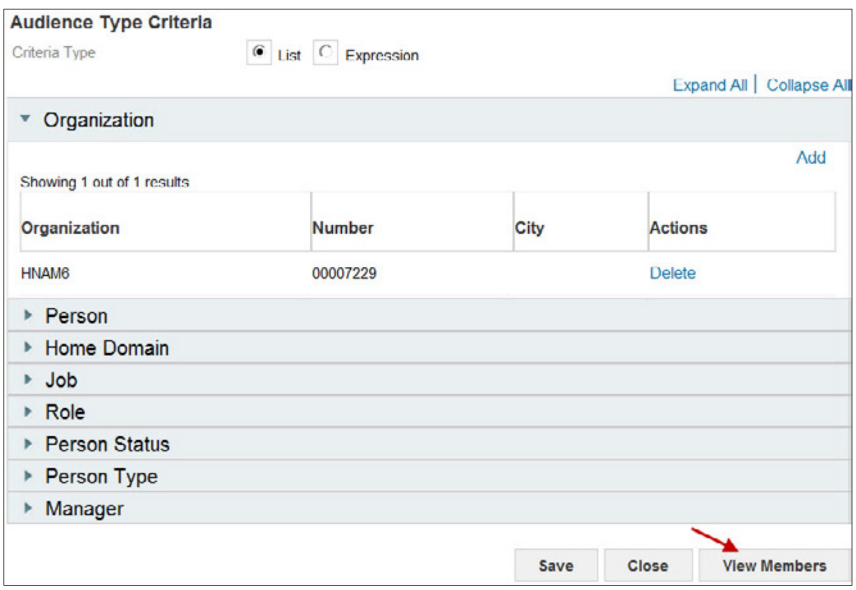


6. Clicking the Delete link in the Actions column will remove the organization from the audience sub type.
7. Follow the above steps to add additional organizations or other criteria.

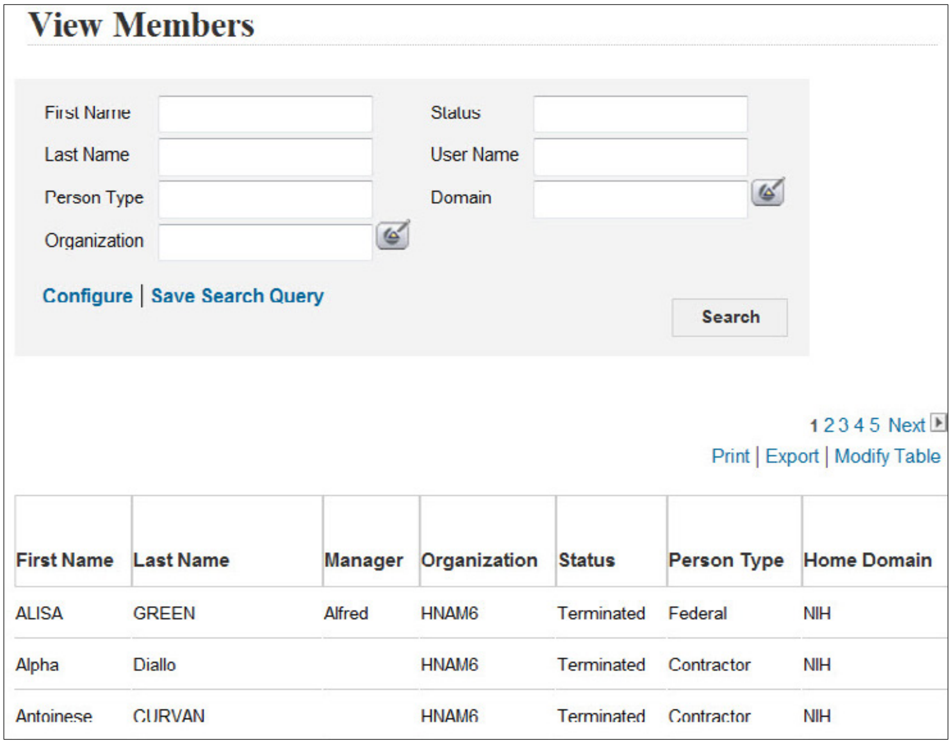
NOTE: Deleting organizations from the audience sub type does not remove the organization or any of its members from the LMS. It does remove all people with that organization code in their LMS profile from the audience sub type.

VIEW ALL MEMBERS OF AN AUDIENCE SUB TYPE

1. While viewing the Audience Sub Type Details screen, click the **View Members button**.



2. All of the members of the audience sub type will be displayed.



SESSION TEMPLATES

A Session Template defines a period of time that can be used to schedule learning offerings. It defines the number of sessions, the length of each session, and the days of the week and times when each session of the offering will be held.

An example of a session might be:

- Monday and Tuesday from 8:30AM to 4:30PM
- Wednesday 9AM to 12PM then 1PM to 4PM
- The next four Mondays from 9AM to 5PM

Each Session Template consists of one or more sessions, grouped by weeks. Each session consists of a day of the week, and a start and end time. To accommodate breaks and meal times, a day can be divided into multiple sessions. The total hours for a Session Template are calculated automatically, based on the number of sessions in the template and the length of each session.

Weekly Session Templates are for use with scheduled offerings that are held on the same days of the week over multiple weeks. For weekly Session Templates, you specify the duration of the Session Templates in number of weeks. You then add sessions by specifying start date, start time, and end time for each session. Each session you add is replicated in the template over the specified duration of the template.

All Session Templates are NIH-specific and their names are prefaced with "NIH".

IMPORTANT! Please modify existing Session Templates before creating new ones.

Name requirements:

Begins with "NIH"

3-letter day codes (Mon, Tue, Wed, Thu, …)

Hyphenated time (8:30-3, 9-12, 10-11:30, …)

Session Template examples:

NIH Mon 9 – 11

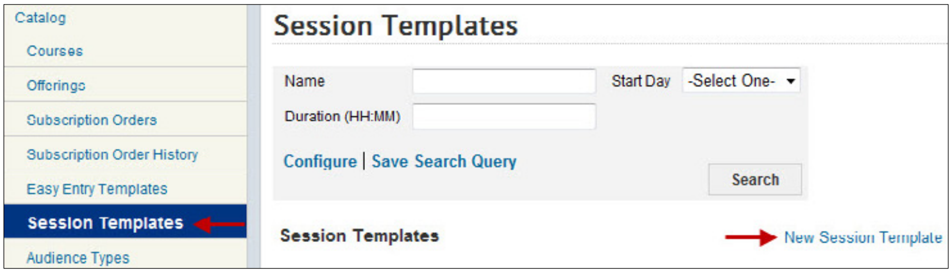
NIH Mon - Wed 9 – 5

NIH Mon, Wed, Fri 1 – 4:30

CREATING A SESSION TEMPLATE

1. Select the **Admin Icon**.

2. Select **Session Templates** in the left menu.



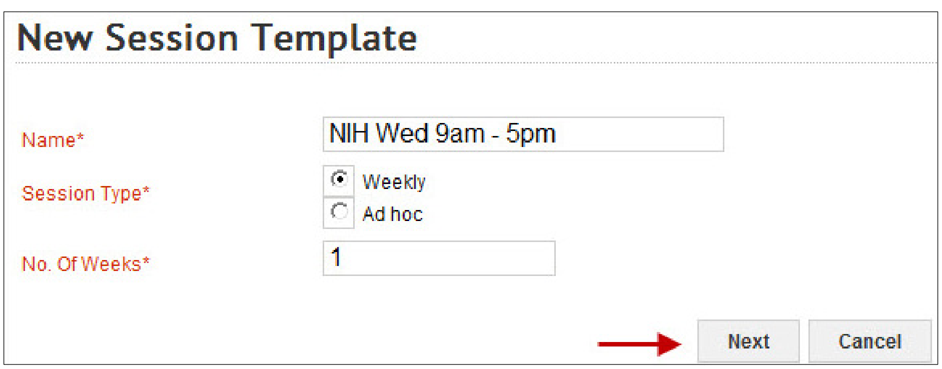
3. In the **Name field**, enter a name for the session template according to the Name Requirements listed on the previous page.
4. Select the **Weekly Session Type** radio button to define the type of template you want to create. (Default)

NOTE: If you want to create a new session template that will only be used once, then select the **Ad Hoc** radio button instead.

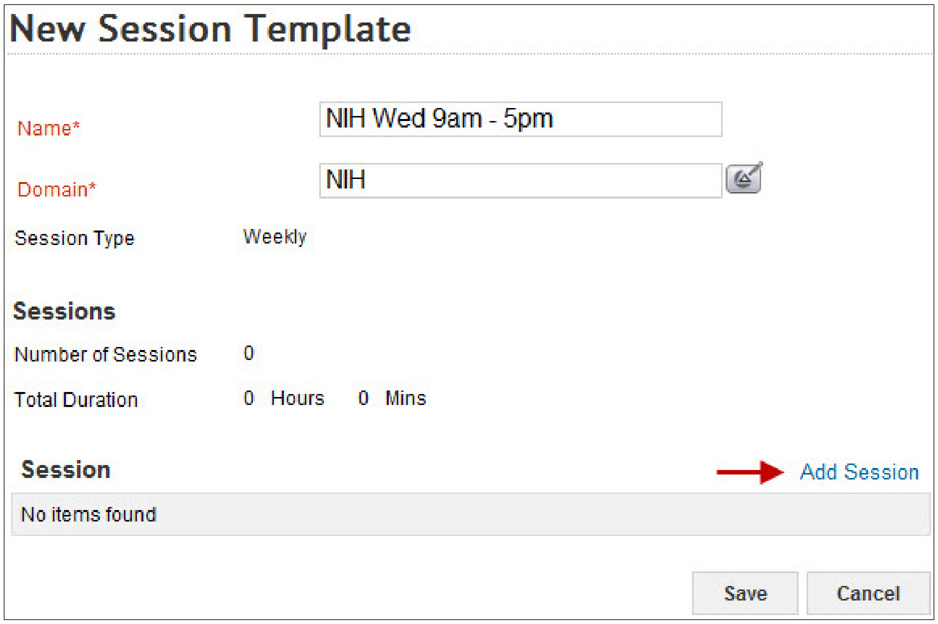
5. In the **No. Of Weeks** field, enter the number of weeks for which sessions associated with this template will be held.

NOTE: The **No. Of Weeks** field does not apply when the **Ad hoc** session type is selected.

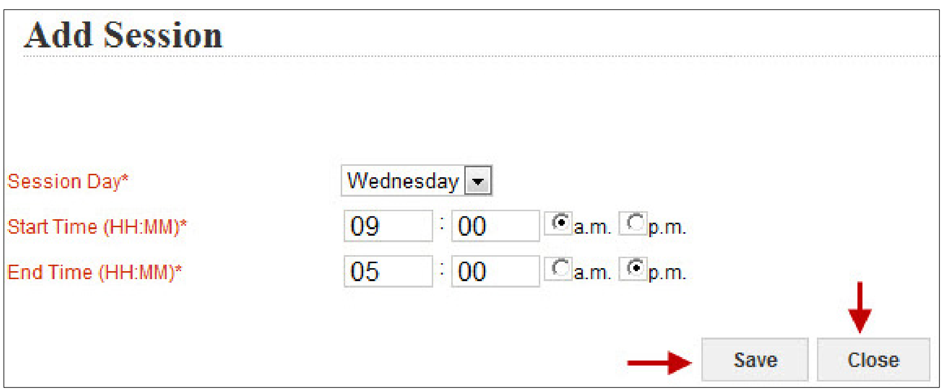
6. Click the **Next button**.



7. Click the **Add Session** link.



8. From the **Session Day** drop-down menu, select the day of the week on which the session will be held.
9. In the **Start Time (HH:MM)** and **End Time (HH:MM)** fields, enter the start and end times for the session.
10. Click the **Save button** to add the session then click the **Close button**.

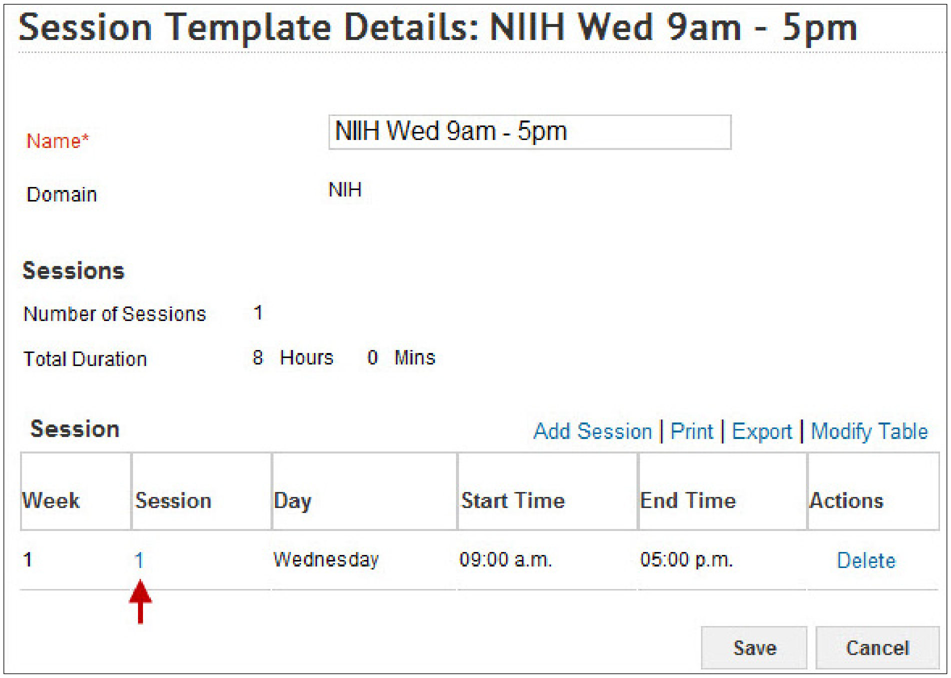


NOTE: The session is listed at the bottom of the New Session Template screen and will be replicated for each week specified in the No. Of Weeks field.

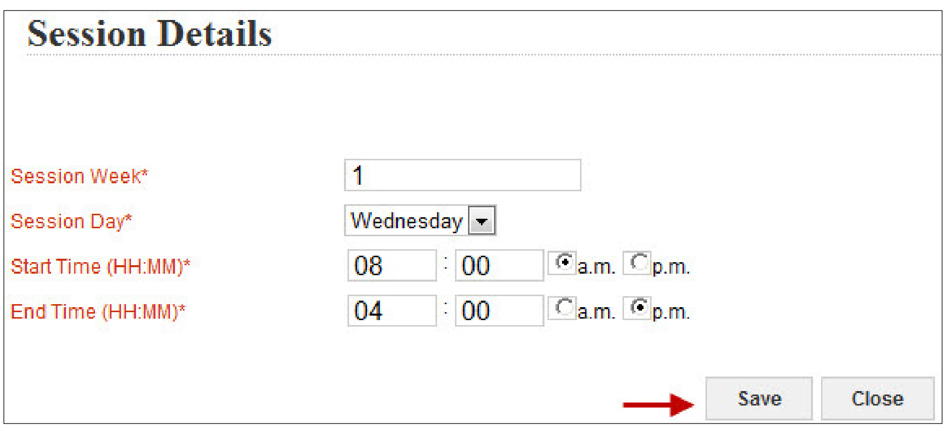
11. To add more sessions to the template, repeat Steps 9 – 13.

EDIT AND DELETE A SESSION IN A SESSION TEMPLATE

1. To edit a session's details, click the Session link.

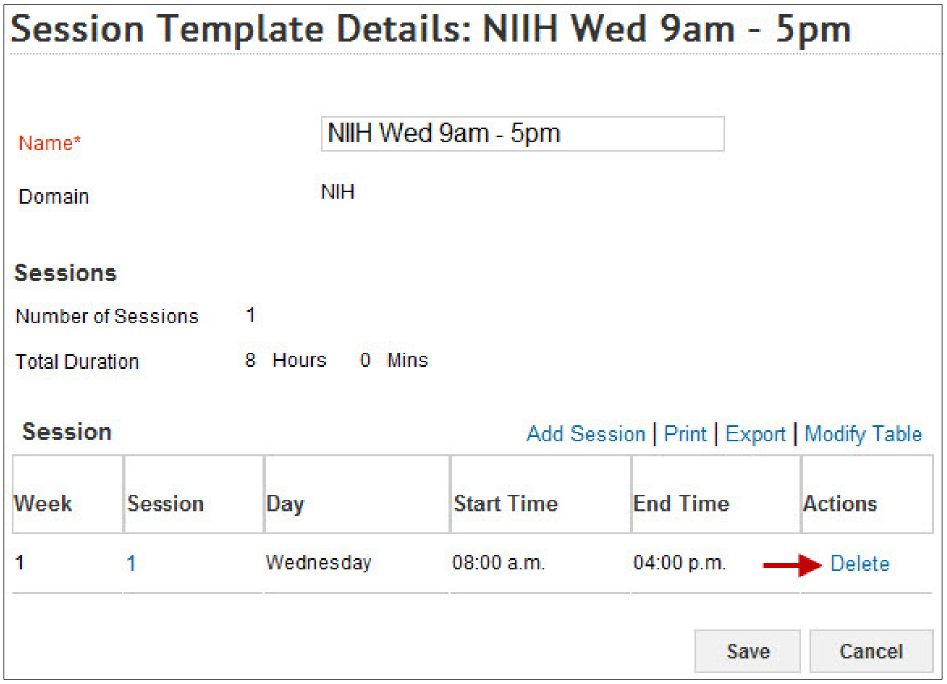


2. Edit the information on the Session Details page then click the Save button.



NOTE: Make sure that the Name is reflective of the session day and times that are selected.

3. Click the **Delete link** in the Actions column to delete any session.

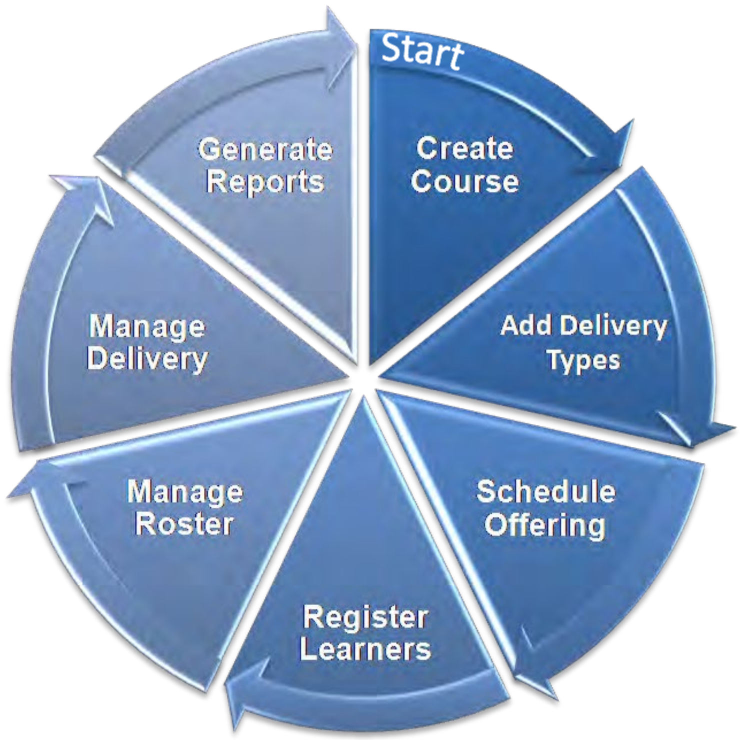


MANAGING COURSES

COURSE MANAGEMENT LIFECYCLE

Course management in the LMS (whether it's a course that will be delivered as an instructor-led, web-based, seminar, or any other type of offering), requires that a Learning Administrator perform a standard series of tasks during the course's lifecycle. Each of these steps is essential to properly creating and managing learning events (also known as classes or "offerings") in the system.

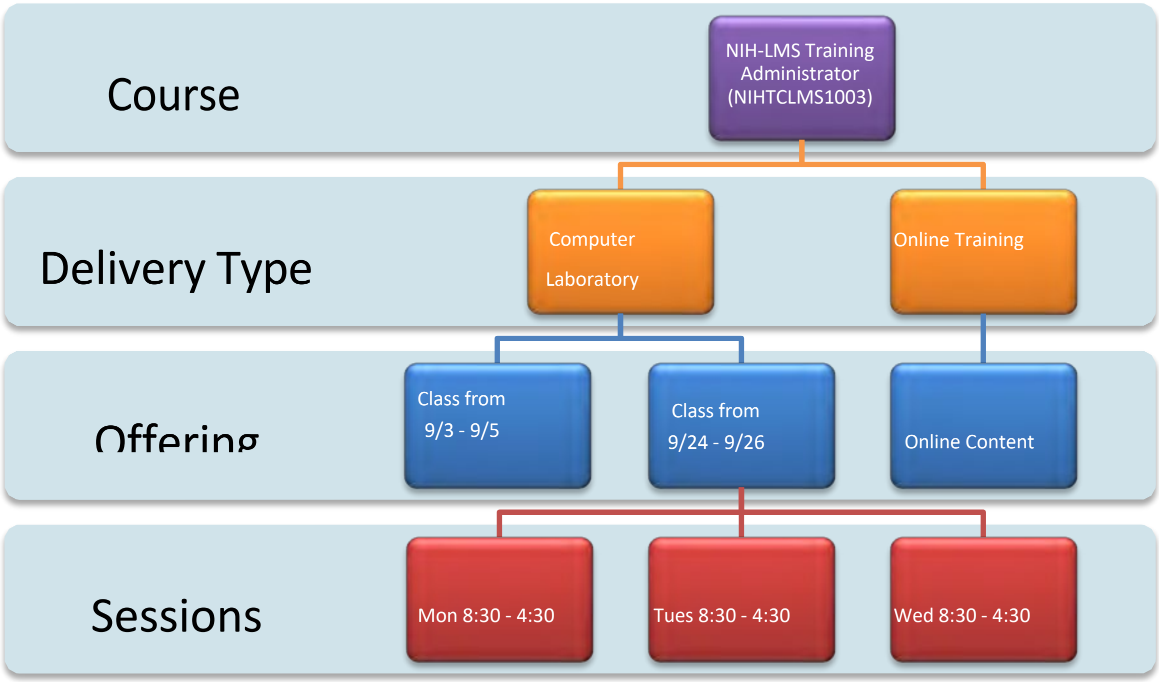
The following figure depicts the Course Management lifecycle at a high level:



A course is the highest level in the learning hierarchy. It represents a topic of study that can be delivered in various formats across multiple instances.

THE LEARNING HIERARCHY

Each learning event that is managed in the LMS is part of a structured series of hierarchical components. It is this hierarchy that allows us to manage aspects of how a topic of study will be delivered—or communicated—to learners, at varying levels of granularity.



The **COURSE**, as the broadest component, resides at the top of the hierarchy and is used to manage information that is common to all Delivery Types and Offerings (or learning events) associated with this topic of study.

DELIVERY TYPES are added by the Learning Administrator once a Course is created. The Delivery Type is a sub-component of the course, and is used to manage information that is common to all instances of a specific type of delivery or communication method. Instructor-Led classes, for example, may have different information associated with them than Web Casts do for the same Course (e.g., all instructor-led classes for a particular course are a total of 16 hours in duration, whereas all Web Casts associated with this Course are a total of 2 hours in duration.

IMPORTANT!Each Course must have *at least* one Delivery Type in order for you to set-up a class for which students may register. Courses may have multiple unique Delivery Type assigned, however, each Delivery Type may only be assigned once (e.g., no Course may have 2 Instructor-Led Delivery Types assigned, but it may have one each of multiple Delivery Types assigned.)

OFFERINGS, or what we traditionally think of as classes, are then created in association with their respective Delivery Type(s). They are used to manage information that is specific to a particular learning event for which learners may enroll. Each Offering, for example, may have different start and end dates, or may be held in different classrooms.

SESSIONS, which are grouped together in the Session Template, are used by the LMS to define the start and end times for each day of an Offering. In some cases, an Offering may only have one Session in the Session Template because it is only a one-day class. A multi-day class, however, would have multiple Sessions included in the Session Template; one Session for each day that a Learner is expected to attend the class. A Monday, Wednesday, and Friday Offering, for example, will have a separate Session defined for Monday, Wednesday, and Friday. Those three Sessions together make up the Session Template.

ENTERPRISE HUMAN RESOURCE INFORMATION (EHRI) DATA

When creating a new course, EHRI data must be recorded in the Other Information section. Any field in this section prefaced with "EHRI:" is required information; however, because the necessary information may not be available at the moment the course is created, these fields are not marked as required in the system. Doing so would prevent you from saving your new course unless all fields are complete.

Any EHRI field not completed during course creation should be completed as soon as the information becomes available.

What is EHRI Data?

Enterprise Human Resources Integration is a President's Management Agenda requirement that is tracked by OPM.

The LMS transmits this data to OPM on a bi-weekly basis.

Learning Administrators are responsible for making sure this requirement is met.

Empty or incorrectly completed EHRI fields will be recorded as "errors" by OPM, and may cause result in NIH being deemed non-compliant with the PMA requirement.

More information on EHRI may be found at http://www.opm.gov/egov/e-gov/EHRI/

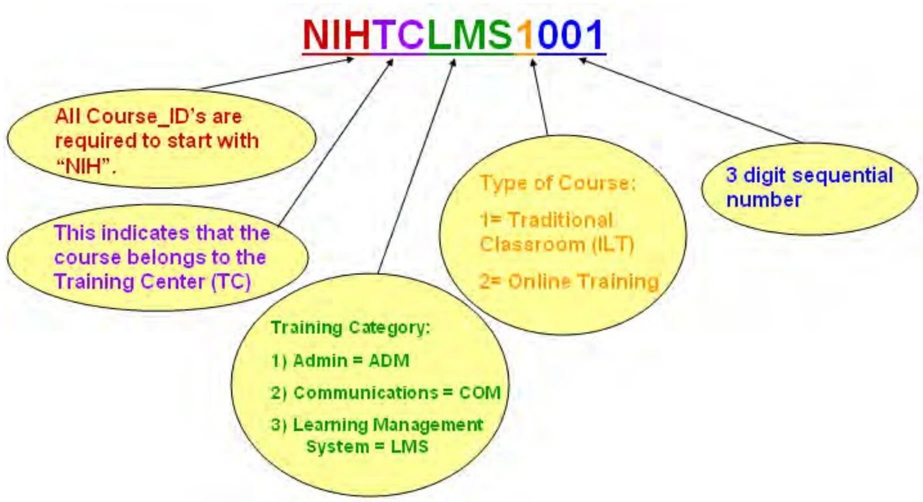
TIP: Refer to Appendix B of this document for more detailed information about entering EHRI field data.

DEFINING A COURSE ID

As part of the course creation process, you will need to generate a unique Course ID that will be entered during the course creation process.

Please take note of the following:

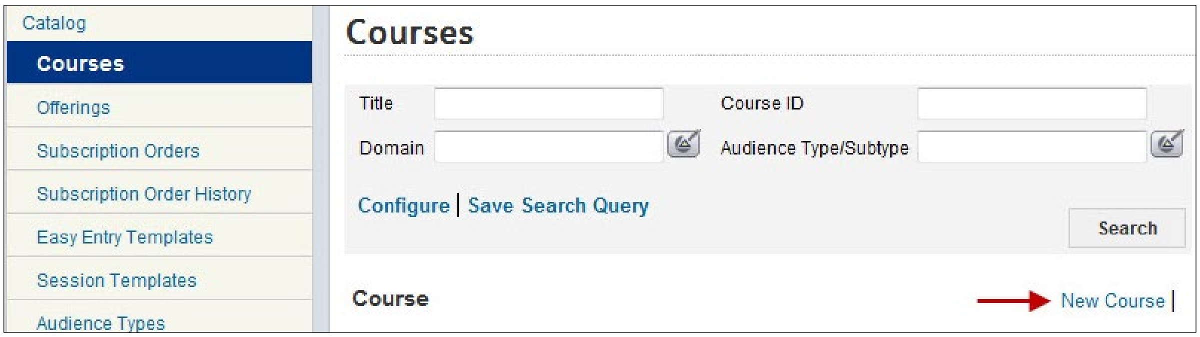
- All Course ID's are required to start with "NIH".
- Course ID's are entered manually by the Learning Administrator creating the course.
- They should follow a standardized, structured sequence that is defined by your organization.
- Course ID's are a valuable tool that help learners locate a particular course's offerings in the LMS.
- The following graphic depicts the standardized structure of a sample NIH Training Center Course ID:



CREATING A BASIC INSTRUCTOR-LED COURSE

1. Select the **Admin Icon**.

2. Select **Courses** in the left menu. (Default)
3. Click the **New Course link**.

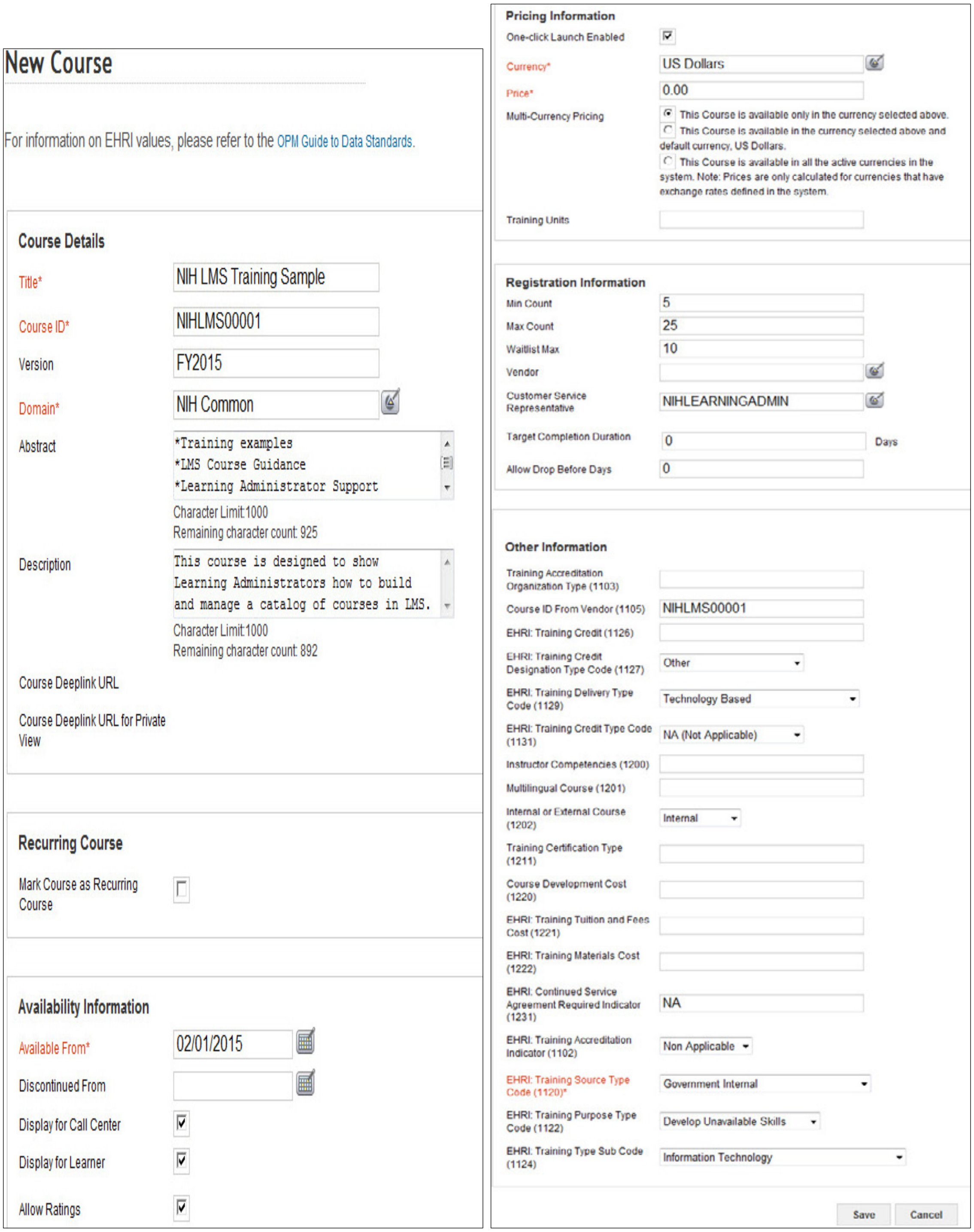


4. Enter all pertinent information about the course including all required fields.
5. Enter information as available in the Other Information section of the page.

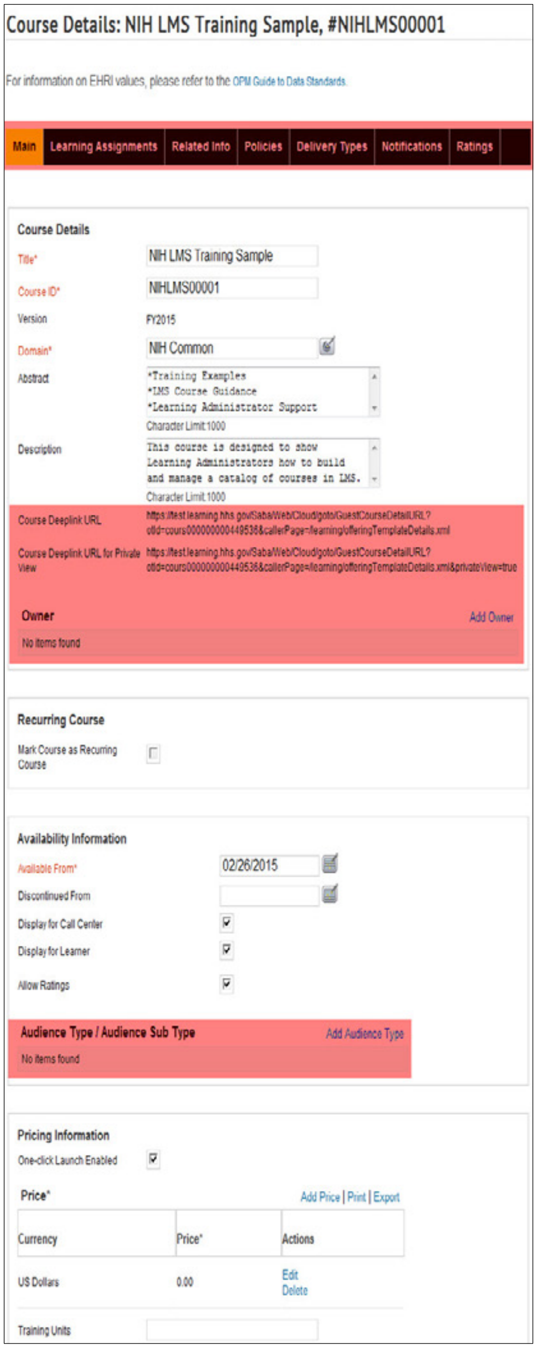
NOTE: Although the EHRI fields listed on this screen are not required by the system, it is the responsibility of the Learning Administrator to ensure that these fields contain EHRI accepted values.

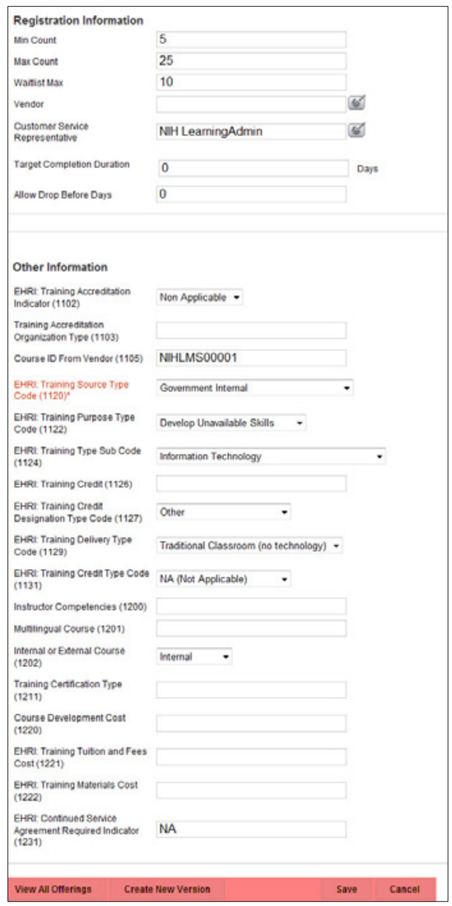
IMPORTANT! Please refer to Appendix B of this document for detailed information about accepted EHRI field values.

6. Click the **Save button**.



NOTE: In the screenshots below you will find highlighted areas that change after clicking the **Save button**.

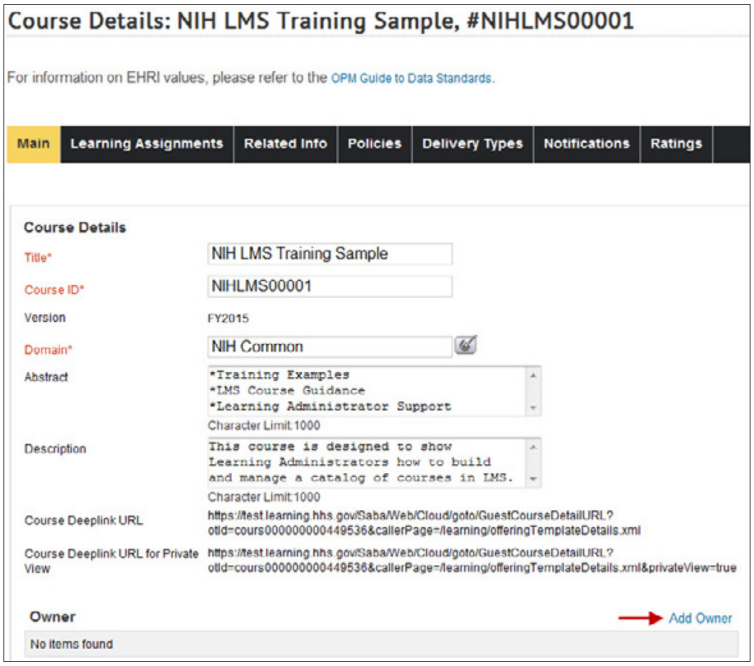

Course Details: NIH LMS Training Sample, #NIHLMS00001
For information on EHRI values, please refer to the OPM Guide to Data Standards.
Main
Learning Assignments
Related Info
Policies
Delivery Types
Notifications
Ratings
Course Details
Title*
NIH LMS Training Sample
Course ID*
NIHLMS00001
Version
FY2015
Domain*
NIH Common
Abstract
*Training Examples
*LMS Course Guidance
*Learning Administrator Support
Character Limit 1000
Description
This course is designed to show
Learning Administrators how to build
and manage a catalog of courses in LMS.
Character Limit 1000
Course Deeplink URL
Course Deeplink URL for Private View
Owner
Add Owner
No items found
Recurring Course
Mark Course as Recurring Course
Availability Information
Available From*
02/26/2015
Discontinued From
Display for Call Center
Display for Learner
Allow Ratings
Audience Type / Audience Sub Type
Add Audience Type
No items found
Pricing Information
One-click Launch Enabled
Price*
Add Price | Print | Export
Currency
Price*
Actions
US Dollars
0.00
Edit
Delete
Training Units


Registration Information
Min Count
5
Max Count
25
Waitlist Max
10
Vendor
Customer Service Representative
NIH LearningAdmin
Target Completion Duration
0
Days
Allow Drop Before Days
0
Other Information
EHRI: Training Accreditation Indicator (1102)
Non Applicable
Training Accreditation Organization Type (1103)
Course ID From Vendor (1105)
NIHLMS00001
EHRI: Training Source Type Code (1120)*
Government Internal
EHRI: Training Purpose Type Code (1122)
Develop Unavailable Skills
EHRI: Training Type Sub Code (1124)
Information Technology
EHRI: Training Credit (1126)
EHRI: Training Credit Designation Type Code (1127)
Other
EHRI: Training Delivery Type Code (1129)
Traditional Classroom (no technology)
EHRI: Training Credit Type Code (1131)
NA (Not Applicable)
Instructor Competencies (1200)
Multilingual Course (1201)
Internal or External Course (1202)
Internal
Training Certification Type (1211)
Course Development Cost (1220)
EHRI: Training Tuition and Fees Cost (1221)
EHRI: Training Materials Cost (1222)
EHRI: Continued Service Agreement Required Indicator (1231)
NA
View All Offerings
Create New Version
Save
Cancel

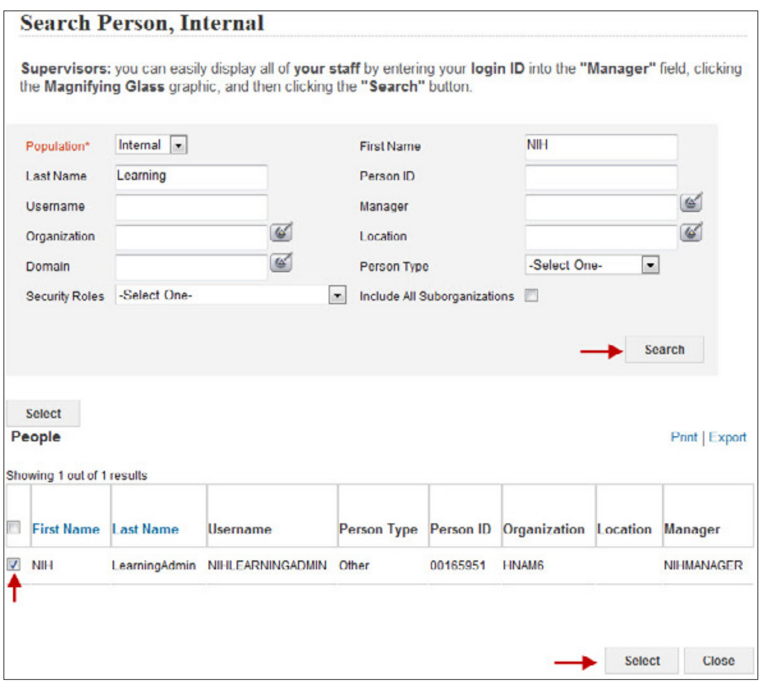
ADDING AN OWNER TO A COURSE

Once a course is created and saved, an owner should be designated at the course level. This helps other administrators identify a point of contact that is responsible for the course.

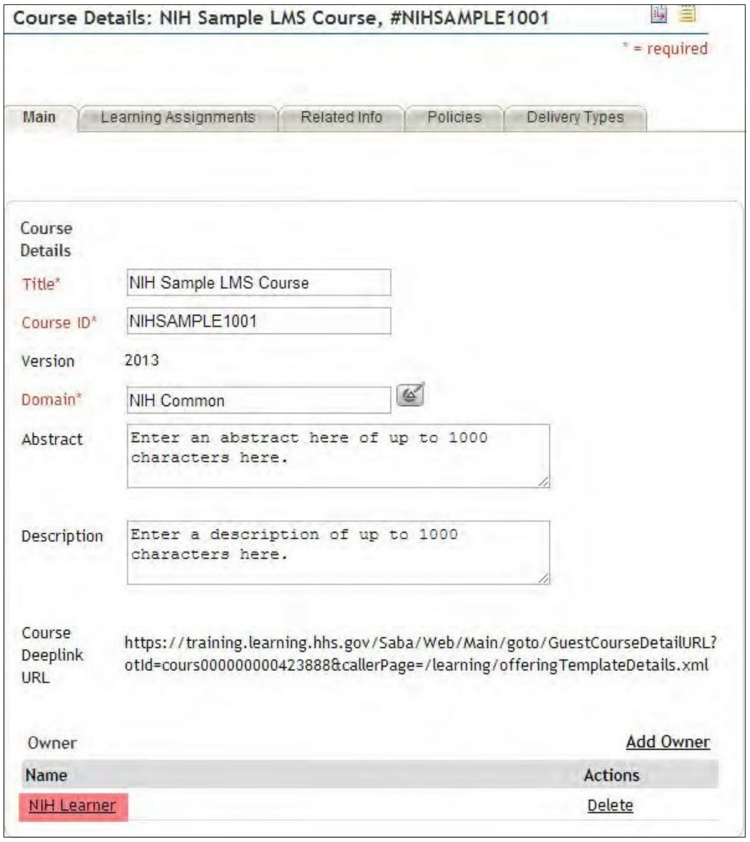
1. Click the **Add Owner link** in the Course Details section of the **Main tab**.



2. Enter search criteria for the course owner then click the **Search button**.
3. Select the **checkbox** next to the name of the owner.
4. Click the **Select button**.



5. The owner will now appear on the course details screen.

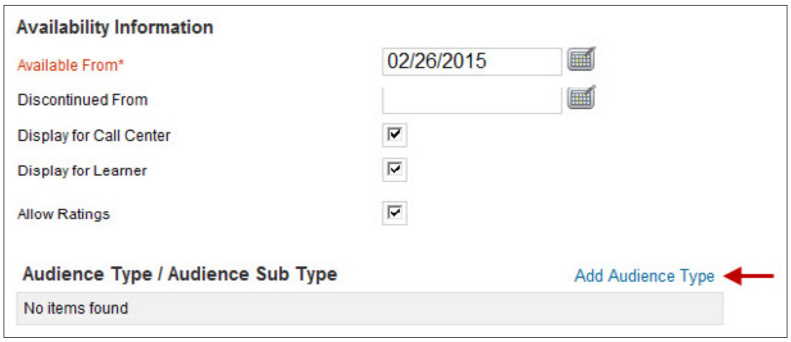


NOTE: You may delete an owner by clicking the **Delete link**.

ADD AN AUDIENCE TYPE TO A COURSE - OPTIONAL

Once a course is created, Audience Sub-Types may be added at the course level. Keep in mind that the audience sub-type used at the course level will be the broadest population of people allowed to take the course.

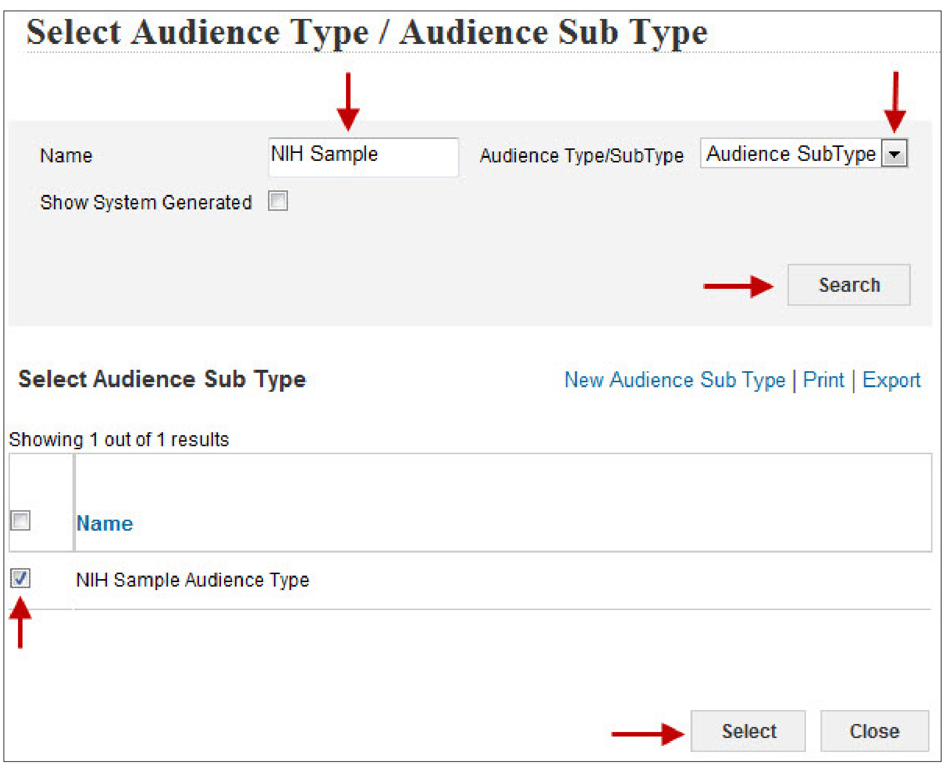
1. From the course's Main tab, scroll down to the Audience Type/Audience Sub Type section and click the Add Audience Type link in the Availability Information section.



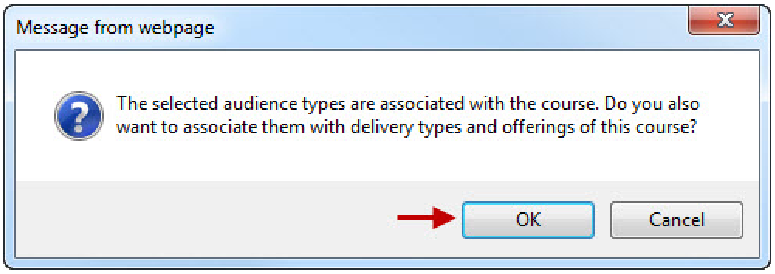
2. Select Audience Sub Type from the Audience Type/SubType pull-down menu.
3. In the **Name field**, enter the name of the Audience Sub-Type then click the **Search button**.

NOTE: All NIH Audience Types used in offerings will be sub types of the NIH – all audience type. Using your created audience subtype at this level will not allow you to open the course up to any other people outside of the audience subtype.

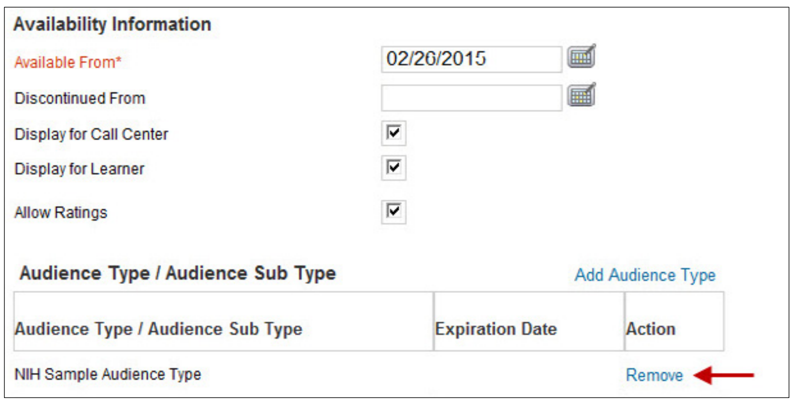
4. Click the **checkbox** associated with the audience sub-type.
5. Click the **Select button**.



6. Click the OK button in the confirmation popup window.



7. The course and any future offerings that are created from it will be restricted to just the members of the audience sub-type.
8. You may also delete the audience sub-type by clicking the **Remove link**.



LEARNING ASSIGNMENTS TAB

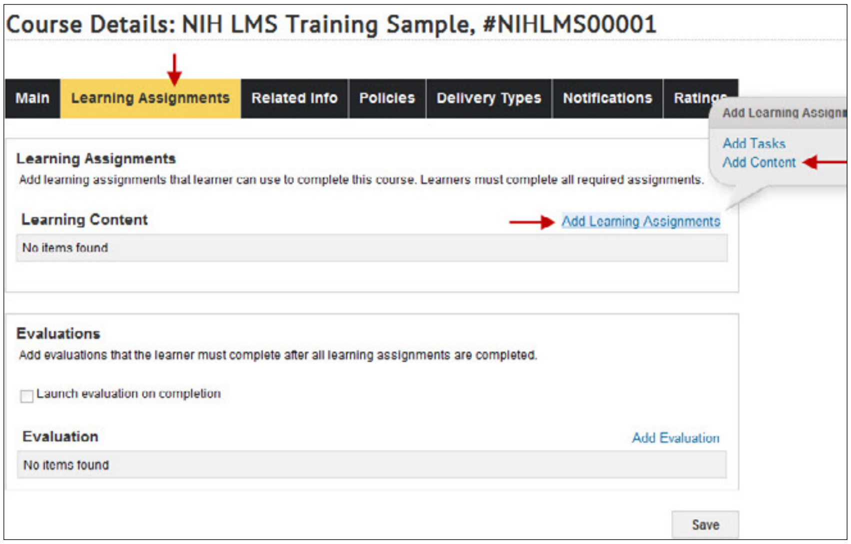
ADDING ONLINE CONTENT

Courses that contain an online component or supplemental learning files need to have the content attached to it. Assigning the content to the course level will ensure that every delivery type and every offering will have the same content assigned to it by default. Content can be added or deleted at the delivery type and offering levels.

NOTE: If this course is intended to be available as instructor-led and online, it is recommended that the online content be attached at the delivery type or offering level.

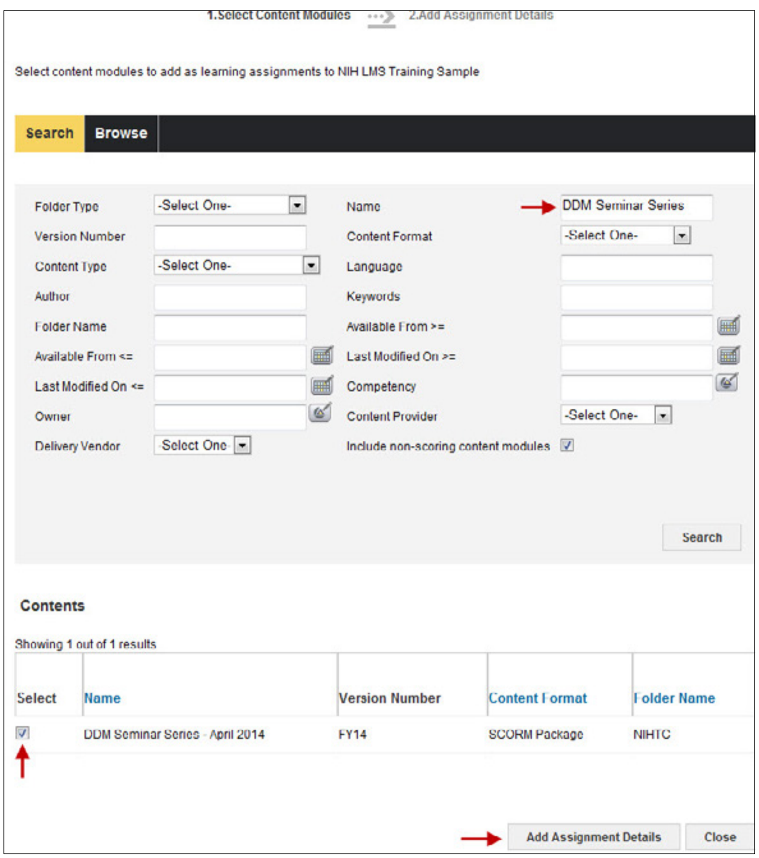
Prior to attaching online content modules to the course, they must first be uploaded to the content repository by a Content Administrator. Refer to the LMS Content Administrator Guide for instructions on how to do this.

1. Click the **Learning Assignments tab**.
2. Click **Add Content** in the popup bubble.



3.

4. Enter search criteria for the content being added then click the **Search button**.
5. Click the **checkbox** that appears to the left of the content name.
6. Click the **Add Assignment Details button**.



IMPORTANT: Any content that is not SCORM compliant will be automatically marked complete when accessed by the learner.

LEARNING ASSIGNMENT DETAILS

The following options are available for your content:

Type

- Training Content – Use for online course content.
- Pre Class Assessment – Use for tests that are taken in advance of the training. There is also an option for a learner to test out of the class.
- Post Class Assessment – Use for tests that are taken after training has occurred.

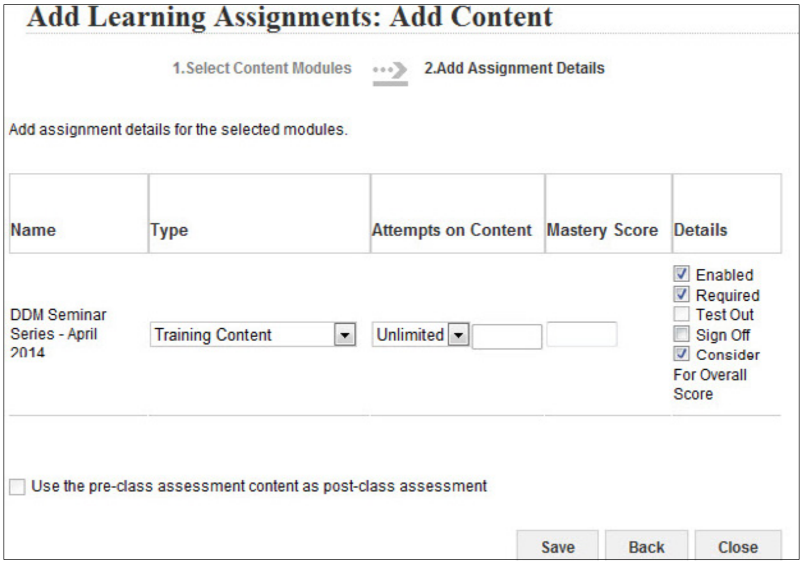
Attempts

- Unlimited – Use to allow learners to retake the content as many times as needed to gain a successful completion.
- Limited – Use to specify the exact number of tries on the content that is allowed for a learner.

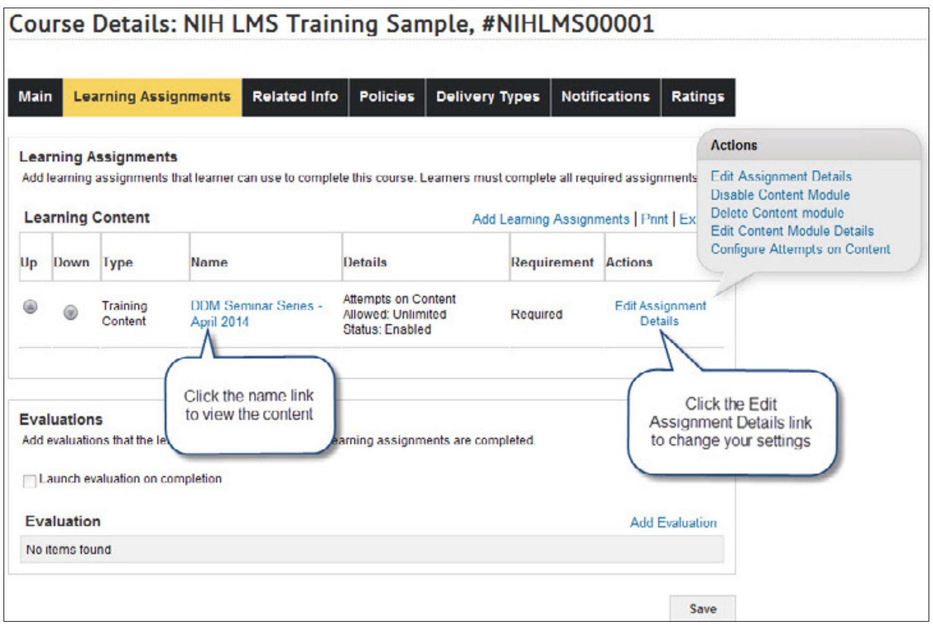
Details

- Enabled – When this box is checked, the content is able to be accessed by learners.
- Required – When this box is checked, the content is required to be passed as part of a successful completion for the course.
- Test Out – When this box is checked, successful completion of a pretest will mark this course complete.
- Sign Off – When this box is checked, learners my use the signoff function to receive a successful completion.
- Consider For Overall Score – When this box is checked, it will use the score in the content as part of the mastery score average for the course to determine a successful completion.

1. Adjust the settings for the course content then click the **Save button**.



2. The Content Modules section will be updated.



CONTENT MODULES ACTIONS

When a content module is added, a Learning Administrator can perform the following actions by clicking the **Edit Assignment Details link** in the Actions column:

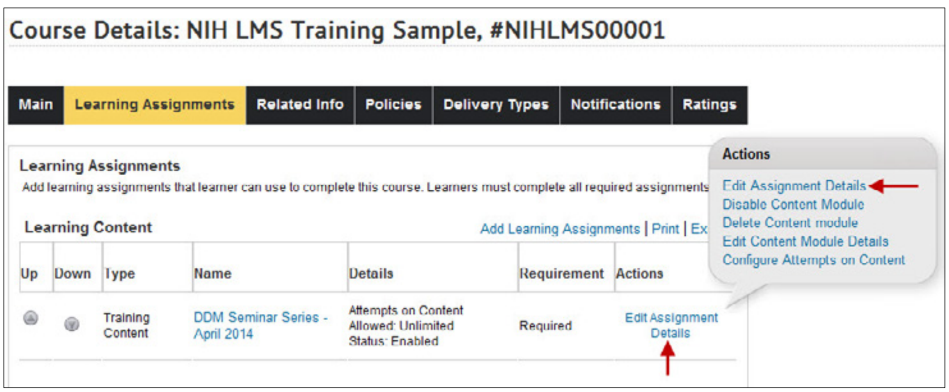
- Edit Assignment Details
- Disable Content Module
- Delete Content Module
- Edit Content Module Details
- Configure Attempts on Content

The following pages will show how to use these actions.

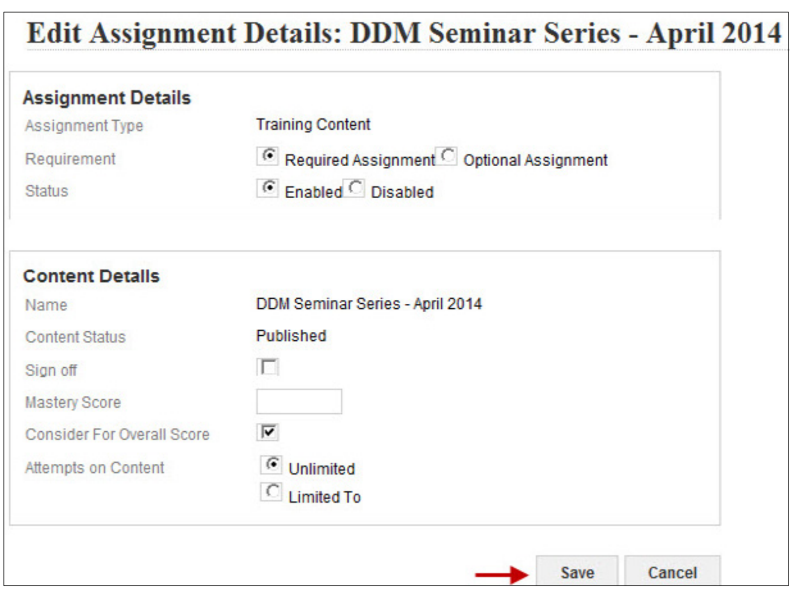
EDIT ASSIGNMENT DETAILS

To change the requirements of the content module, perform the following:

1. Click the **Edit Assignment Details link** associated with the content module.
2. Select **Edit Assignment Details** from the popup bubble.



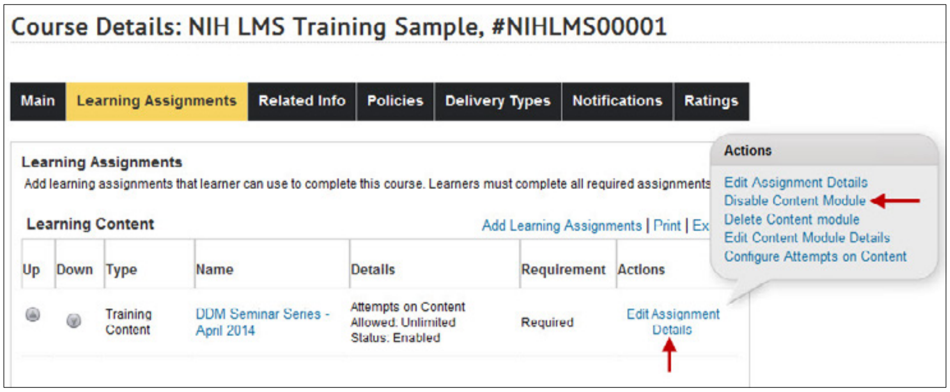
3. Make changes as needed then click **Save**.



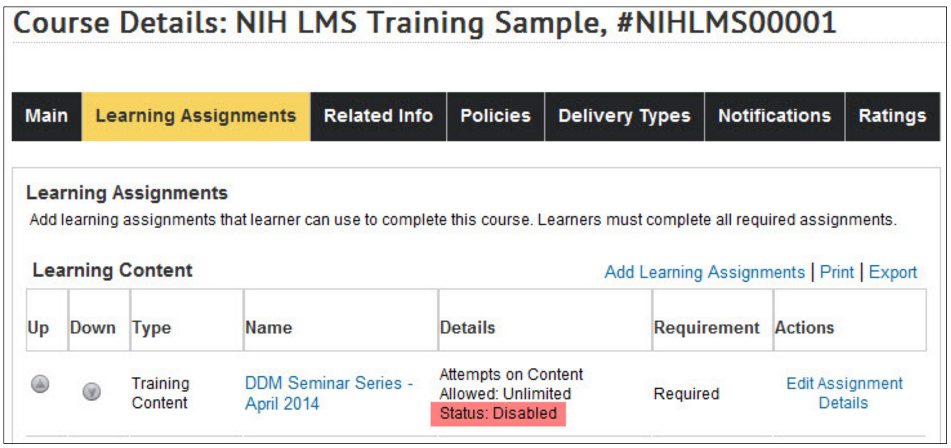
DISABLE CONTENT MODULE

To disable the content modules so that learners are unable to access it, perform the following:

1. Click the Edit Assignment Details link associated with the content module.
2. Select Disable Content Module from the popup bubble.



3. The content will be disabled and the status updated as shown below.



ENABLE CONTENT MODULES

To enable content that has been previously disabled, perform the following:

1. Click the Edit Assignment Details link associated with the content module.
2. Select Disable Content Module from the popup bubble.

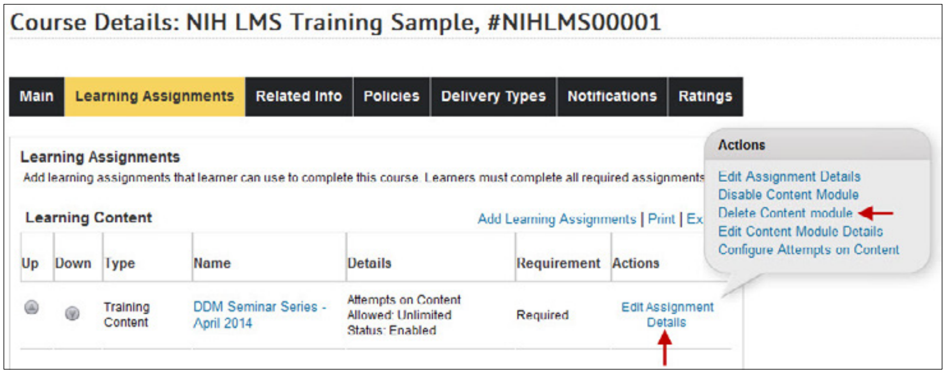
NOTE: This option is only available for content that has been disabled.

3. The content will be enabled and the status updated as shown below.

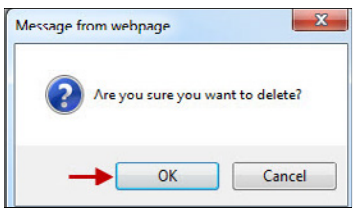
DELETE A CONTENT MODULE

To remove a content module from a course, perform the following:

1. Click the **Edit Assignment Details link** associated with the content module.
2. Select **Delete Content Module** from the popup bubble.



3. Click **OK** in the delete confirmation popup message.



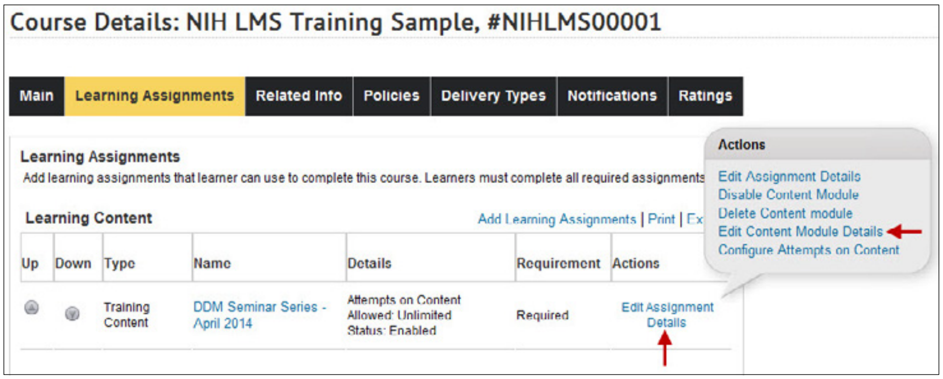
4. The content will now be removed from the course as shown below.

NOTE: If learners have already accessed the content, it may not be able to be removed. The content should then be discontinued if it cannot be removed.

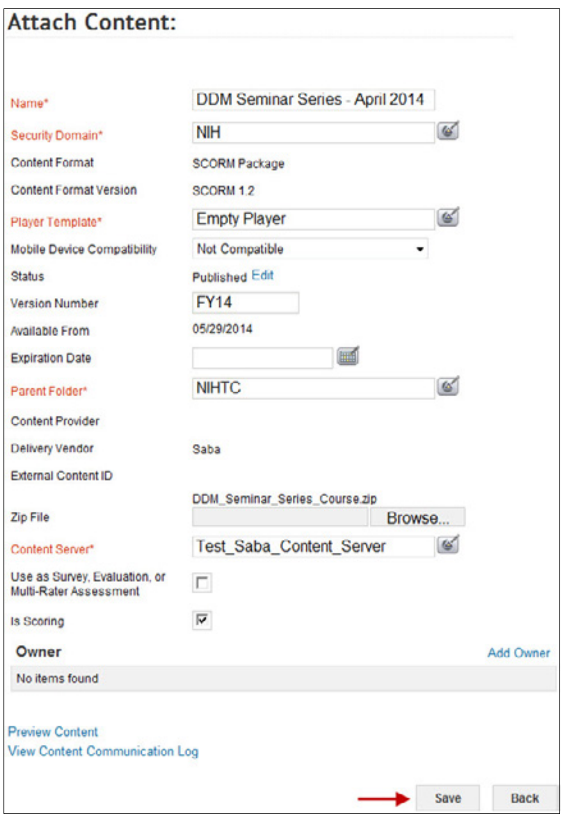
EDIT CONTENT MODULE DETAILS

The content module details are originally set by the Content Administrator when the content is imported into the LMS. To edit the content module details, perform the following:

1. Click the **Edit Assignment Details link** associated with the content module.
2. Select **Edit Content Module Details** from the popup bubble.



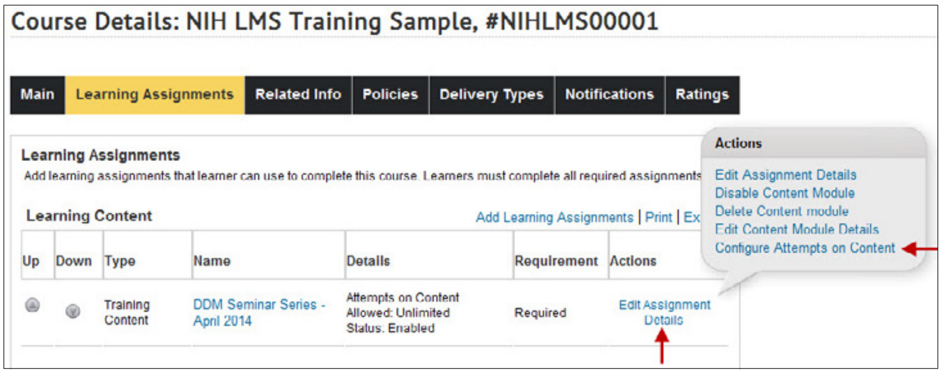
3. Edit the desired fields then click Save.



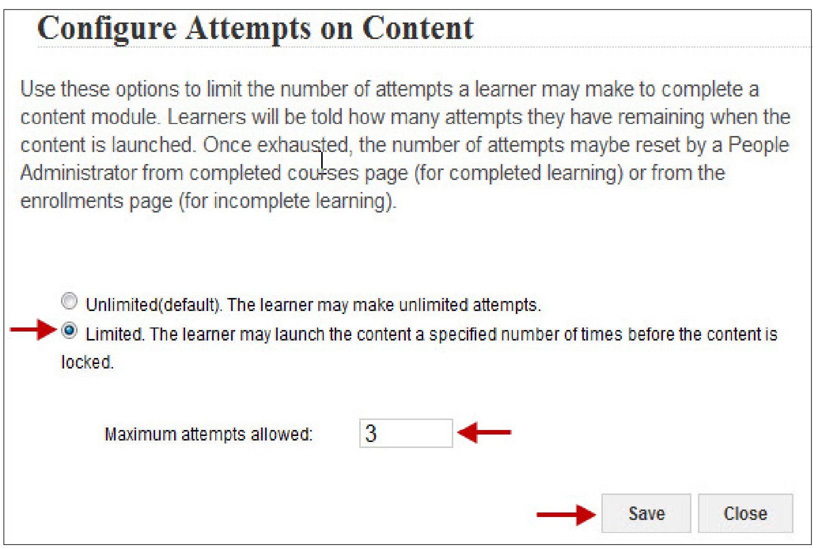
CONFIGURE ATTEMPTS ON CONTENT

Learning Administrators can configure the number of attempts a learner can have to access the content. The default allows unlimited access but can be changed to a finite number of attempts. To change the number of attempts allowed, perform the following:

1. Click the **Edit Assignment Details link** associated with the content module.
2. Select **Edit Content Module Details** from the popup bubble.

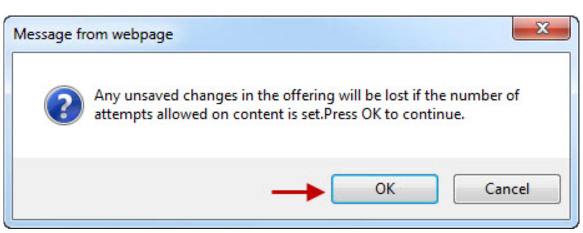


3. Select the radio button for **Limited attempts**.
4. Enter the number of attempts the learner will be allowed.
5. Click the **Save button**.

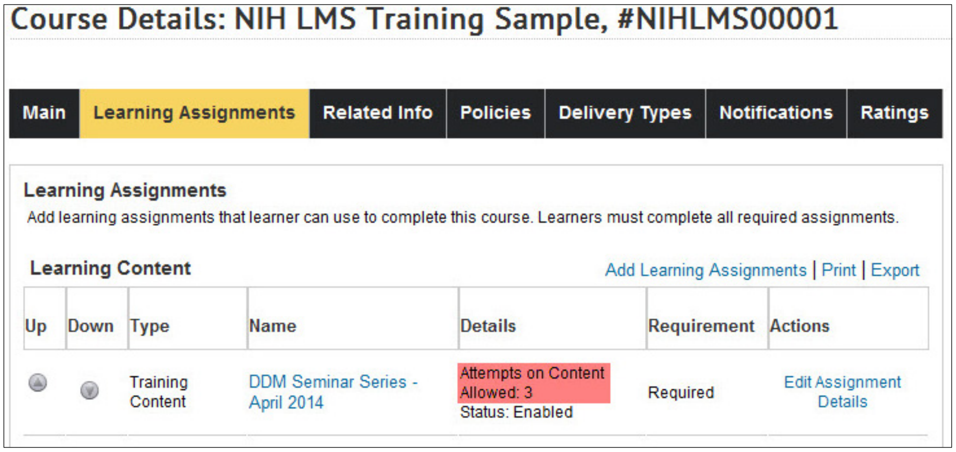


NOTE: If the content is limited and you want to allow the learners unlimited access, select the Unlimited(default) radio button and then click the **Save button**.

6. Click **OK**.



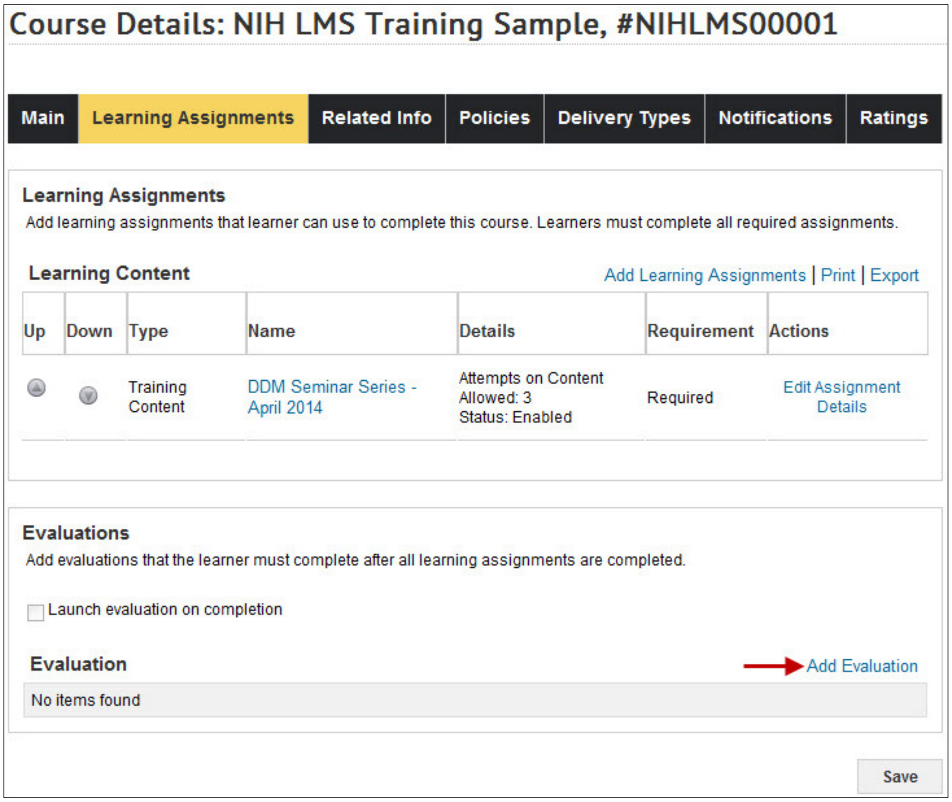
7. The attempts allowed will be updated and shown in the Details column.



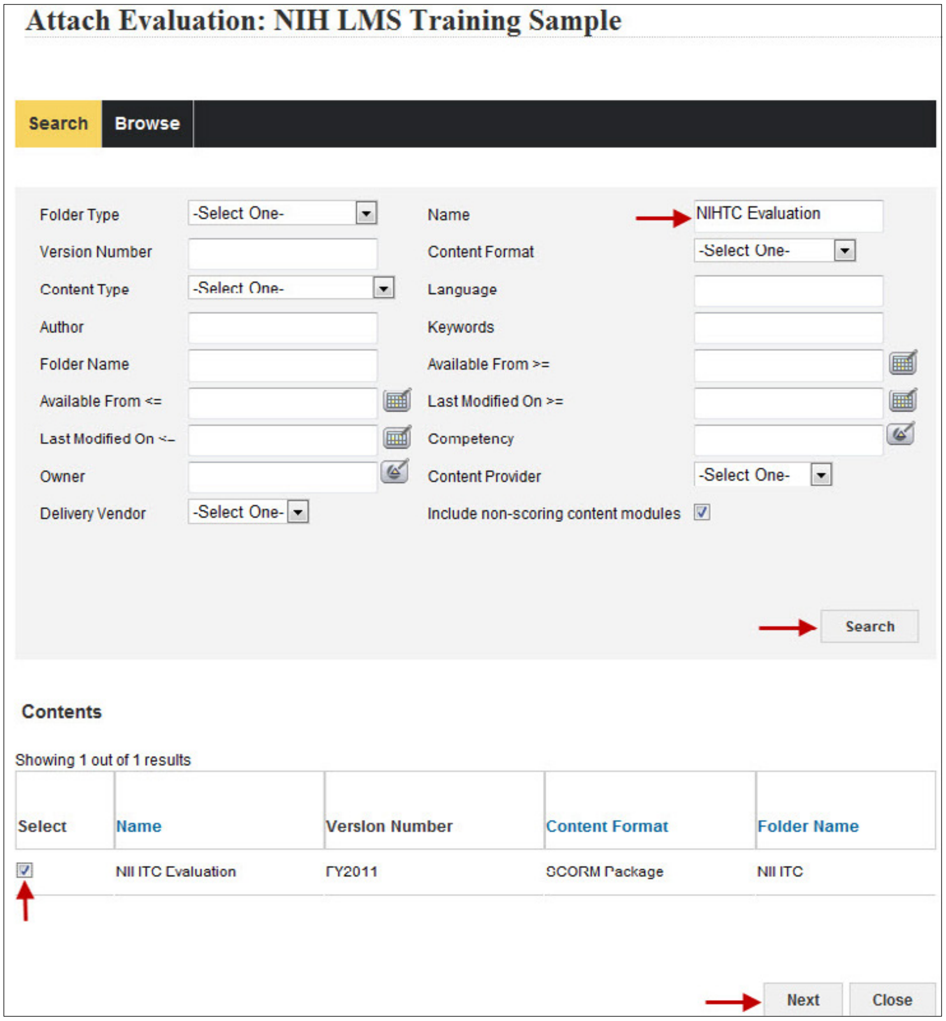
ADD AN EVALUATION TO A COURSE - OPTIONAL

Learning Administrators can add an evaluation to the course that will be available to the learners in the LMS. Evaluations must first be created by a Content Administrator before they may be attached to a course. To add an evaluation to the course, perform the following:

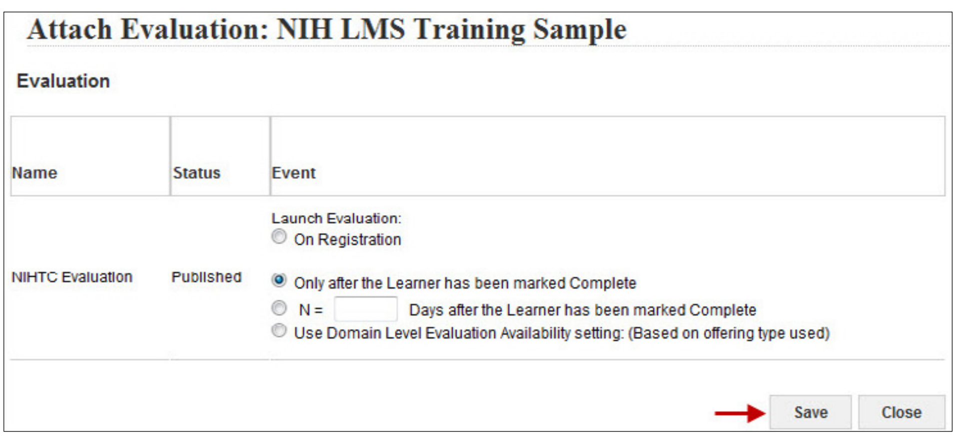
1. Click the **Add Evaluation link** in the Evaluations section.



2. Enter search criteria for the evaluation then click the **Search button**.
3. Click the **checkbox** associated with the evaluation then click the **Next button**.

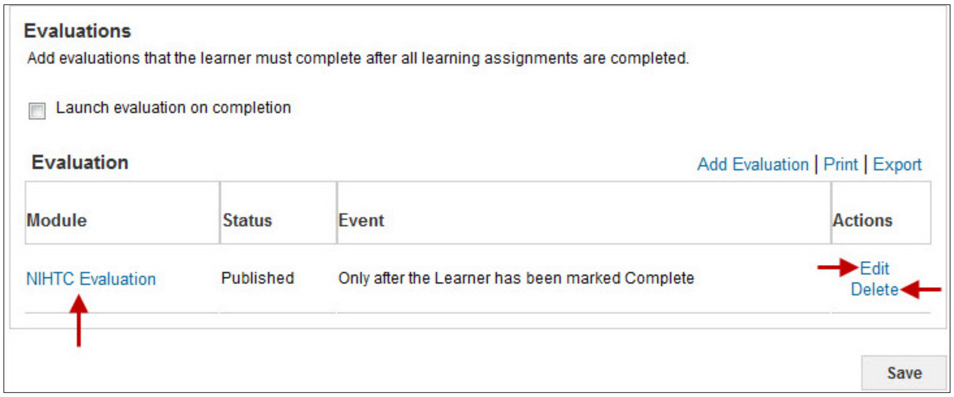


4. Choose the settings for when the evaluation should be launched then click the **Save button**.



5. The evaluation will be displayed in the Evaluations section.

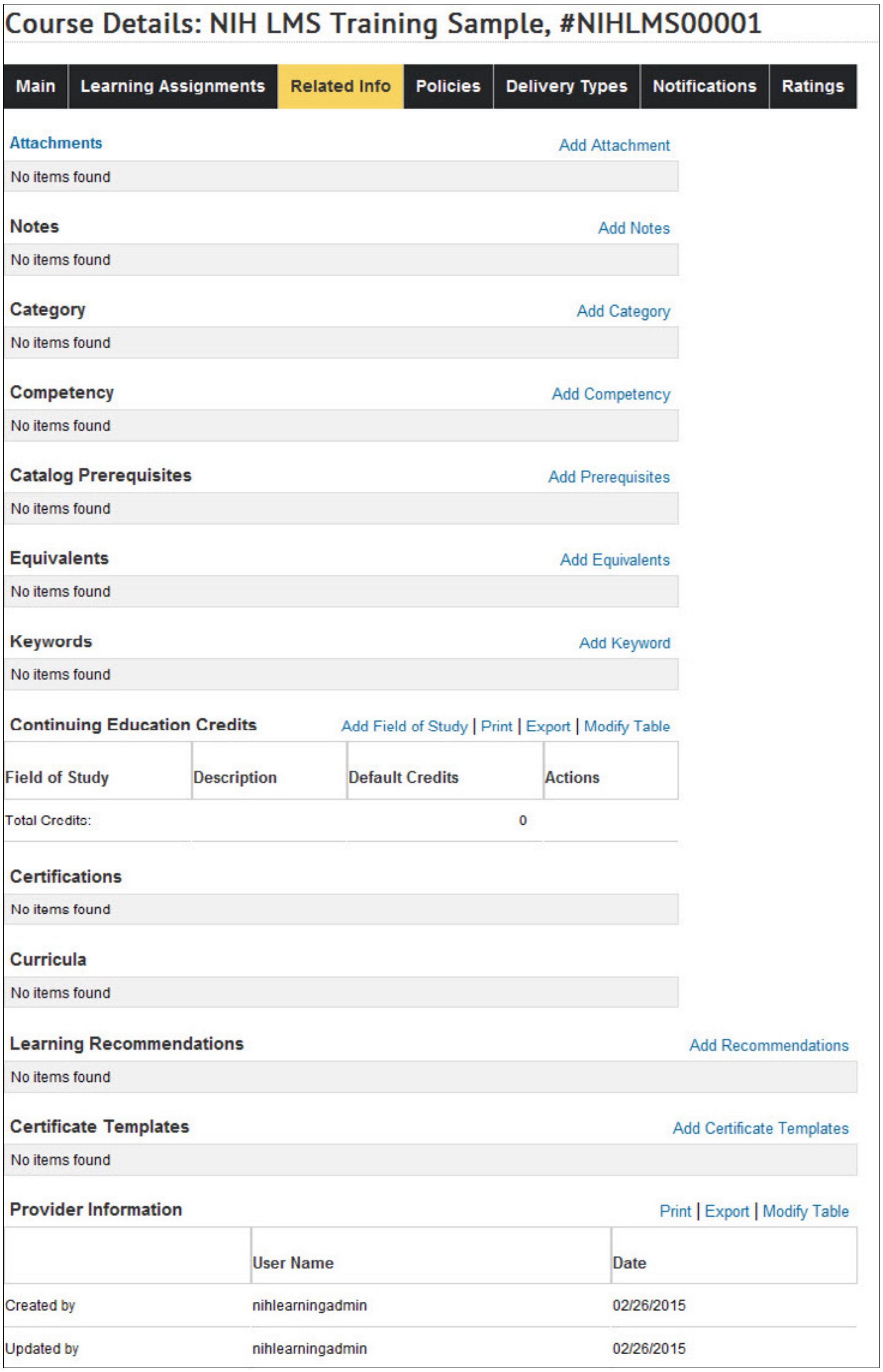
- Click the **evaluation name** to preview the evaluation content.
- Click the **Edit link** to change the evaluation launch settings in step 4.
- Click the **Delete link** to delete the survey.



RELATED INFO TAB

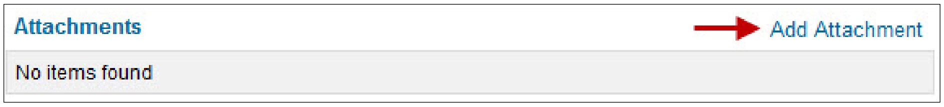
The Related Info tab allows additional information to be added to the course. The sections on this tab are not required to save the course however there are two that will aid learners in searching for the course. They are Category and Keywords. It is recommended that these two sections be updated to ensure that the course can be found by learners.

Below you will find a graphic of the entire Related Info tab.



ADDING ATTACHMENTS

1. Click the **Add Attachment link**.

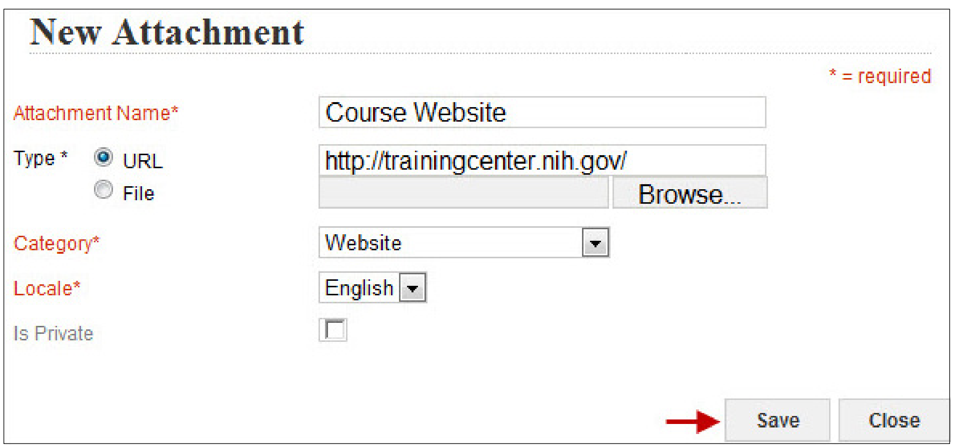


2. Enter a name for the attachment in the **Attachment Name field**.
3. Click the radio button for a Type.

    URL – Type the URL for the website being used as an attachment.
    File – Click Browse to search your computer and find the file to be used as an attachment.

NOTE: When using files as attachments, be sure to use a format that is widely accepted. Formats such as PDF are recommended since most computers can open files in that format.

4. Select a **Category**.
5. **Locale** should be English which is selected by default.
6. **Is Private** – Click this checkbox to make the attachment available only to those registered for the course.
7. Click the **Save button**.

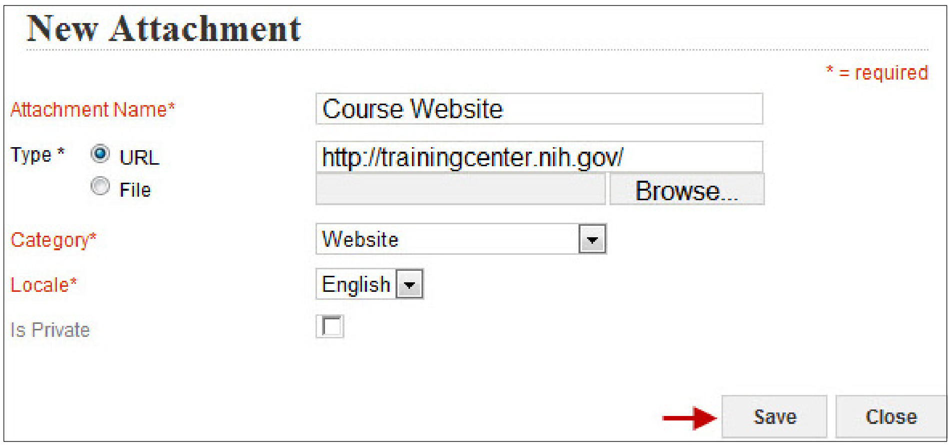


8. Click the **attachment name link** to make sure that it launches correctly.

EDIT AN ATTACHMENT

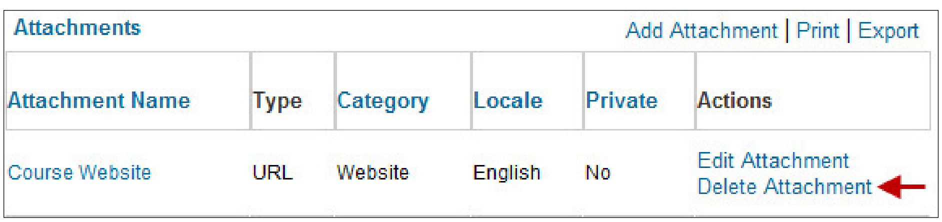
1. Click **Edit Attachment** in the Actions column.

2. Edit attachment details then click the **Save button**.

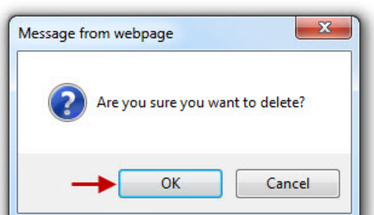


DELETE AN ATTACHMENT

1. Click Delete Attachment in the Actions column.



2. Click **OK** in the popup window.



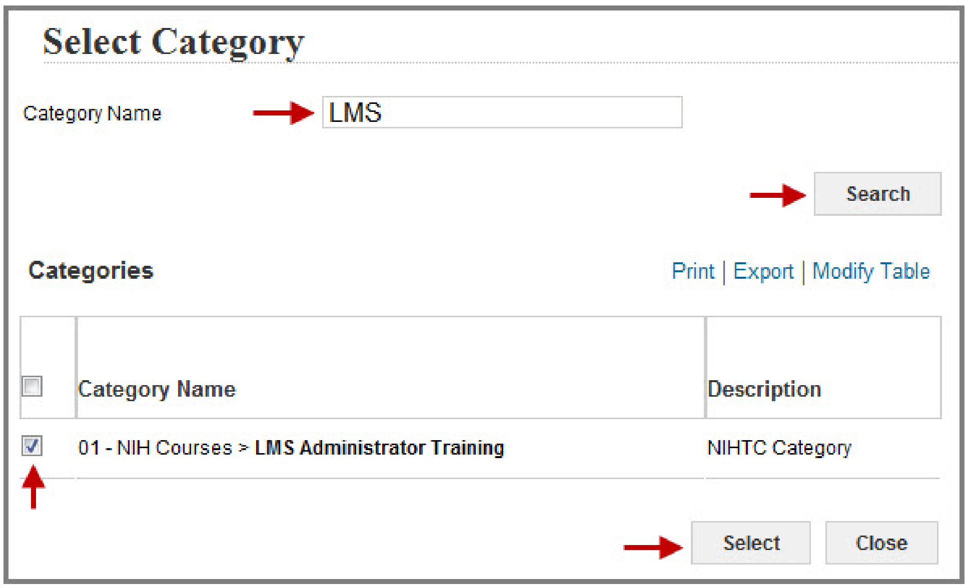
3. The attachment will now be deleted from the course.

ADD A CATEGORY TO A COURSE - RECOMMENDED

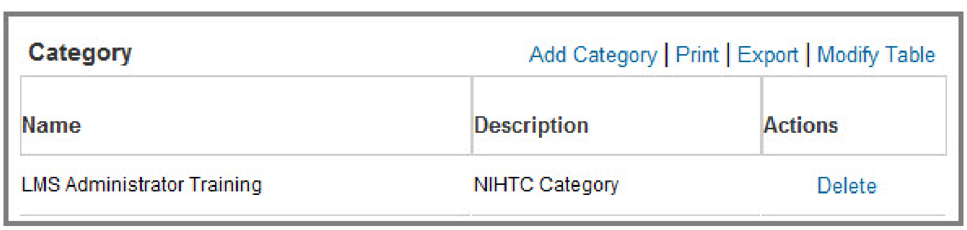
Categories give learners an alternative way to search for courses. It is recommended that every course be associated with at least one category. Categories must be created before they can be added as described below.

1. Click the **Add Category link**.

2. Type the name of the category in the **Category Name field**.
3. Click the **Search button**.
4. Click the **checkbox** associated with the category being added.
5. Click the **Select button**.



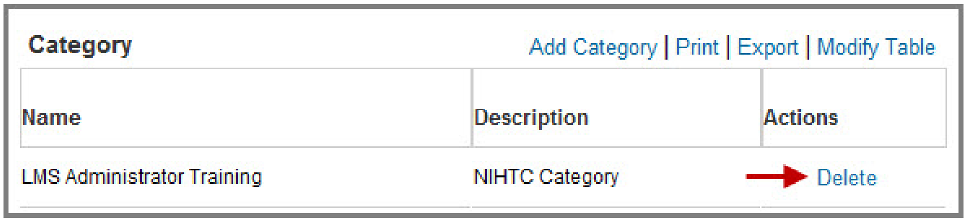
6. The category will now be associated with the course.



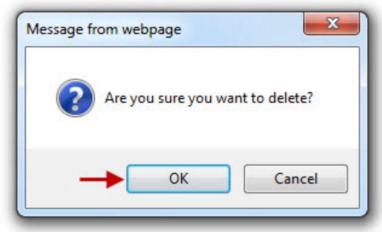
7. Repeat these steps to add additional categories as needed.

DELETE A CATEGORY

1. Click the Delete link in the Actions column that is associated with the category being deleted.



2. Click **OK** in the popup window.



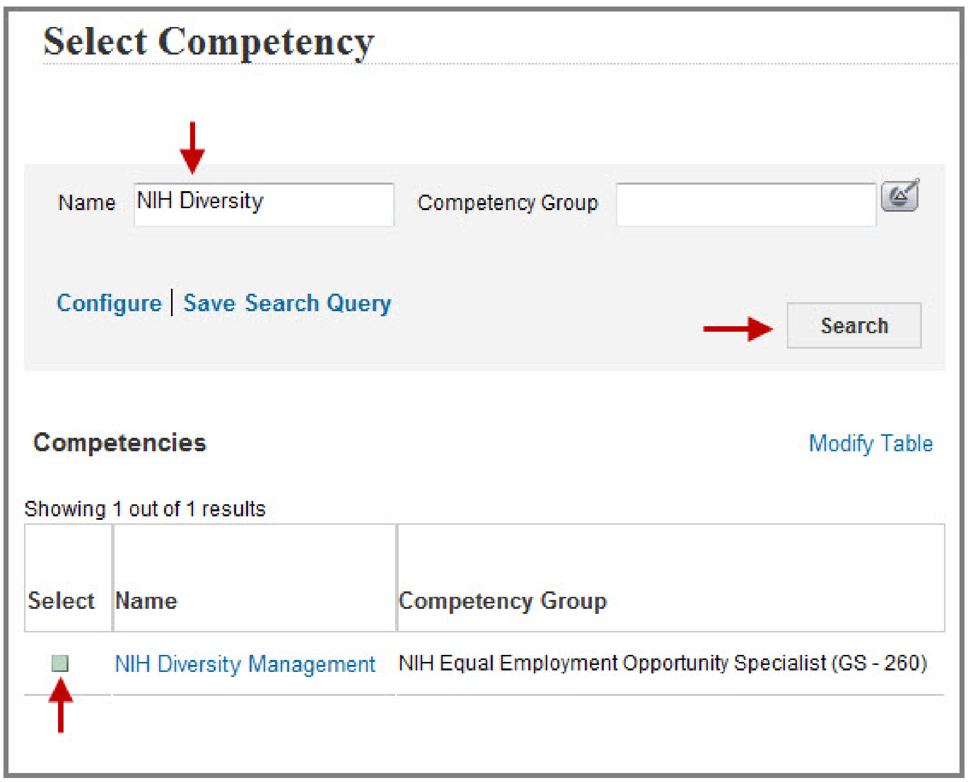
3. The category will no longer be associated with the course.

ADDING A COMPETENCY

Competencies are a set of skills or knowledge that can be defined, measured, and tracked. Adding a competency to the course will allow that competency to be added to a learner as a required competency when they earn a successful completion for the course.

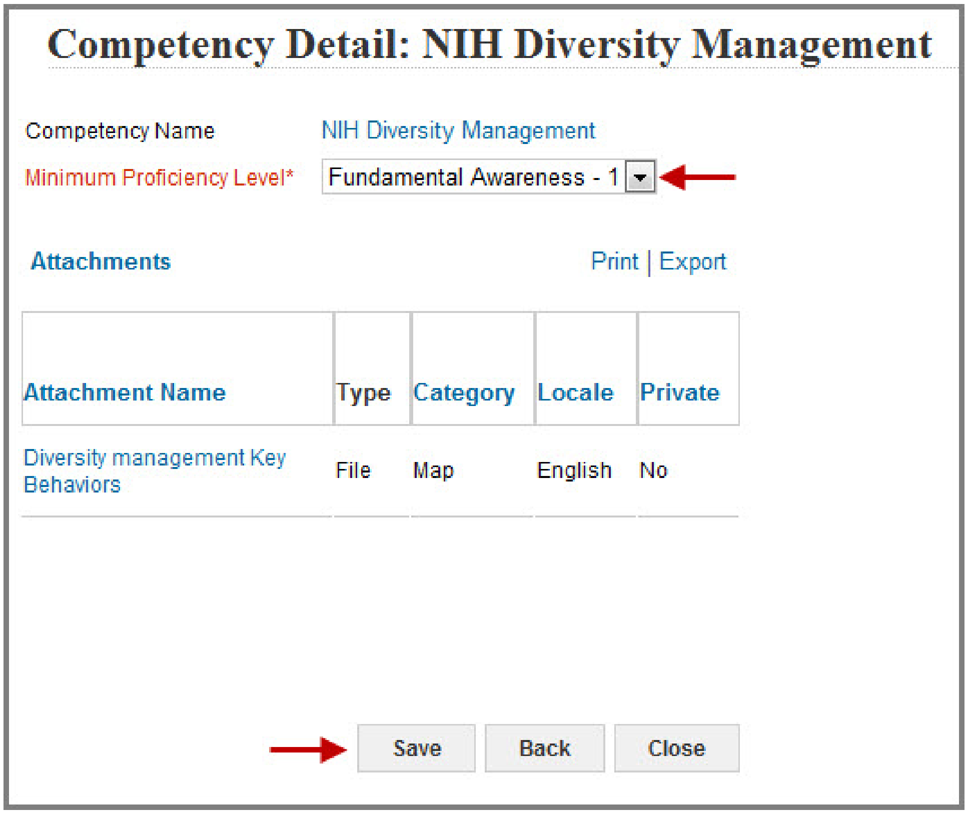
1. Click the **Add Competency link**.

2. Enter search criteria for the competency then click the **Search button**.
3. Click the **checkbox** associated with the competency.

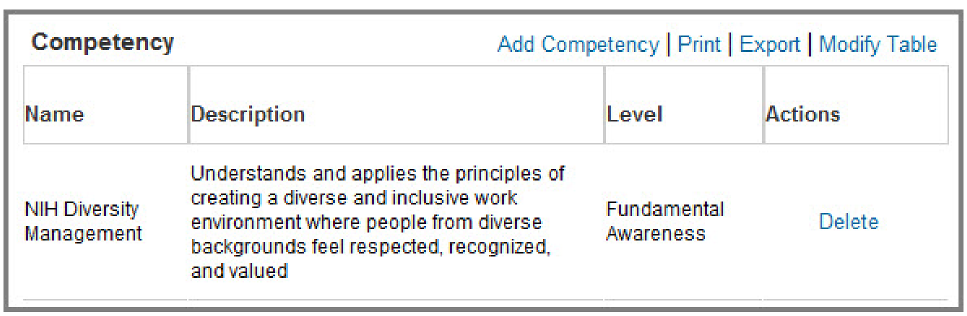


4. Select a **Minimum Proficiency Level** from the drop-down menu.
5. Click the **Save button**.

NOTE: Click the Attachment Name to view any additional information about the competency.

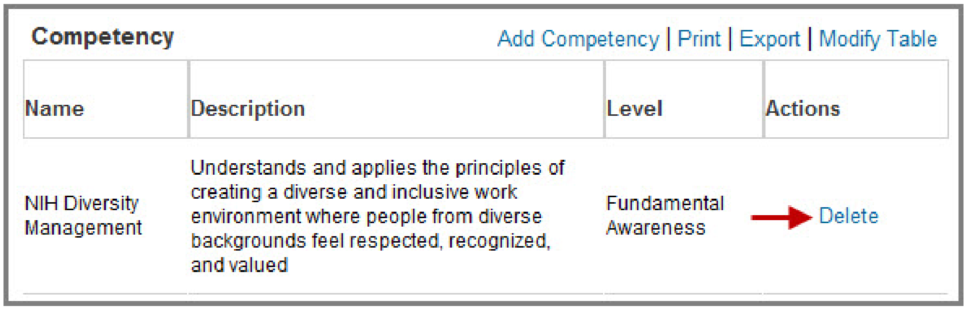


6. The competency will now be associated with the course as shown below.



DELETE A COMPETENCY

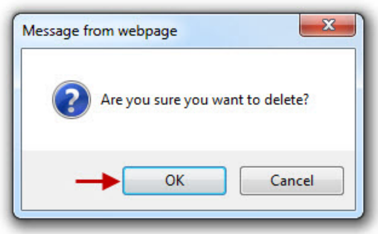
1. Click the **Delete link** in the Actions column.



Competency — Add Competency | Print | Export | Modify Table

Name	Description	Level	Actions
NIH Diversity Management	Understands and applies the principles of creating a diverse and inclusive work environment where people from diverse backgrounds feel respected, recognized, and valued	Fundamental Awareness	Delete

2. Click **OK** in the popup window.



3. The competency will no longer be associated with the course.

ADDING A COURSE PREREQUISITE

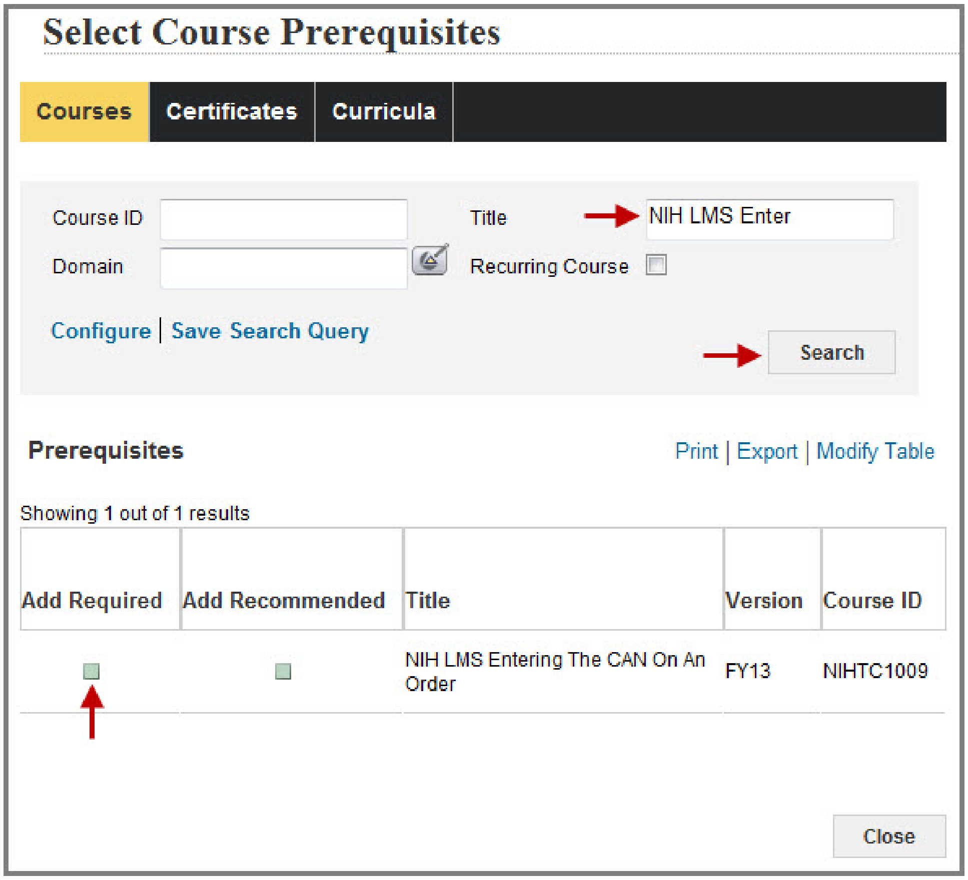
A course prerequisite will cause the LMS to require that learners successfully complete a specific course prior to registering for this course.

1. Click the **Add Prerequisites link**.

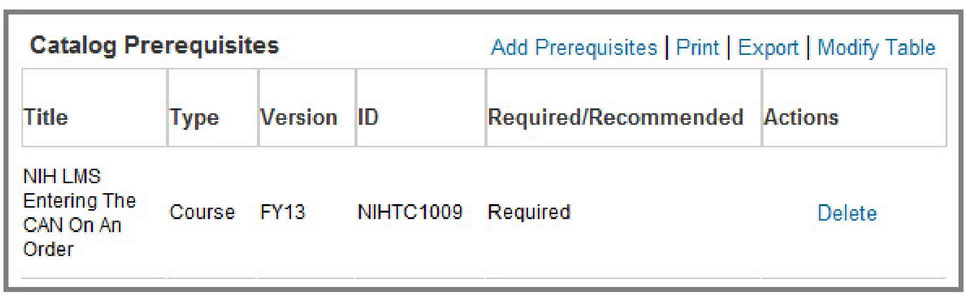
2. Enter search criteria for the prerequisite course then click the **Search button**.
3. Click the **Add Required checkbox** for the prerequisite course.

   NOTE: The Add Recommended option will recommend the prerequisite but still permit learners to register even if it has not been completed.

   NOTE: You can also add a certification or a curriculum as a prerequisite to a course.



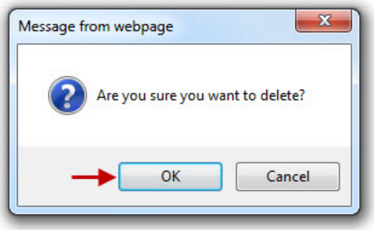
4. The course prerequisite will now be added to the course.



DELETING A PREREQUISITE

1. Click the **Delete link** in the Actions column.

2. Click **OK** in the Popup window.



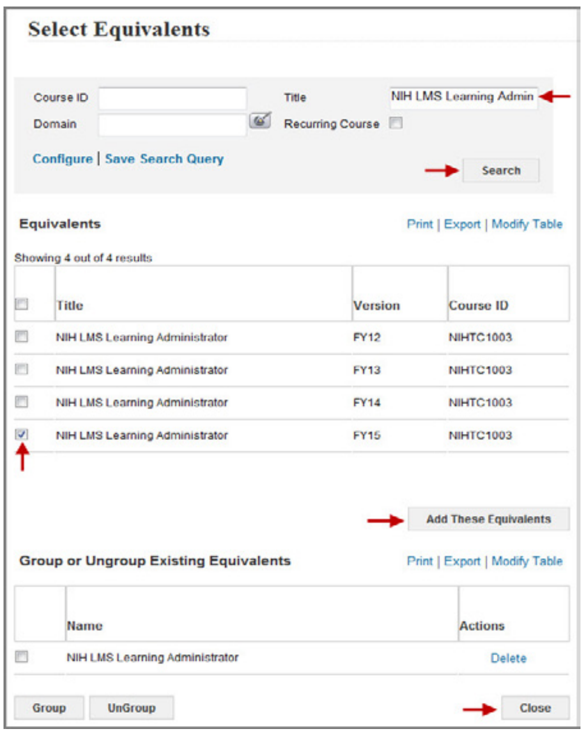
5. The prerequisite will no longer be associated with the course.

ADDING EQUIVALENTS TO A COURSE

Equivalents are courses that meet the same objectives and cover the same content. Courses can be made equivalent but the equivalence in not automatically reciprocal. Contact the course owner for more detail on the course content that is being made equivalent to this course.

1. Click the **Add Equivalents link**.

2. Enter search criteria for the course(s) being made equivalent to this course then click the **Search button**.
3. Select the **checkbox** associated with the course being identified as a prerequisite.
4. Click the **Add These Equivalents button**.



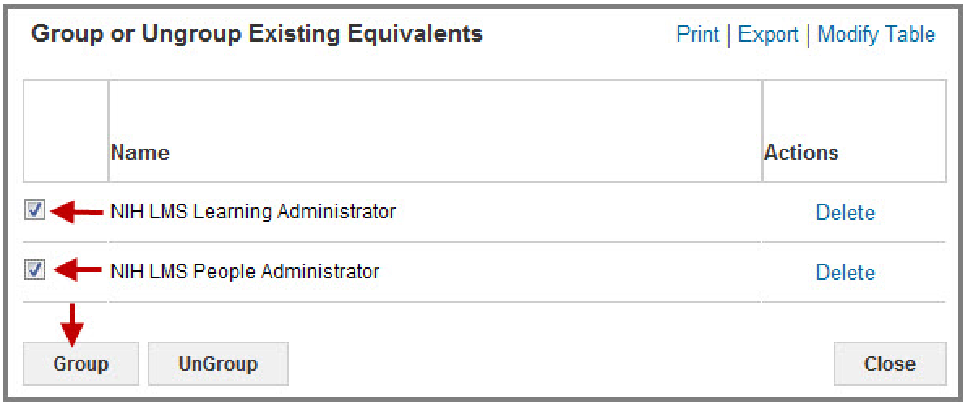
5. Repeat steps 2 through 4 to add additional prerequisites.
6. Click the **Close button**.

7. The learning items will be added to the course.

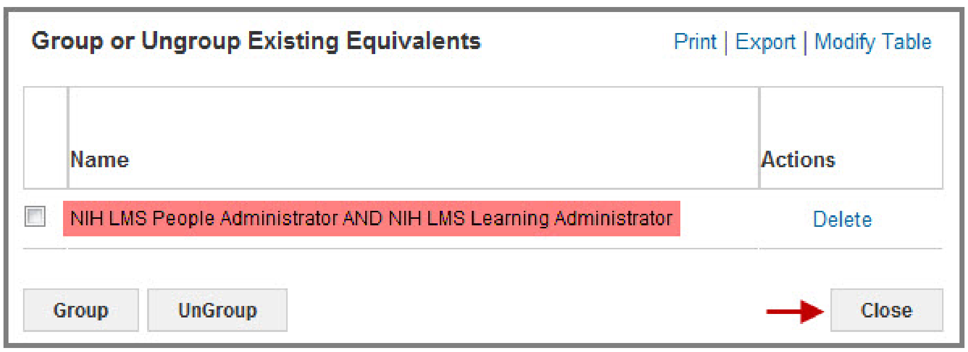
GROUPING ITEMS AS A SINGLE EQUIVALENT - OPTIONAL

If two or more courses have been added as equivalents, the can be combined so that they all become equivalent to this course. To group multiple courses together as a single equivalent, follow the directions below.

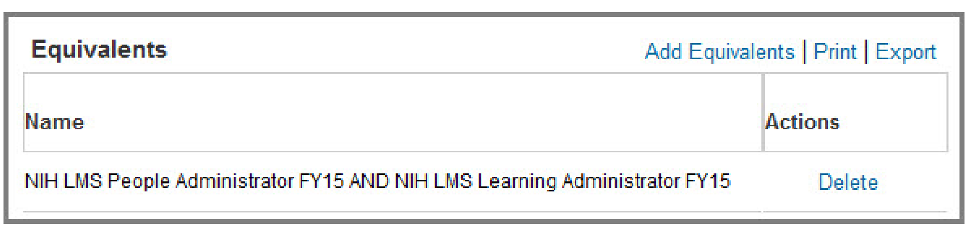
1. Select the courses that will be equivalents to this course by clicking their associated **checkboxes**.
2. Click the **Group button**.



3. The previously selected courses will be merged into one unit.



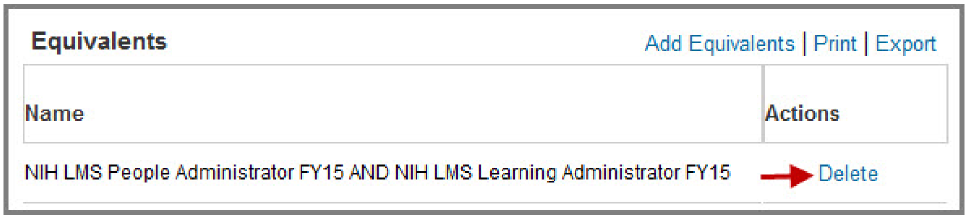
4. The LMS will require both of the grouped courses to be complete in order to satisfy the equivalency.
5. Click **Close** when finished.



6. The equivalents are now added to the course.

DELETE AN EQUIVALENT FROM A COURSE

1. Click the **Delete link** in the Actions column.



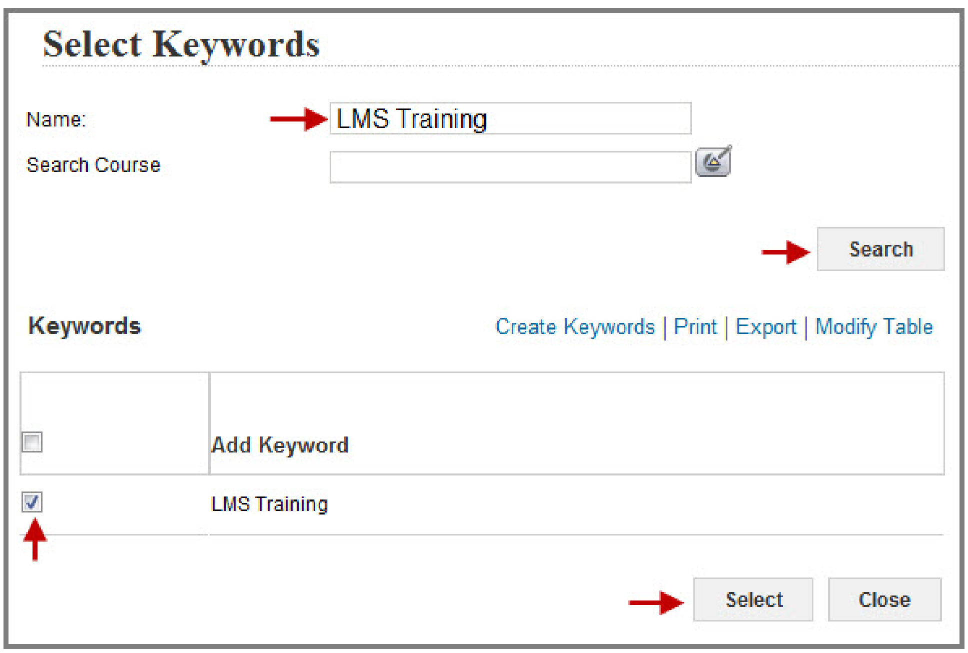
2. The equivalency will be deleted. There is no confirmation screen for this action.

ADDING KEYWORDS TO A COURSE - RECOMMENDED

Keywords allow the LMS to reference the course when a learner types something other than the actual course name in their search. Using relevant keywords will make this course easier to find. Keywords and phrases may also be used.

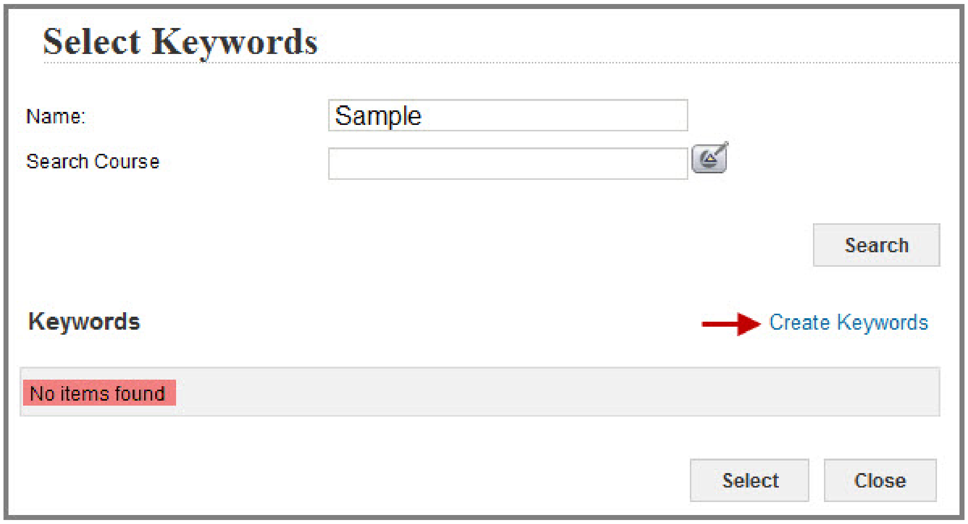
1. Click the **Add Keyword link**.

2. Enter search criteria for the keyword then click the **Search button**.
3. Click the **checkbox** associated with the keyword.
4. Click the **Select button**.

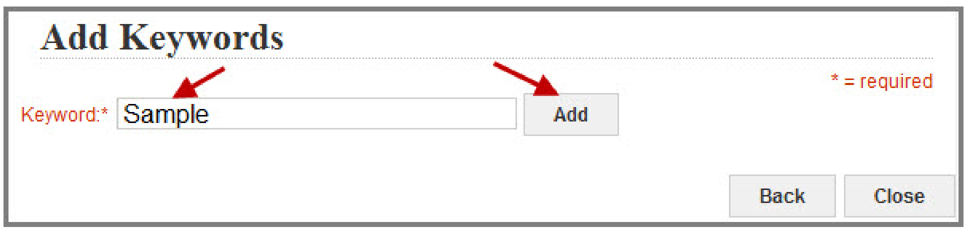


NOTE: If the keyword desired is not found, do the following:

5. Click the **Create Keywords link**.



6. Enter the new keyword in the **Keyword field**.
7. Click the **Add button**.

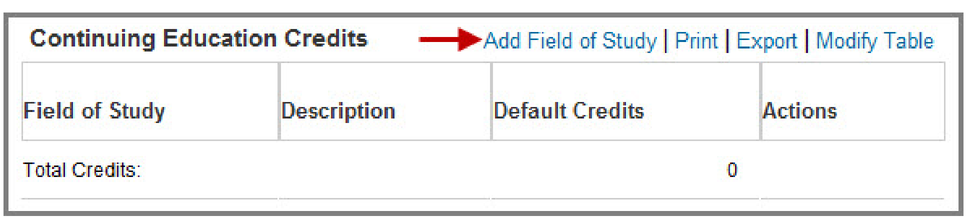


8. The keyword will be displayed in the keywords section.
9. Repeat the steps above to add additional keywords as needed.

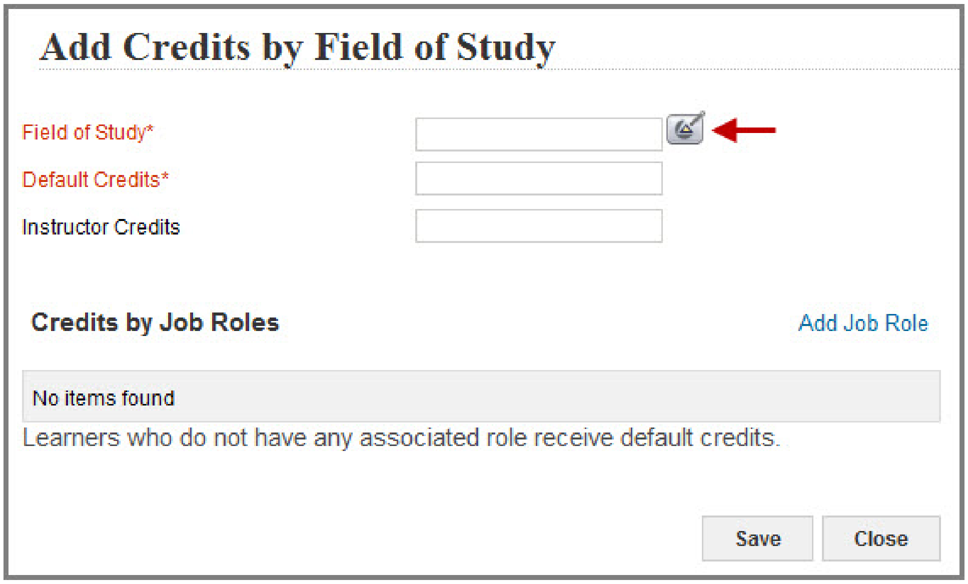
ADDING CONTINUING EDUCATION CREDITS TO A COURSE

Fields of study such as Supervisory Training are ways to classify certain kinds of courses. Fields of study can also be used to issue credits for the completion of a course. It is recommended that Learning Administrators contact their management teams to determine if a course is eligible to have credits associated with it and if so, how many. Follow the steps below to add a field of study to a course.

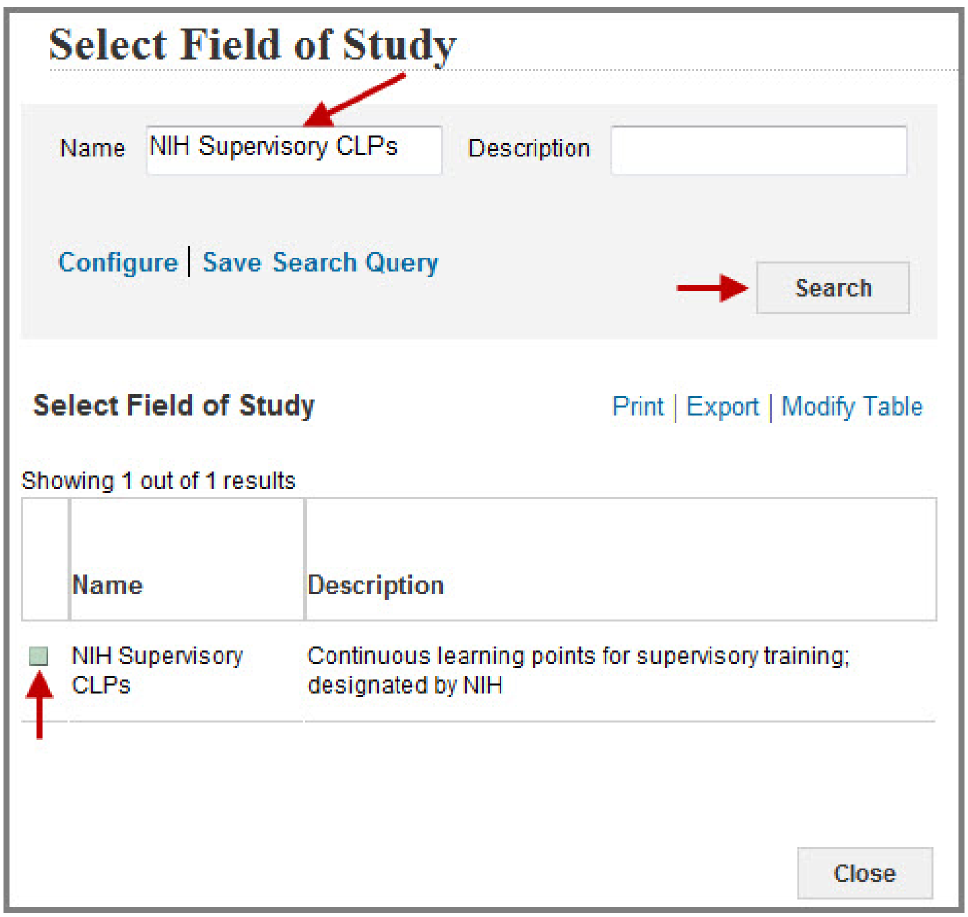
1. Click the **Add Field of Study link**.



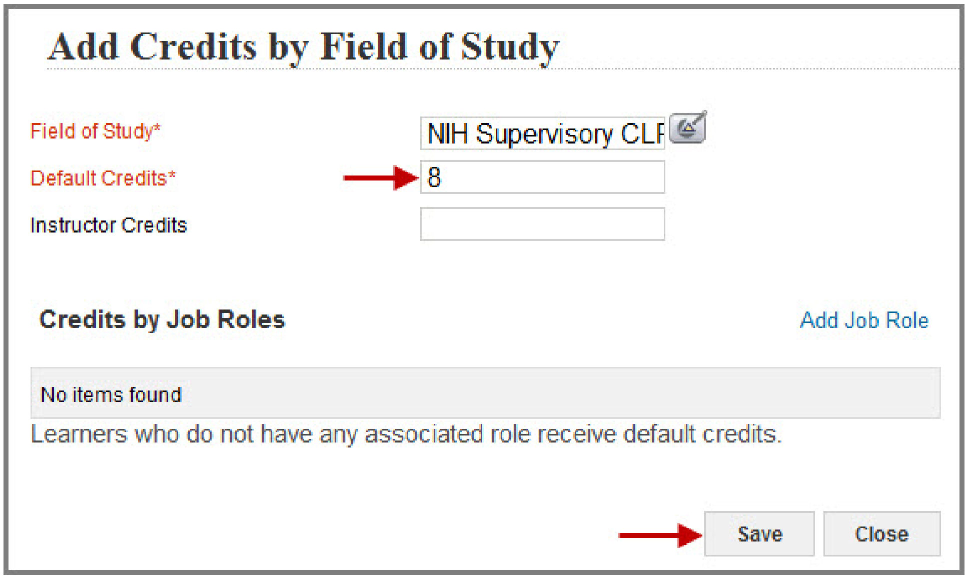
2. Click the Pick Icon for the Field of Study field.



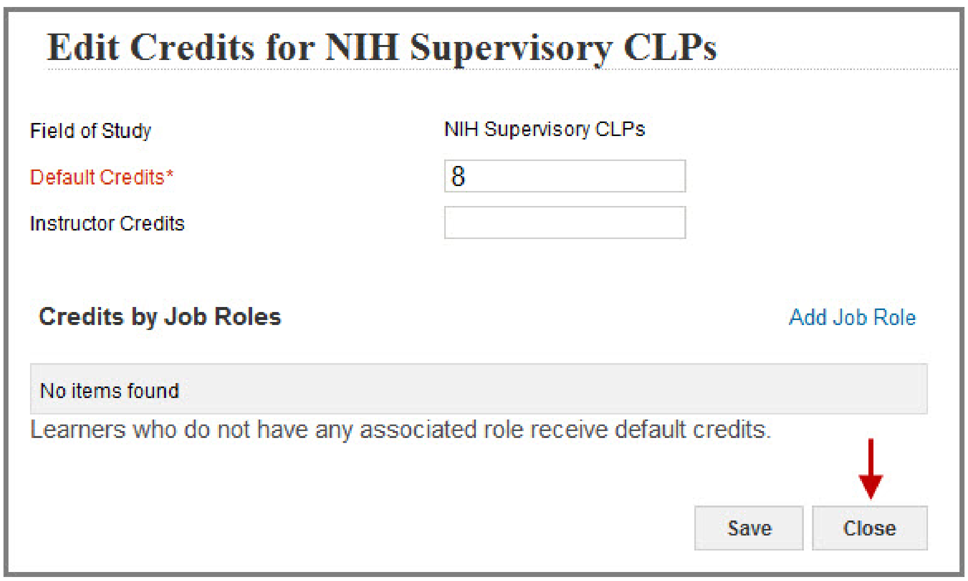
3. Type the name of the field of study in the **name field**.
4. Click the **Search button**.
5. Click the **checkbox** associated with the field of study.



6. Enter the number of **Default Credits** that will be earned when the course is successfully completed. This is usually equal to the number of hours of training.
7. Click the **Save button**.



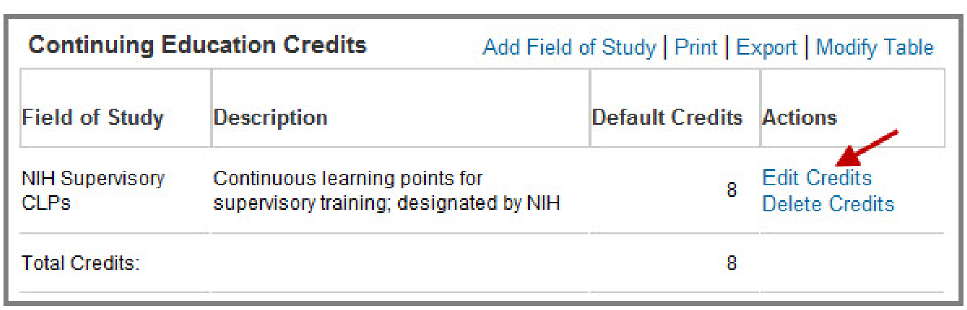
8. After the screen refreshes, click the **Close button**.



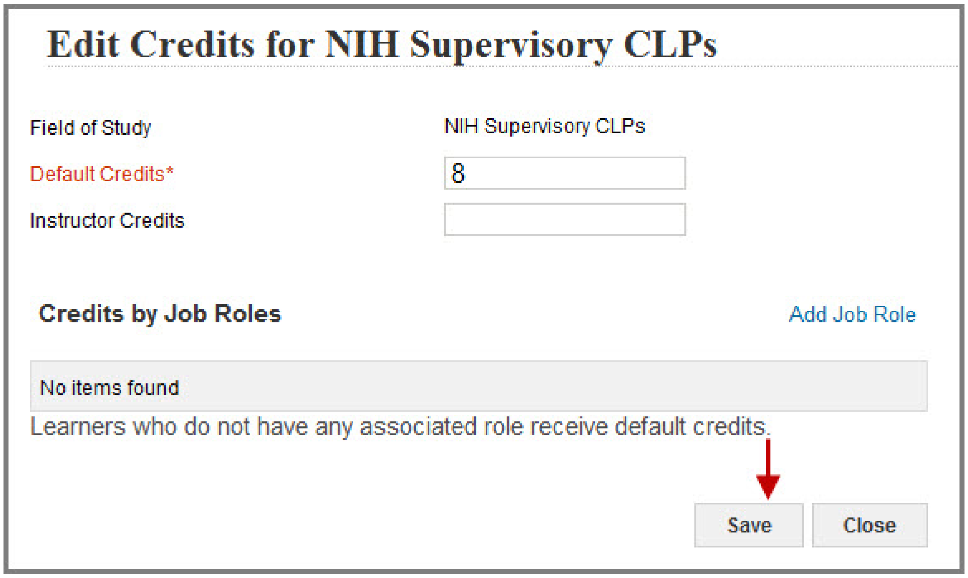
9. The field of study will now appear on the Related Info tab.

EDIT FIELD OF STUDY

1. Click the **Edit Credits link** in the Actions column.



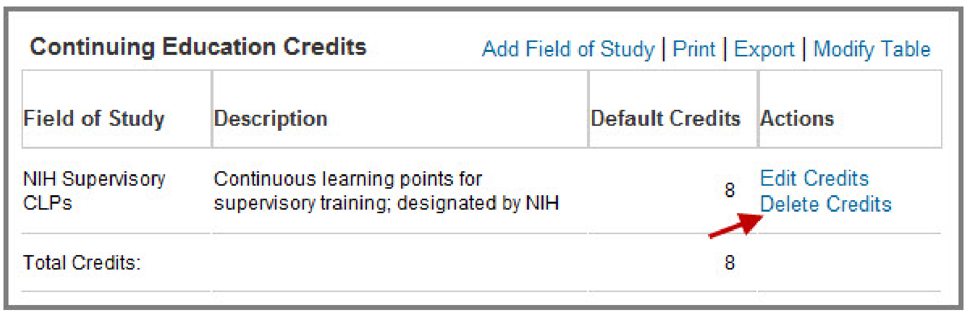
2. Make all necessary changes then click the **Save button**.



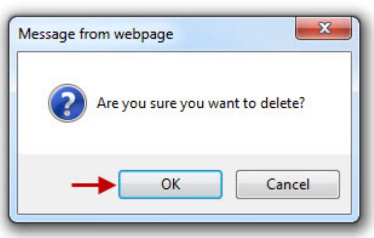
3. When the screen refreshes, click the **Close button**.

DELETE FIELD OF STUDY

1. Click the **Delete Credits link** in the Actions column.



2. Click **OK** in the popup window.



3. The field of study will now be deleted from the course.

ADD LEARNING RECOMMENDATIONS - OPTIONAL

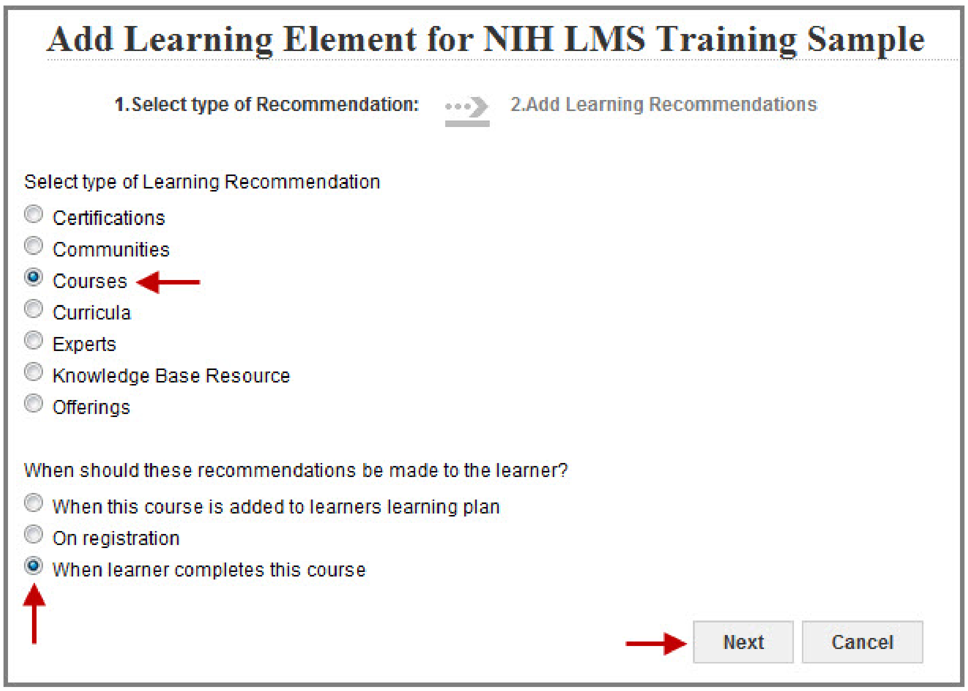
Learning Administrators can recommend other learning items to learners. These recommendations can be made to the learner in three instances:

- When the course is added to the learner's learning plan
- When the learner registers for the course
- When the learner completes the course

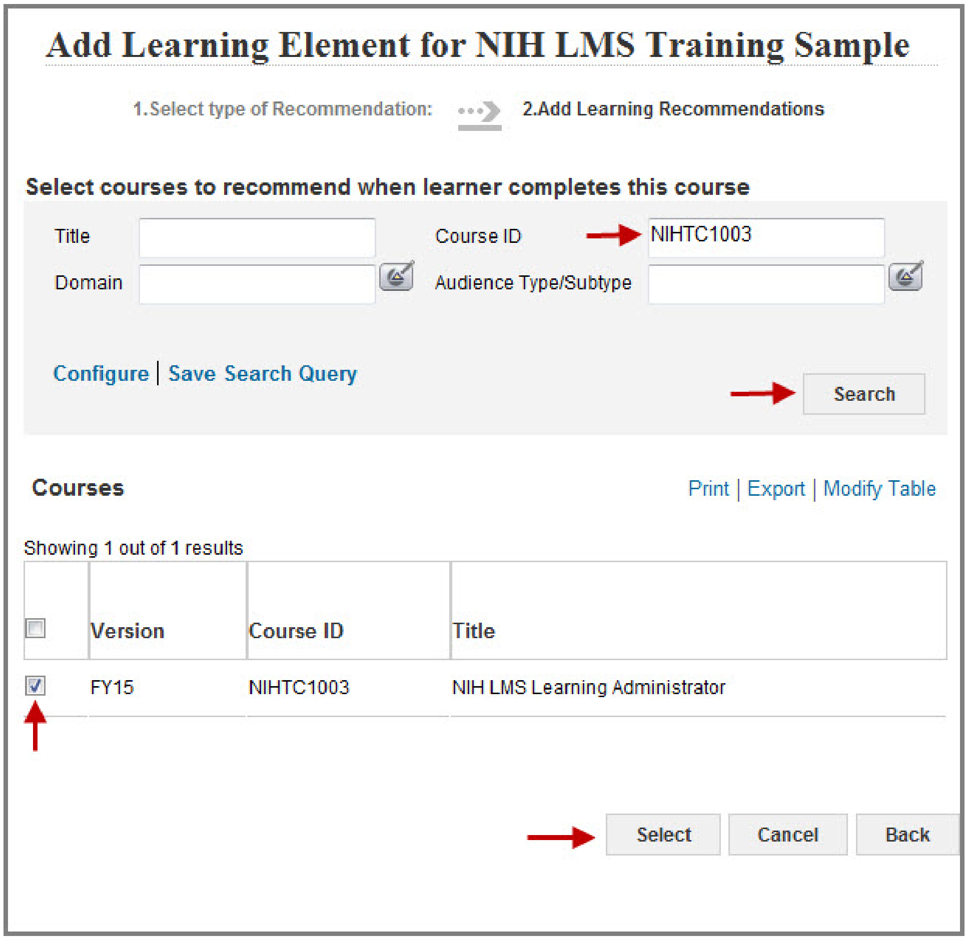
Follow the instructions below to recommend another course to a learner upon completing this course. The process is very similar when adding other types of learning items.

1. On the Related Info tab, click the **Add Recommendations link**.

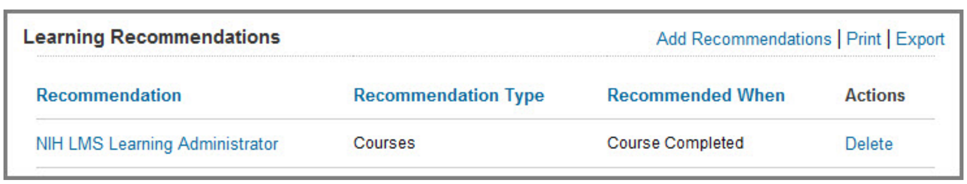
2. Select the radio button for **Courses**.
3. Select the radio button for **When learner completes this course**.
4. Click the **Next button**.



5. Enter search criteria for the recommended course.
6. Click the **Search button**.
7. Click the **checkbox** to the left of the course being recommended.
8. Click the **Select button**.

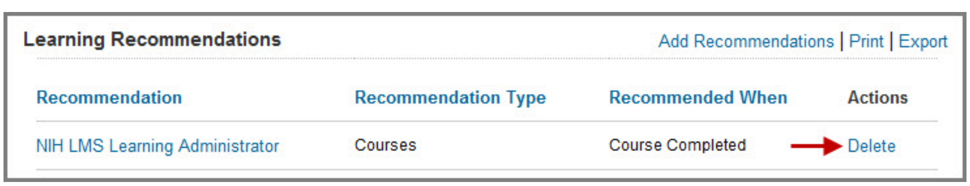


9. The course will now be added as a learning recommendation.

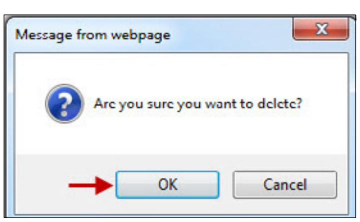


DELETING A LEARNING RECOMMENDATION

1. Click the **Delete link** for the learning recommendation being deleted.



2. Click **OK** in the confirmation popup window.



3. The recommendation will no longer be made to learners taking this course.

POLICIES TAB

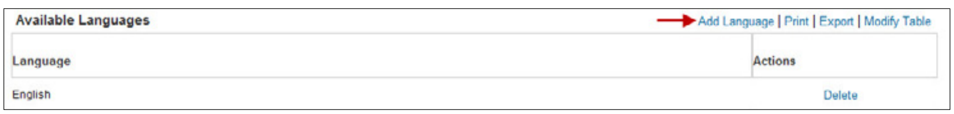
The Policies tab allows you to configure a number of options related to the course. The following may be specified for all courses:

- Languages
- Price List (NOT USED AT NIH)
- Approval Policies
- Recurring Registration Policies
- Completion Policies

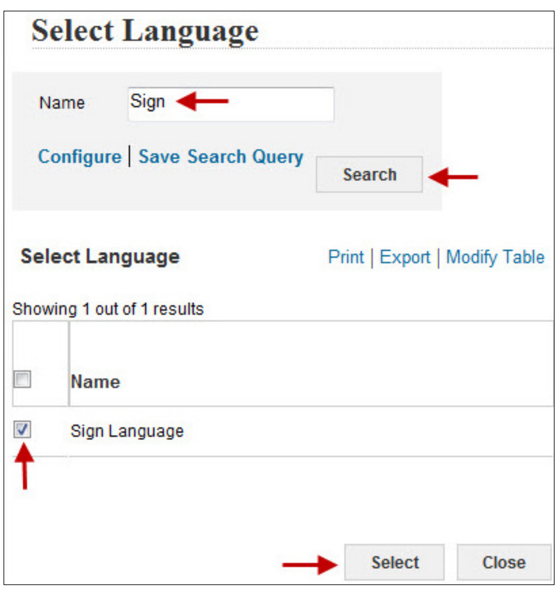
SPECIFYING LANGUAGES FOR COURSES - OPTIONAL

The available languages for all courses are specified on the Policies tab at the course level. The Add Language link can be used to add a list of languages in which courses will be provided. A language for a specific offering is set on the Main tab at the offering level. Follow the steps below to add a new language to the course.

1. Click the **Add Language link**.



2. Enter search criteria for the language then click **Search**.
3. Click the **checkbox** associated with the language.
4. Click **Select**.



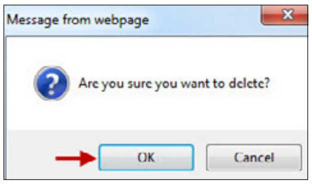
5. The language will now be added to the course which can be selected when creating an offering.

DELETING A LANGUAGE

Any added language may be deleted but English should always remain as the default.

1. Click the **Delete link** in the Actions columns.

2. Click **OK** in the confirmation popup window.

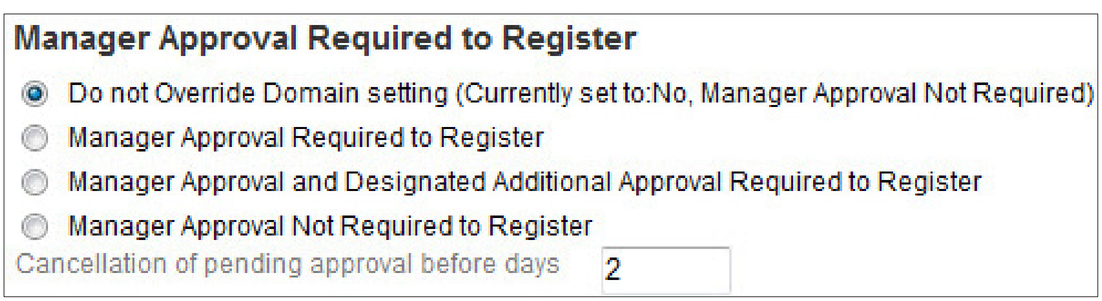


3. The language will no longer be associated with the course.
4. Click the **Save button** to save all changes.

SPECIFYING APPROVAL POLICIES FOR COURSES

Learning Administrators can manage the approval requirements for a course from the Policies tab. The options available are explained below:

- **Do not override domain setting** – This option uses the default domain settings to determine the approval requirements. The default setting may be different depending on the domain your course resides in.
- **Manager Approval Required to Register** – This option requires a manager or alternate manager to approve registrations for the course.
- **Manager Approval and Designated Additional Approval Required to Register** – This option requires the manager/alternate manager and Additional Approver on Orders to approve registrations for the course.
- **Manager Approval Not Required to Register** – This option will allow learners to register without manager approval.



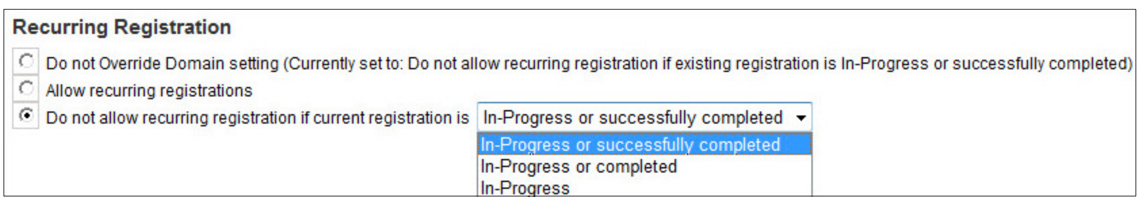
Once the manager approval requirement has been selected, click the Save button located at the bottom right part of the screen.

NOTE: The approval requirement can also be changed at the offering level.

SPECIFYING RECURRING REGISTRATION POLICIES FOR COURSES

Recurring Registration settings allow Learning Administrators to indicate whether or not a learner can register for a class more than once and when that registration can be performed.

- **Do not override domain setting** – This option uses the domain setting to determine recurring registration status and will vary depending upon the domain the course resides in.
- **Allow recurring registration** – This setting allows a learner to reregister for a course even if they have already successfully completed it.
- **Do not allow recurring registration if the current registration is**:
  - *In-Progress or Successfully Completed*: This option prevents a learner from registering for the course when it is in the learner's enrollments or has already been successfully completed.
  - *In-Progress or Completed*: This option prevents a learner from registering for the course when it is in the learner's enrollments or has already been completed successfully or unsuccessfully.
  - *In-Progress*: This option prevents a learner from registering for the course only when the course is in the learner's enrollments.



1. Once the Recurring Registration option has been selected, click the **Save button** at the bottom right part of the screen.

NOTE: The approval requirement can also be changed at the offering level.

Specifying Completion Policies For Courses

SPECIFYING COMPLETION POLICIES FOR COURSES

Learning Administrators can choose to override the default business rule that specifies who is able to mark a course complete.

Select from the following options:

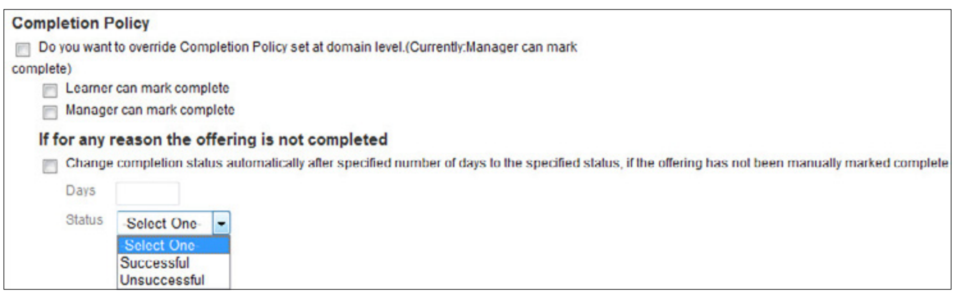
Do you want to override Completion Policy set at Delivery Mode level? - Select this checkbox to override the domain default settings.

- Learner can mark complete – This option allows learners to mark the course complete.

- Manager can mark complete – This option allows managers and alternate managers to mark offerings complete for their employees.

Change Completion Status – This option automatically changes the learner's status in an offering after a specified number of days if the offering has not been manually marked completed.

- Click the checkbox to use this option.
- Enter the number of days the LMS will wait before changing the status.
- Select the status that will be entered for learners by the LMS. The statuses available in the drop-down menu are Successful and Unsuccessful.



Once the Recurring Registration option has been selected, click the **Save button** at the bottom right part of the screen.

NOTE: These setting can also be changed at the offering level.

DELIVERY TYPES TAB

Delivery Types represent the various methods by which a course's content will be delivered. When a Delivery Type is associated with a course, it inherits the basic properties of that course. These properties remain the same regardless of the method by which the course content is delivered (e.g., course description, vendor, course owner, etc.)

Each Delivery Type can have an unlimited number of learning offerings associated with it. The information you specify for the specific Delivery Type is inherited by all learning offerings created for that delivery method (e.g., all offerings associated with the Instructor Led Delivery Type for a specific course will be 8 hours in duration).

At this level, you may also define a list of resources that can be associated with all offerings of a specific delivery type, in addition to information on scheduling policies, such as audience type, price, and drop policy.

Delivery types fall into three categories:

Self-Paced— delivered through the LMS as online content

Scheduled—have a time and location associated with them

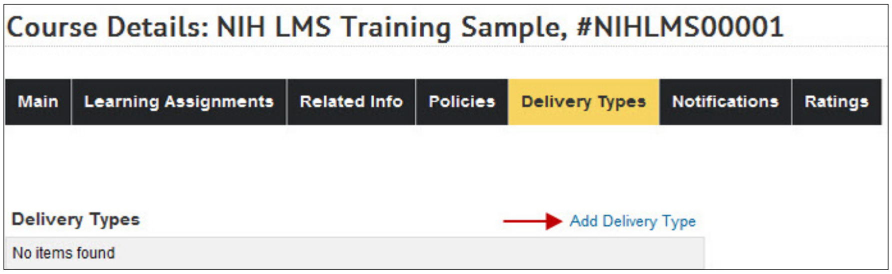
Physical—materials used to deliver training (e.g., manuals, CDs, DVDs, etc.)

A course may have multiple Delivery Types but cannot have a duplicate delivery type. Choose a delivery type that best fits the course you are offering.

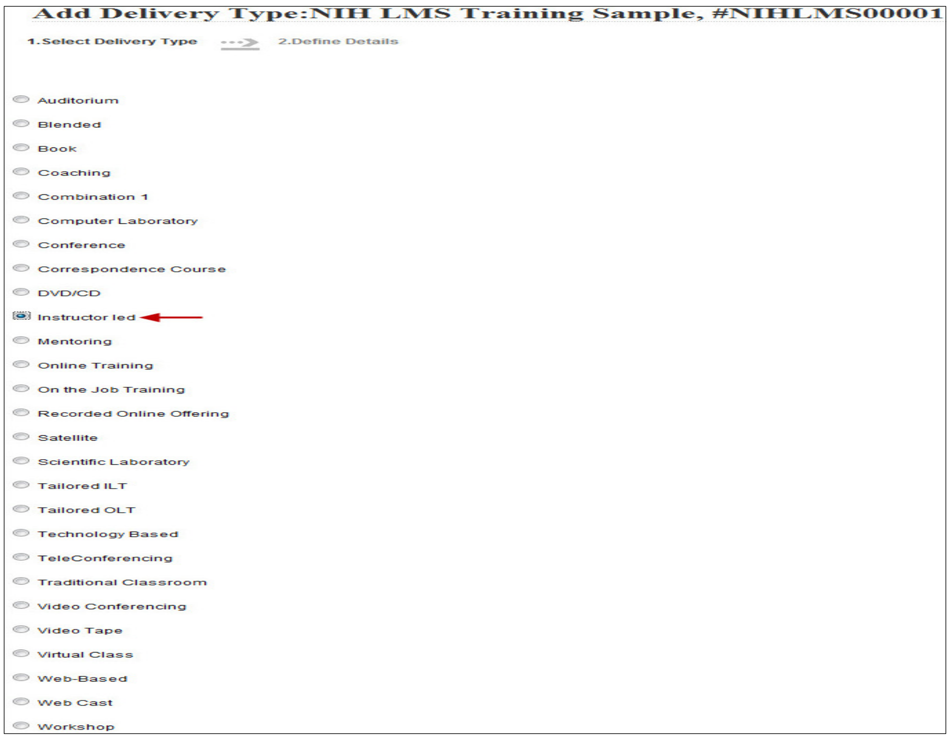
IMPORTANT! If the existing delivery types do not apply to the type of offering that you plan to deliver, please contact the NIH LMS Team for assistance.

ADD A DELIVERY TYPE TO A COURSE - REQUIRED

1. Click the Add Delivery Type **link**.



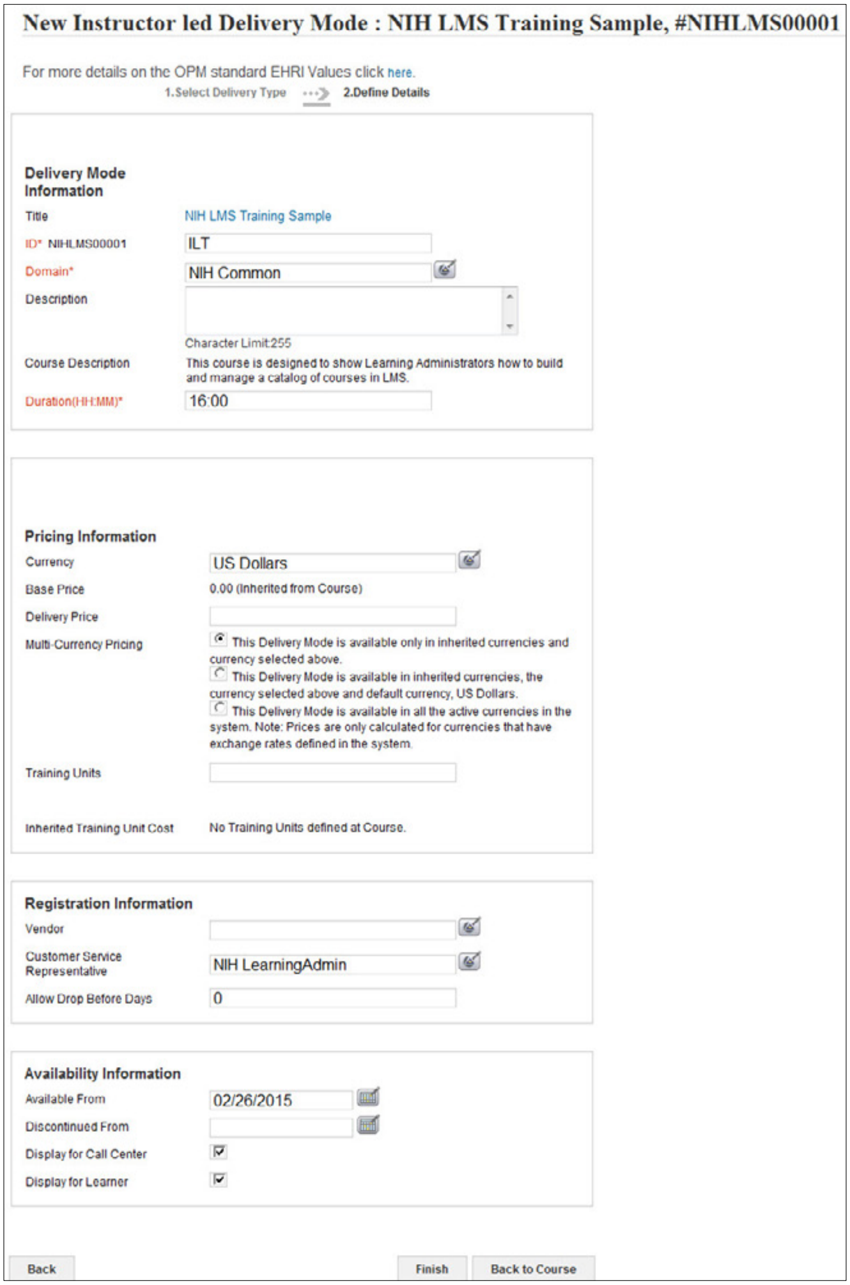
2. Click the **radio button** for the delivery type being added.
3. Click the **Next button** at the bottom of the screen.



NOTE: The non-required fields that display will vary based on the individual Delivery Type. Some information will be pre-populated based on what is defined at the course level.

4. Enter a unique **ID**. (Examples: ILT or OLT for Instructor Led and Online Training)
5. The **domain** should be identical to the domain used at the course level.
6. Enter the **duration** (number of hours) for the course. The format for the duration is ##:## (Example 16:00)
7. Adjust data in the remaining fields as needed then click the **Finish button**.

IMPORTANT! Entering a price in the **Delivery Price** field will supersede the price specified at the Course level. If the Offerings associated with this Delivery Type are free of charge, enter “0” in this field.



New Instructor led Delivery Mode : NIH LMS Training Sample, #NIHLMS00001

For more details on the OPM standard EHRI Values click here.

1.Select Delivery Type → 2.Define Details

Delivery Mode Information

Title	NIH LMS Training Sample
ID* NIHLMS00001	ILT
Domain*	NIH Common
Description	Character Limit:255
Course Description	This course is designed to show Learning Administrators how to build and manage a catalog of courses in LMS.
Duration(HH:MM)*	16:00

Pricing Information

Currency	US Dollars
Base Price	0.00 (Inherited from Course)
Delivery Price	
Multi-Currency Pricing	(●) This Delivery Mode is available only in inherited currencies and currency selected above. ( ) This Delivery Mode is available in inherited currencies, the currency selected above and default currency, US Dollars. ( ) This Delivery Mode is available in all the active currencies in the system. Note: Prices are only calculated for currencies that have exchange rates defined in the system.
Training Units	
Inherited Training Unit Cost	No Training Units defined at Course.

Registration Information

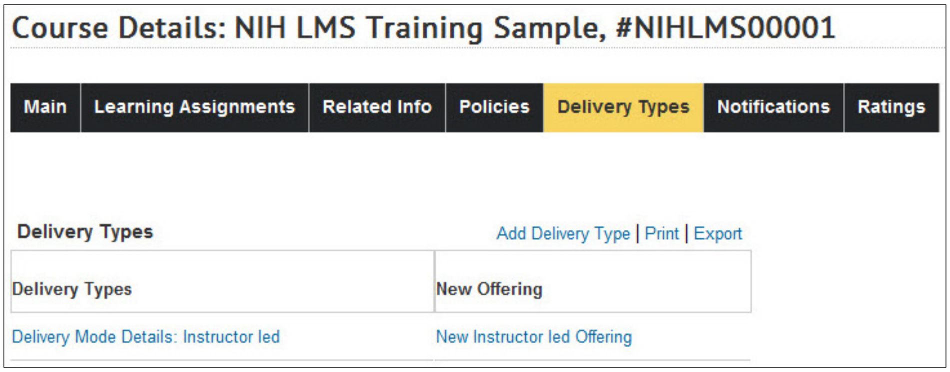
Vendor	
Customer Service Representative	NIH LearningAdmin
Allow Drop Before Days	0

Availability Information

Available From	02/26/2015
Discontinued From	
Display for Call Center	☑
Display for Learner	☑

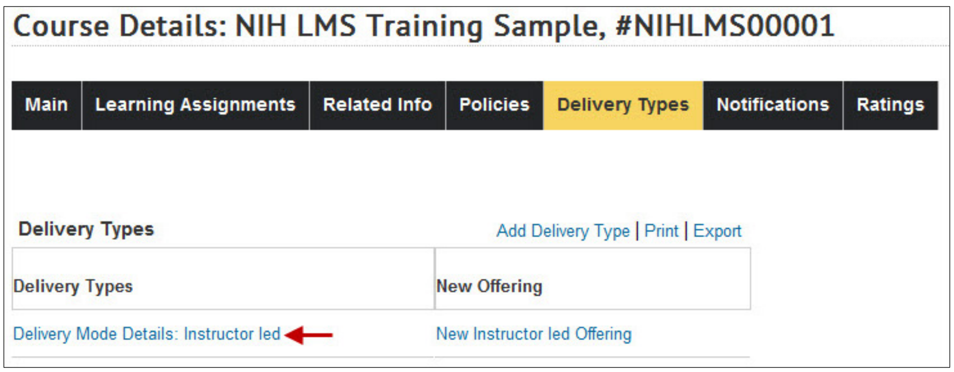
Back | Finish | Back to Course

8. The new delivery type will appear on the Delivery Types tab.



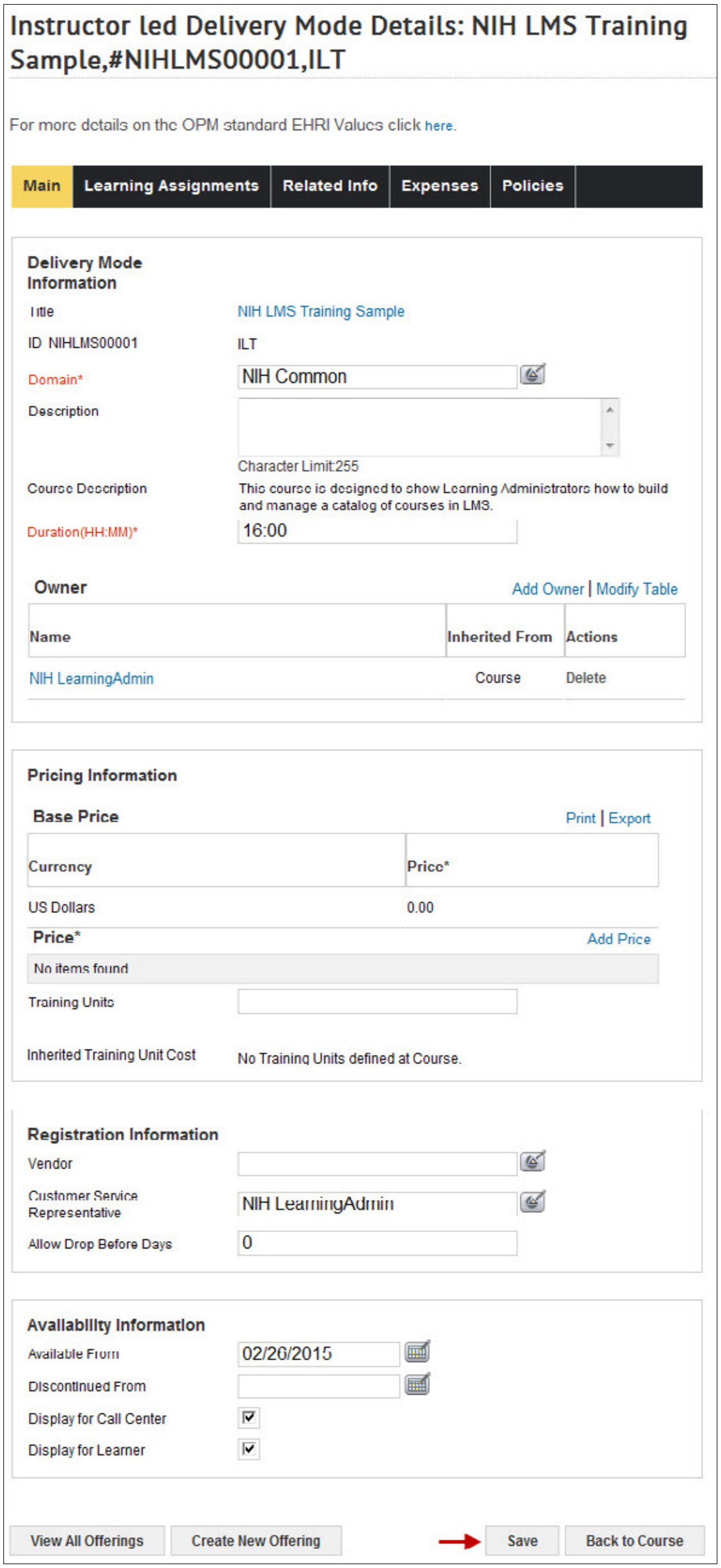
EDIT DELIVERY TYPE SETTINGS - OPTIONAL

1. Click the **Delivery Mode Details link**.



MAIN TAB

1. Make the necessary changes then click the **Save button**.

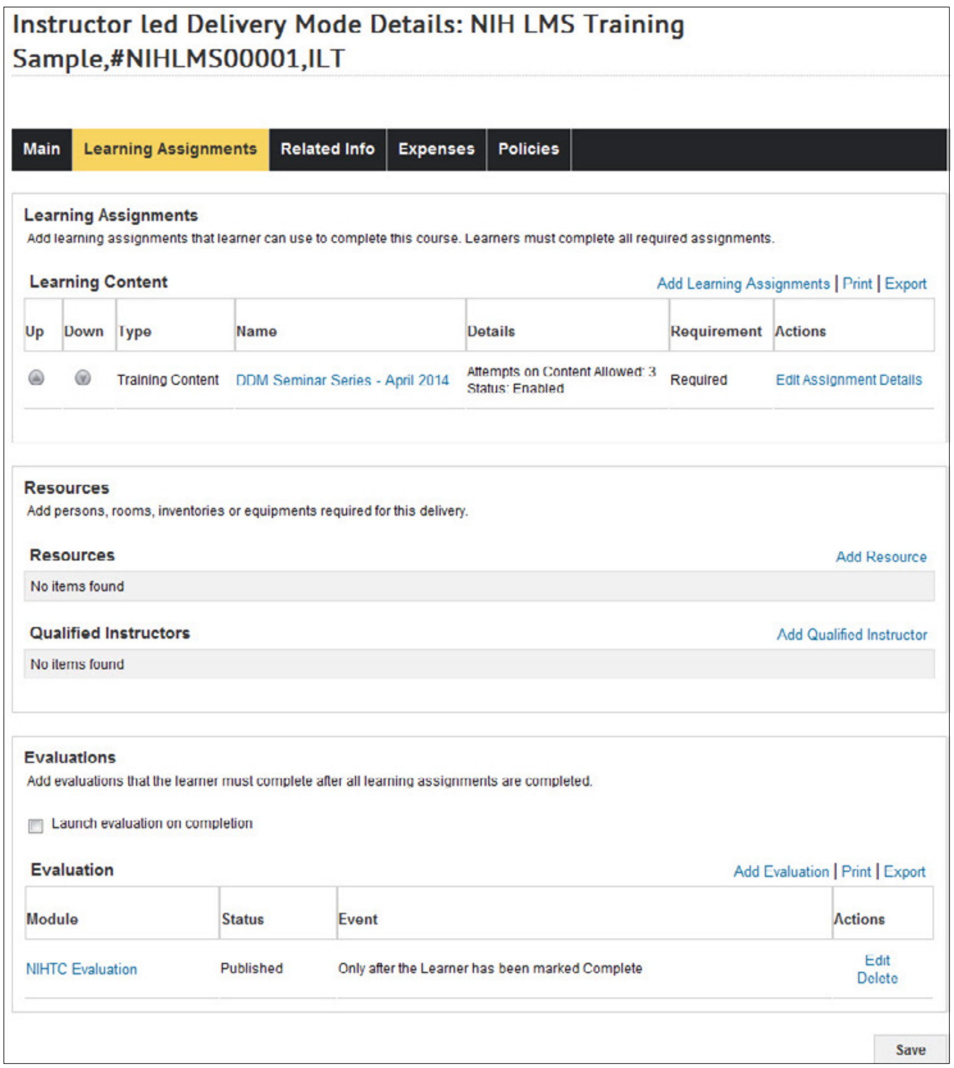


LEARNING ASSIGNMENTS TAB

The Learning Assignments tab can be used to add the following to a delivery type:

- **Learning content**
  - Tasks – These are items that must be completed and checked off by the learning administrator, manager, or learner in order to successfully complete the course.
  - Content - This refers to online course content.
- **Resources** – Resources include rooms, people, equipment and inventory.
- **Evaluations** – These are questions learners answer after completing a course. The evaluations must be created in the LMS to be used.

NOTE: Any learning assignments or evaluations that were identified at the course level will become defaults at the delivery types level. They may be updated or deleted at any time.



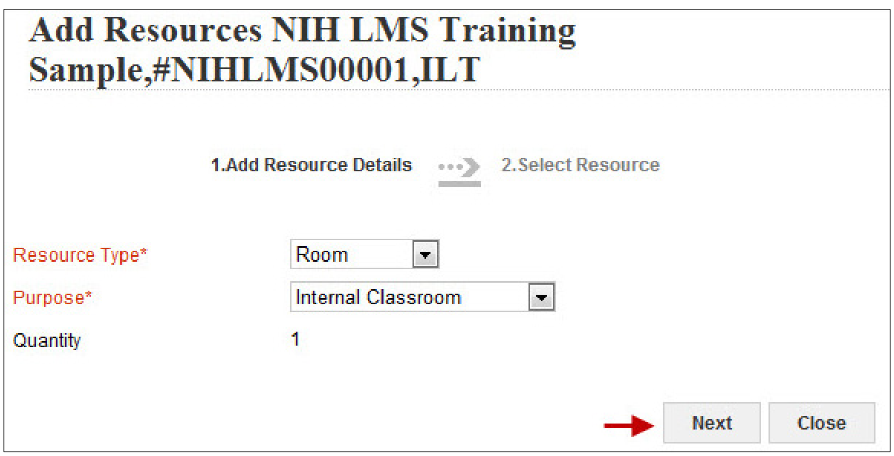
LEARNING ASSIGNMENTS TAB – ADDING A ROOM RESOURCE

NOTE: Any changes made on this tab will be saved automatically.

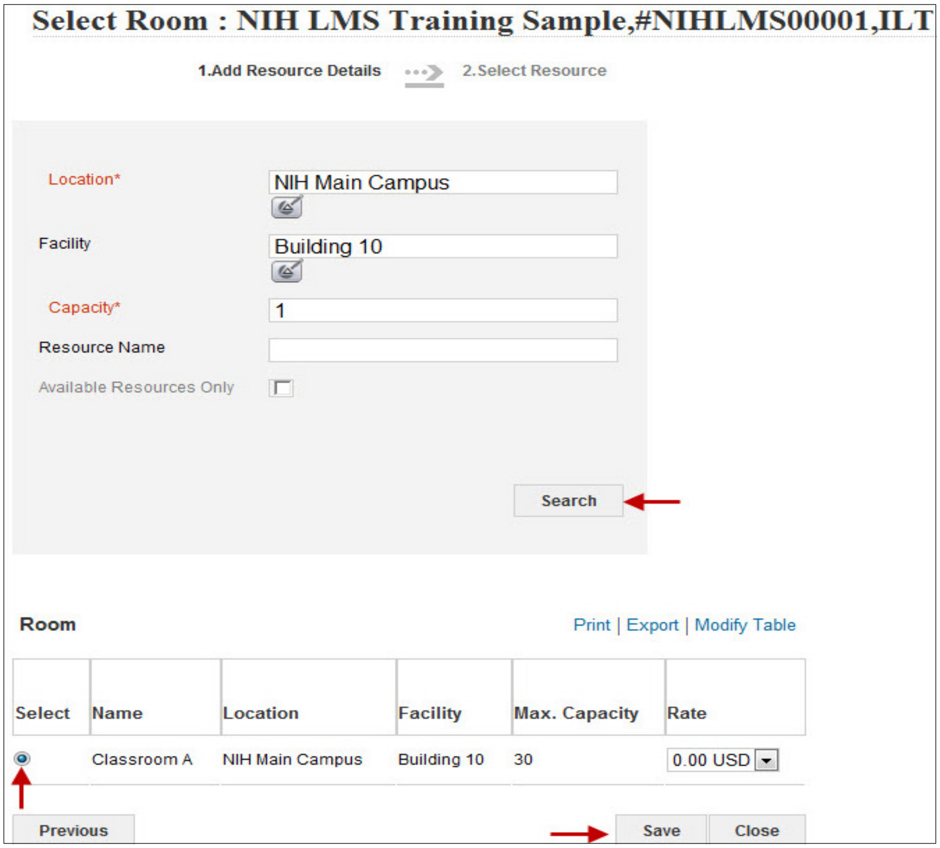
Instructor-led courses should be assigned to a room. Making the room assignment at the delivery type level will assign the room to every offering that is created base on the delivery type. Room assignments can also be made at the offering level. This is useful if you have multiple rooms that could potentially be used for the course.

1. Click the **Add Resource link**.

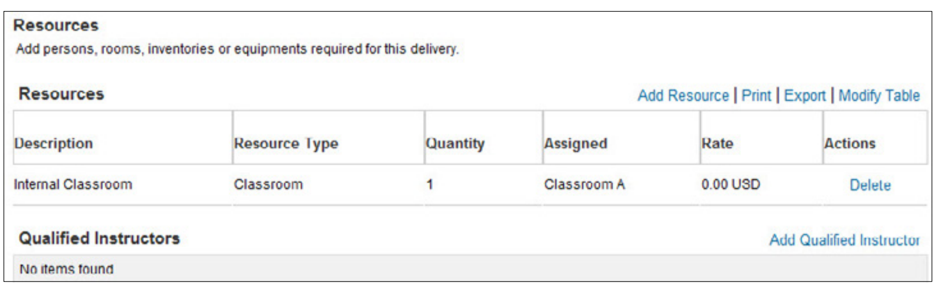
2. Select “Room” as the **Resource Type**.
3. Select “Internal Classroom” as the **Purpose**.
4. Click the **Next button**.



5. Enter **search criteria** for the room being added.
6. Click the **Search button**.
7. Click the **checkbox** associated with the room being added.
8. Click the **Save button**.

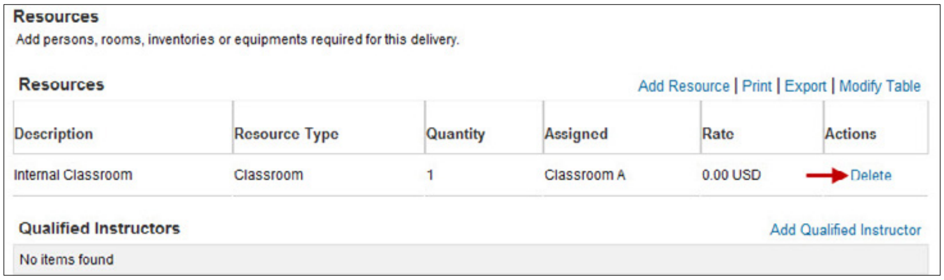


9. The room will now be associated with the delivery type of this course.

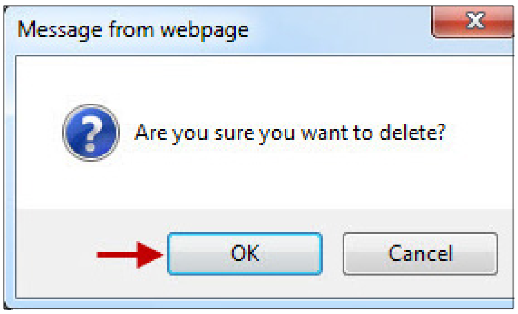


DELETING A ROOM RESOURCE

1. From the Learning Assignments tab, click the **Delete link** associated with the room being deleted.



2. Click **OK** in the confirmation popup window.

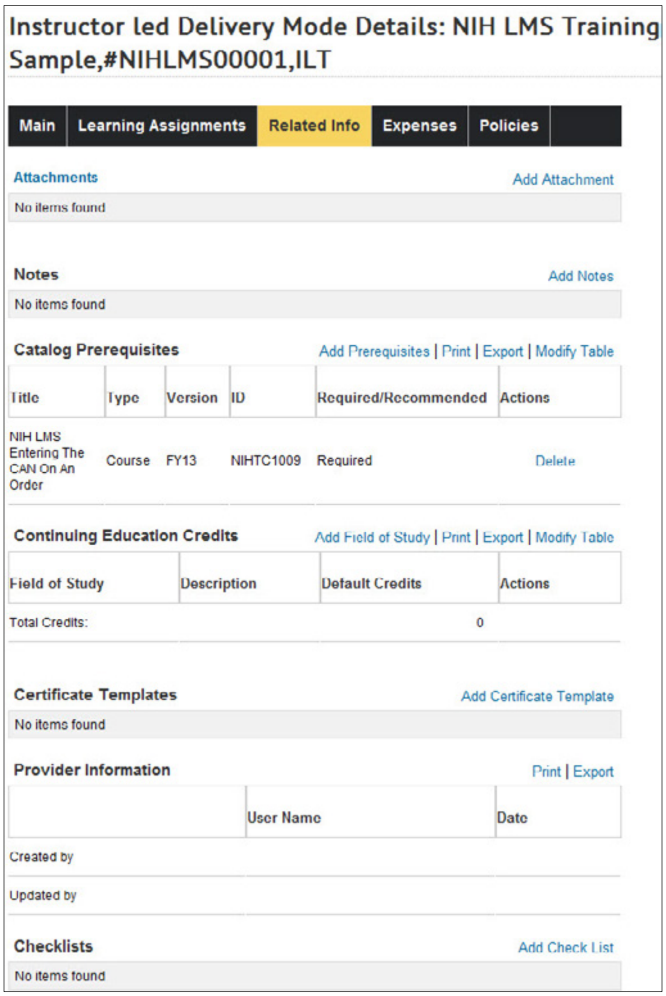


3. The room will no longer be associated with the delivery type.

RELATED INFO TAB

Learning Administrators can add specific items to a delivery type that will be available in addition to items added at the course level and in some cases overwrite the settings at the course level.

- Attachments – Attachments added here will be specific to this delivery type and be available along with course level attachments.
- Prerequisites – Prerequisites added here will be in addition to any set at the course level.
- Continuing Education Credits – Adjusting the credits or field of study will overwrite the course defined settings. Additional fields of study may be added.



To make changes, follow the directions as describe in the Managing Courses section of this manual.

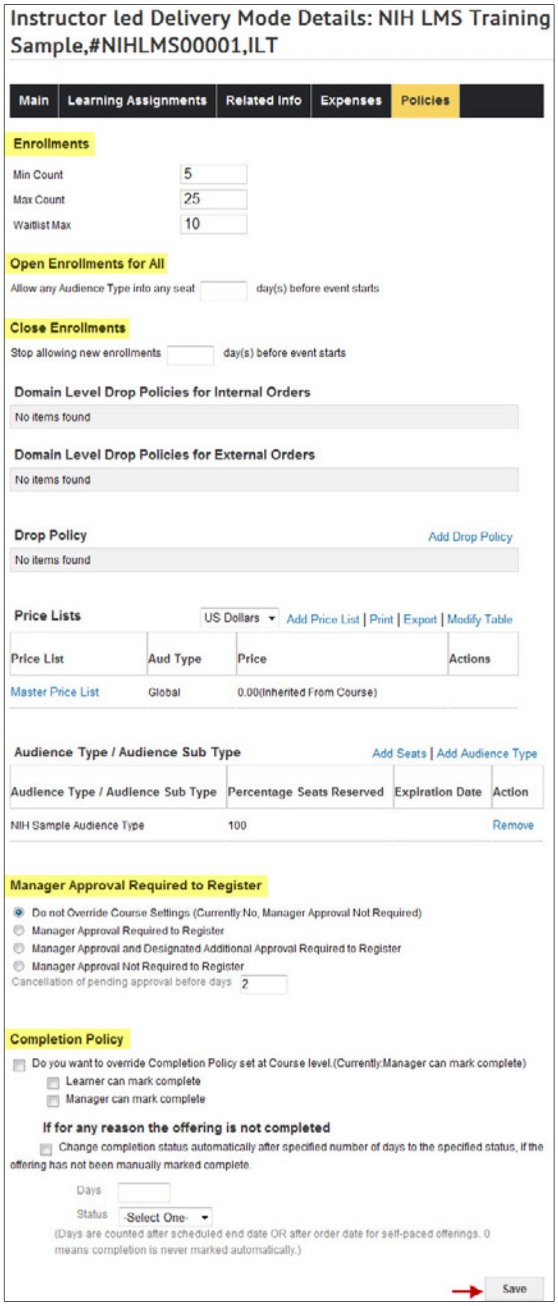
Adding Attachments
Adding A Course Prerequisite
Adding Continuing Education Credits To A Course

NOTE: All changes on this tab are automatically saved.

POLICIES TAB

Learning Administrators can adjust various policies specific to the delivery type on the Policies tab. These policies will carry over to every offering created based on the delivery type.

NOTE: All changes made on this tab will be lost unless the Save button is clicked after making the changes.



Enrollments: To change the Minimum Count, Maximum Count, and Waitlist Count, enter the new values into their respective fields.

Open Enrollments for All: The number entered in this field represents the number of days the start of an offering that a course audience type will lose its effect. All offerings based on this delivery type will become open for registration to all learners X number of days before the offering starts.

Close Enrollments: The number entered in this field represents the number of days before the offering starts that registrations will no longer be accepted by learners.

Manager Approval Required to Register: Select a radio button to change the course policy.

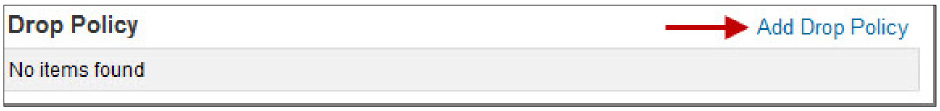
Completion Policy: Select the appropriate checkboxes to change the course completion policy.

DELIVERY TYPES – ADDING A DROP POLICY

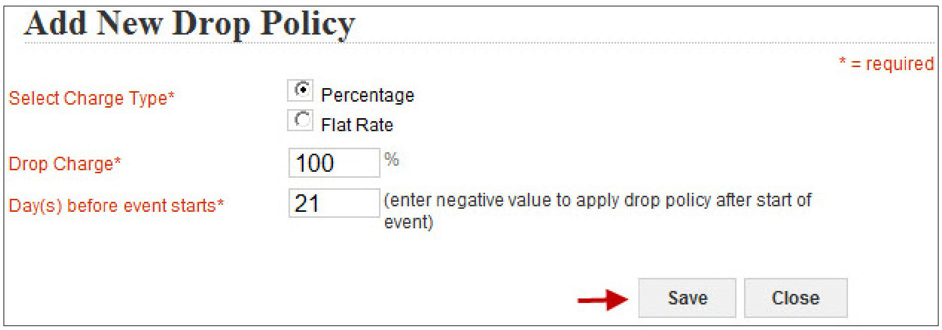
Learning Administrators can add a drop policy to a delivery type. All offerings that are created based on this delivery type will inherit the drop policy as a default.

Follow the steps below to create a drop policy for a delivery type.

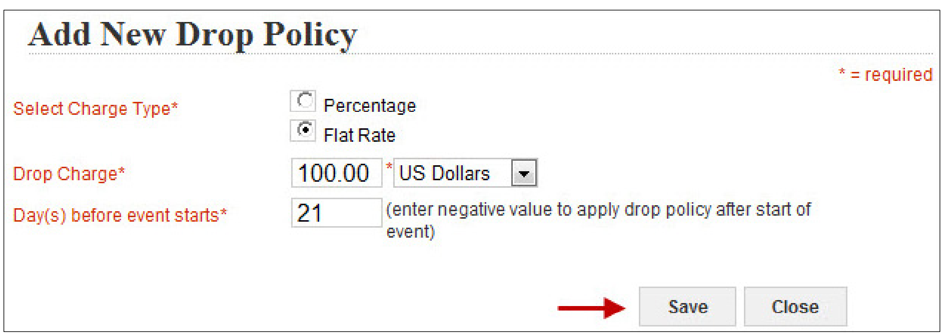
1. From the Policies tab, click the **Add Drop Policy link**.



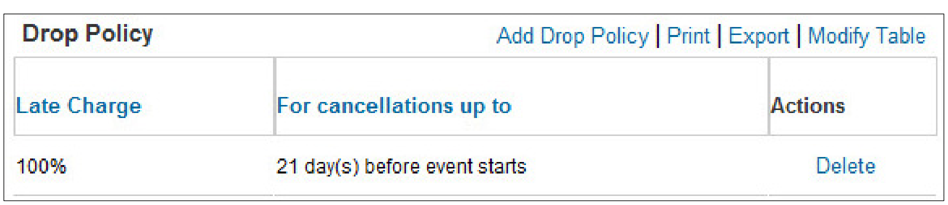
2. Enter the percent to be charged if a learner drops the offering and the number of days before the offering start date this policy will be effective.
3. Click the **Save button**.



NOTE: Selecting the Flat Rate option requires a price to be entered: (Shown below)

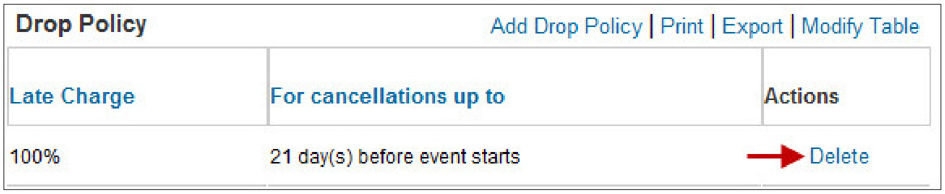


4. The policy will now be added to the delivery type.

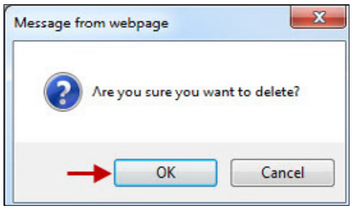


DELETE A DROP POLICY

1. From the policies tab, click the **Delete link** associated with the drop policy.



2. Click the **OK button**.

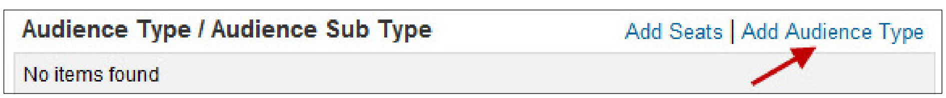


3. The drop policy will no longer apply to the delivery type.

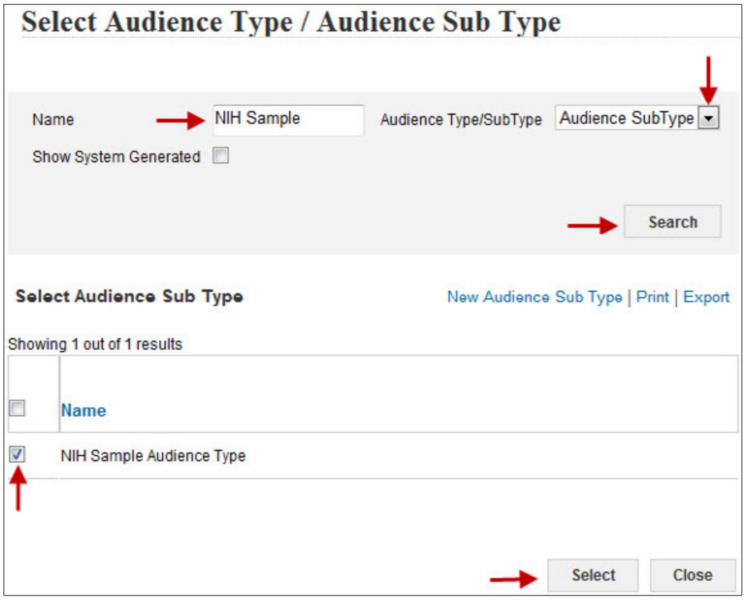
ADD AN AUDIENCE SUB-TYPE TO A DELIVERY TYPE

Learning Administrators can add an audience sub-type to a delivery type. Adding an audience sub-type at this level restricts all offerings created based on this delivery type to the population in the audience sub-type. Follow the instructions below to add an audience sub-type to a delivery type.

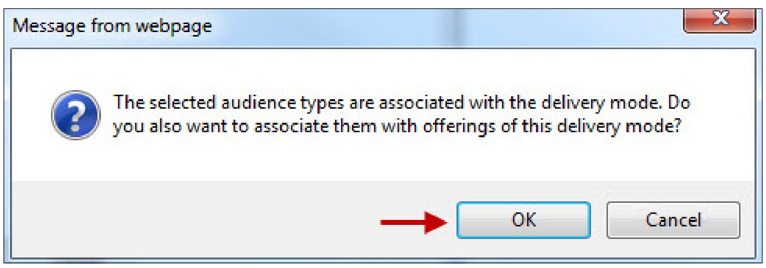
1. Click the **Add Audience Type link**.



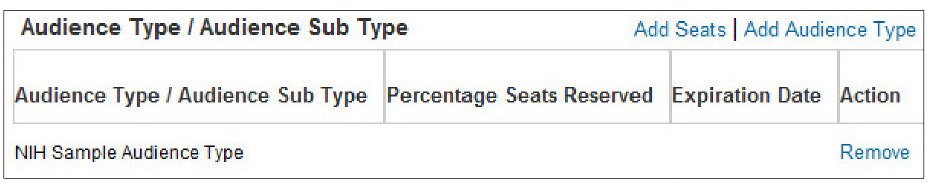
2. Select **Audience SubType** from the Audience Type/Sub Type drop-down menu.
3. Enter the **name** of the audience sub type.
4. Click the **Search button**.
5. Click the **checkbox** associated with the audience sub type.
6. Click the **Select button**.



7. Click the OK button in the confirmation window.



8. The Audience Sub Type will now be added to the delivery type.



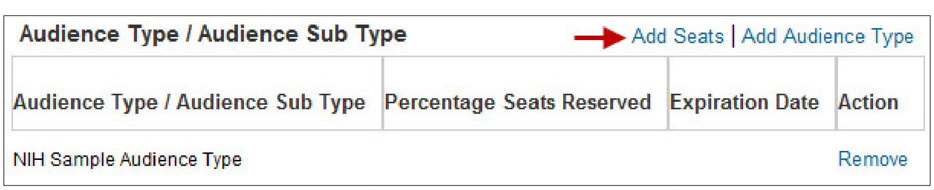
NOTE: You can add additional audience sub types by repeating these steps.

NOTE: All offerings created from this delivery type will be restricted to the audience sub-type populations that have been added.

ADDING SEATS TO AN AUDIENCE SUB TYPE

A percentage of seats can be reserved for specific audience sub types that will be reflected in the offerings created. Follow the instructions below to reserve seats in the audience sub type.

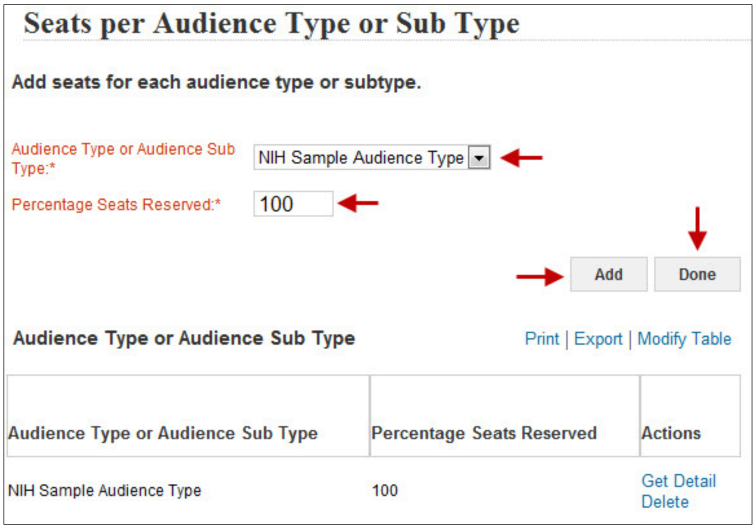
1. Click the **Add Seats link**.



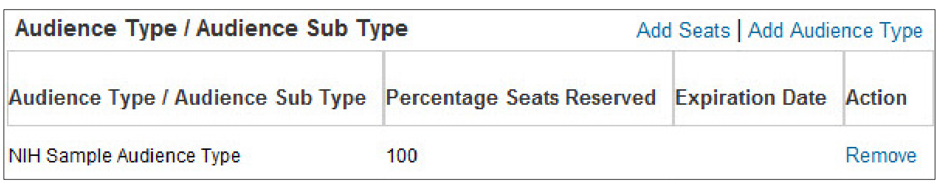
2. Select the **audience Sub Type** from the Audience Type or Audience Sub Type

drop-down menu.

3. Enter a **number for the percentage** of seats that will be allocated per offering to the audience sub type.
4. Click the **Add button** then click the **Done button**.

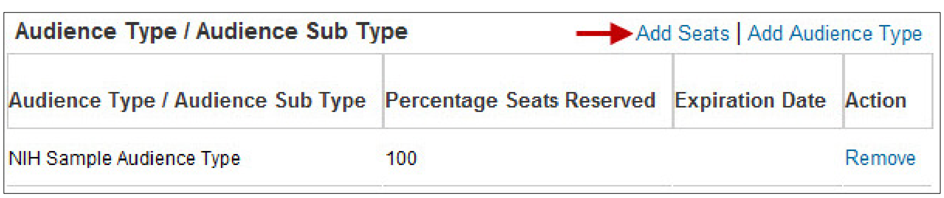


5. The percentage of seats reserved will now be displayed along with the audience sub type.

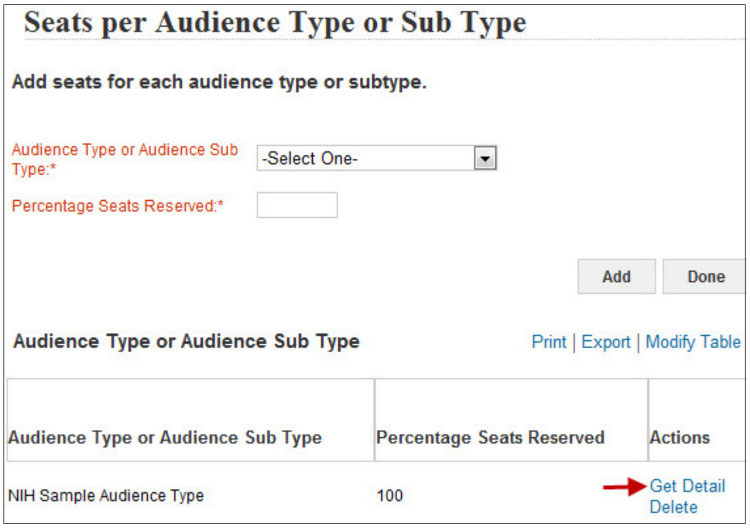


EDITING THE NUMBER OF RESERVED SEATS

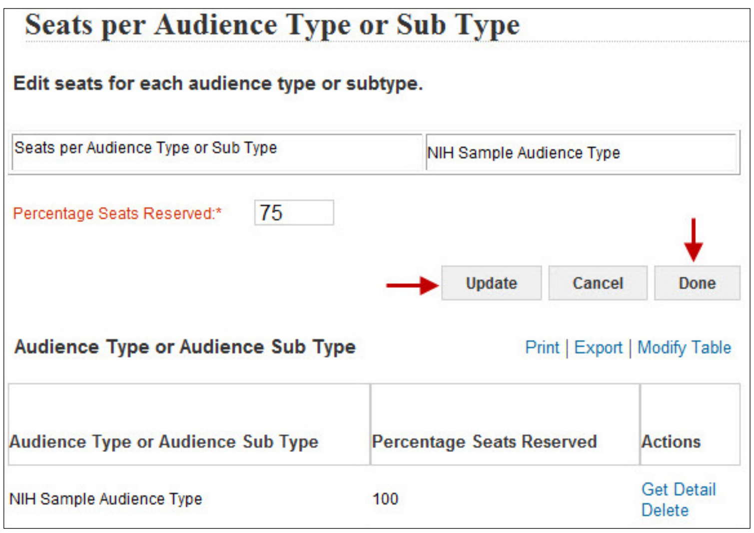
1. Click the **Add Seats link**.



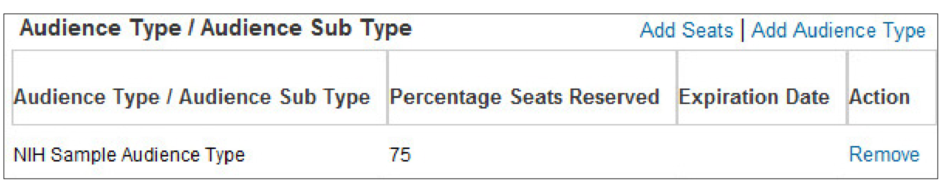
2. Click the **Get Detail link** in the Actions column.



3. Enter a new value for the Percentage Seats Reserved field.
4. Click the Update button.
5. Click the Done button.



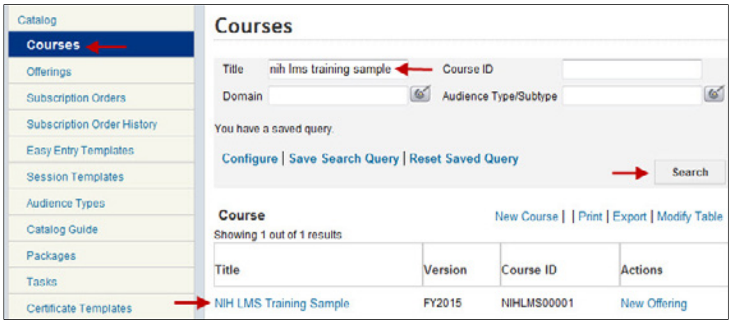
6. The reserved number of seats will now be updated.



LOCATING A COURSE AFTER IT IS CREATED

1. Click the **Admin Icon**.

2. Select **Courses** in the left navigation menu. (Default)
3. Enter search criteria for the course then click the **Search button**.



4. Click the course **Title link** to view and edit the course details.

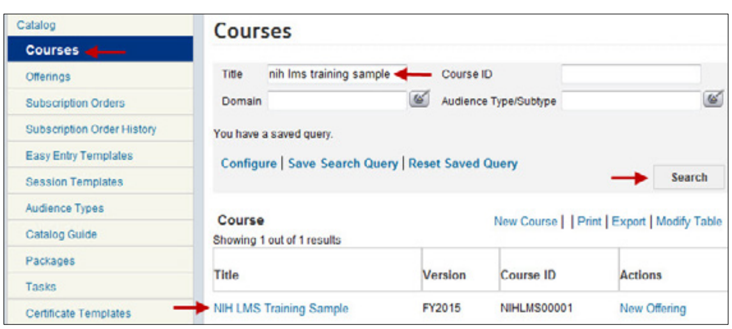
CREATING A NEW COURSE VERSION – OPTIONAL

Learning Administrators have the ability to create multiple versions of the course. This is useful for courses that may have pricing or content changes periodically. Creating a new version keeps a record of the course's previous settings, attachments, content, price, etc. If a course is update without creating a new version, there will be no record in the LMS of the previous settings.

Follow the instructions below to create a new version of a course.

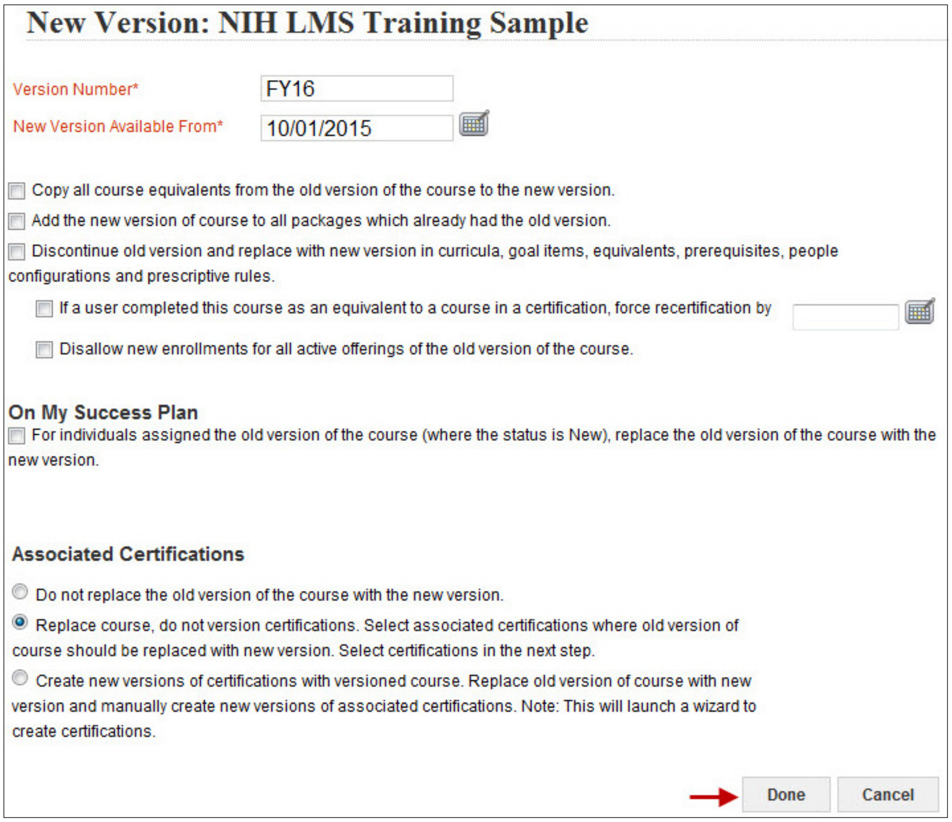
1. Click the **Admin Icon**.

2. Select **Courses** in the left navigation menu. (Default)
3. Enter search criteria for the course then click the **Search button**.



4. Click the course **Title link** to view and edit the course details.
5. Scroll to the bottom of the screen and click **Create New Version**.

6. Enter the new version number and the date from which the course will be available. (Both are required to save a new version.)
7. Select any other options you would like to take effect when the new version is created.
8. Click the **Done button**.



NOTE: The old version of the course will still be active until the new version becomes available.

MANAGING OFFERINGS

OFFERINGS

Offerings, which are also known as classes or learning events, are individual instances of Delivery Types. Just as Delivery Types inherit details from the parent course, offerings inherit details from the parent delivery type.

There are four places from which you can create a new offering:

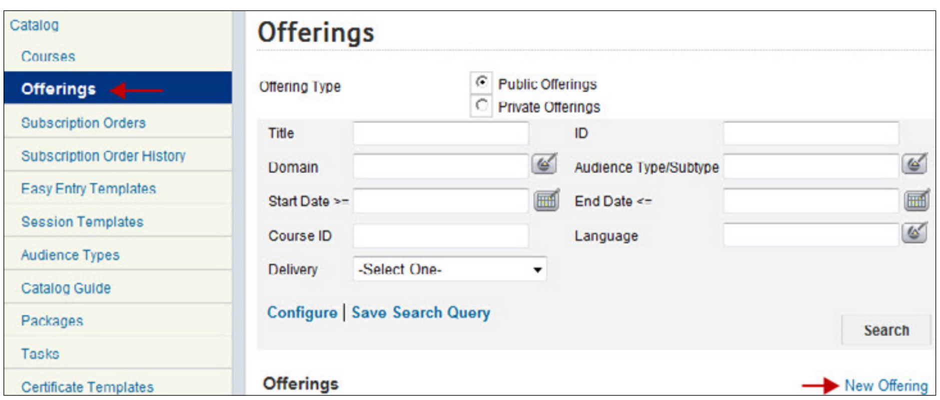
- The **Delivery Type tab** of a specific course
- The **New Offering link** on the Offerings search screen.
- The **Course Search Results table** after searching for a course.
- The **Main Tab** of an offering.

The following instructions will guide you through creating an offering from the Offerings search screen.

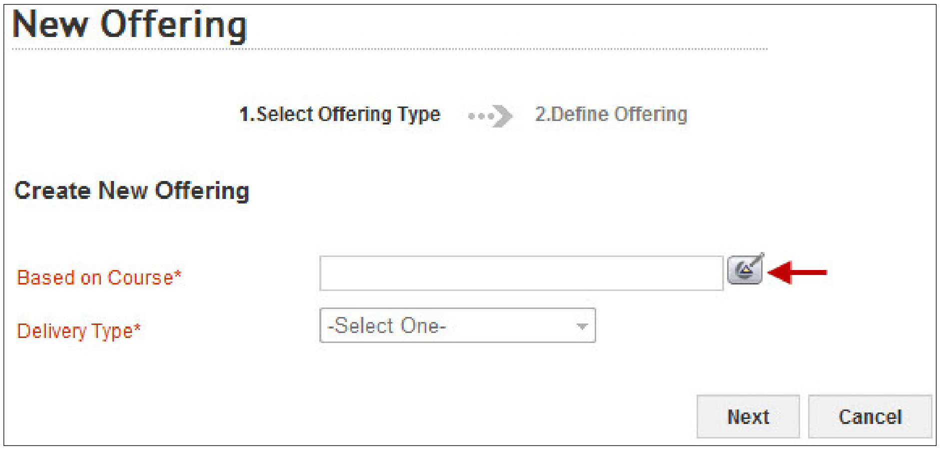
CREATE AN OFFERING

1. Select the **Admin Icon**.

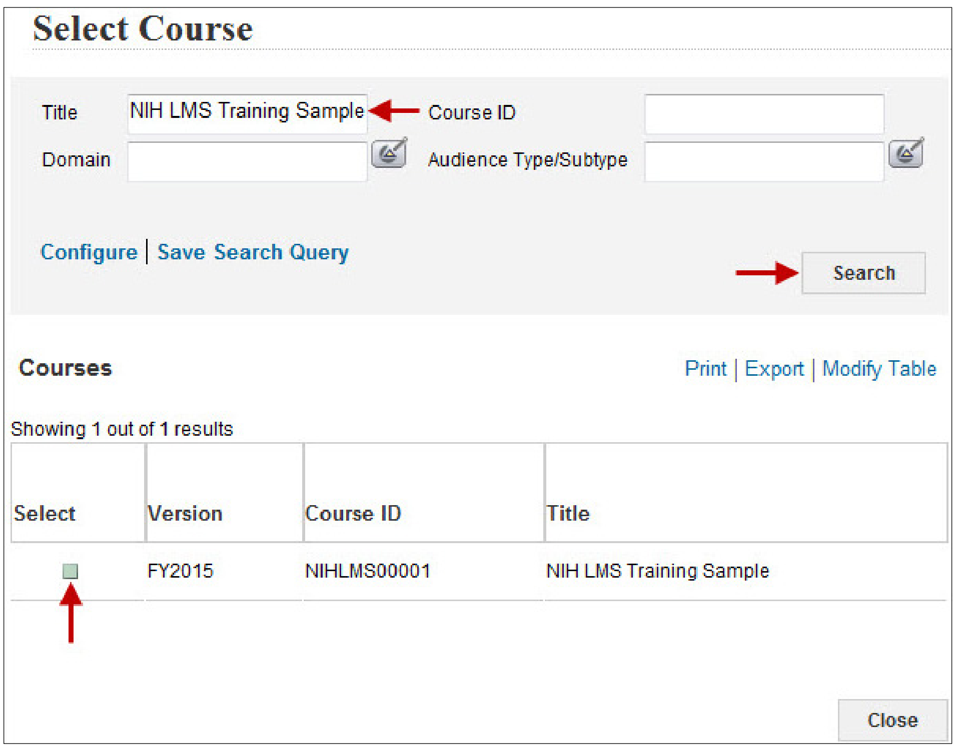
2. Select **Offerings** in the left navigation menu.
3. Click the **New Offering link**.



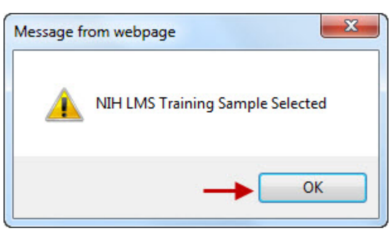
4. Click the **Based on Course pick icon**.



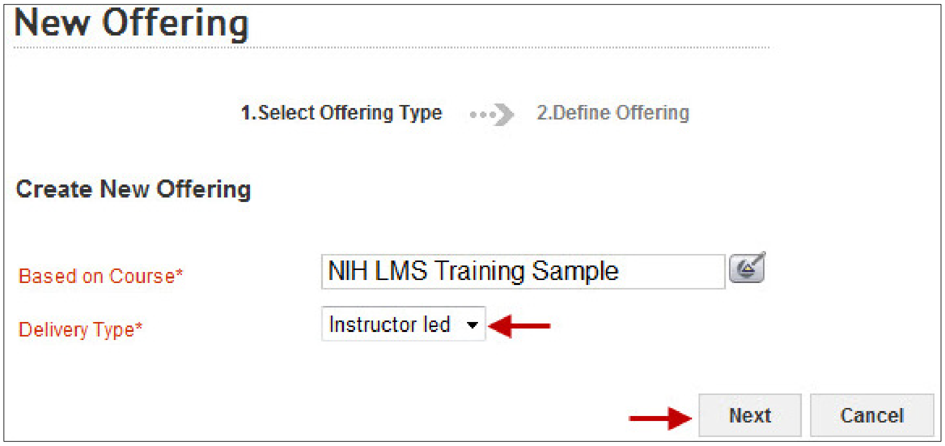
5. Enter search criteria for a course then click the **Search button**.
6. Click the **checkbox** associated with the course in the results table.



7. Click **OK** in the confirmation popup window.



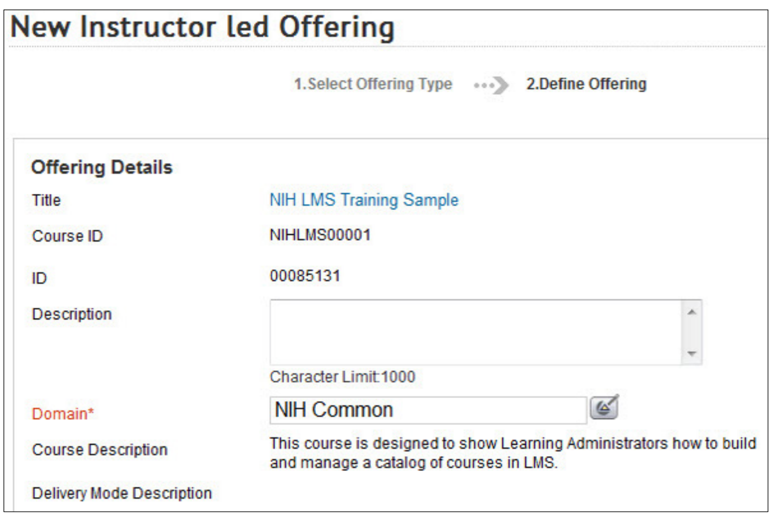
8. Select a delivery type from the **Delivery Type drop-down menu**.
9. Click the **Next button**.



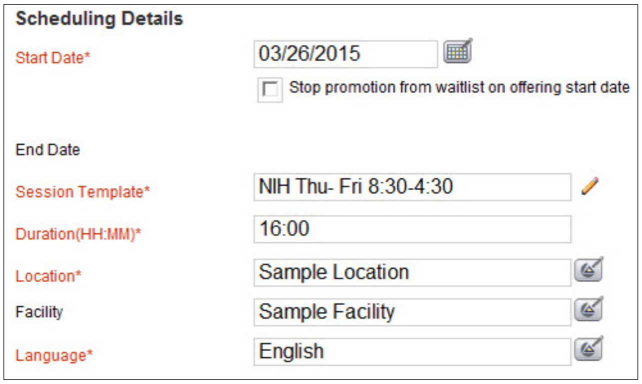
10. The Offering Details screen will be displayed.

EDIT OFFERING DETAILS - REQUIRED

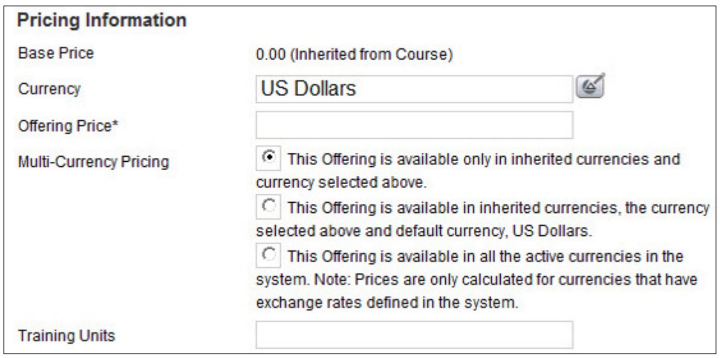
1. In the Domain field, verify that the correct domain is specified and that it is the same domain that is also specified for the Course and Delivery Type. If not, change it so that it matches the domain of the other levels.
2. A description for this offering may be entered. This description will be in addition to the description displayed from the course level.



3. Enter the **start date** of the offering.
4. Enter a **session template**. This will automatically calculate the end date.
5. Enter the **duration**. This will default to the duration of the delivery type but can be changed if needed.
6. Enter the **location and facility**.
7. Enter the appropriate **language**.

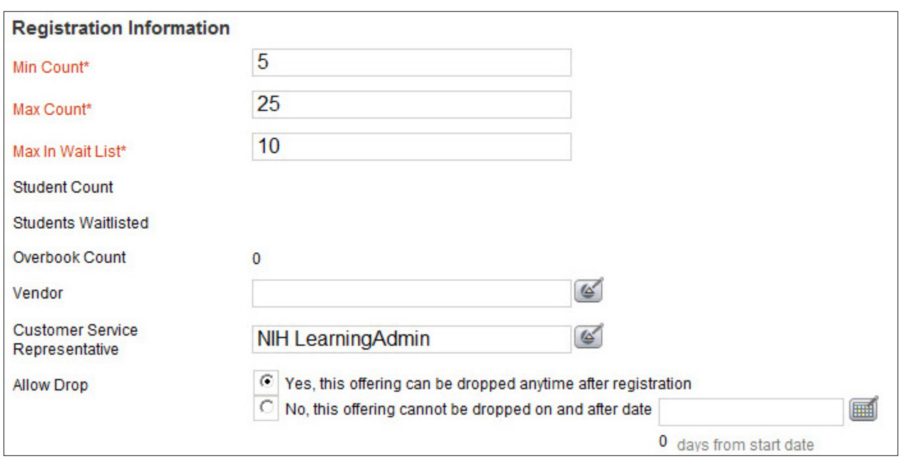


8. The Offering Price and Training Units can be adjusted in the Pricing Information section if needed.

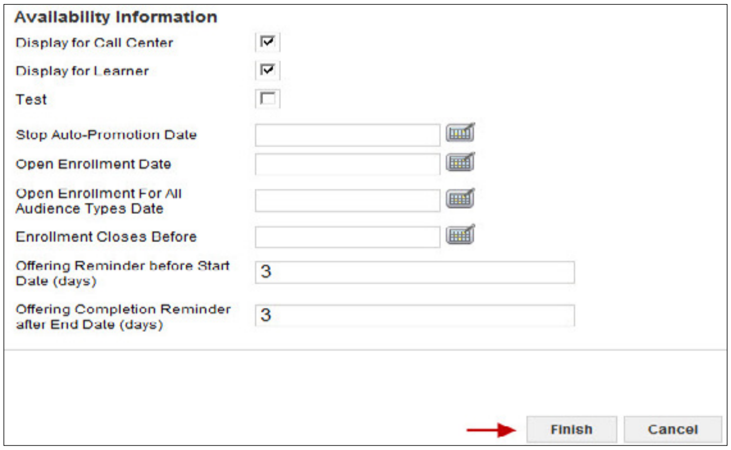


9. Make any needed changes in the **Registration Information** section.

10. The **Min Count**, **Max Count**, and **Max in Waitlist** will default based on the delivery type settings. These may be changed if needed.



11. Make any necessary changes in the **Availability Information** section then click the **Finish button**.

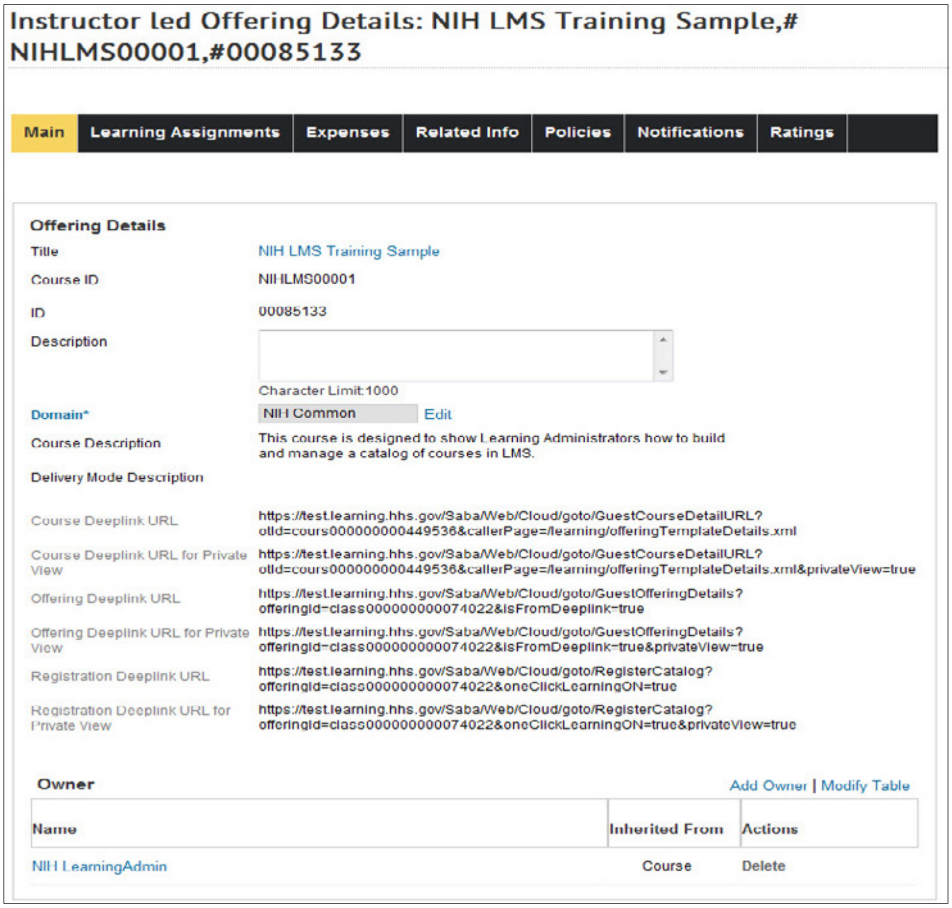


- **Display for Call Center** – Checking or unchecking does not change any functionality in the LMS. Leave as is.
- **Display for Learner** – When checked, the offering is visible to learners in the LMS Catalog.
- **Test** – When checked, the test attached to the course becomes available to learners taking this offering.
- **Stop Auto-Promotion Date** – The date entered here is the date learners no longer move from the waitlist to the roster even if space becomes available.

- **Open Enrollment Date** – The date entered here is the date the offering becomes visible in the LMS catalog for all learners to register.
- **Open Enrollment For All Audience Types Date** – The date entered here is the date all learners will be able to register even if an audience type is assigned to the offering.
- **Enrollment Closes before** – The date entered here is the date that learners can no longer register even if space is available.
- **Offering Reminder Before Start Date (days)** – The number entered here represents then number of days before the start date of the offering that a reminder notification will be sent to registered learners.
- **Offering Completion Reminder after End Date (days)** – The number entered here represents the number of days after the offering end date that a reminder notification will be sent to the owner of the offering.

USING OFFERING DEEPLINKS

Once the offering is saved, deep links will be available for use on the main page. Below is a description of what they are used for.

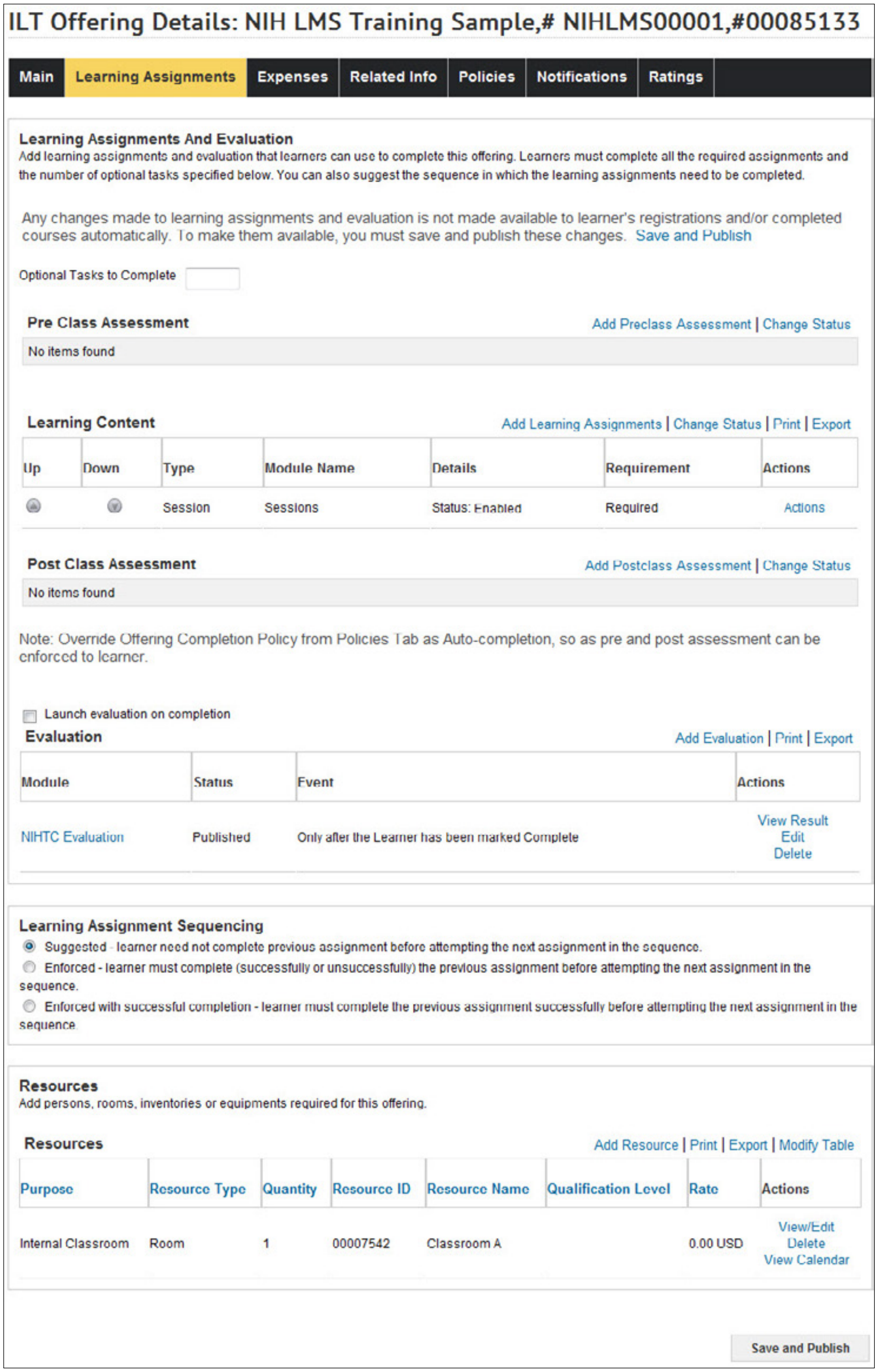


- **Course Deeplink URL** – This link directs a learner to the course where all course details can be viewed and registrations for any available offerings may be performed.
- **Offering Deeplink URL** – This link directs a learner to the offering where all offering details can be viewed and registration for the offering may be performed.
- **Registration Deeplink URL** – This link registers learners for the offering.

NOTE: The Private view links allow learners to view even when the Display For Learner checkbox is unchecked.

OFFERINGS – LEARNING ASSIGNMENTS TAB

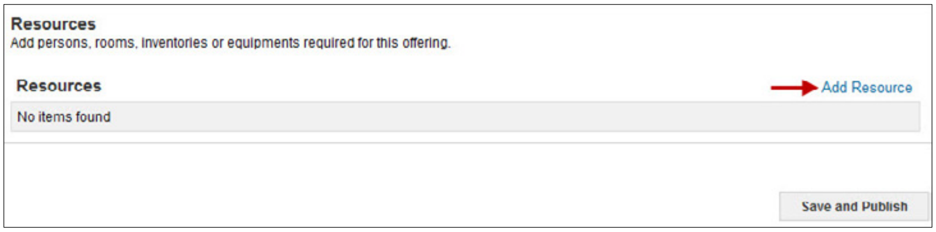
Learning Administrators may change any of the previous settings that have defaulted from the course and delivery type levels. All changes affect the offering only.



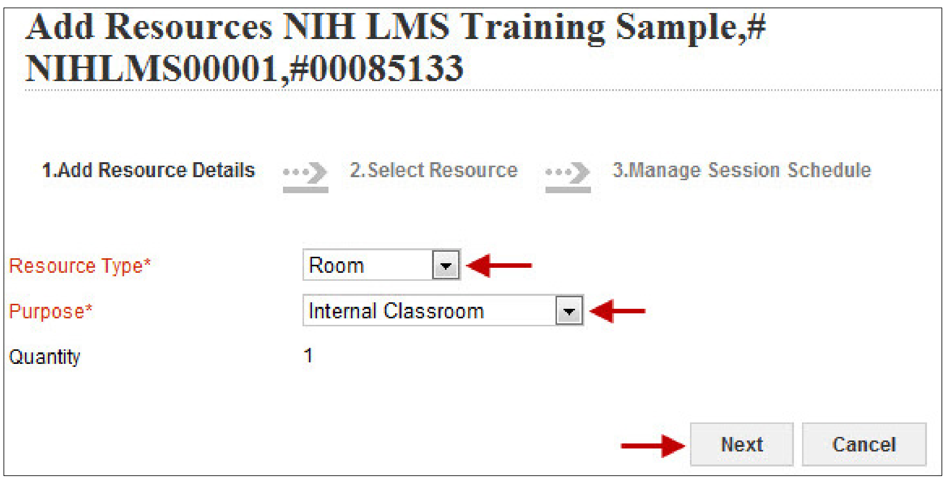
ADDING A ROOM RESOURCE - RECOMMENDED

Adding a room to instructor-led offerings is important so that learners know which room the offering is being held in. The room is displayed in the email notification sent at the time of registration. Follow the instructions below to add a room to the offering.

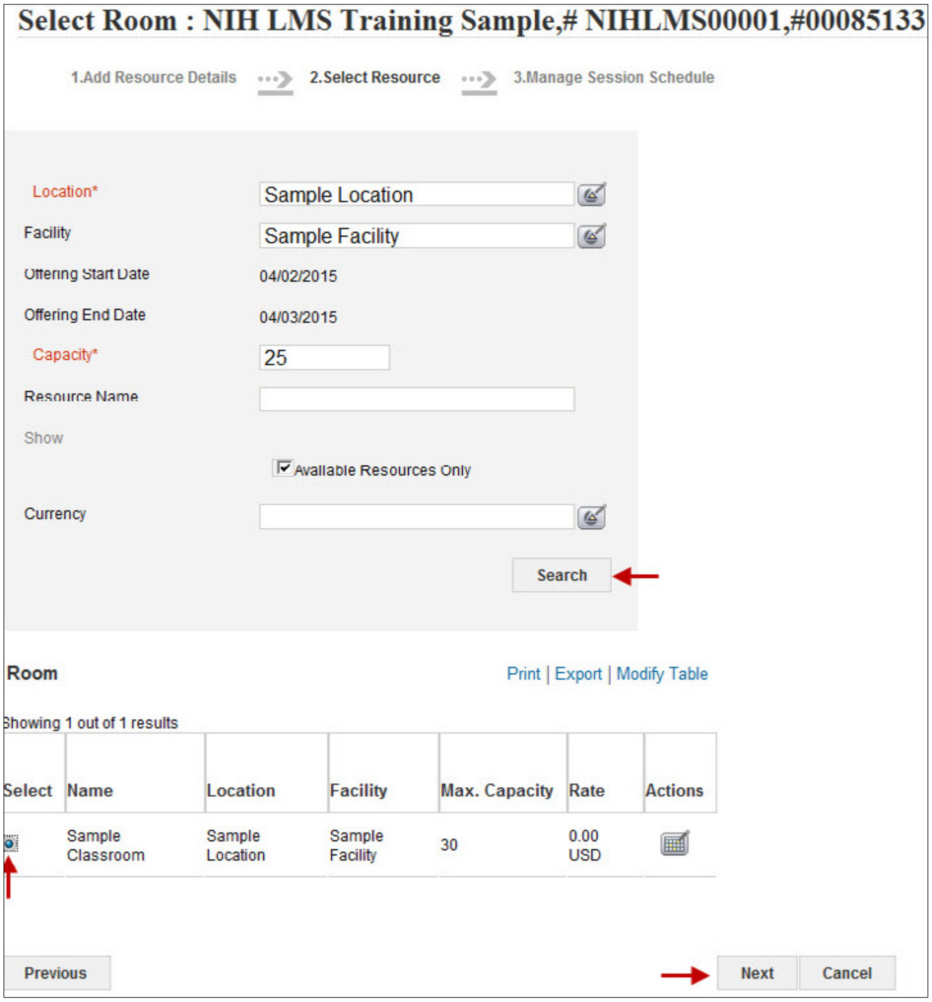
1. Click the **Add Resource link**.



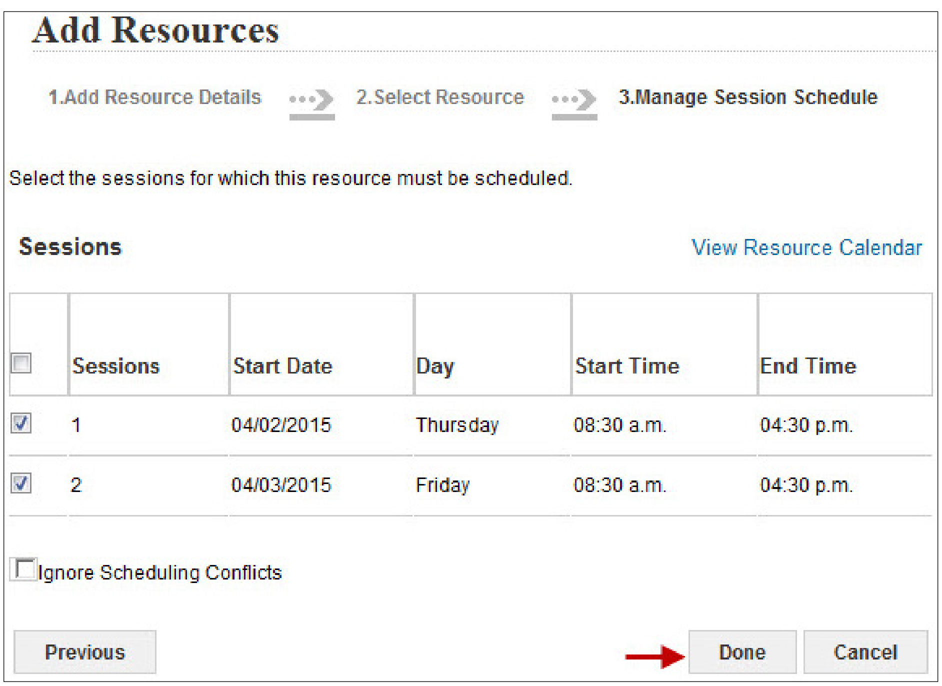
2. Select **Room** from the Resource Type drop-down menu.
3. Select **Internal Classroom** from the Purpose drop down menu.
4. Click the **Next button**.



5. Enter search criteria for the room then click the **Search button**.
6. Select the **radio button** associated with the room being selected.
7. Click the **Next button**.



8. On the Add Resources screen, click the **Done button**.

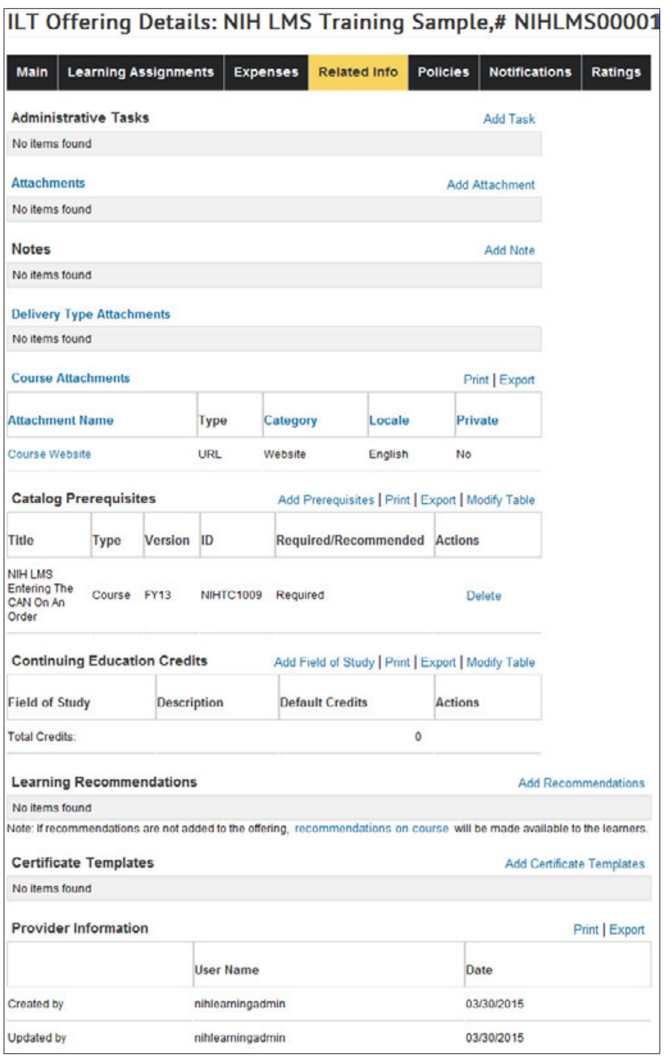


9. The offering will now be assigned to the room.

- Change a room by clicking the **View/Edit link** in the Actions column.
- Delete a room by clicking the **Delete link** in the Actions column.
- View the room calendar by clicking the **View Calendar link** in the Actions column.

RELATED INFO TAB

The related information that is inherited from the course and delivery type levels may be changed as described in earlier sections of this manual. These changes will only affect this specific offering. **Changes made on this tab are automatically saved**.



Add Attachments: See page 84

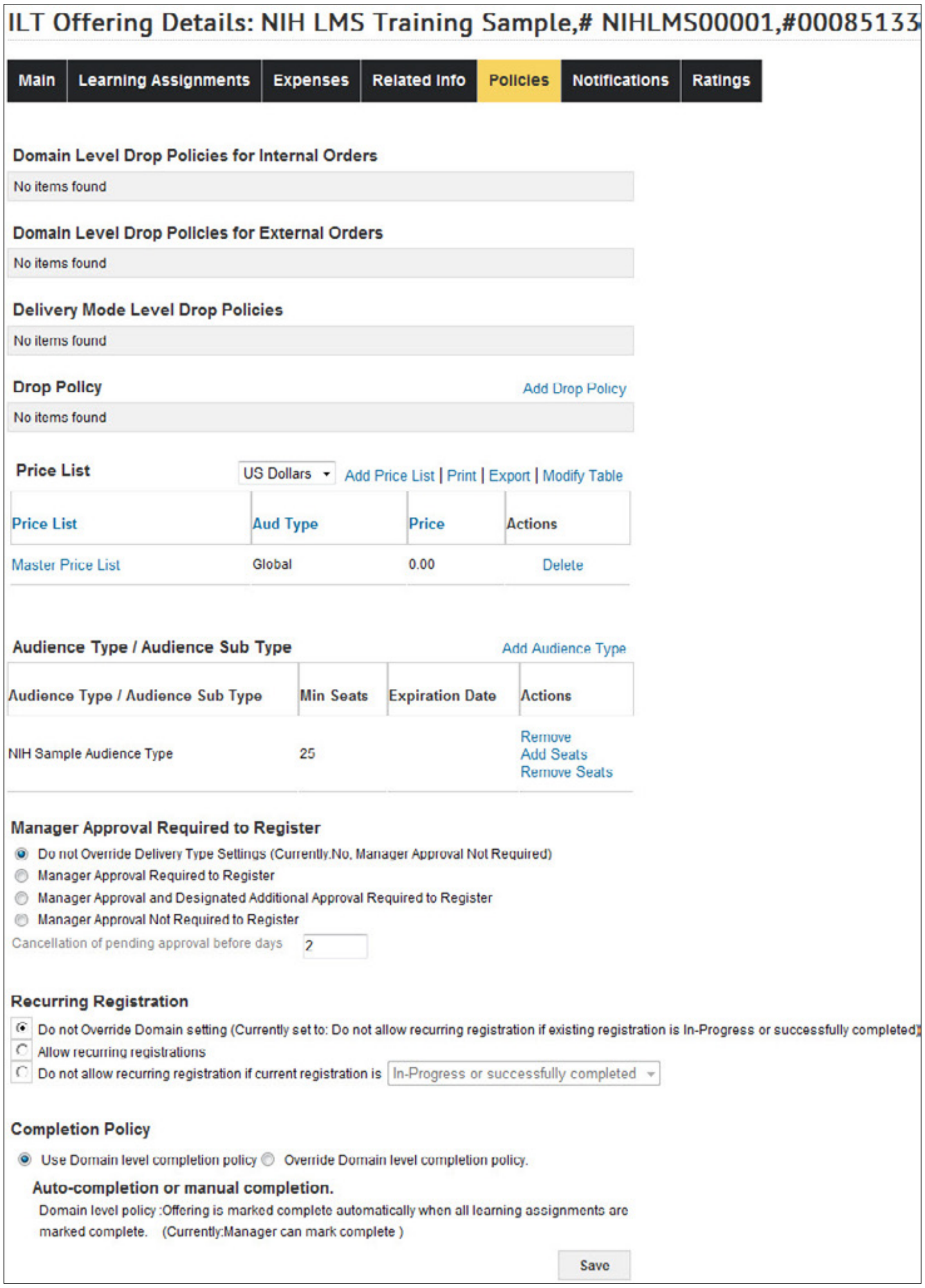
Add Prerequisite: See page90

Add Field of Study: See page96

Add Learning Recommendation: See page100

POLICIES TAB

The policies that are inherited from the course and delivery type levels may be changed as described in earlier sections of this manual. These changes will only affect this specific offering. **After making changes, the Save button must be clicked to make the changes permanent**.



ADD A DROP POLICY

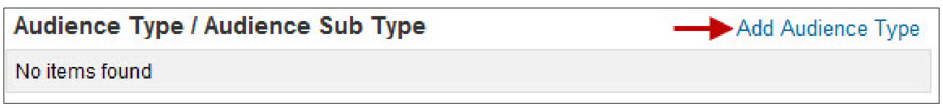
Follow the instructions in the Delivery Types section to add a drop policy to the offering.

ADD AUDIENCE TYPE SEATS

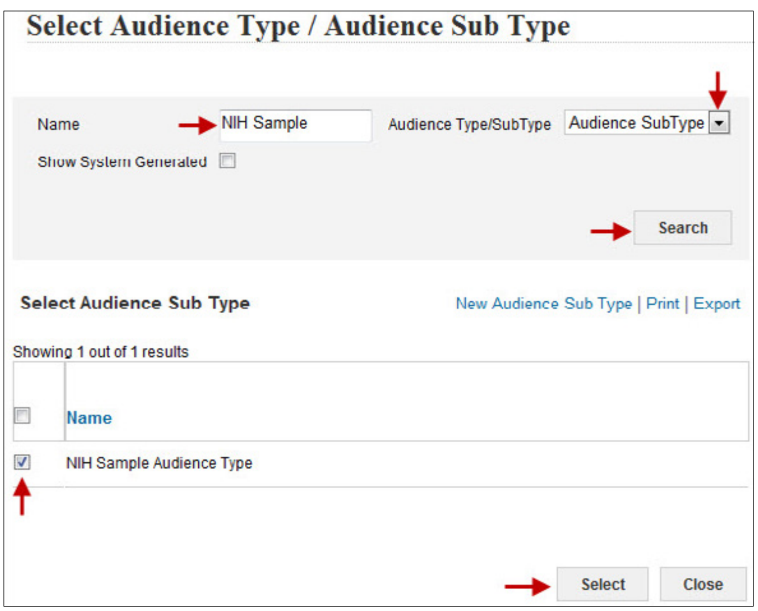
The LMS allows Learning Administrators to identify specific groups of people to have access to an offering through the use of Audience sub-types. Any audience sub-type that is added at the offering level will apply just to that offering. If the intent is to have every offering restricted to a specific audience, the audience sub-type must be applied to the delivery type (See page 118). If the course has multiple deliver types, then the audience must be applied at the course level to ensure that all offerings are restricted. To add an audience sub-type to a specific offering, follow the instructions below.

NOTE: By default, all learners can view and register for all offering in the LMS unless they are restricted by an audience sub-type.

1. Click the **Add Audience Type link**.



2. Select **Audience Sub Type** from the Audience Type/Sub Type drop-down menu.
3. Enter the name of the audience sub type then click the **Search button**.
4. Click the **checkbox** associated with the audience sub type.
5. Click the **Select button**.



The offering will now be restricted to the population of the audience sub type.

Audience Type / Audience Sub Type			Add Audience Type
Audience Type / Audience Sub Type	**Min Seats**	**Expiration Date**	**Actions**
NIH Sample Audience Type			Remove Add Seats

SPECIFY RESERVED SEATS FOR AN AUDIENCE SUB TYPE

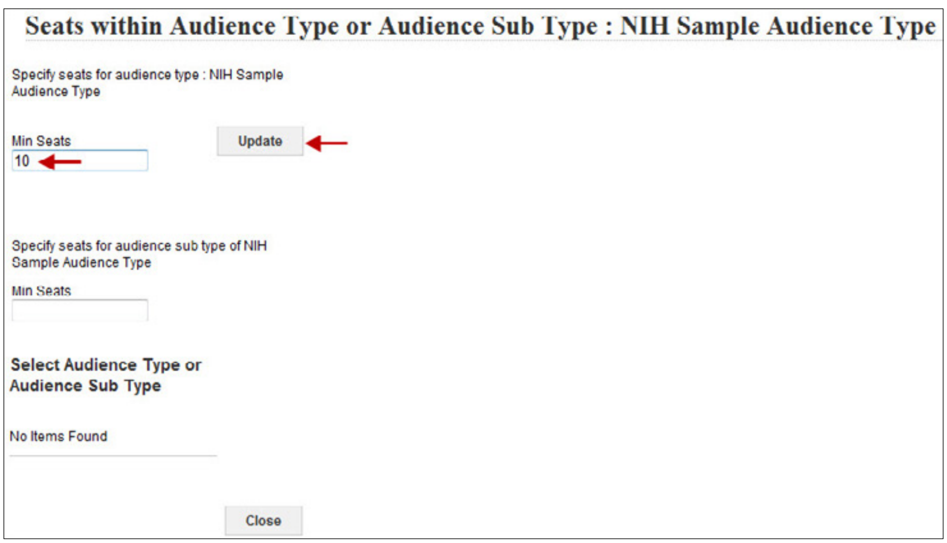
Learning Administrators can reserve a specific number of seats for an audience sub type in any offering. Follow the directions below to reserve seats.

1. Click the **Add Seats link** in the Actions column.

Audience Type / Audience Sub Type			Add Audience Type
Audience Type / Audience Sub Type	**Min Seats**	**Expiration Date**	**Actions**
NIH Sample Audience Type			Remove Add Seats

2. Enter a value in the **Min Seats field** then click the **Update button**.

NOTE: The value entered cannot exceed the number of seats available in the offering.



3. The number of reserved seats for the audience sub type will now be displayed.

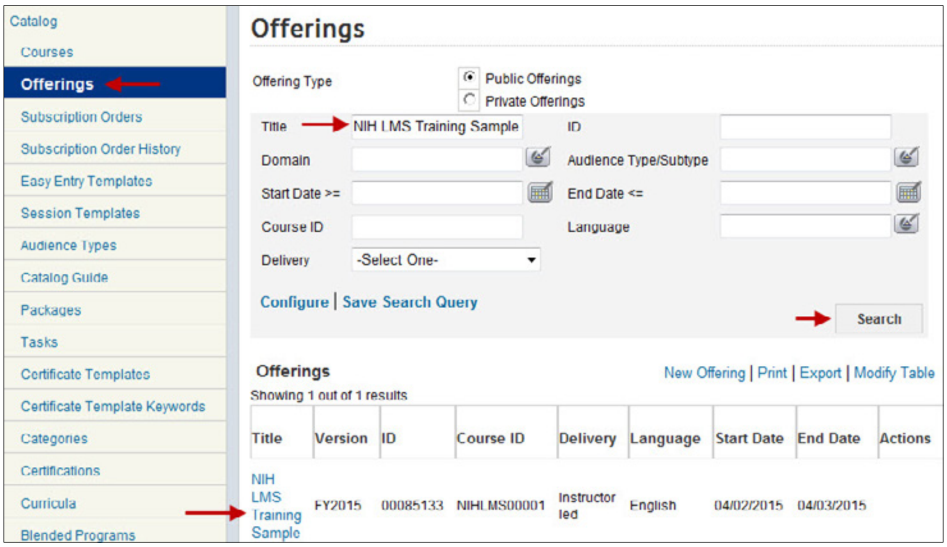
Audience Type / Audience Sub Type			Add Audience Type
Audience Type / Audience Sub Type	**Min Seats**	**Expiration Date**	**Actions**
NIH Sample Audience Type	10		Remove Add Seats Remove Seats

These seats will be reserved for the population in the audience sub type. All other remaining seats will be available to learners that are not in the audience sub type.

LOCATING AN OFFERING AFTER IT IS CREATED

1. Click the **Admin Icon**.

2. Select **Offerings** in the left navigation menu.
3. Enter search criteria for the offering then click the **Search button**.
4. When the offering is found, click the **Title** to access the offering details.

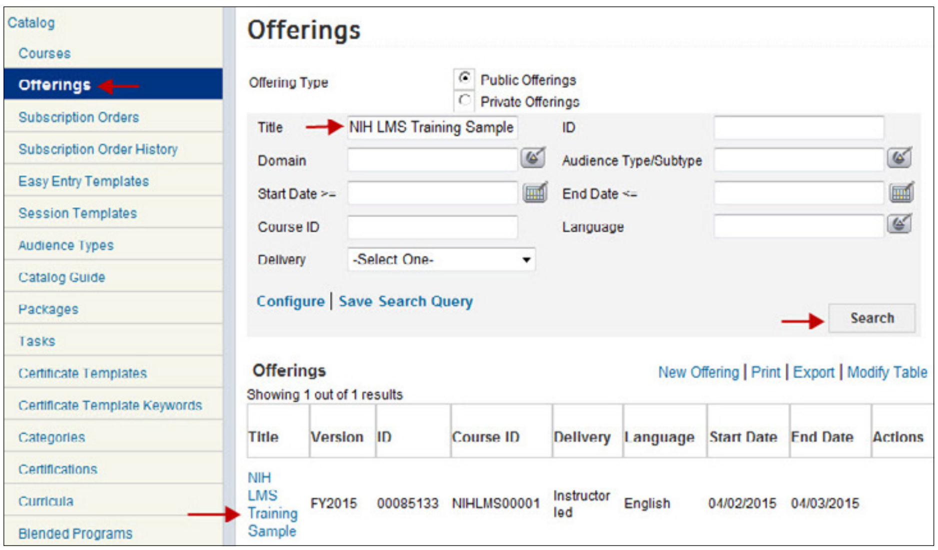


NOTE: Offerings cannot be found by learners using the simple search on the day that they are created. Using the advanced search or category search method is the best way to for learners to locate the offering on the day that it is created.

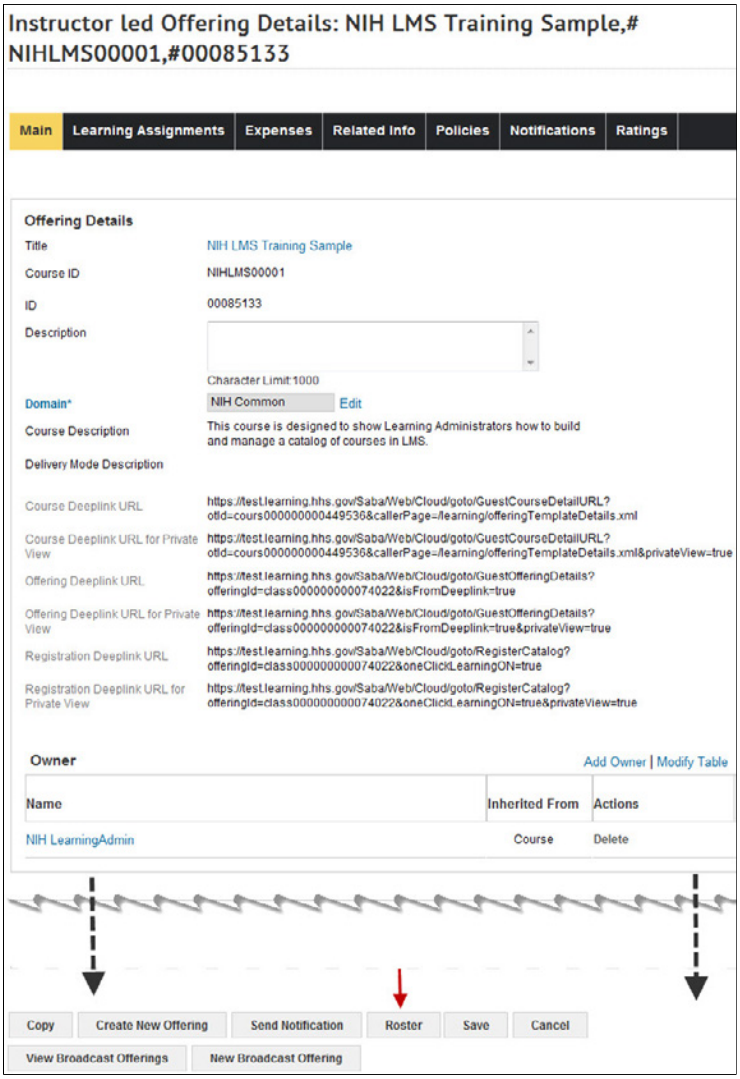
VIEW AN OFFERING ROSTER

1. Click the **Admin Icon**.

2. Select **Offerings** in the left menu.
3. Enter **search criteria** for the offering then click the **Search button**.
4. Click the **Title** of the offering.

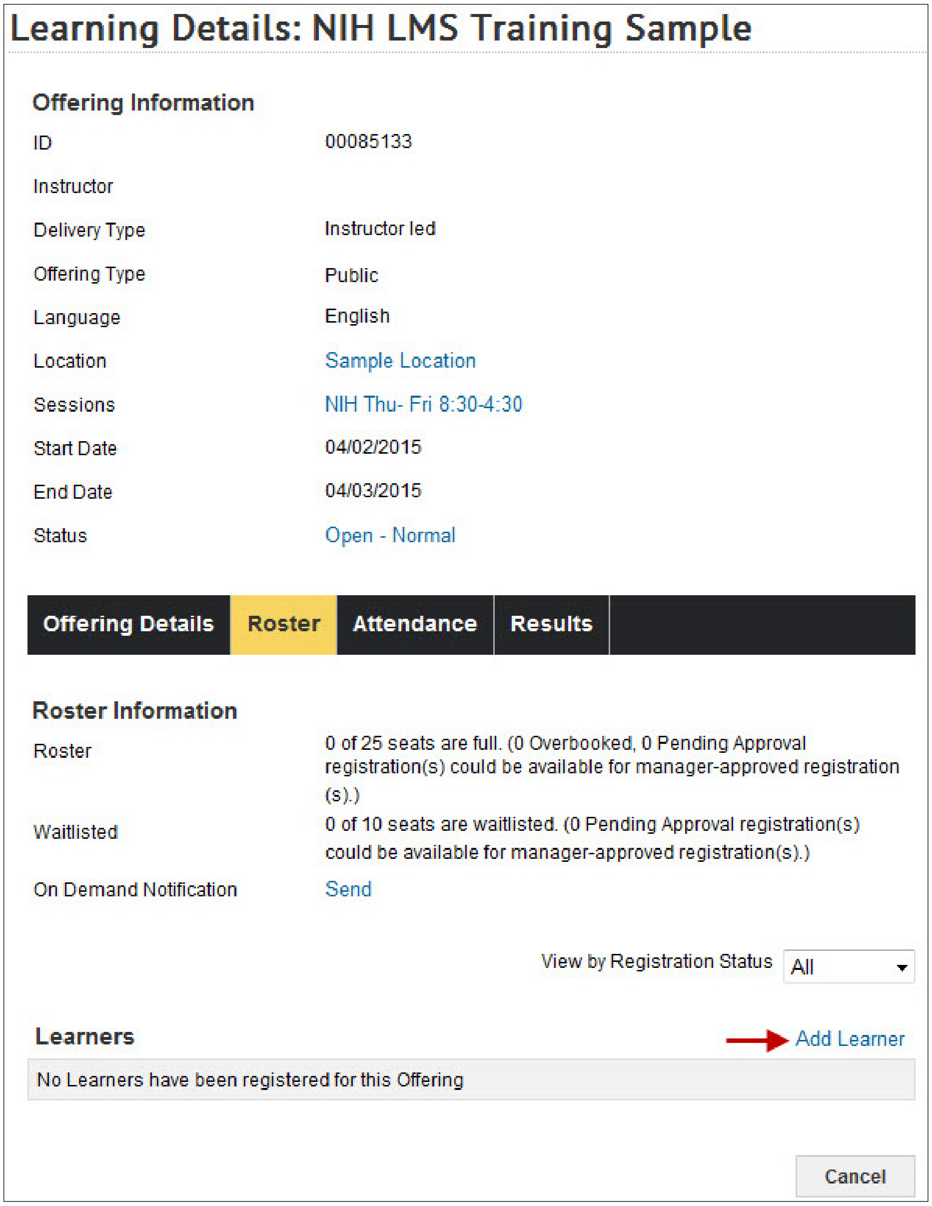


5. Scroll to the bottom of the screen and click the **Roster button**.

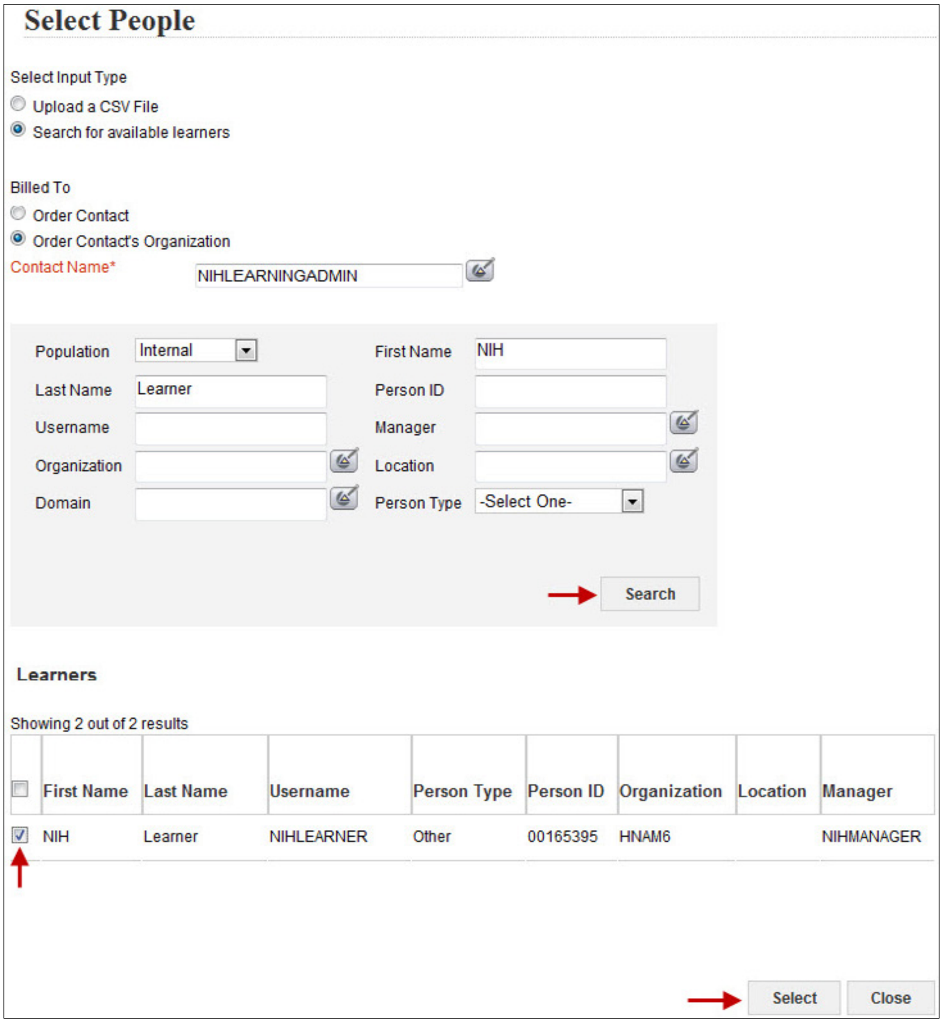


ADD A LEARNER TO A ROSTER

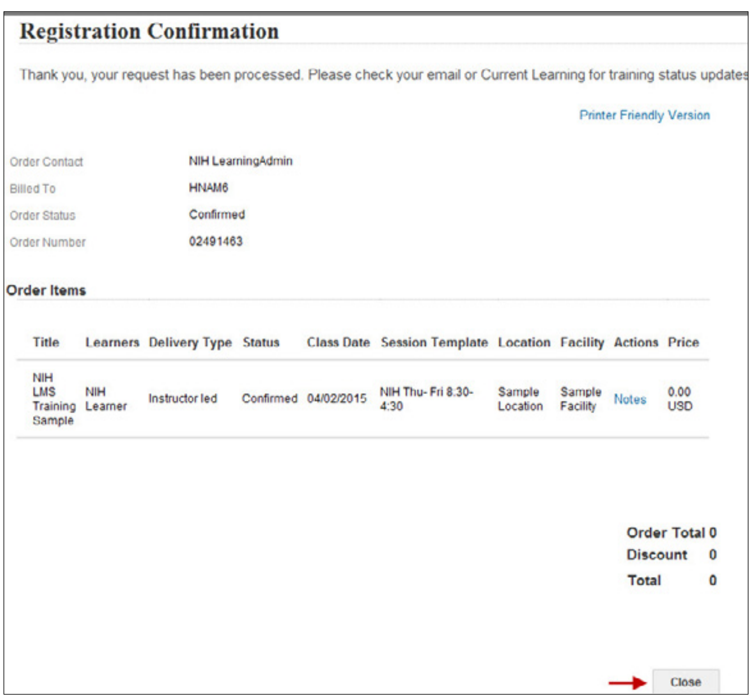
1. While [viewing the Roster tab](), click the **Add Learner link**.



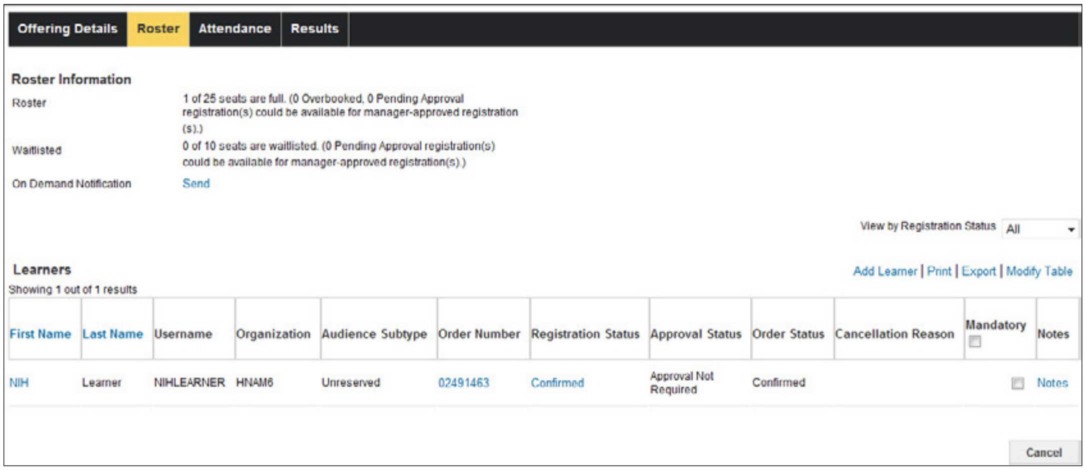
2. Enter search criteria for a learner then click the **Search button**.
3. Click the **checkbox** associated with the learner.
4. Click the **Select button**.



5. Click the **Close button** on the Registration Confirmation screen.

6. 

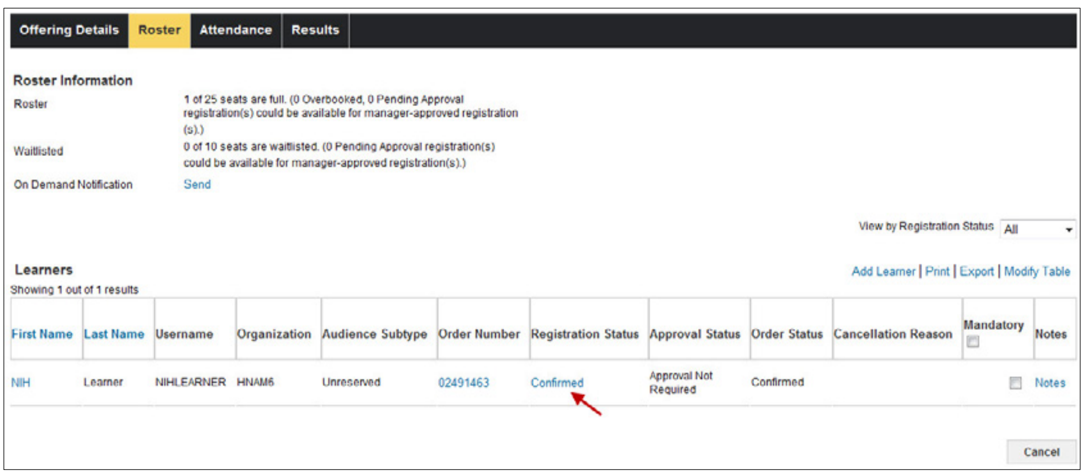
7. The learner will be added to the roster as shown below.



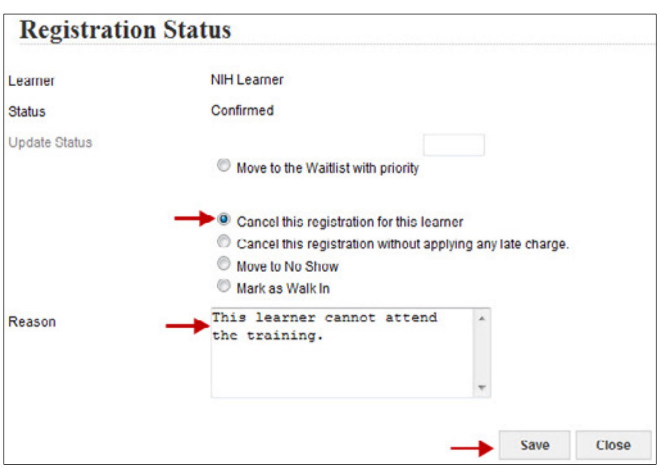
8. Additional learners may be added by repeating the previous steps in this section.

CANCEL A LEARNER REGISTRATION

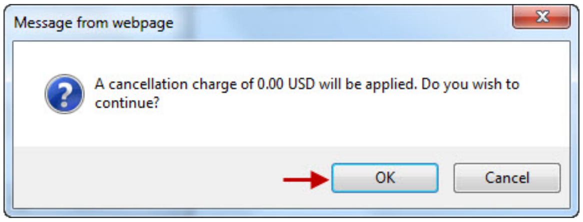
1. While viewing the roster, click the **Registration Status** of the learner whose registration will be canceled.



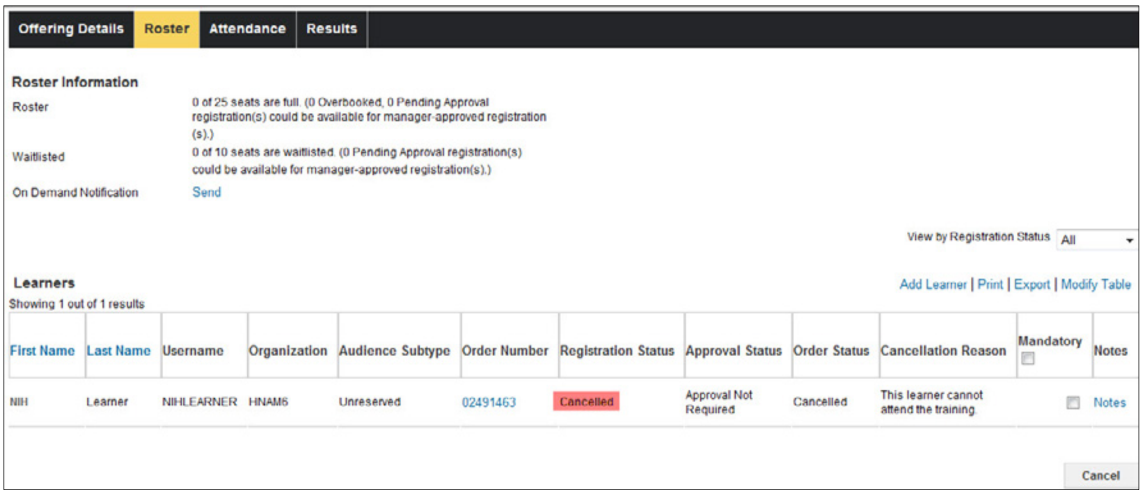
2. Select radio button for **Cancel this registration for this learner**.
3. Enter a comment in the Reason field to document the cancellation.
4. Click the **Save button**.



5. Click **OK** in the cancellation charge message window.



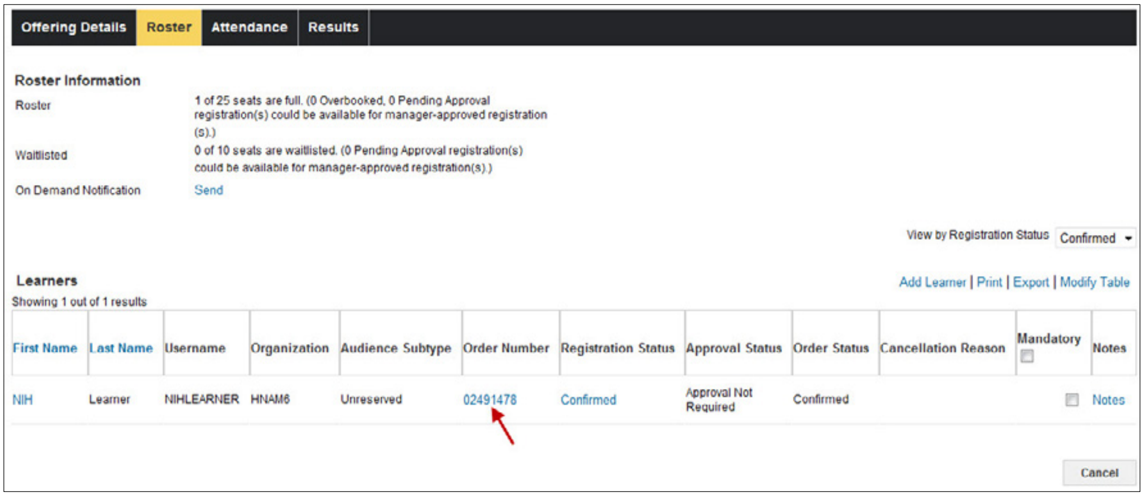
6. The learner will be removed from the active roster and their registration will be cancelled.



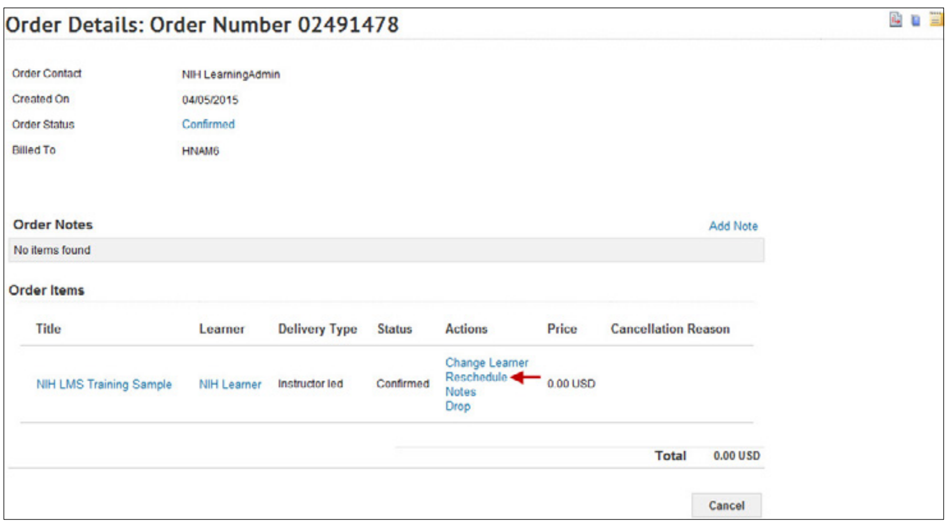
RESCHEDULE A LEARNER

NOTE: Do not use this process for NIH Training Center Courses.

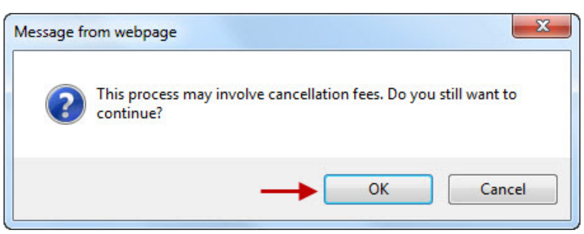
1. While [viewing the roster](), click the **Order Number**.



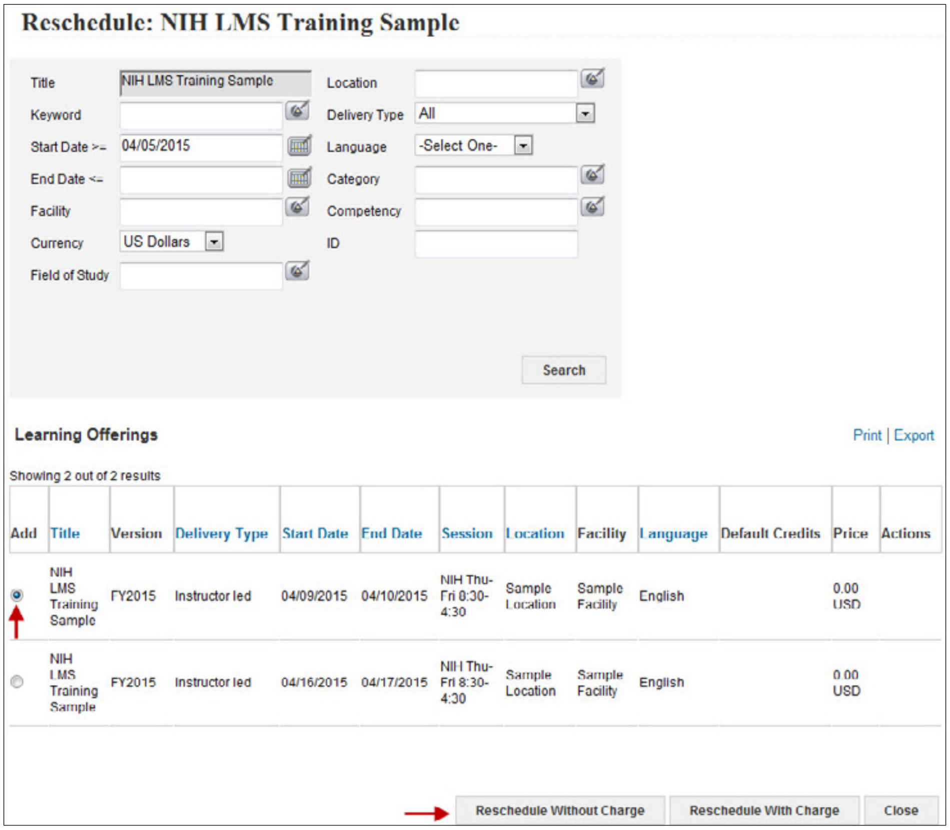
2. Click the **Reschedule link** in the Actions column.



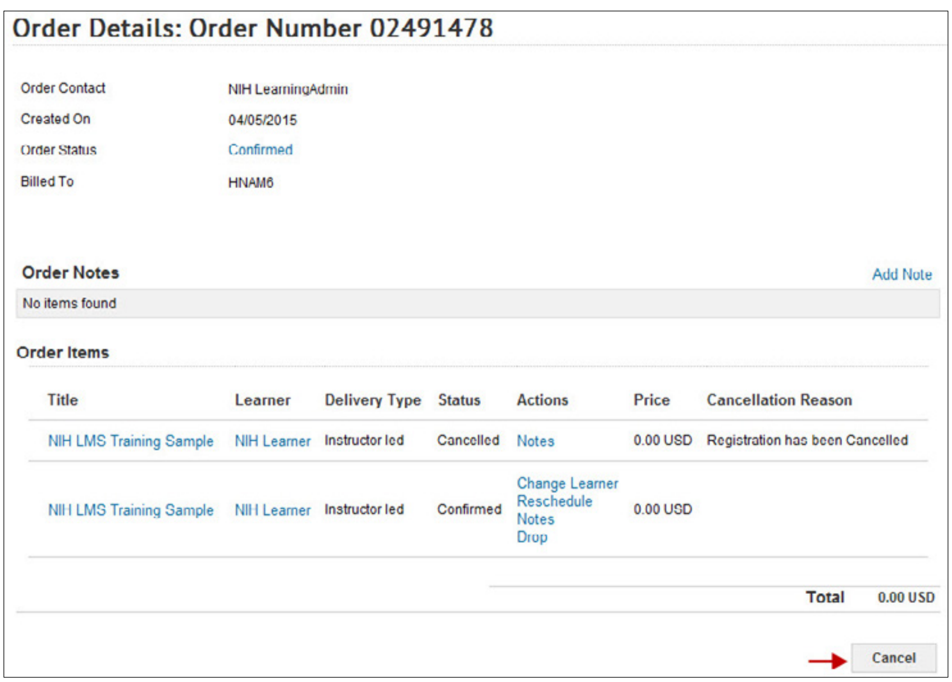
3. Click the **OK button** in the popup window.



4. Click the **radio button** associated with the new offering.
5. Click the **Reschedule Without Charge button**.

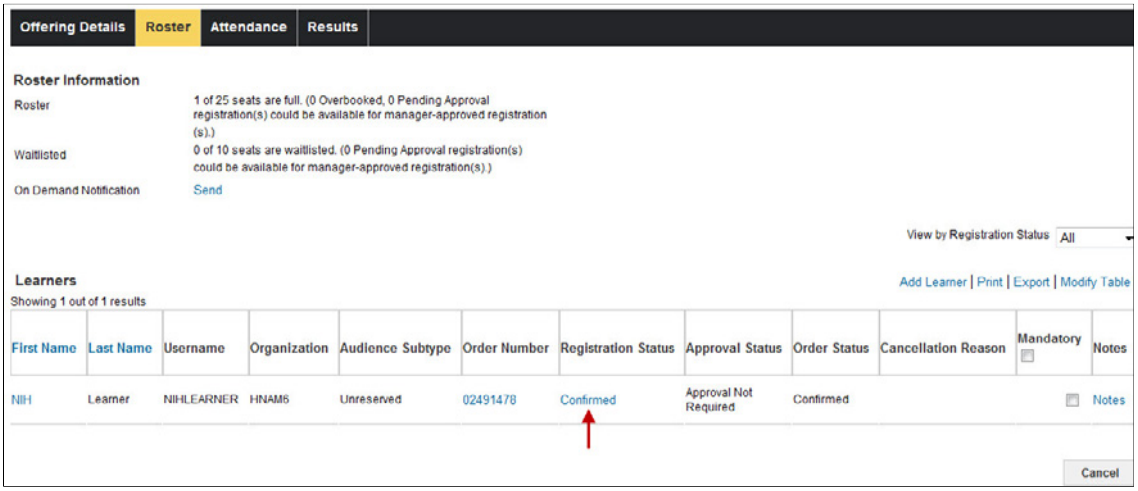


6. The learner’s original registration will be cancelled and a new registration will be created. The learner will receive a cancellation notification followed by a registration notification.
7. Click **Cancel** to return to the roster.

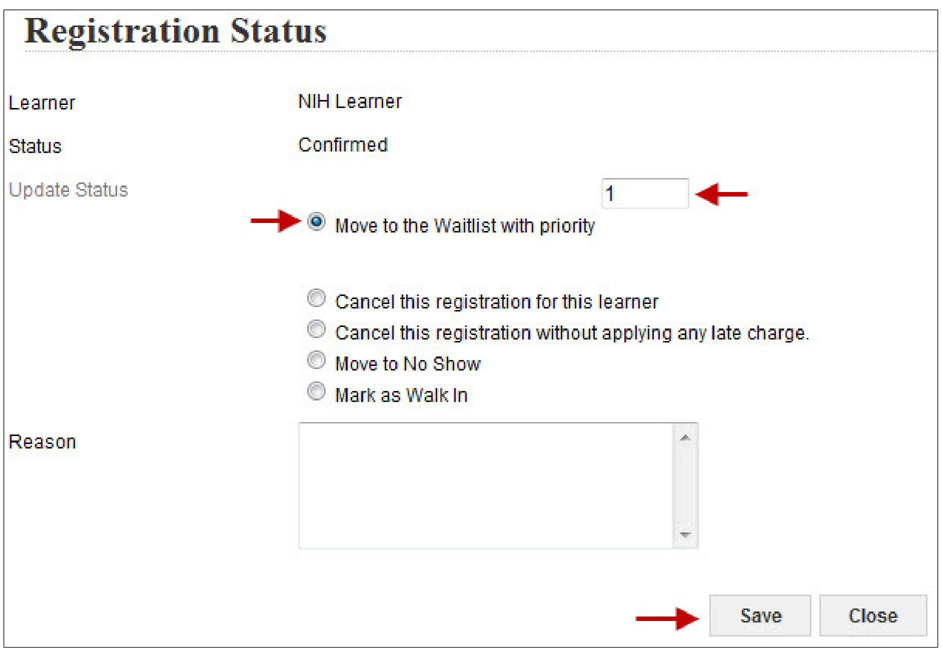


WAITLIST A LEARNER

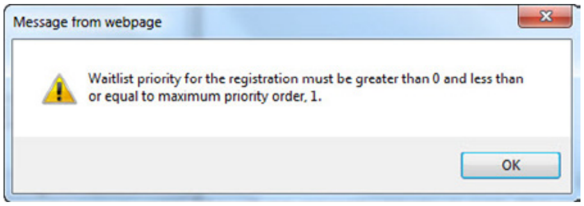
1. While viewing the roster, click the **Registration Status link**.



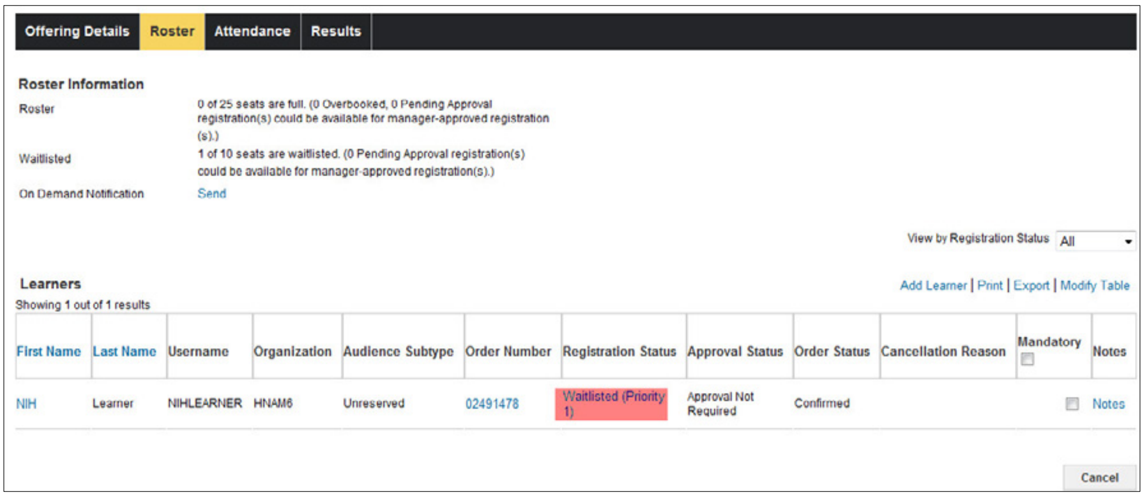
2. Select the **radio button** for Move to the Waitlist with priority.
3. Enter a priority level. This corresponds to the order the learner will be promoted from the waitlist if auto-promotion is being used. The value entered must be equal to or less than the total number of learners on the waitlist. If this is the first learner to be added to the waitlist, the priority level should be set to one (1).
4. Enter a comment in the **Reason field** if need.
5. Click the **Save button**.



NOTE: If no priority level is set, an error message will be displayed as shown below.

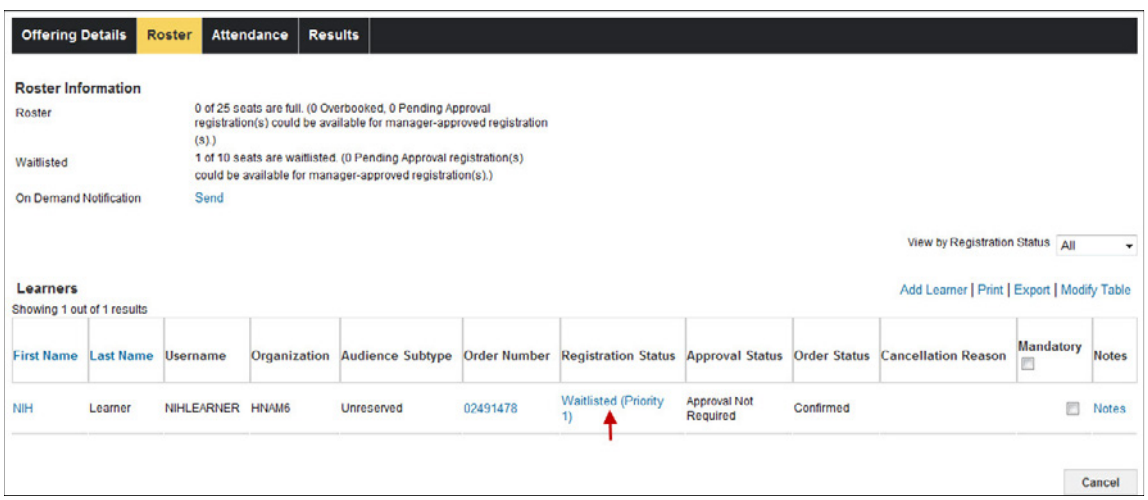


6. The learner will now appear on the roster as a waitlisted learner with the priority level indicated as well.

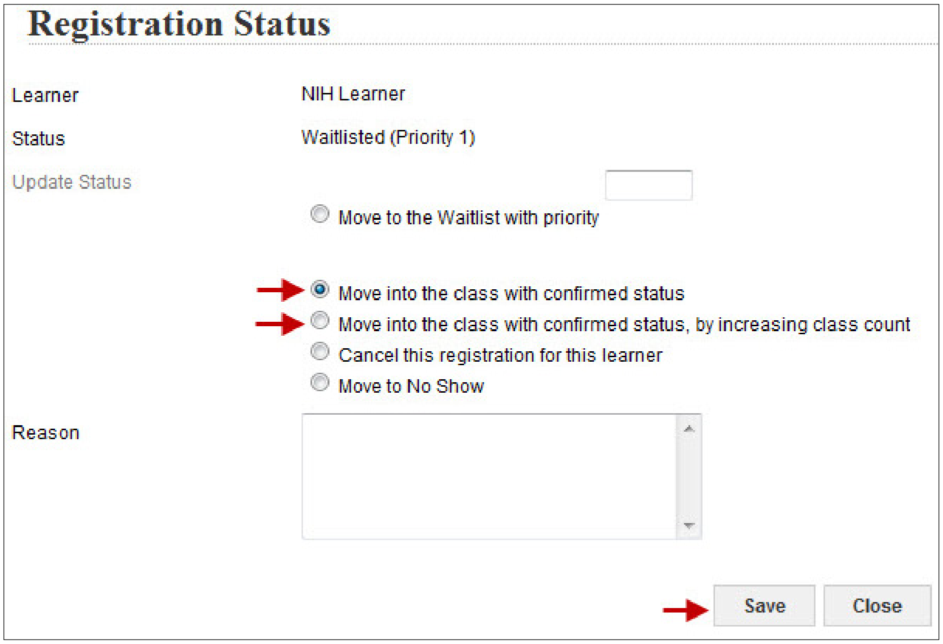


PROMOTE A WAITLISTED LEARNER

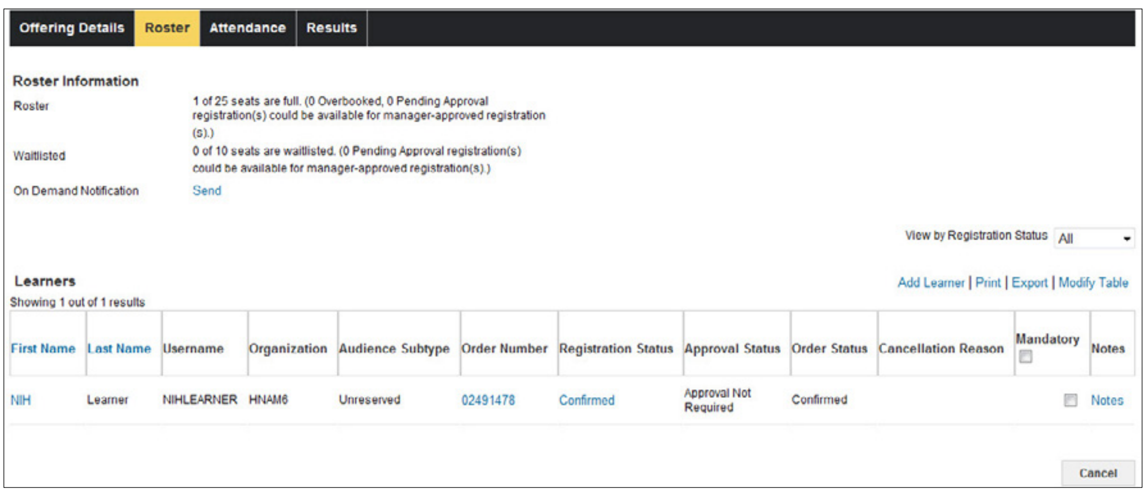
1. While [viewing the roster](), click the **Registration Status link**.



2. Select the radio button associated with one of the two following options:
   - Move into the class with confirmed status
   - Move into the class with confirmed status, by increasing class count

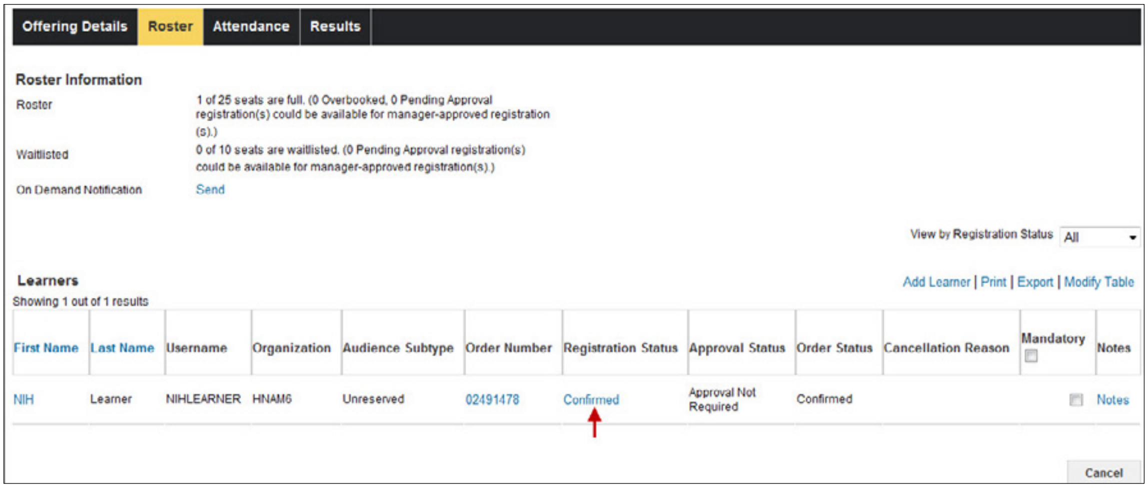


3. The learner will now be moved from the waitlist to the roster with a confirmed status.

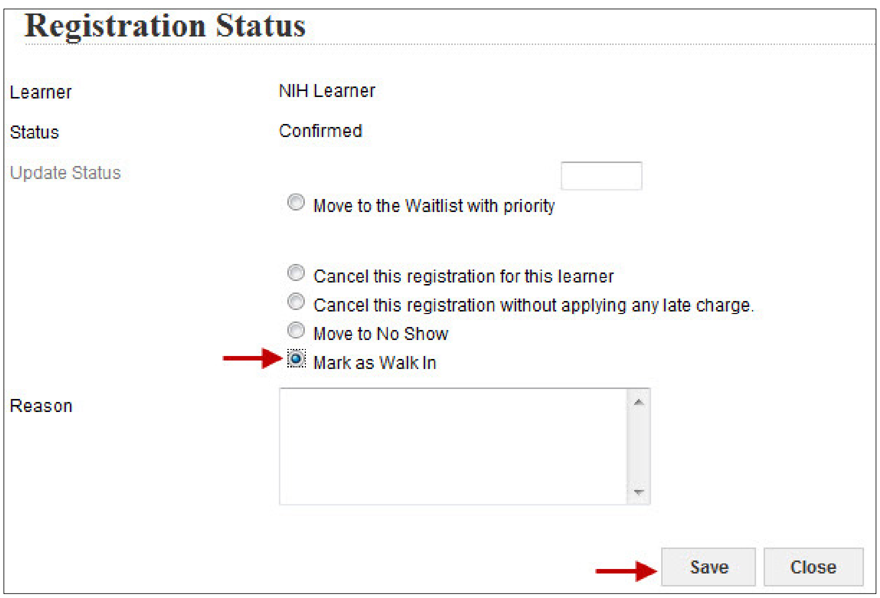


ADD A “WALK-IN” LEARNER TO A ROSTER

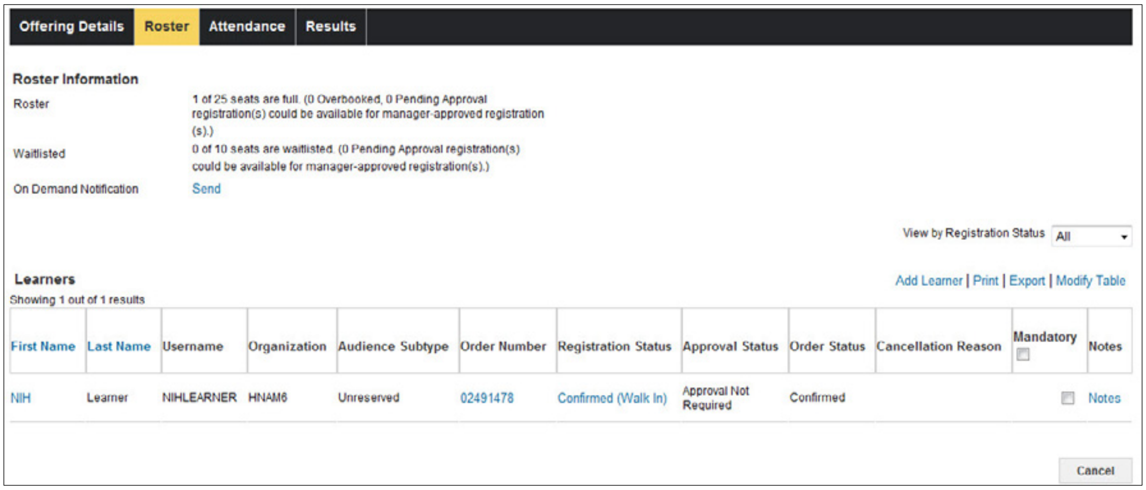
1. While viewing the roster, add the “walk-in” learner to the roster as described in the section: Add A Learner To A Roster
2. Click the **Registration Status link** of the walk-in learner.



3. Select the **Mark as Walk In radio button**.
4. Click the **Save button.**

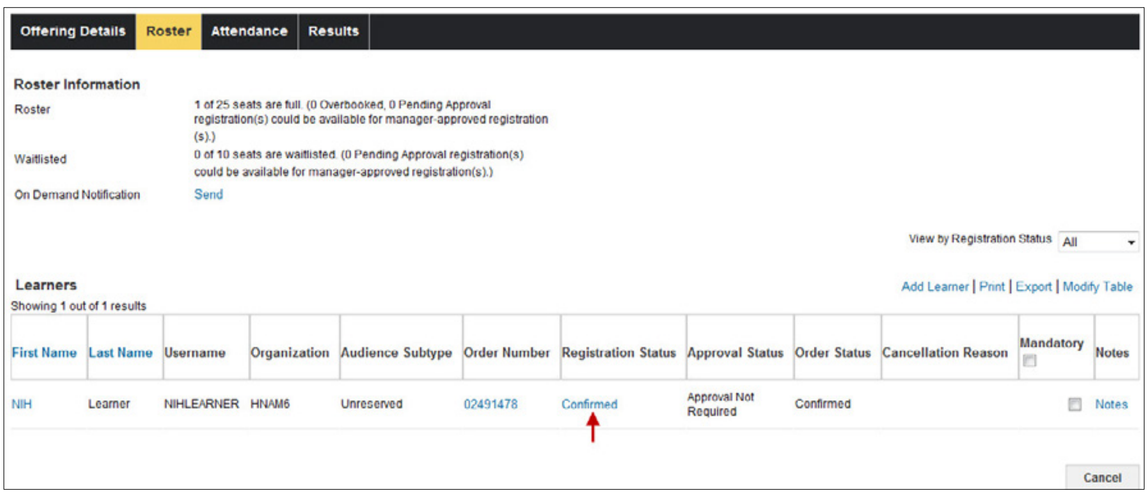


5. The learner will be shown on the roster as “Confirmed (Walk In)”.

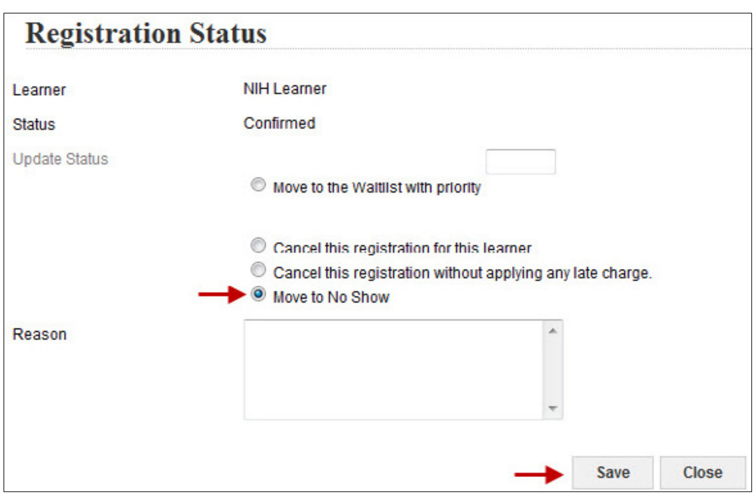


MARK A CONFIRMED LEARNER AS A “NO-SHOW”

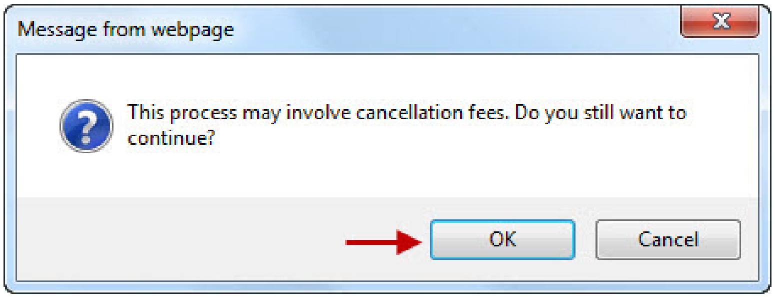
1. While viewing the roster, click the **Registration Status link**.



2. Click the **Move to No Show radio button**.
3. Click the **Save button**.

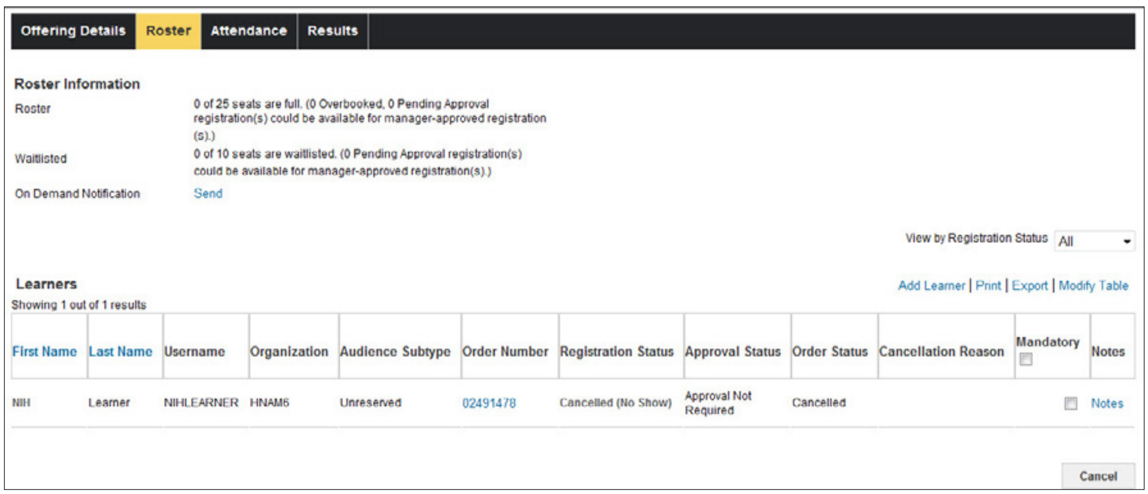


4. Click **OK** in the Cancellation Charge message window.



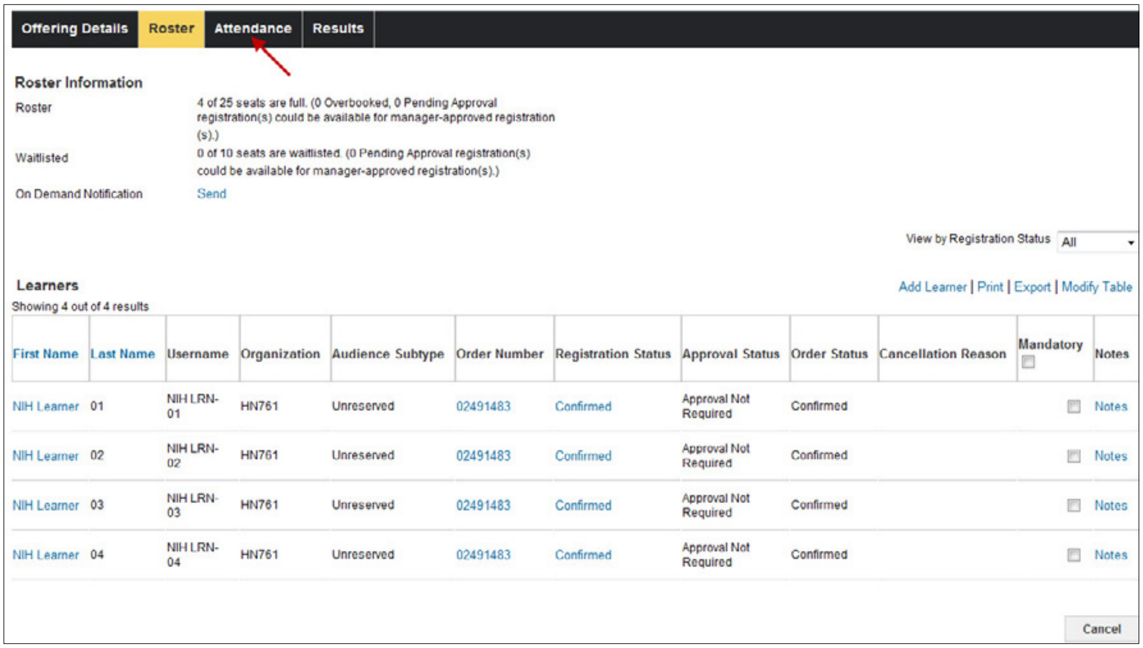
5.

6. The learner’s registration will be cancelled and marked with the status “Cancelled (No Show)”.

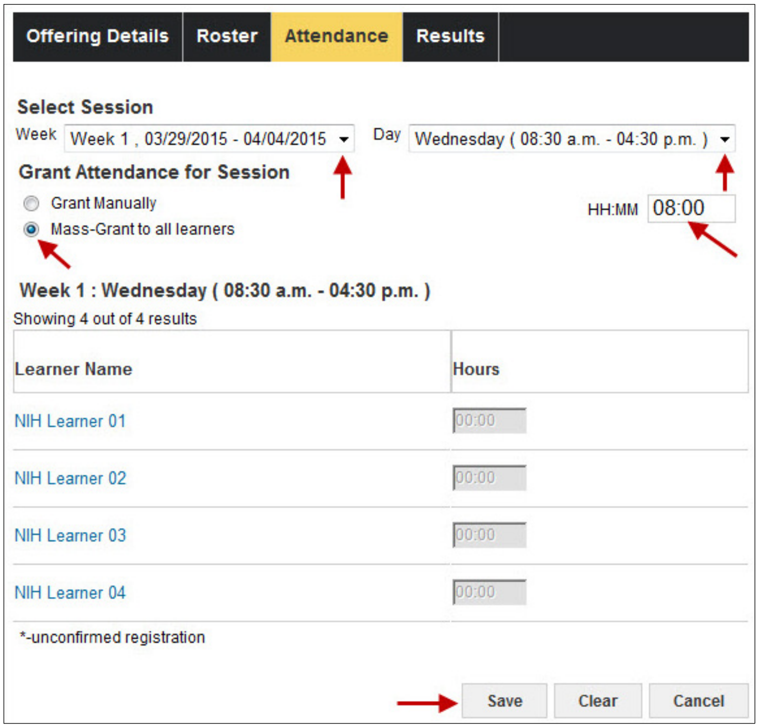


RECORDING ATTENDANCE

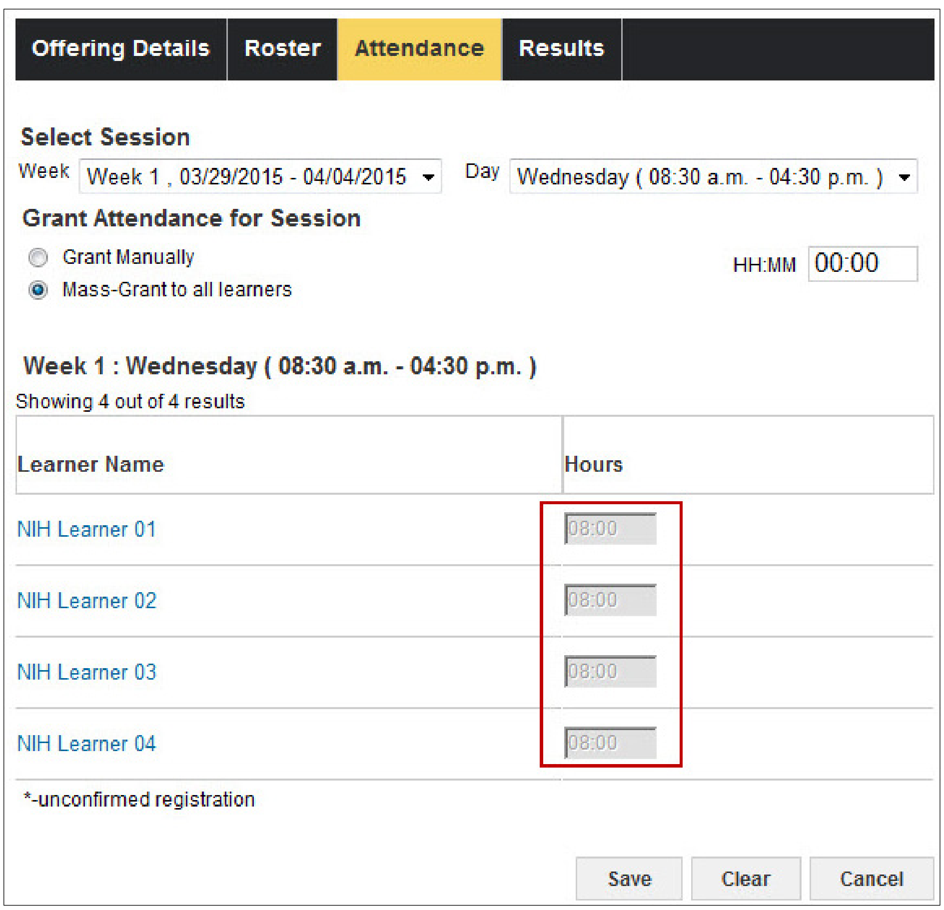
1. While viewing the roster, click the **Attendance tab**.



2. From the **Week drop-down menu**, choose the week of the offering you will mark attendance for.
3. From the **Day drop-down menu**, choose the day of in the week of the offering you will mark attendance for.
4. To assign the same time to all learners, perform the following steps:
5. Select the **Mass-Grant to all learners radio button** to mark the attendance for all learners at once.
6. Enter the time being assigned to the learners in the **time field**.
7. Click the **Save button**.



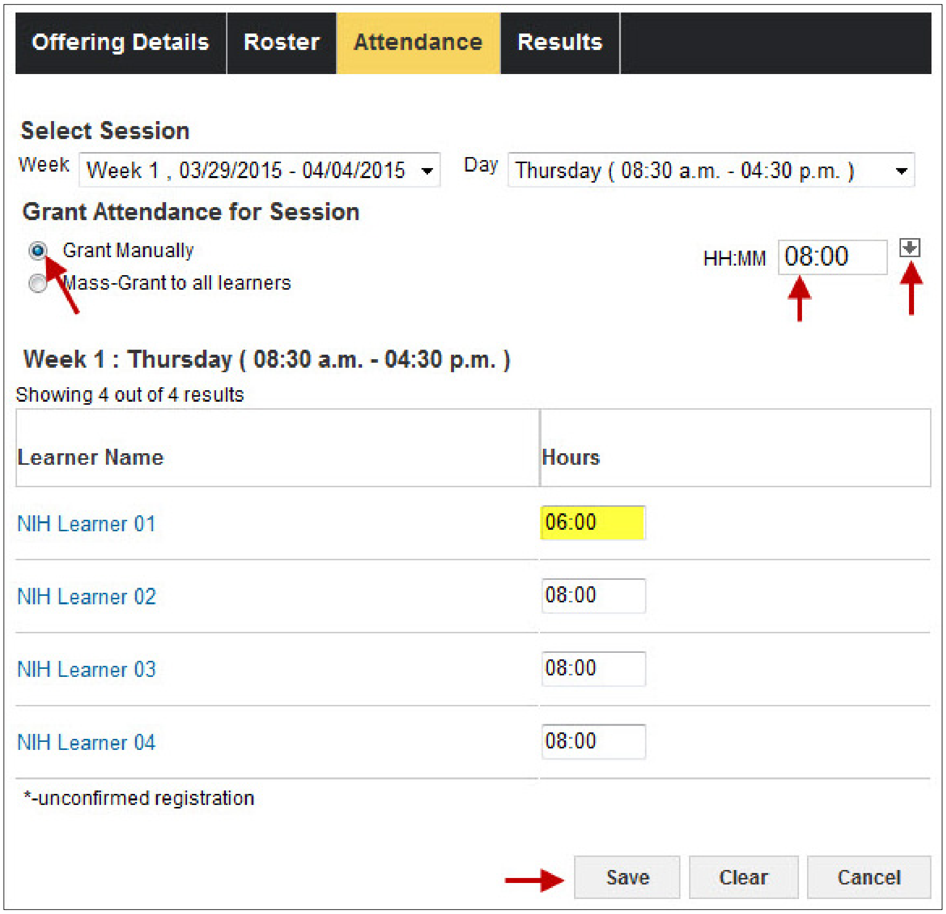
8. All learners will be granted the same number of hours for attendance.



9. Repeat steps 1-4 for each day attendance was recorded.

GRANT ATTENDANCE MANUALLY - OPTIONAL

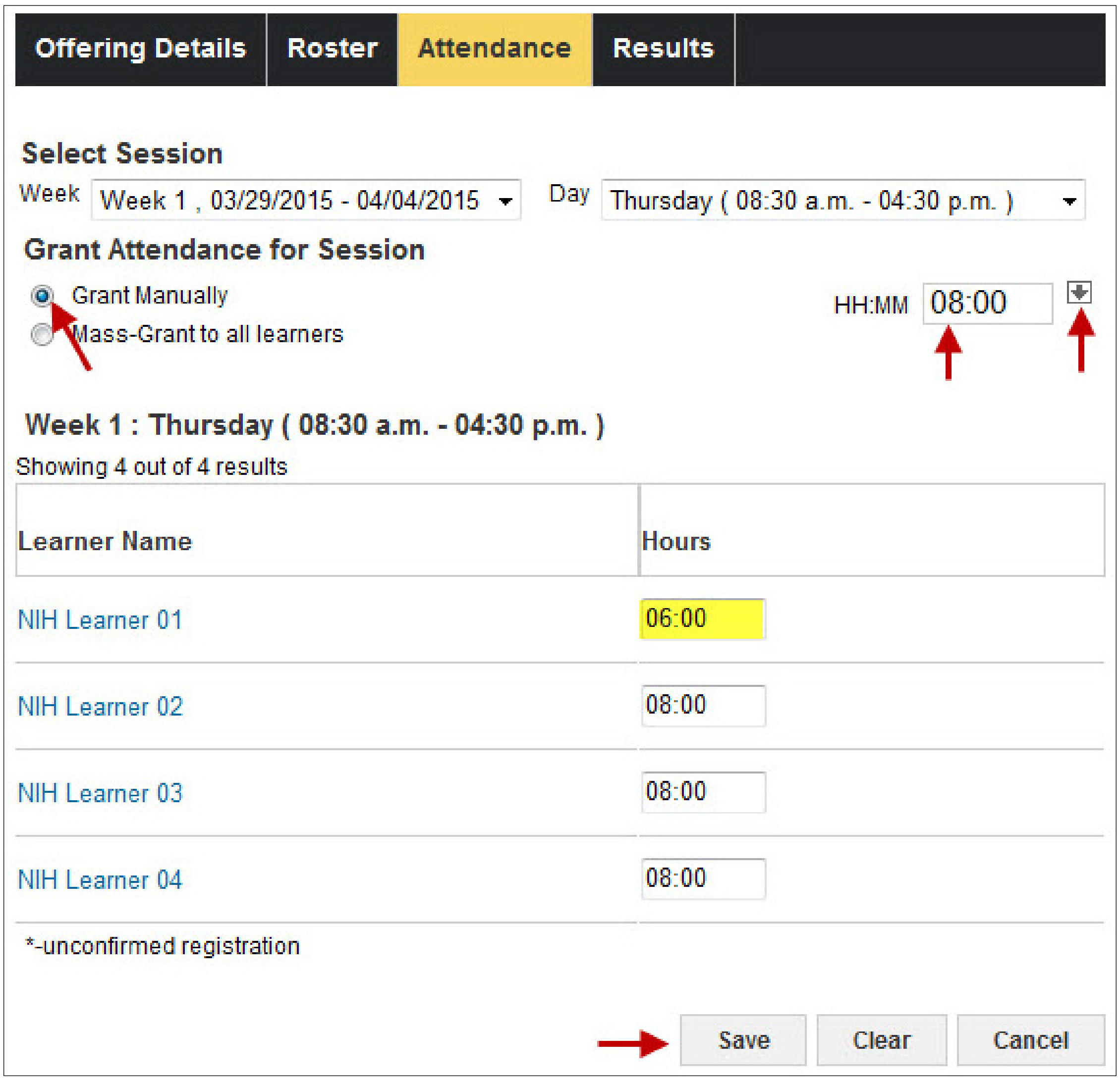
1. Click the **Grant Manually radio button**.
2. Enter the hours in the Hours field for each learner.
3. **NOTE**: You may enter the hours in the time field and then click the down arrow to populate all the learner's hours with that amount of time.
4. Click the **Save button**.



5. In this example, all learners were granted the same number of hours except the first learner. Using the Grant Manually option allows the Hours field to be updated individually.
6. Make sure all learners have a time recorded before proceeding.

RECORD GRADES & COMPLETION STATUS

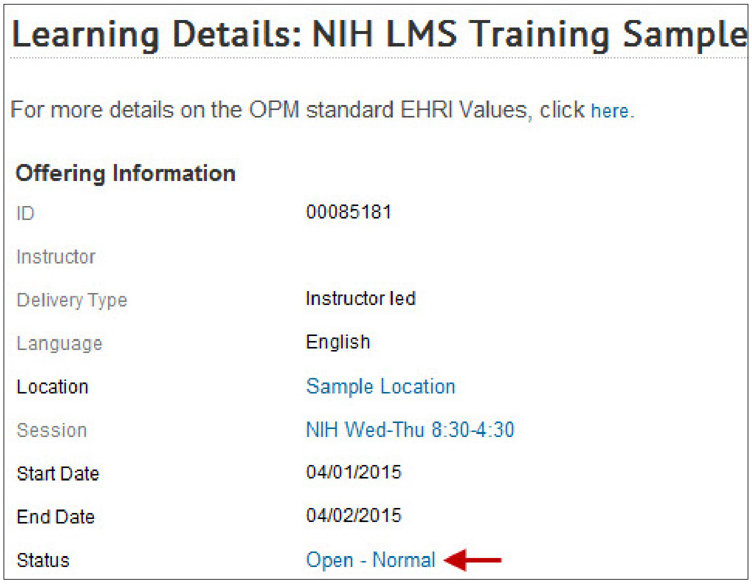
1. While viewing the roster, click the **Results tab**.
2. Click the **Status drop-down menu** and select the appropriate status for each learner.
3. **NOTE**: The drop-down menu above the Learning Results table can be used to change the status of all learners at once. Select the status to be assigned to all the learners then click **Apply to All**. The exceptions can always be edited separately.



4. Click **Apply to All** associated with the Grade. With no value entered, this will remove all zeros so that they are not recorded on the learners' transcripts. Grades that are earned can always be entered separately if needed.
5. Click the **Save button**.

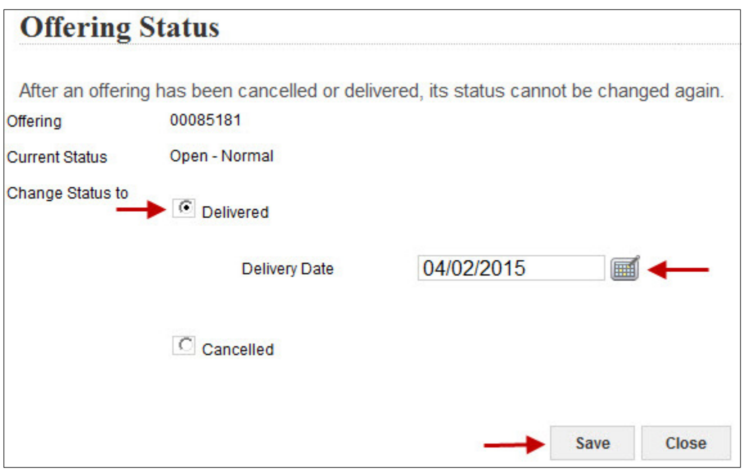
MARKING AN OFFERING DELIVERED

1. Click the Status which is currently set to **Open Normal**.



2. Enter the date the class is marked delivered then click the **Save button**.

NOTE: New learners can be added to the roster at any time after the offering has been marked delivered.

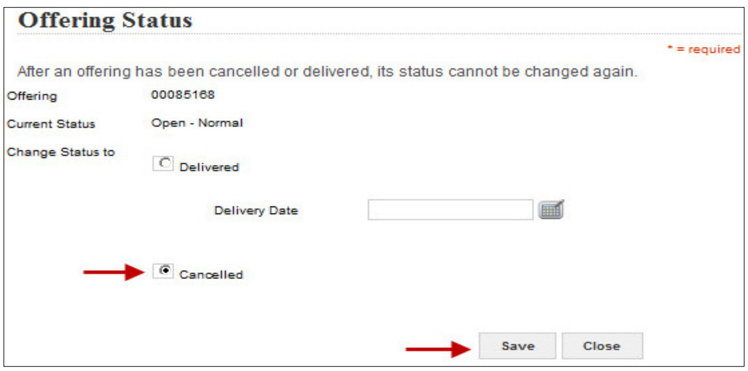


3. The transcripts for all learners will be updated.

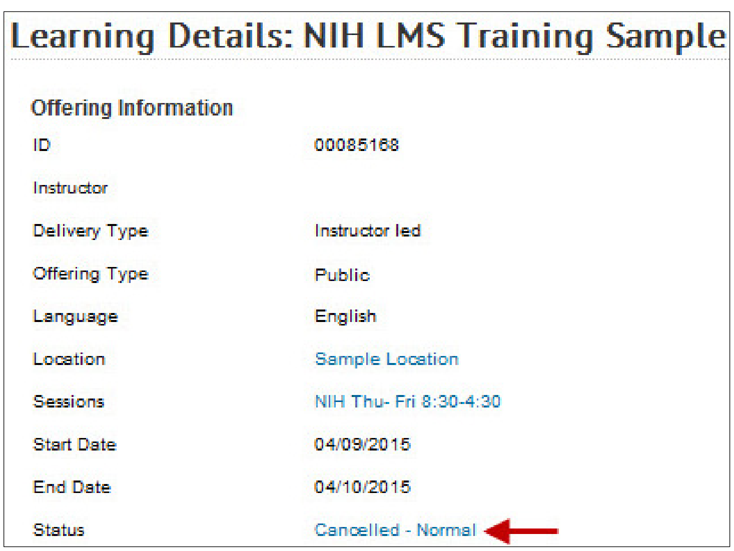
CANCEL AN OFFERING

1. Click the Status which is currently set to **Open Normal**.

2. Select the **Cancelled radio button**.
3. Click the **Save button**.



4. The offering will now be cancelled.



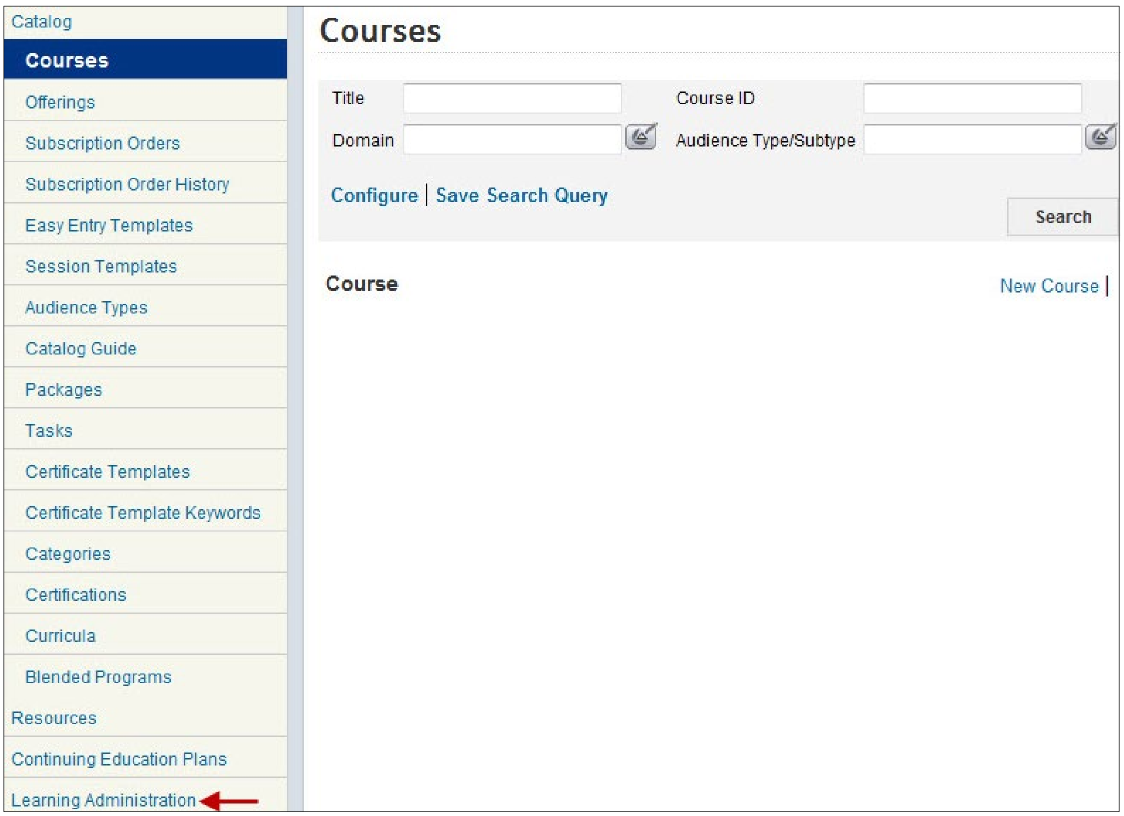
LEARNER ENROLLMENTS

An **Enrollment** is an offering that a learner is registered for, but has not completed.

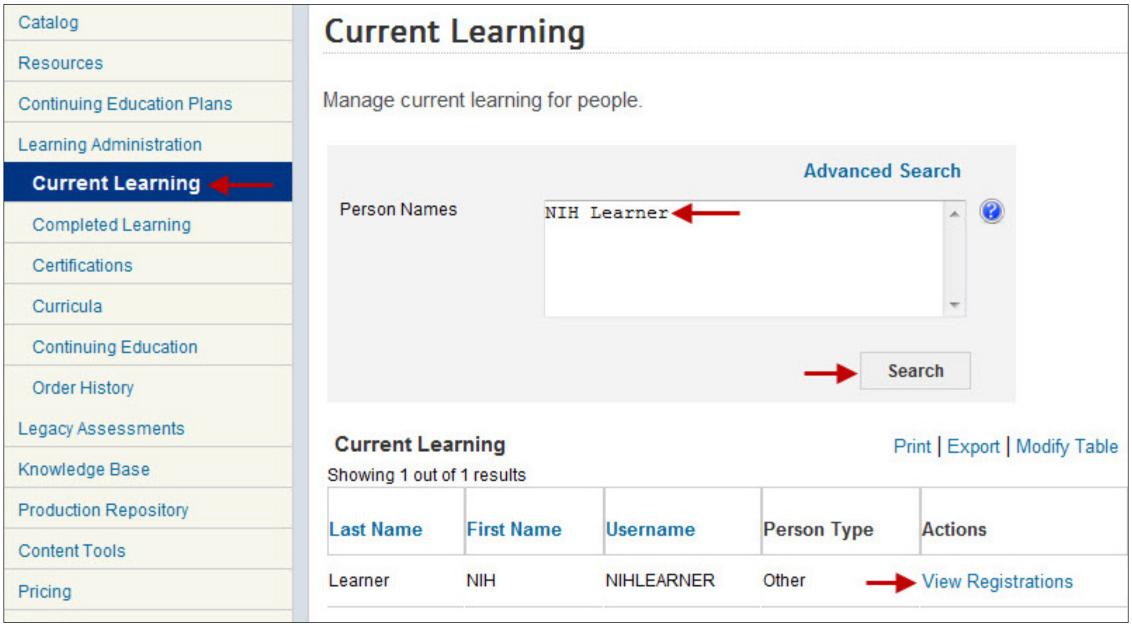
VIEW A LEARNER'S ENROLLMENTS

1. Click the **Admin Icon**.

2. Click **Learning Administration** in the left menu.

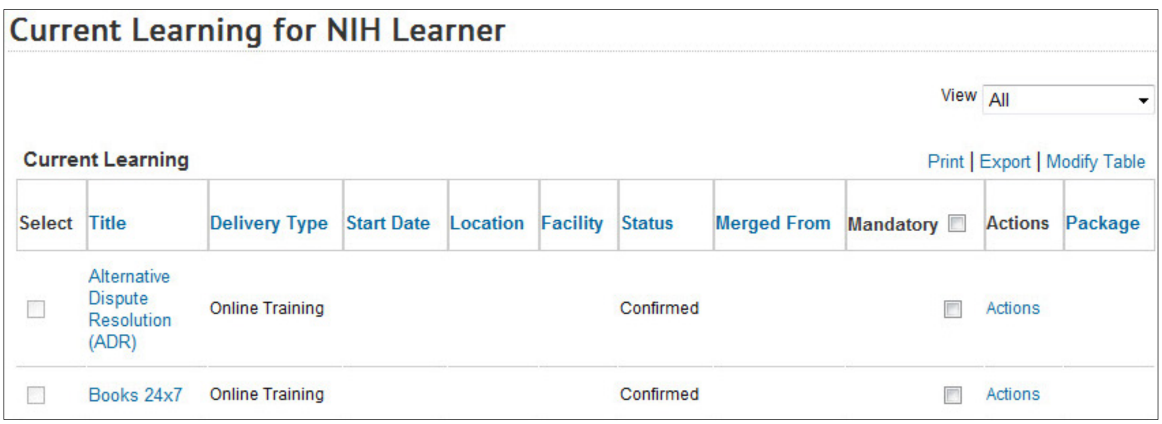


3. Click **Current Learning** in the left menu.
4. Enter search criteria for the learner then click the **Search button**.
5. Click the **View Registrations link**.



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.

6. You will now see the enrollments for the learner.

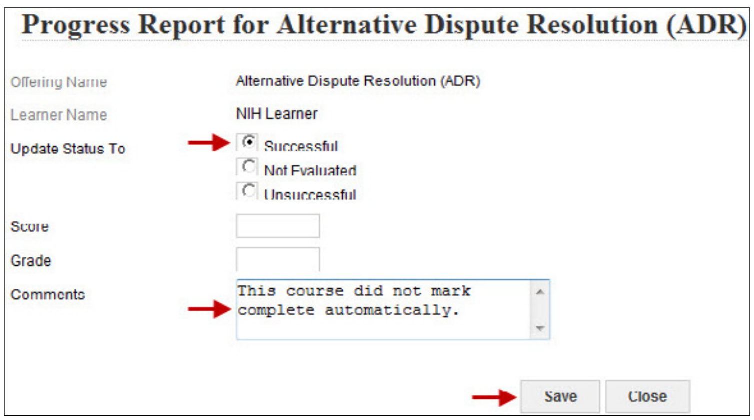


MARK AN ENROLLMENT COMPLETE

This function should rarely be used since Learning Administrators are able to mark multiple completions from the roster. In the event that an offering can't be closed out, a Learning Administrator may mark the completion from the learner's enrollments area.

1. While viewing a learner's enrollments, click the **Actions link** in the Actions column.
2. In the Actions popup, click the **Mark Complete option**.

3. Click the **radio button** for successful.
4. Enter any scores, grades or comments as needed.
5. Click the **Save button**.

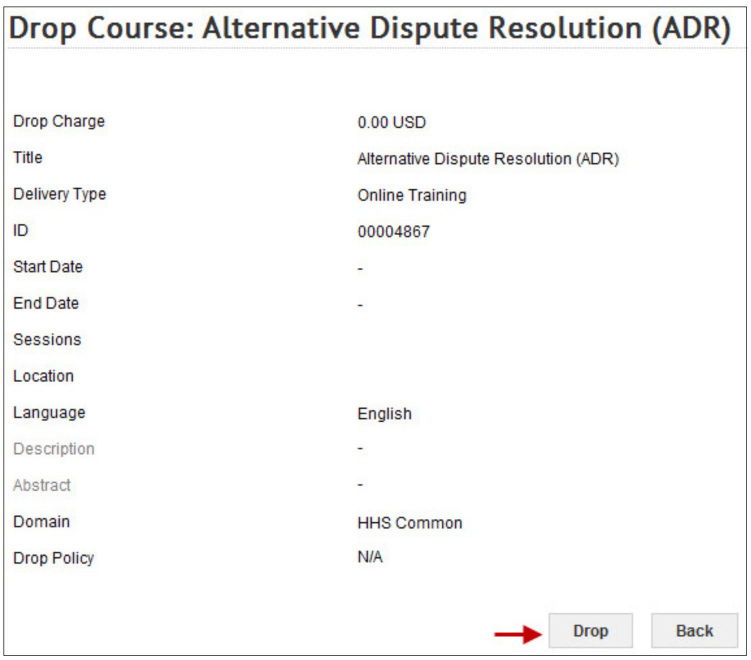


6. The enrollment will be removed and a transcript item created for the learner.

DROP A LEARNER ENROLLMENT

1. While [viewing a learner's enrollments](), click the **Actions link** in the Actions column.

2. Click the **Drop button**.



3. The enrollment will be cancelled for the learner.

COMPLETED COURSES

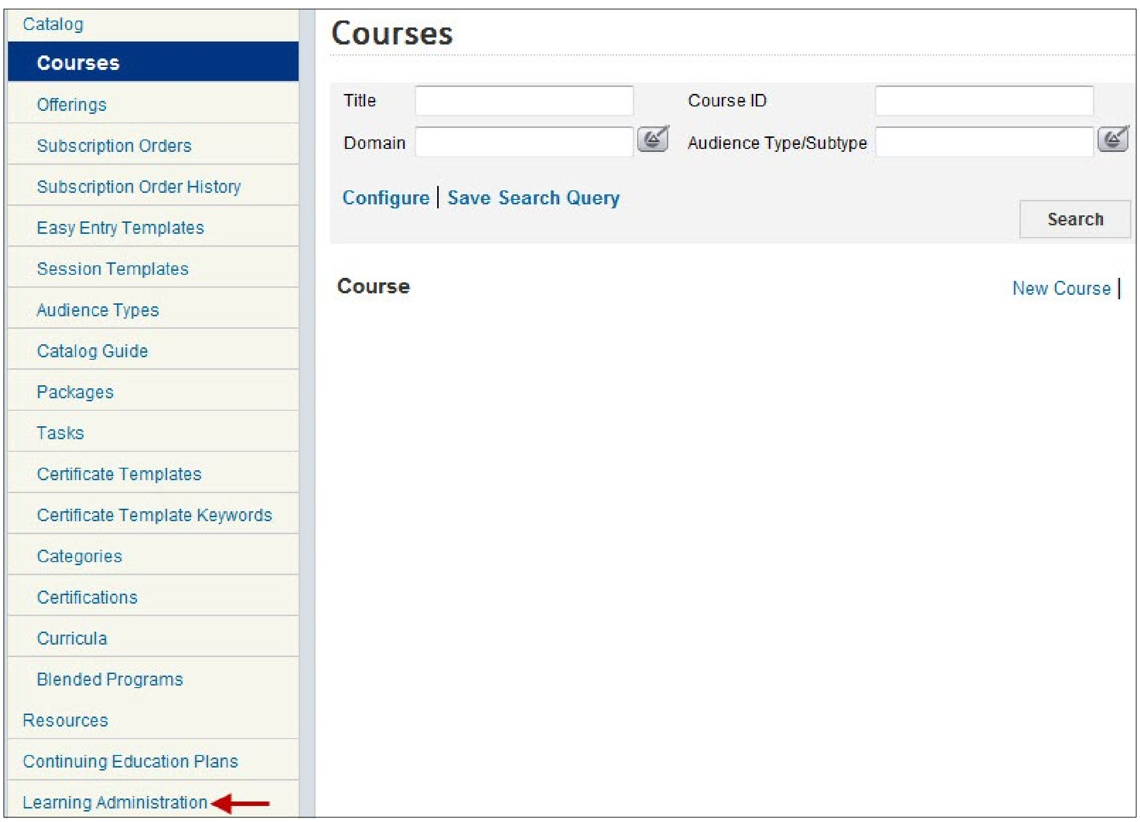
The LMS maintains a transcript of all completed training. Transcripts may contain records for training delivered by NIH, the Department of Health and Human Services (HHS), in addition to training completed outside of HHS (e.g. a college course, conference, etc.). Since the LMS is a department-wide system,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

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

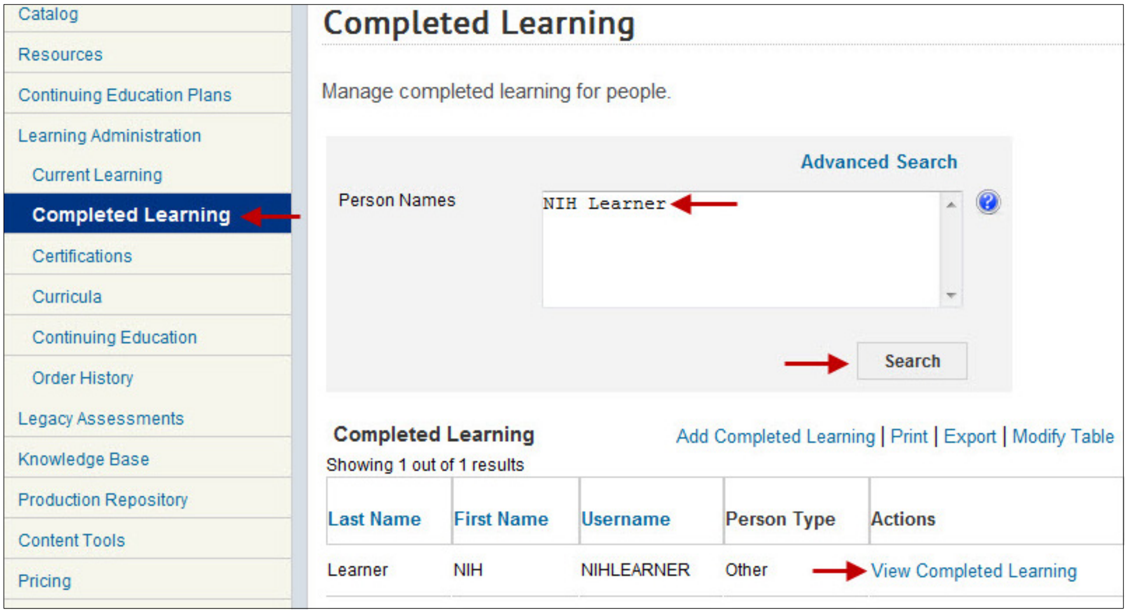
VIEW COMPLETED COURSES

1. Click the **Admin Icon**.

2. Click **Learning Administration** in the left menu.

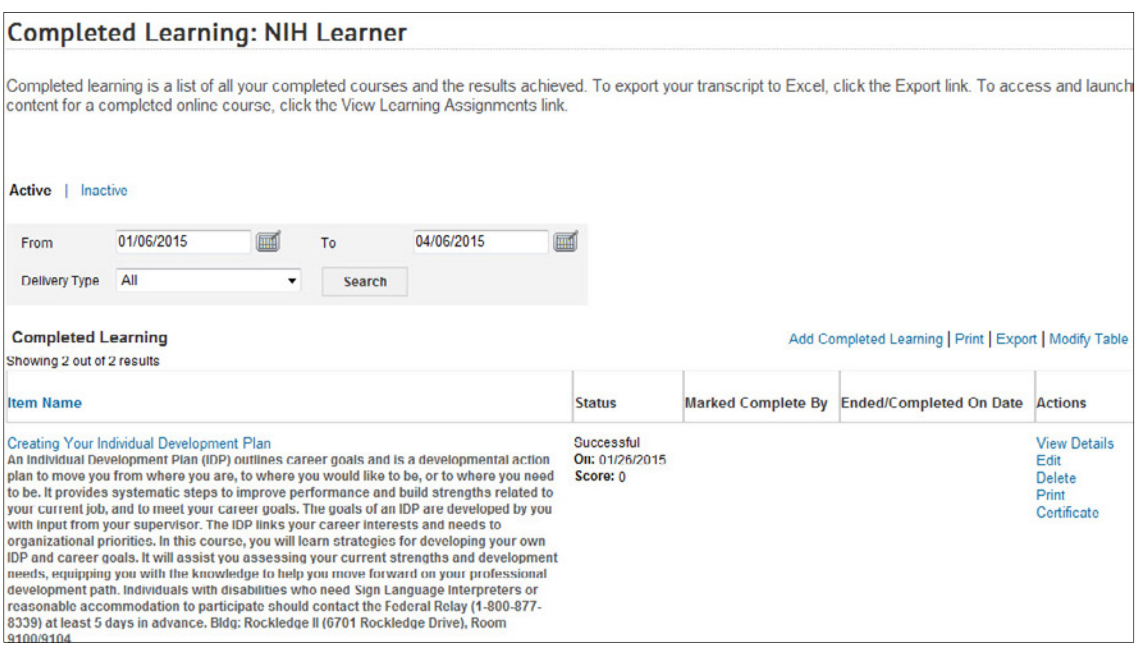


4. Select **Completed Learning** in the left menu.
5. Enter the learner's name in the Name(s) search field then click the **Search button**.
6. Click the **View Completed Learning link** in the Actions column.



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.

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

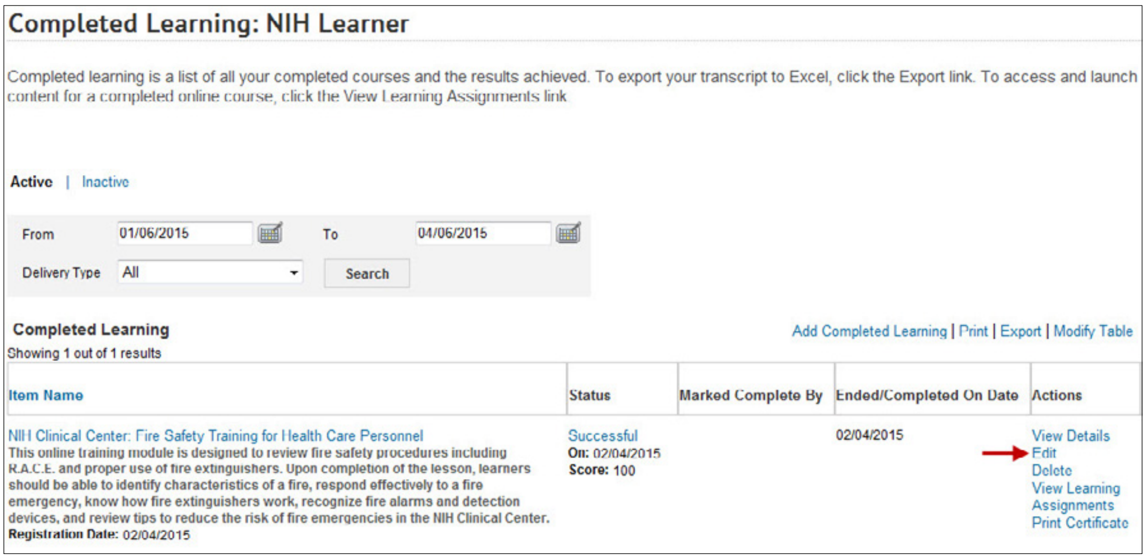


EDIT A COMPLETED COURSE ITEM

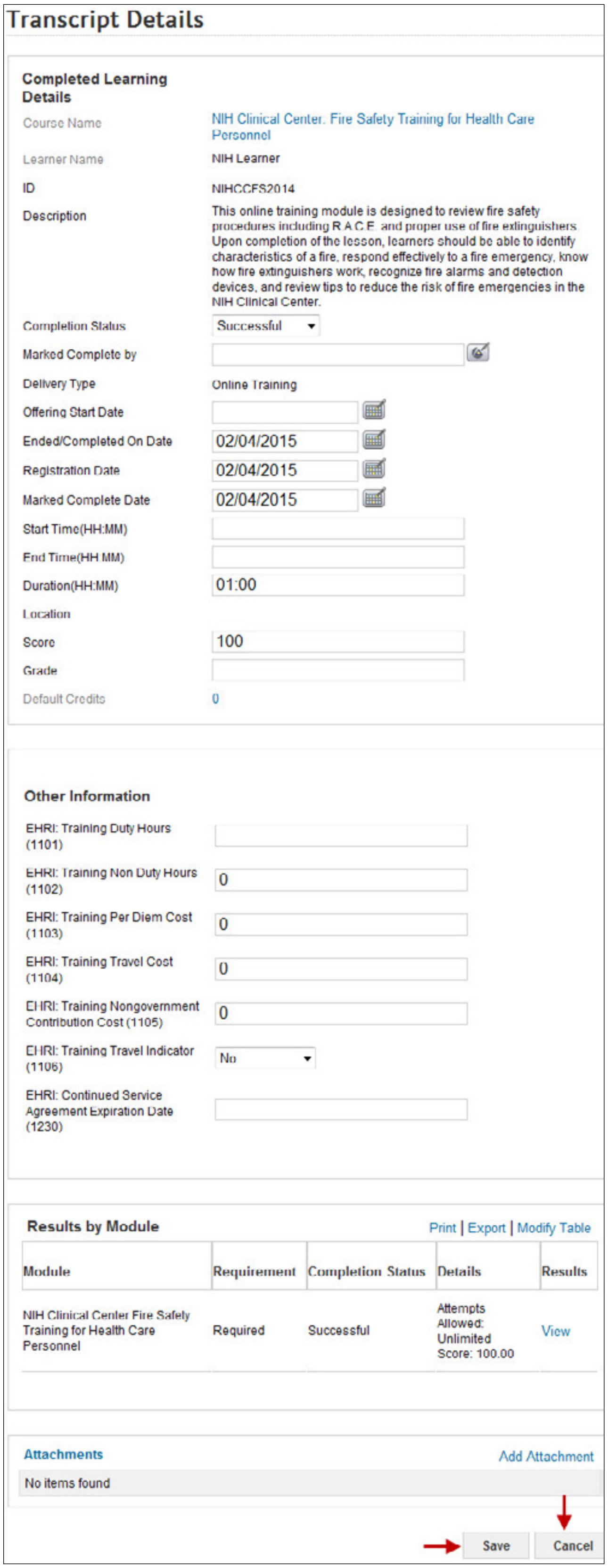
IMPORTANT! Edits to completed courses should only be performed when you take possession of the credentials that warrant the changes. These credentials should be kept on file in a secure location designated by your organization's management team.

Follow the instructions below to edit a completed course item.

1. While viewing the completed courses, click the **Edit link** in the Actions column of the Completed Courses table.



2. Make all necessary changes then click the **Save button** at the bottom of the screen.
3. Click the Cancel button to return to the learner's completed courses.

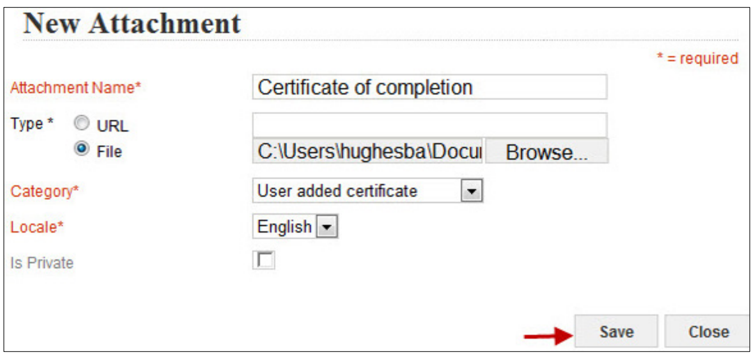


UPLOAD AN EXTERNAL DOCUMENT

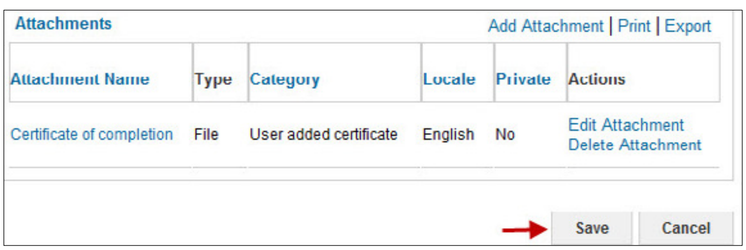
Learning Administrators can upload external documents such as the certificate of completion that was received after completing a course. Follow the instructions below to upload a document that will be attached to the completed course item.

1. While editing a completed course item, scroll to the bottom of the screen and click the **Add Attachment link**.

2. Enter a name for the certificate of completion.
3. Select URL or File **radio buttons** and enter the path where the file may be found.



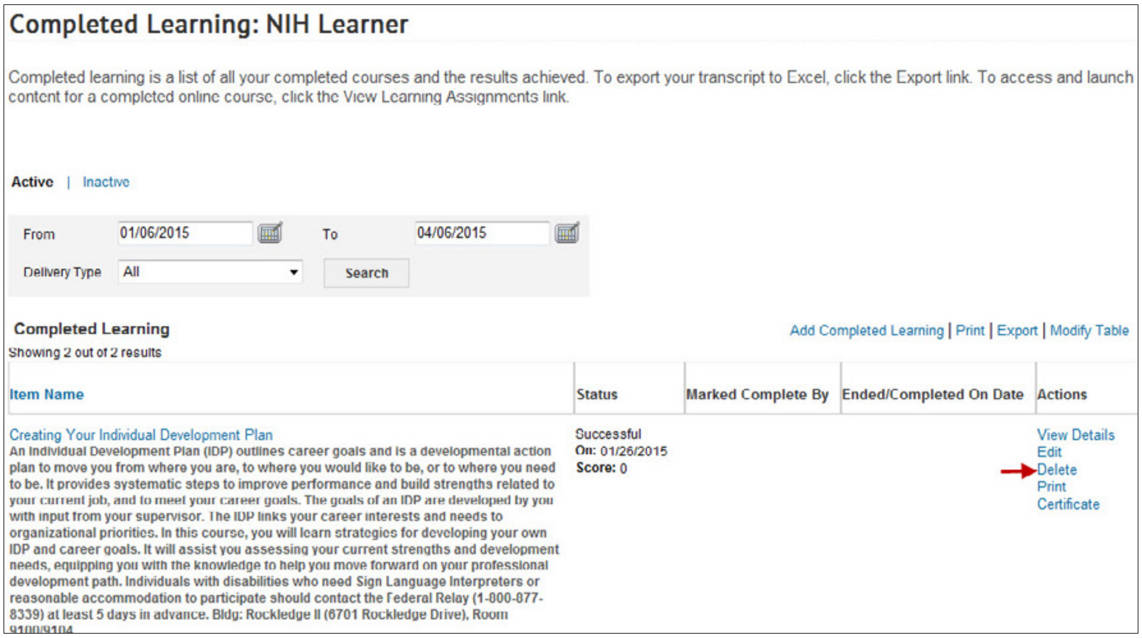
4. The certificate will now be attached to the completed course item.



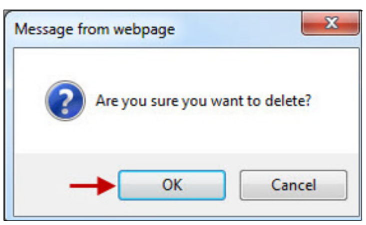
DELETE A COMPLETED COURSE ITEM

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

1. While viewing completed courses, click the **Delete link** in the Actions column.



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



3. The completed course item will be deleted and will now be added to the Inactive tab. To see all the items that have previously been deleted, click the Inactive tab.

IMPORTANT! Only completed courses on the Active tab will be factored into completion reports.

ADDING COMPLETED COURSE ITEMS USING AN EXISTING ITEM

Learning Administrators may manually add additional training to a learner's list of completed courses. The types of learning that are frequently added manually are:

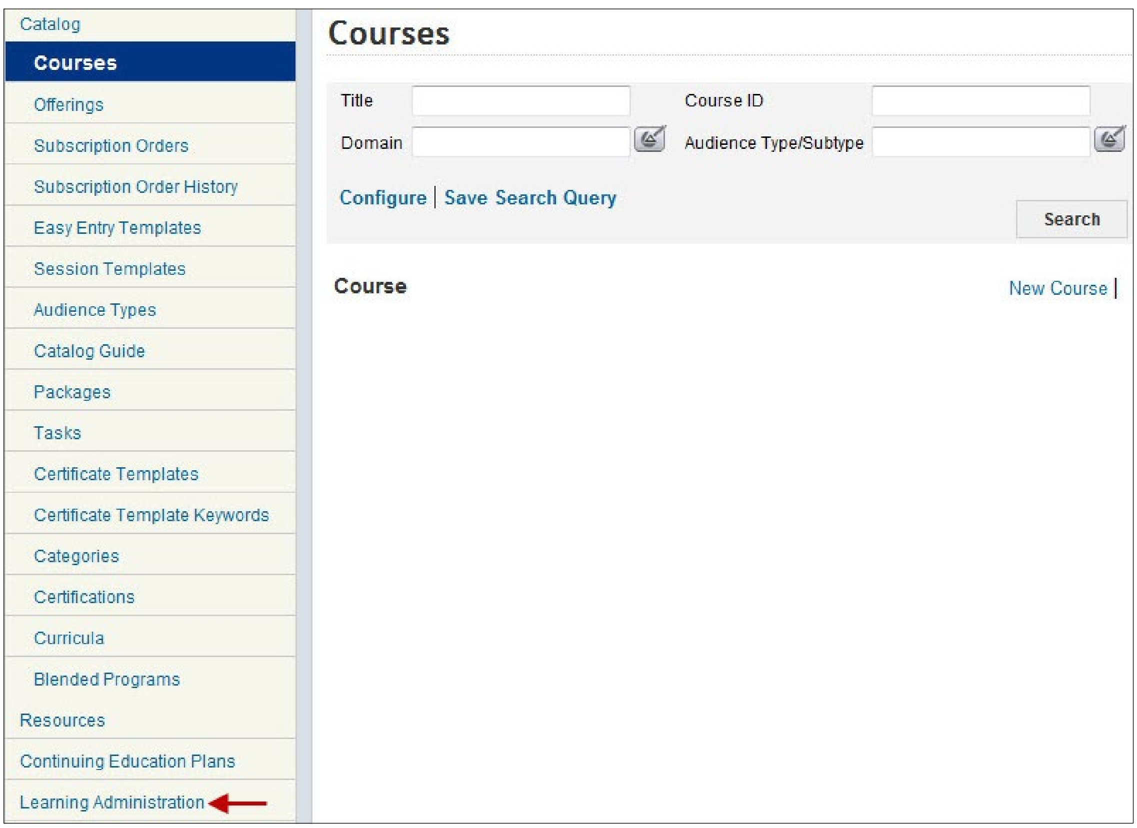
- External training that was completed outside of NIH/HHS
- NIH/HHS training that is not in the LMS catalog
- LMS catalog courses that could not be added by a Learning Administrator during the time completions were being marked

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

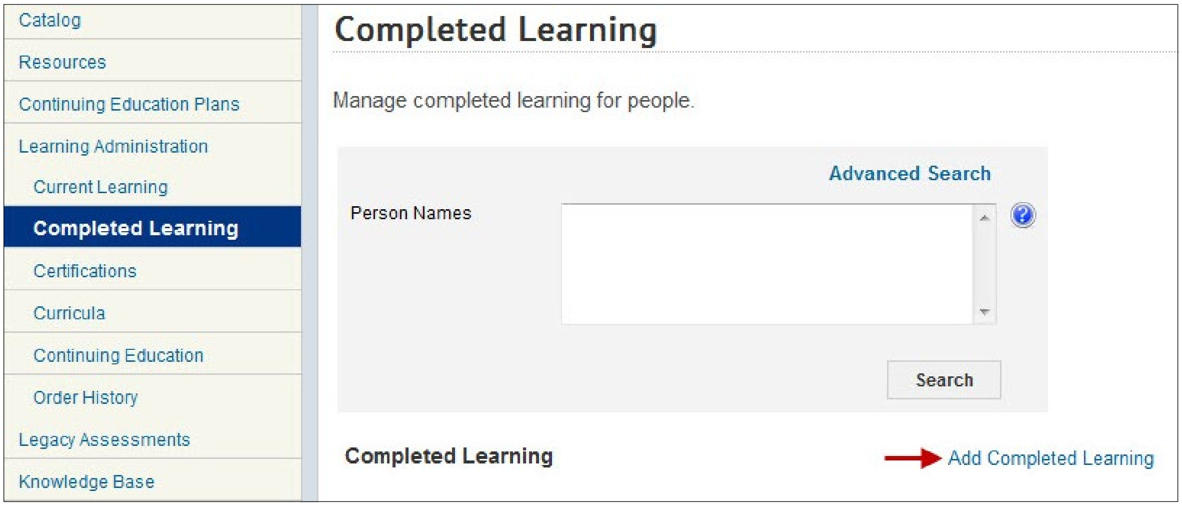
Follow the instructions below to add a course that already exists on another learner's transcript.

1. Click the **Admin Icon**.

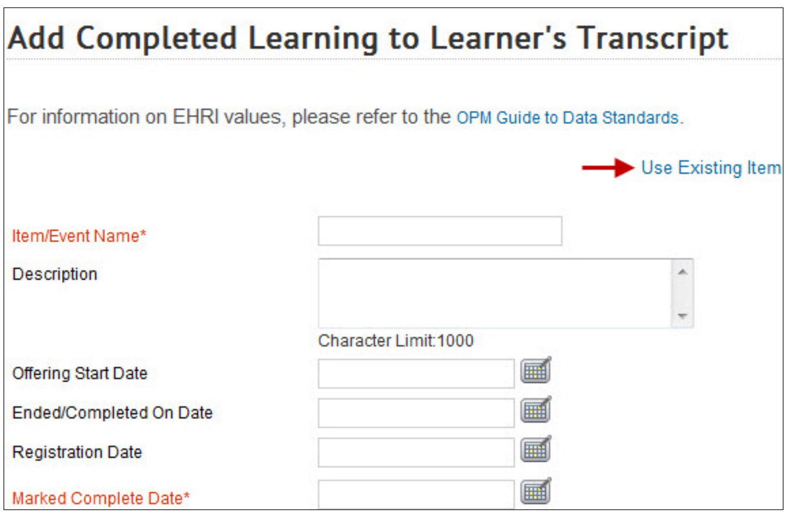
2. Click **Learning Administration** in the left menu.



3. Select **Completed Learning** in the left menu.
4. Click the **Add Completed Learning link**.

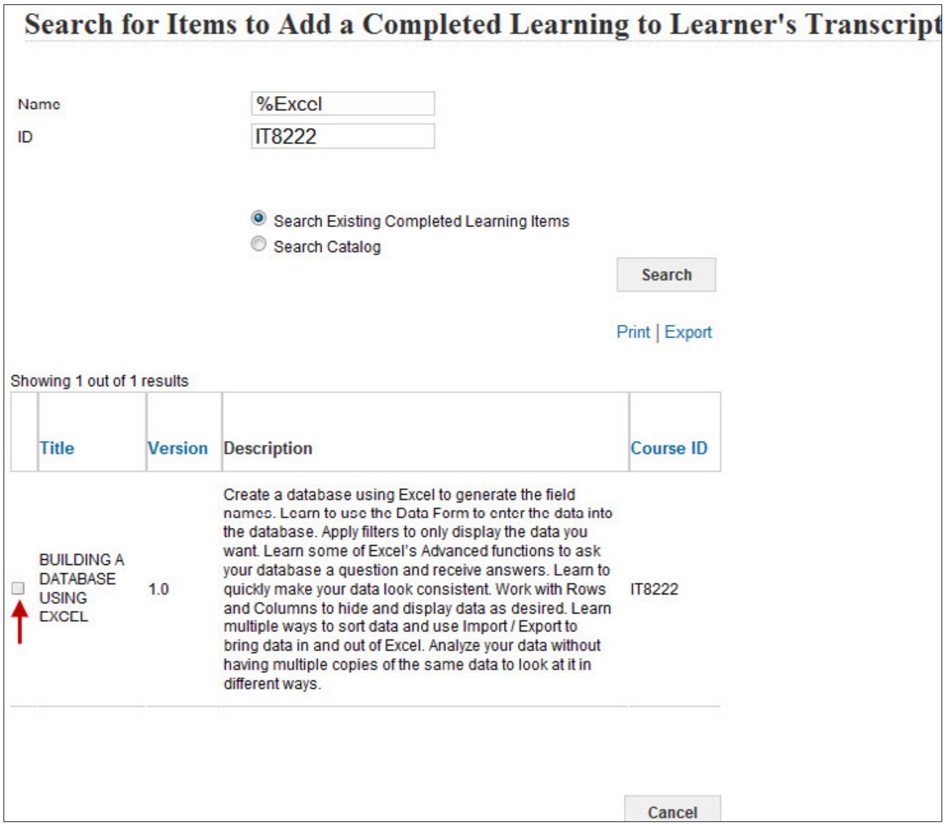


5. Click the **Use Existing Item link**.



6. Select the radio button for **Search Existing Completed Course Items**.
7. Enter a **course ID** or a **course name** then click the **Search button**.
8. **NOTE**: If the training being added is not in the LMS catalog or already added to someone else's transcript, it cannot be found in the LMS as an existing item. Follow the steps in the Adding A Course Not Found In The LMS Catalog if the course is not an existing item.

9. Click the **checkbox** associated with the course.



10. Enter data into remaining fields as appropriate for the course.
11. Click the **Add Learners link**.

Edit Item Added to Completed Learning

Use Existing Item

Item/Event Name	BUILDING A DATABASE USING EXCEL
Version	1.0
Description	Create a database using Excel to generate the field names. Learn to use the Data Form to enter the data into the database. Apply filters to only display the data you want. Learn some of Excel's Advanced functions to ask your database a question and receive answers. Learn to quickly make your data look consistent. Work with Rows and Columns to hide and display data as desired. Learn multiple ways to sort data and use Import / Export to bring data in and out of Excel. Analyze your data without having multiple copies of the same data to look at it in different ways.
Offering Start Date	04/01/2015
Ended/Completed On Date	04/01/2015
Registration Date	04/01/2015
Marked Complete Date*	04/01/2015
Start Time (HH:MM)	09:00
End Time (HH:MM)	12:00
Duration (HH:MM)	03:00
Delivery Type	Traditional Classroom
Course ID	IT8222
Location	NIH
Marked Complete By	NIHLEARNINGADMIN

Other Information

EHRI: Training Accreditation Indicator (1102)	Non Applicable
Training Accreditation Organization Type (1103)	
Course ID From Vendor (1105)	
EHRI: Training Source Type Code (1120)	Government Internal
EHRI: Training Purpose Type Code (1122)	Program/Mission Change
EHRI: Training Type Sub Code (1124)	Information Technology
EHRI: Training Credit (1126)	
EHRI: Training Credit Designation Type Code (1127)	
EHRI: Training Delivery Type Code (1129)	Traditional Classroom (no technology)
EHRI: Training Credit Type Code (1131)	
Instructor Competencies (1200)	
Multilingual Course (1201)	
Internal or External Course (1202)	Internal
Training Certification Type (1211)	
Course Development Cost (1220)	0
EHRI: Training Tuition and Fees Cost (1221)	0
EHRI: Training Materials Cost (1222)	
EHRI: Continued Service Agreement Required Indicator (1231)	
EHRI: Training Duty Hours (1101)	
EHRI: Training Non Duty Hours (1102)	0
EHRI: Training Per Diem Cost (1103)	0
EHRI: Training Travel Cost (1104)	0
EHRI: Training Nongovernment Contribution Cost (1105)	0
EHRI: Training Travel Indicator (1106)	No
EHRI: Continued Service Agreement Expiration Date (1230)	

Continuing Education Credits

No items found

Learners

Add Learners

No items found

Competencies

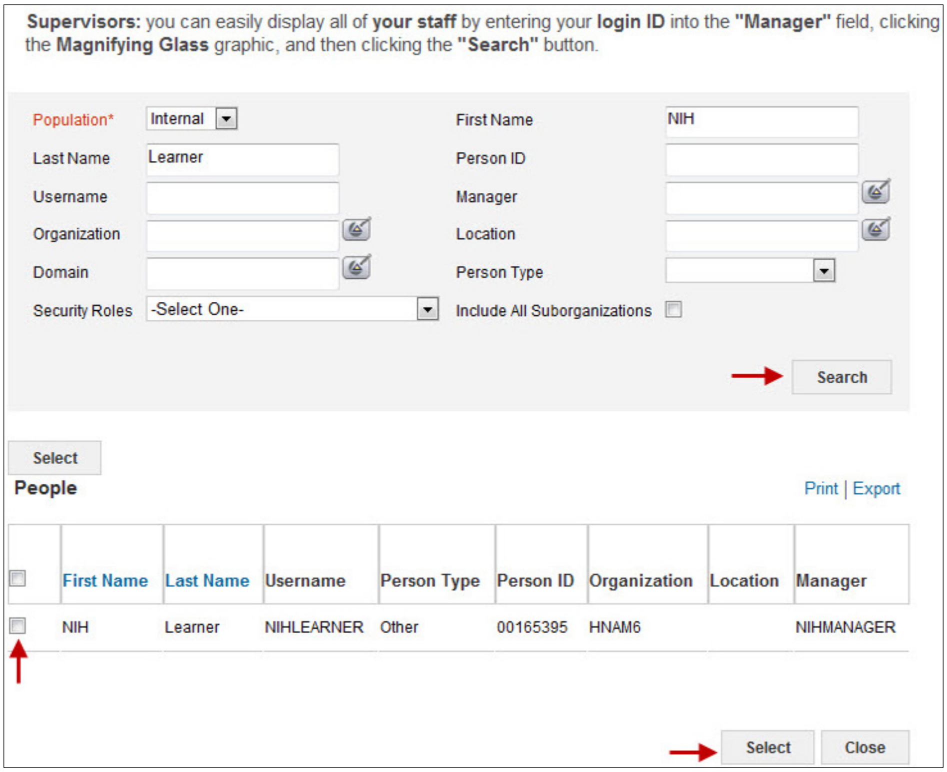
No items found

Notes

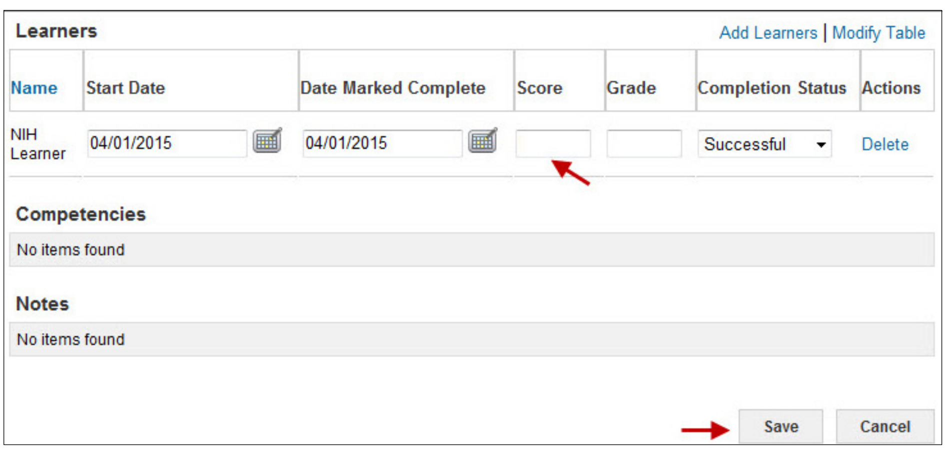
No items found

Save Cancel

12. Enter search criteria for the learner(s) to receive credit for the course then click the **Search button**.
13. Click the **checkbox** associated with the learner then click the **Select button**.



14. Delete the zero from the **Score field**.
15. Click the **Save button**.

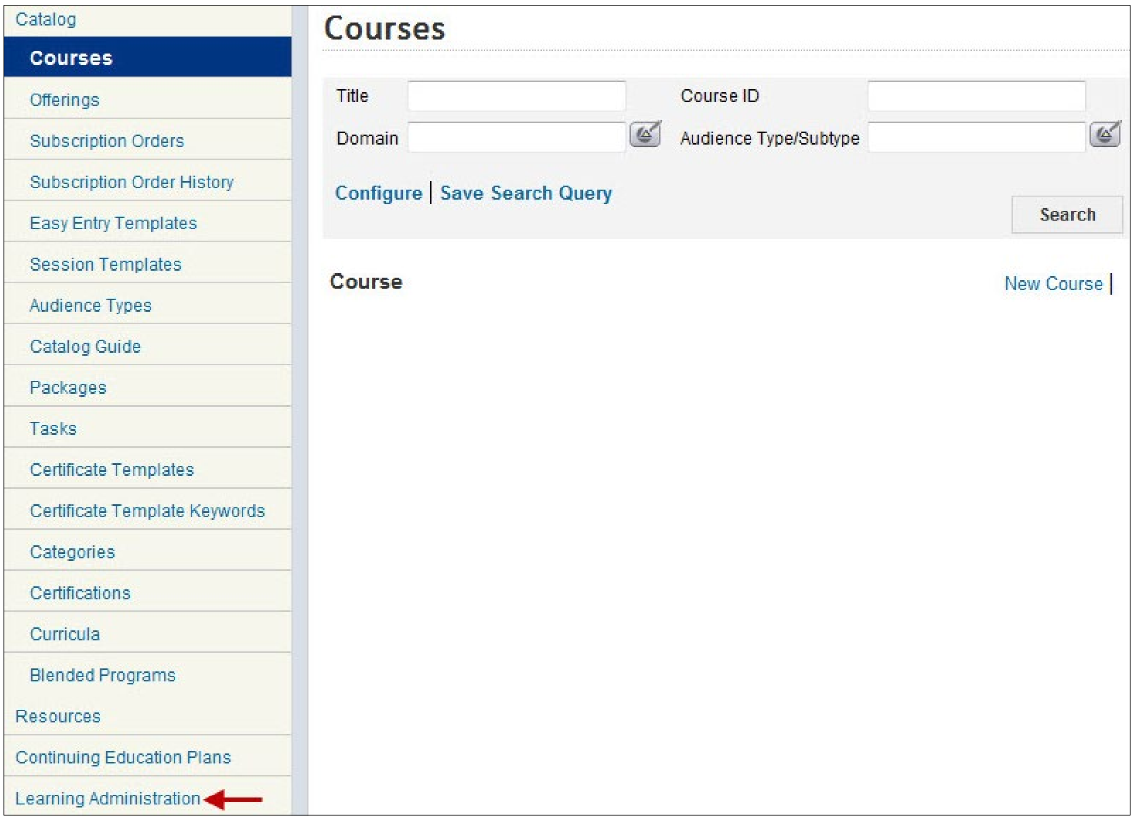


16. The course will now become part of the learner's completed course items.

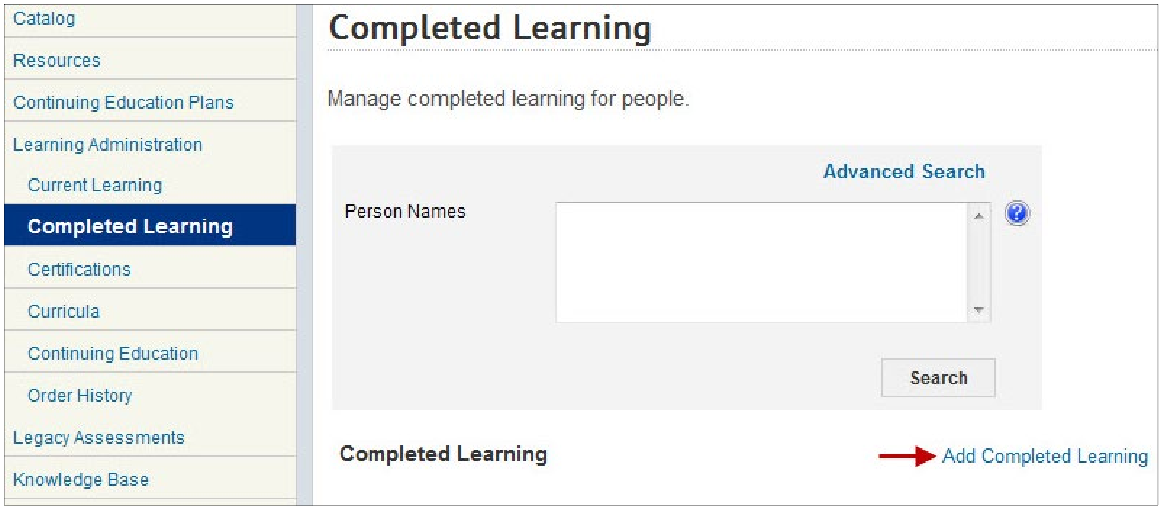
ADDING A COURSE NOT FOUND IN THE LMS

1. Click the **Admin Icon**.

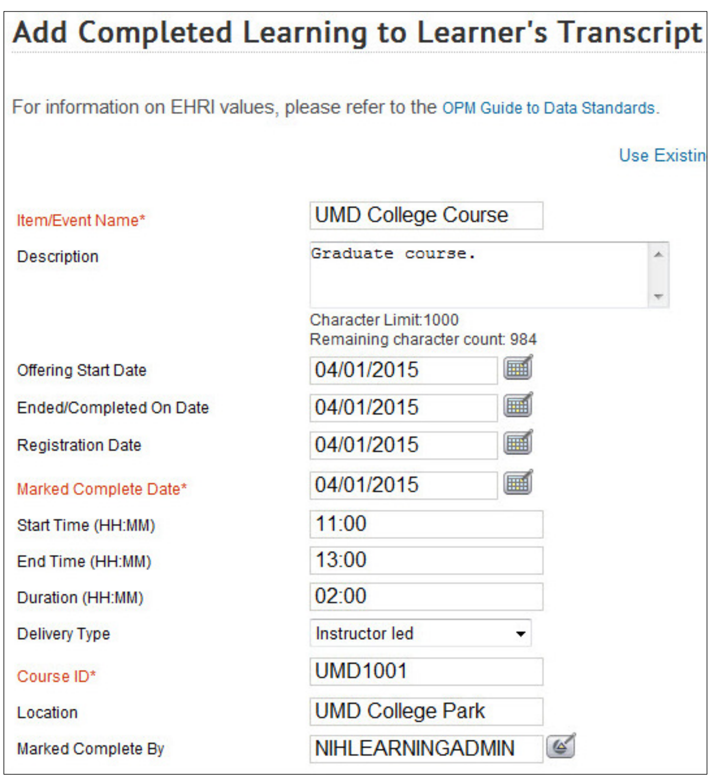
2. Click **Learning Administration** in the left menu.



3. Select **Completed Learning** in the left menu.
4. Click the **Add Completed Learning link**.



5. Enter the following data:
   - **Item/Event Name** – The actual name of the course, workshop, conference, etc.
   - **Dates** – Marked Complete Date is required. This date shows up on the certificate. Enter all dates if known.
   - **Time** – Uses 24 clock and must be entered in a ##:## format.
   - **Delivery Type** – Enter the method of delivery.
   - **Course ID** – The unique course number associated with the course.
   - **Location** – Enter the location of the training.
   - **Marked Complete By** – Enter the administrator that is adding the course.



Add EHRI data in the Other Information section.

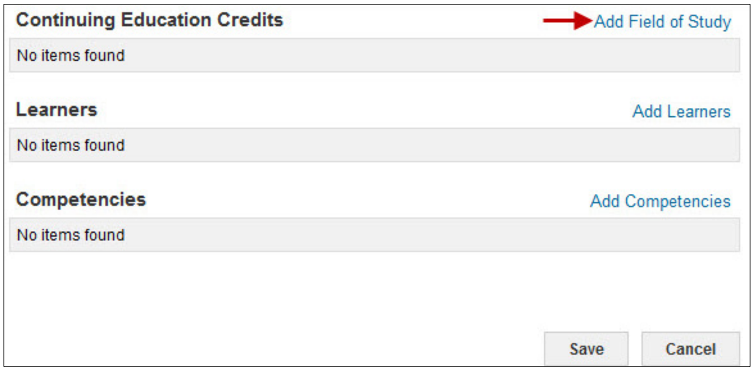
IMPORTANT! All EHRI values included at the bottom of this page should be validated. If any of the values are incorrect, the transcript item should be cancelled and the values corrected in the LMS course catalog by an LMS Learning Administrator. (See Appendix B for explanations of data fields required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

Other Information

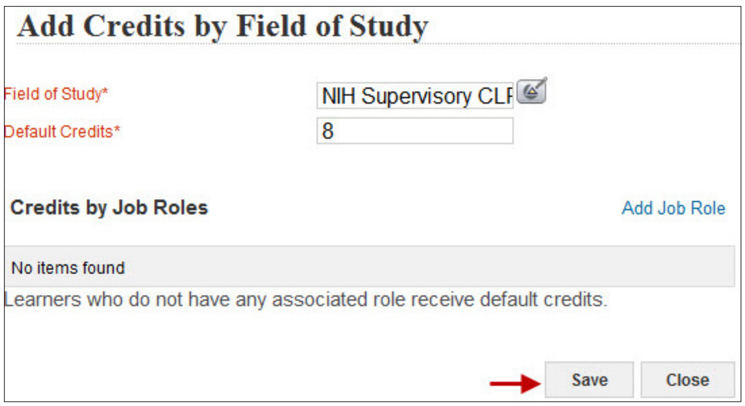
Training Accreditation Organization Type (1103)	NA
Course ID From Vendor (1105)	UMDCP1001
EHRI: Training Credit (1126)	0
EHRI: Training Credit Designation Type Code (1127)	Other
EHRI: Training Delivery Type Code (1129)	Traditional Classroom (no technology)
EHRI: Training Credit Type Code (1131)	NA (Not Applicable)
Instructor Competencies (1200)	
Multilingual Course (1201)	
Internal or External Course (1202)	External
Training Certification Type (1211)	NA
Course Development Cost (1220)	0
EHRI: Training Tuition and Fees Cost (1221)	450
EHRI: Training Materials Cost (1222)	80
EHRI: Continued Service Agreement Required Indicator (1231)	NA
EHRI: Training Accreditation Indicator (1102)	Non Applicable
EHRI: Training Source Type Code (1120)*	Non-government
EHRI: Training Purpose Type Code (1122)	Develop Unavailable Skills
EHRI: Training Type Sub Code (1124)	Leadership Development Program
EHRI: Training Duty Hours (1101)	2
EHRI: Training Non Duty Hours (1102)	0
EHRI: Training Per Diem Cost (1103)	0
EHRI: Training Travel Cost (1104)	0
EHRI: Training Nongovernment Contribution Cost (1105)	0
EHRI: Training Travel Indicator (1106)	No
EHRI: Continued Service Agreement Expiration Date (1230)	NA

ADDING A FIELD OF STUDY FOR CLP TRACKING

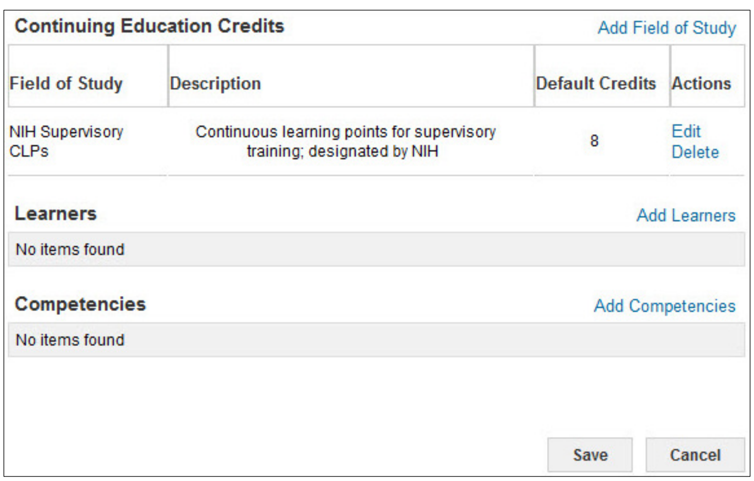
1. Click the **Add Field Of Study link**.



2. Locate the field of study and enter the number of credits.
3. Click the **Save button**.

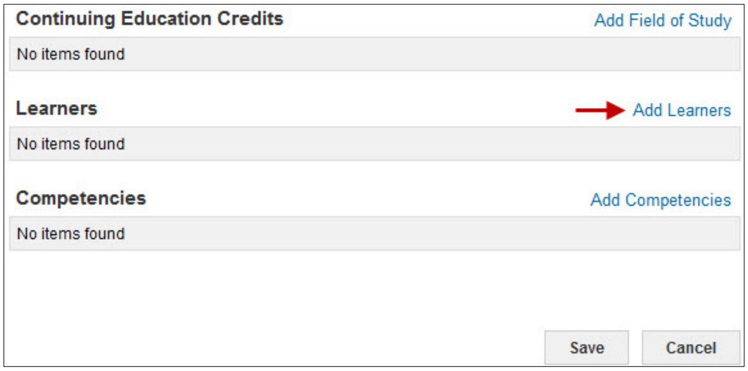


4. The field of study will now be added to the course.

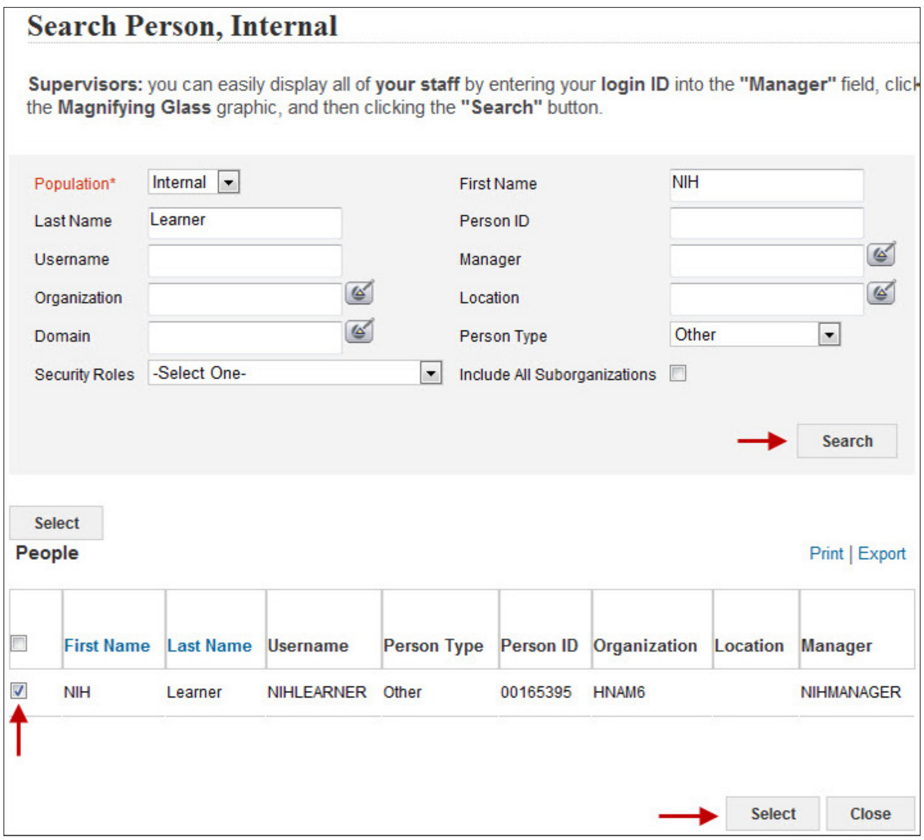


ADDING LEARNERS TO RECEIVE COMPLETED COURSES

1. Click the **Add Learners link**.



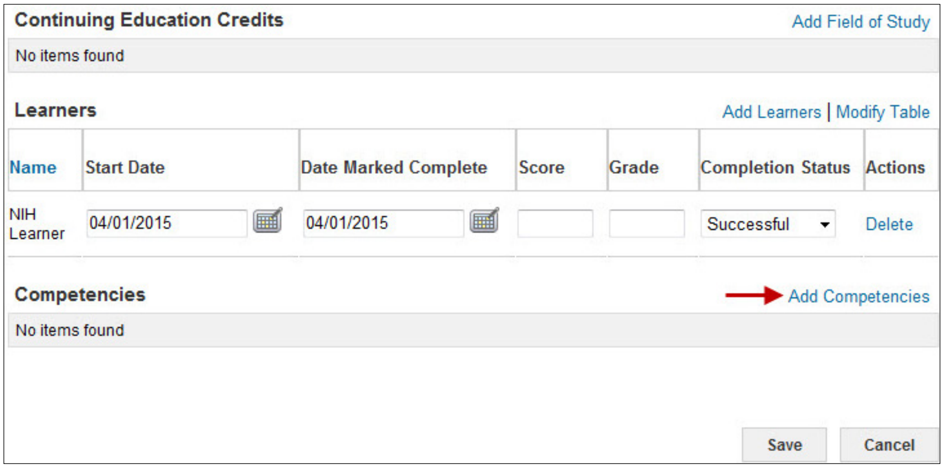
2. Enter search criteria for a learner then click the **Search button**.
3. Click the **checkbox** associated with the learner then click the **Select button**.



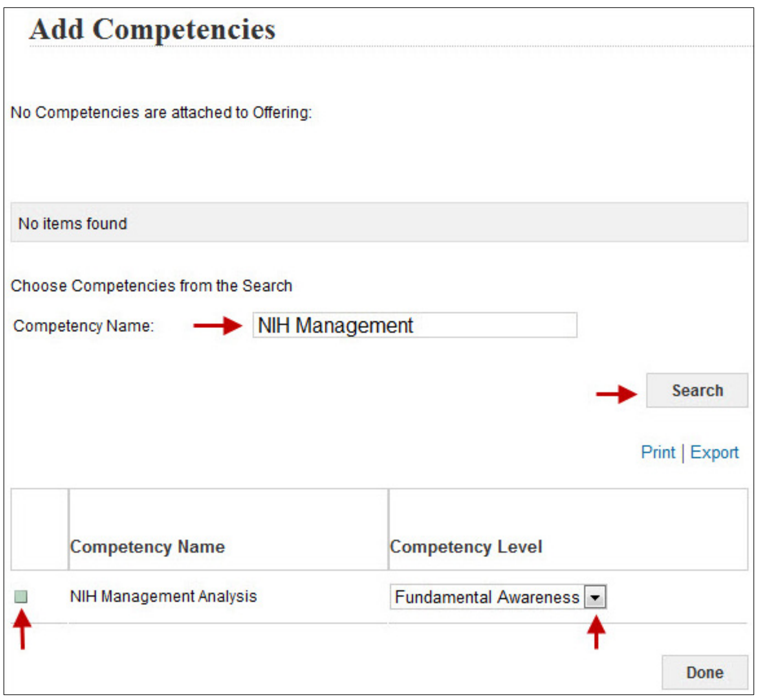
4. The learner will now be added as a recipient of the completed course.
5. Remove the zero in the grade column before saving.

ADDING COMPETENCIES TO A COMPLETED COURSE

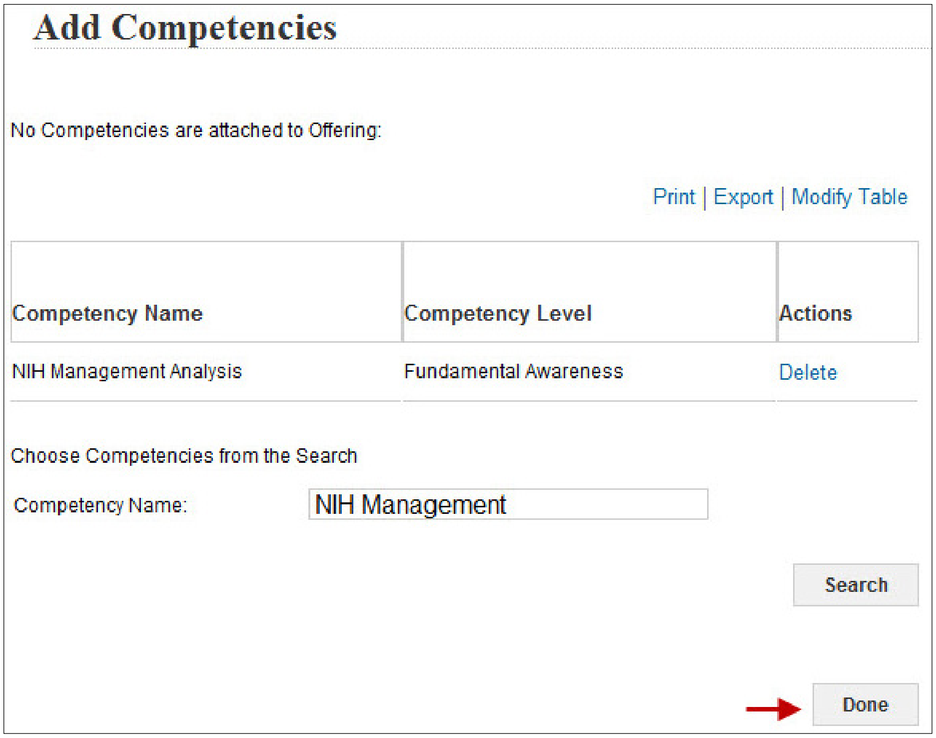
1. Click the **Add Competencies link**.



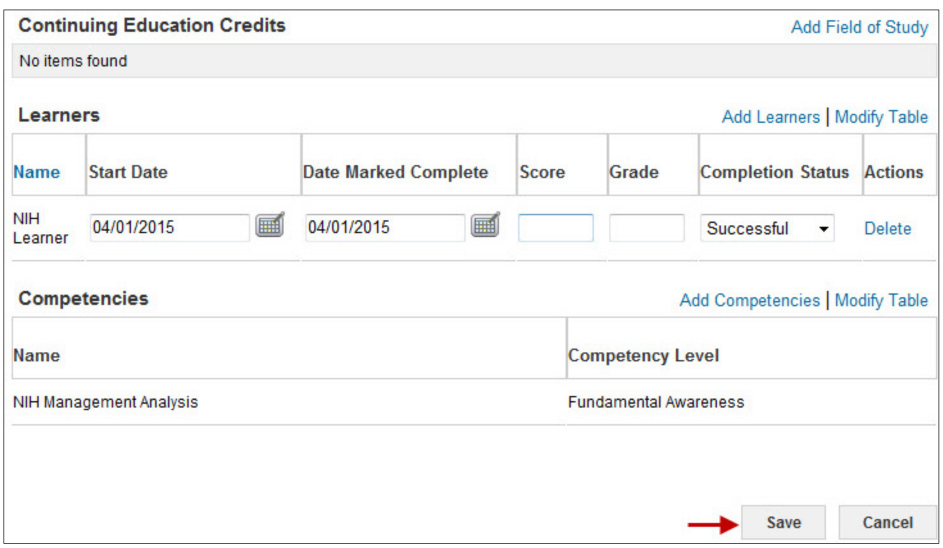
2. Type the **name of the competency** then click the **Search button**.
3. Select the **competency level** from the pull-down menu.
4. Click the **checkbox** associated with the competency.



5. Click the **Done button**.



6. The competency will now be added to the completed course item. Repeat these steps to add additional competencies.



7. The course will now be added to the learner's list of completed courses. Please view the complete courses to make sure the course was saved properly.

REPORTS

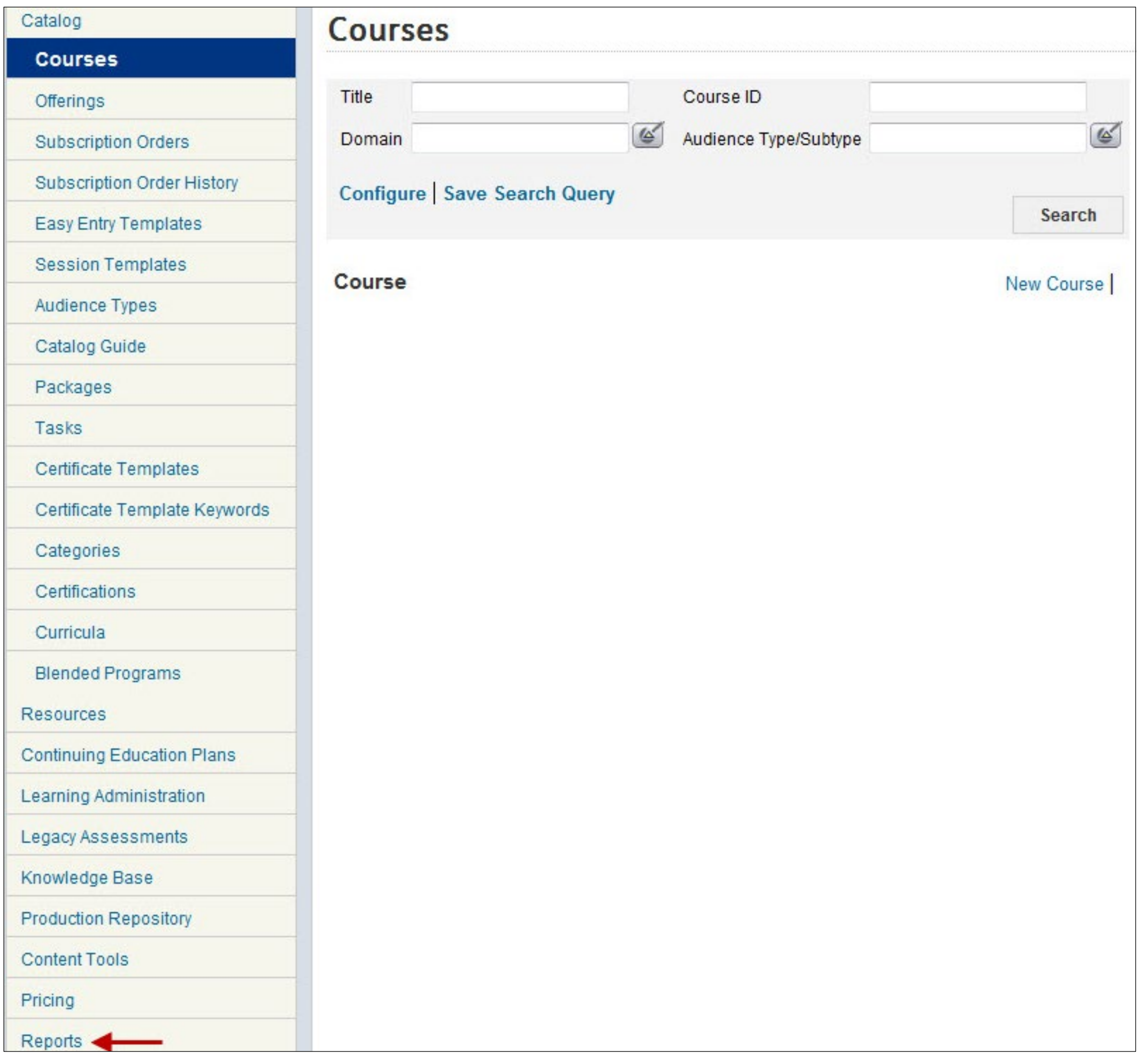
GENERATE REPORTS

Learning Administrators have access to a variety of reports in the LMS. Reports can be generated, exported, printed, emailed and subscribed to if desired. The reports that are available for the roles of Learning Administrator and Content Administrator are unique to the specific role used to access them.

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

1. Click the **Admin Icon**.

2. Click **Reports** in the left menu.

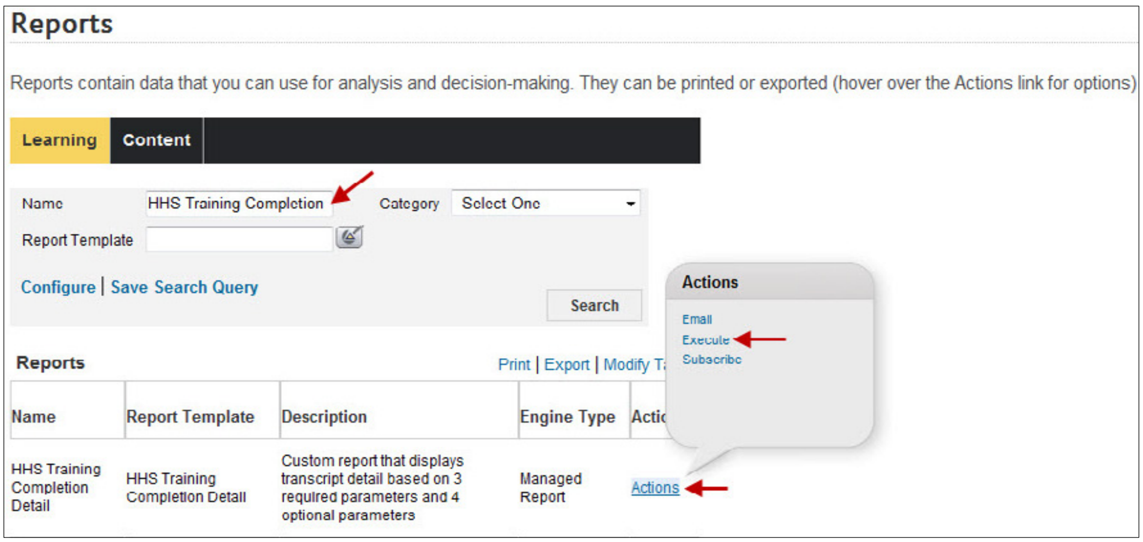


3. Enter the name of the report in the **Name field.**
4. Click the **Search button**.
5. Click the **Actions link** in the Actions column.
6. Click **Execute** in the popup window.

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

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

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

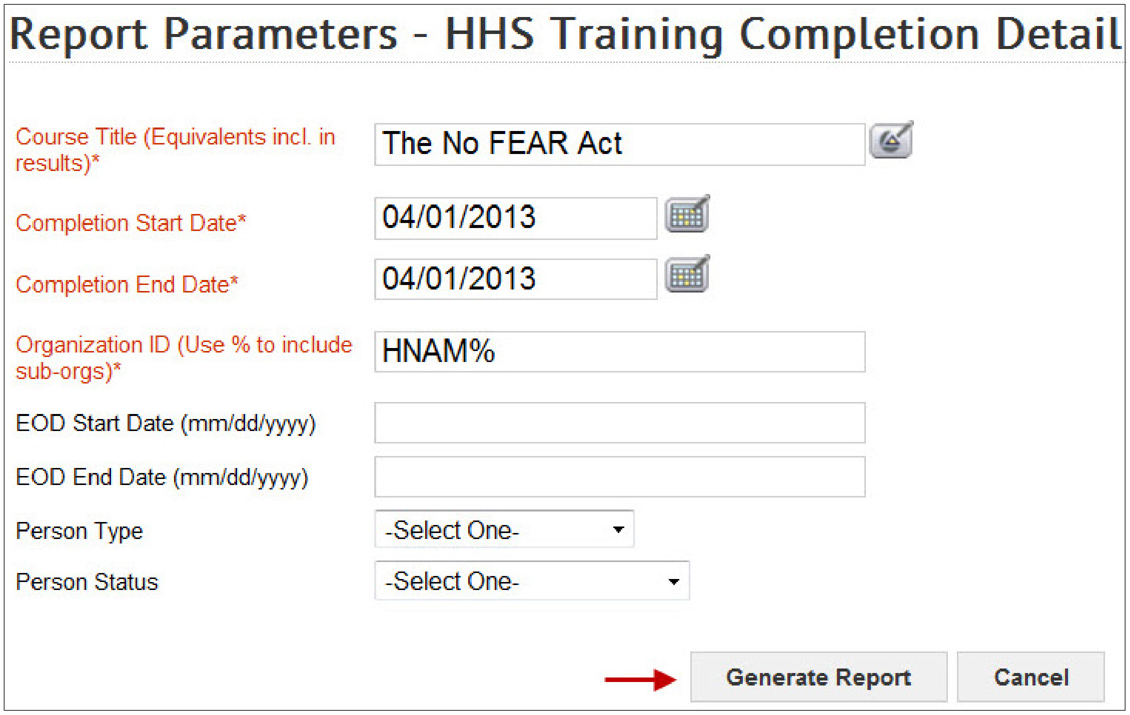


7. Enter parameters required to run the report.
8. Enter report parameters into the appropriate fields. The parameters will vary depending upon the report being run.

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

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

9. Click the **Generate Report button**.



Report Parameters - HHS Training Completion Detail

Course Title (Equivalents incl. in results)* The No FEAR Act

Completion Start Date* 04/01/2013

Completion End Date* 04/01/2013

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

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

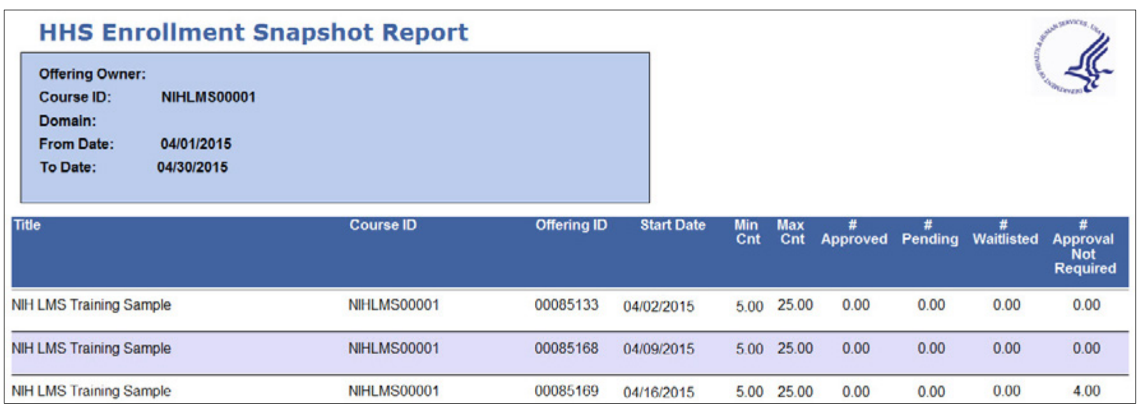
Person Type -Select One-

Person Status -Select One-

Generate Report Cancel

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

NOTE: Depending on the amount of data being pulled, some reports may take longer than others to run. Try using a subscription or email the report to yourself to reduce waiting times.



HHS Enrollment Snapshot Report

Offering Owner:
Course ID: NIHLMS00001
Domain:
From Date: 04/01/2015
To Date: 04/30/2015

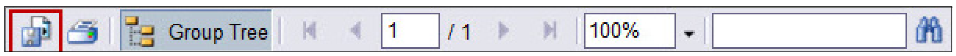
Title	Course ID	Offering ID	Start Date	Min Cnt	Max Cnt	# Approved	# Pending	# Waitlisted	# Approval Not Required
NIH LMS Training Sample	NIHLMS00001	00085133	04/02/2015	5.00	25.00	0.00	0.00	0.00	0.00
NIH LMS Training Sample	NIHLMS00001	00085168	04/09/2015	5.00	25.00	0.00	0.00	0.00	0.00
NIH LMS Training Sample	NIHLMS00001	00085169	04/16/2015	5.00	25.00	0.00	0.00	0.00	4.00

EXPORT A REPORT

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

Follow the instructions below to export an LMS report.

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



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

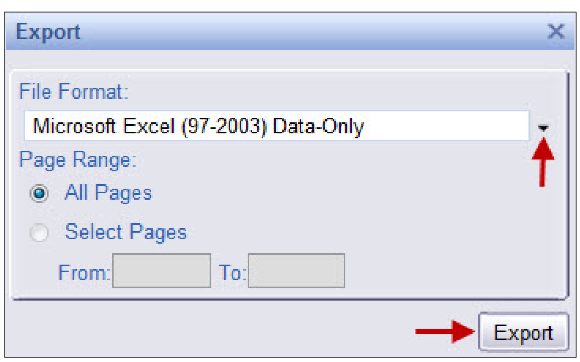
NOTE: The following two formats are the most commonly used:

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

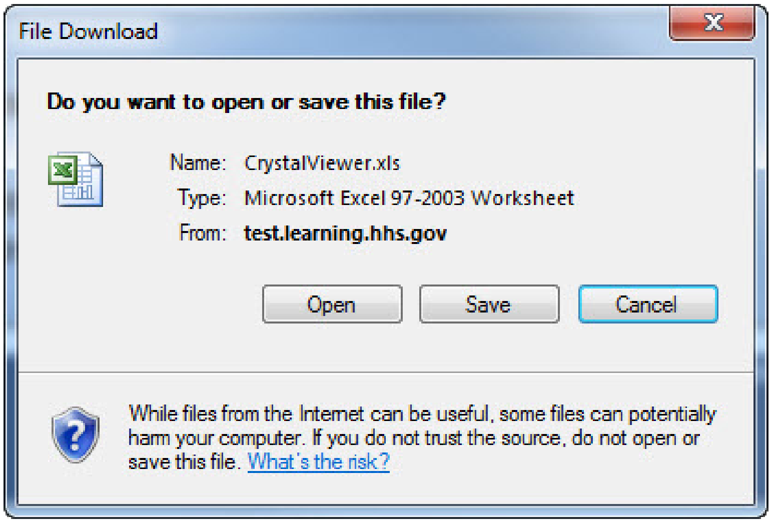
3. Select the range of pages that should be exported. All pages in the report will be exported unless a specific page range is defined.

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

4. Click **Export**.

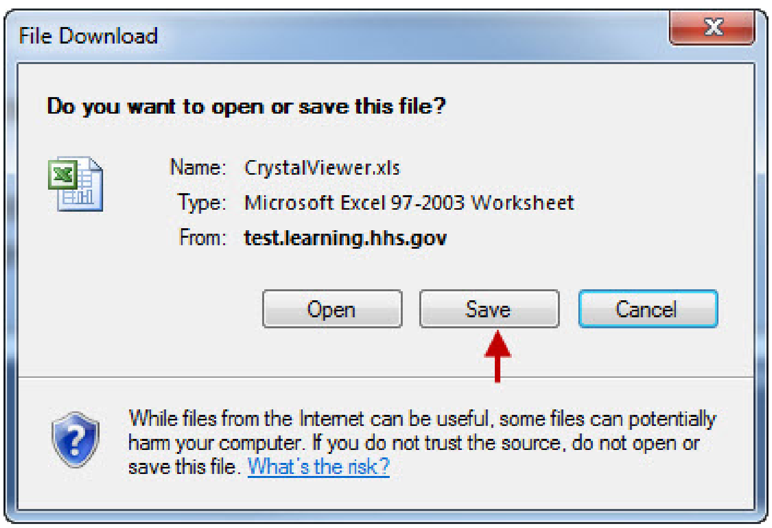


5. You will be prompted to open or save the file.
   a. Clicking **Save** will allow you to save the file before opening.
   b. Clicking **Open** will open the data in the chosen format.

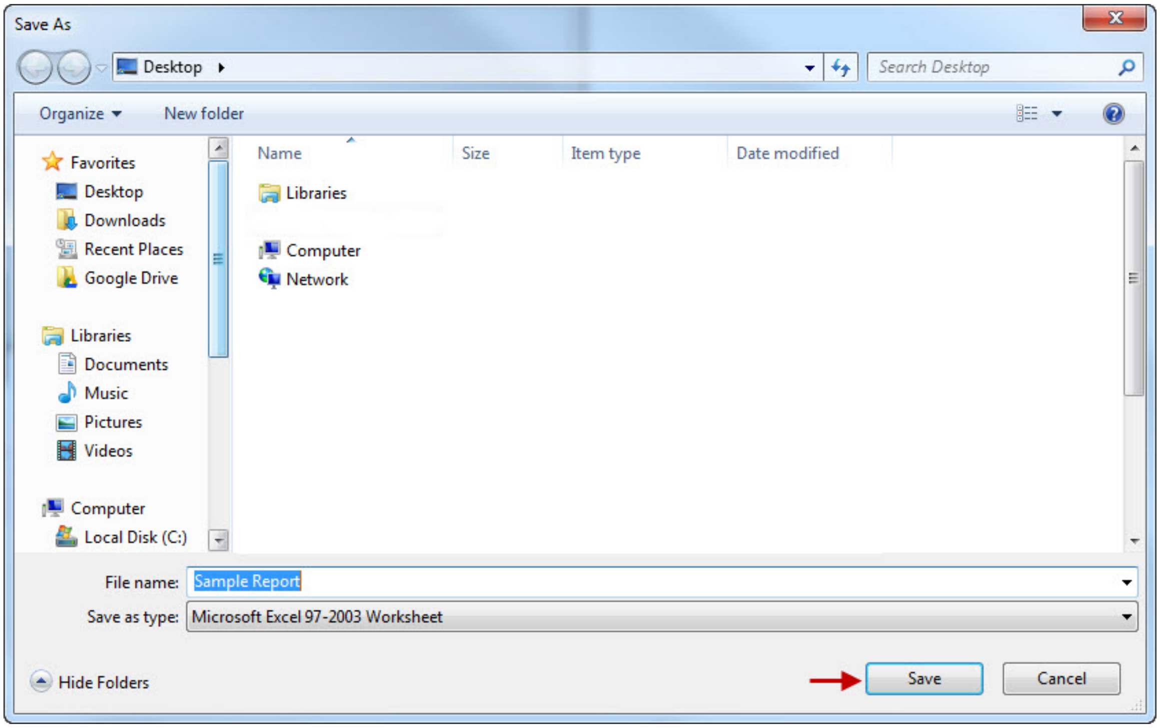


SAVING AN EXPORTED REPORT

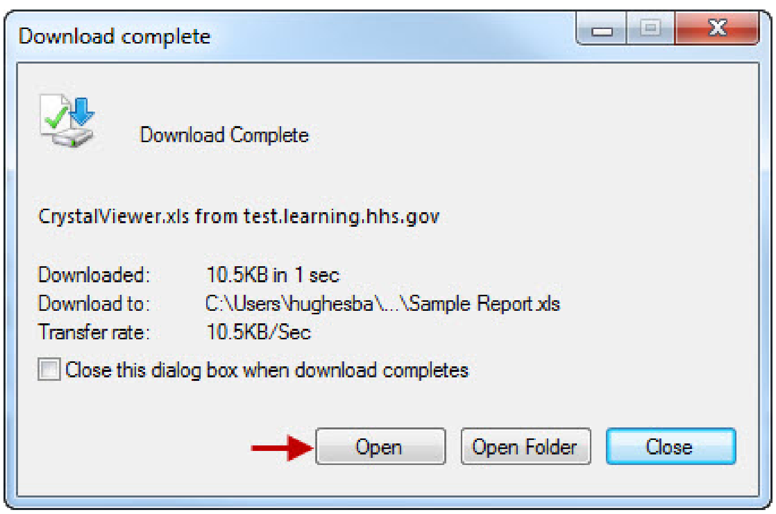
1. While viewing the File Download popup window, click the **Save button**.



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



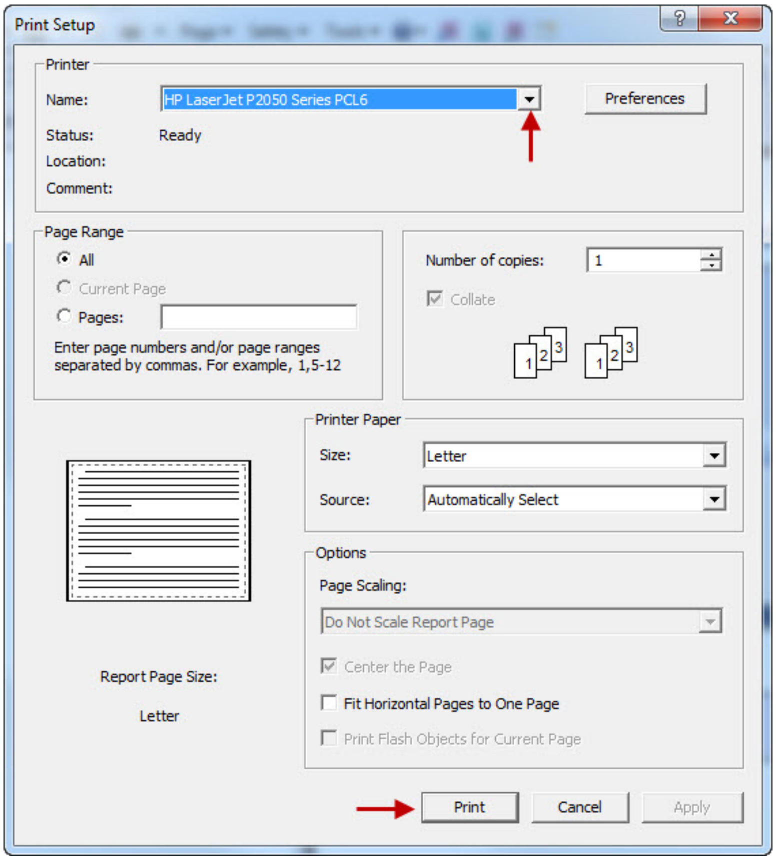
4. You will receive a prompt when the download is complete. Click **Open** to open the report file you just downloaded.



PRINT A REPORT

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

2. Select a printer to receive the report.
3. Click the **Print button**.



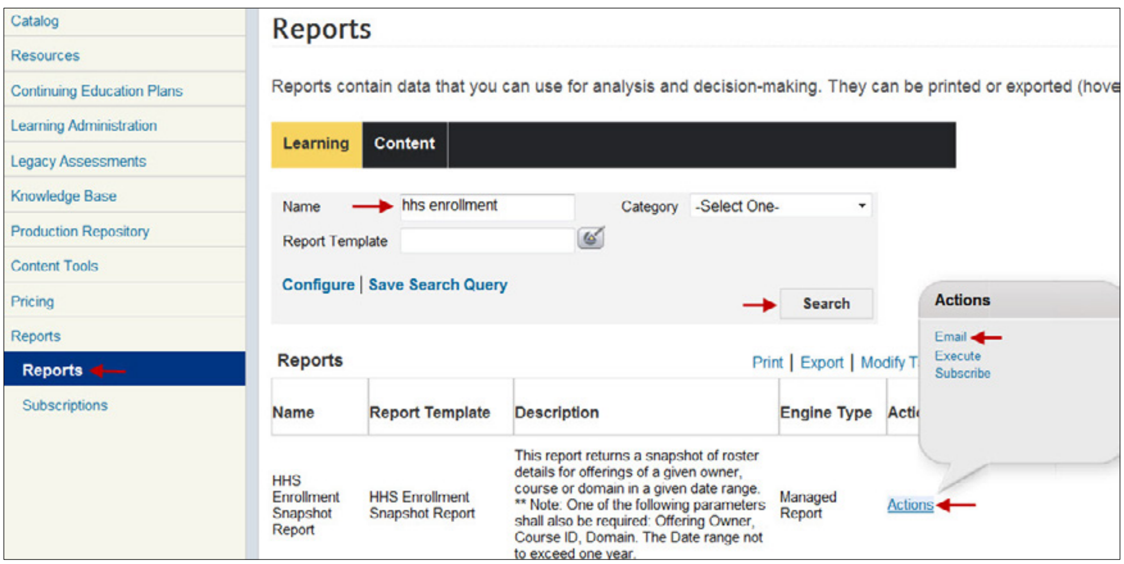
5. The report will now be printed on the selected printer.

EMAIL A REPORT

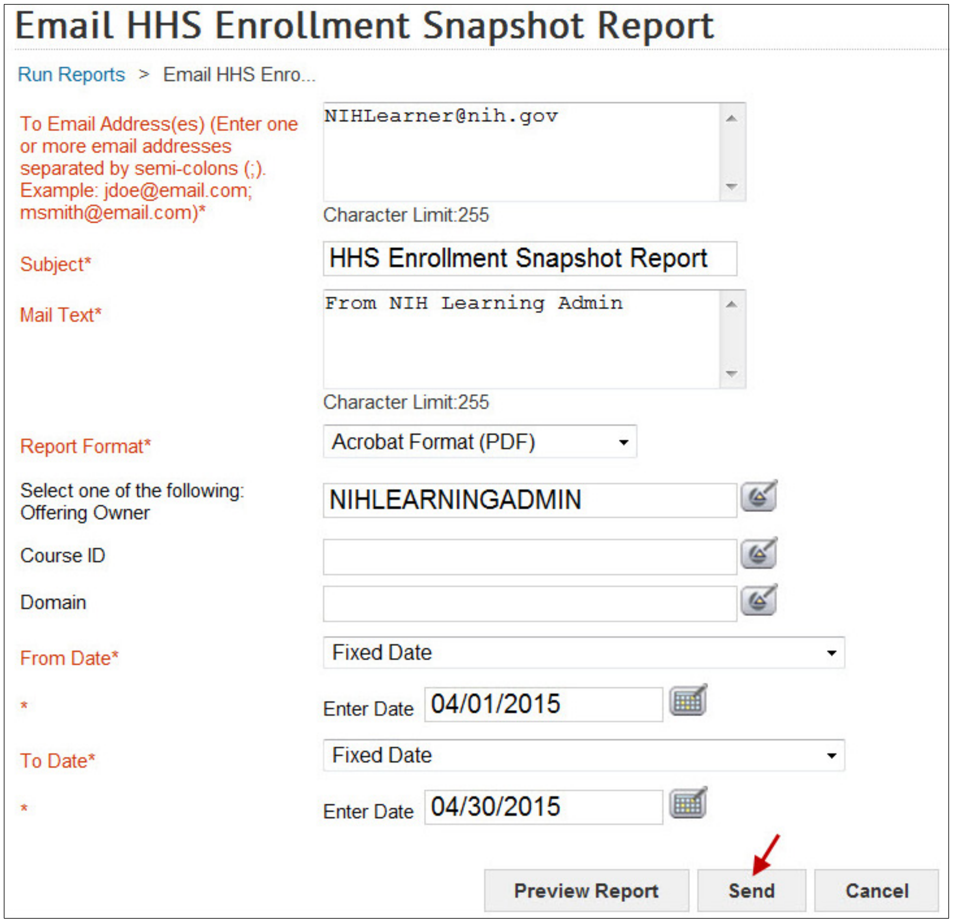
The LMS allows reports to be emailed, on-demand, to any valid email address. Those who receive the email do not need to log on or have access to the LMS in order to view the emailed report.

1. Click the **Admin Icon**.

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



7. Enter one or more recipient email addresses in the **To** field. (Separate multiple emails with either a comma or semi-colon)
8. Modify the **Subject** and **Mail Text** (the email body) fields to appear as you want them in the email.
9. Choose a **Report Format** from the report format pull-down menu.
10. Enter all remaining report parameters.
11. **NOTE**: The remaining parameters will vary by report. All fields labeled with red letters require data to email the report.
12. Click the **Preview button** to see the report based with the parameters you entered.
13. Click the **Send button** to send the report to the email recipient(s).



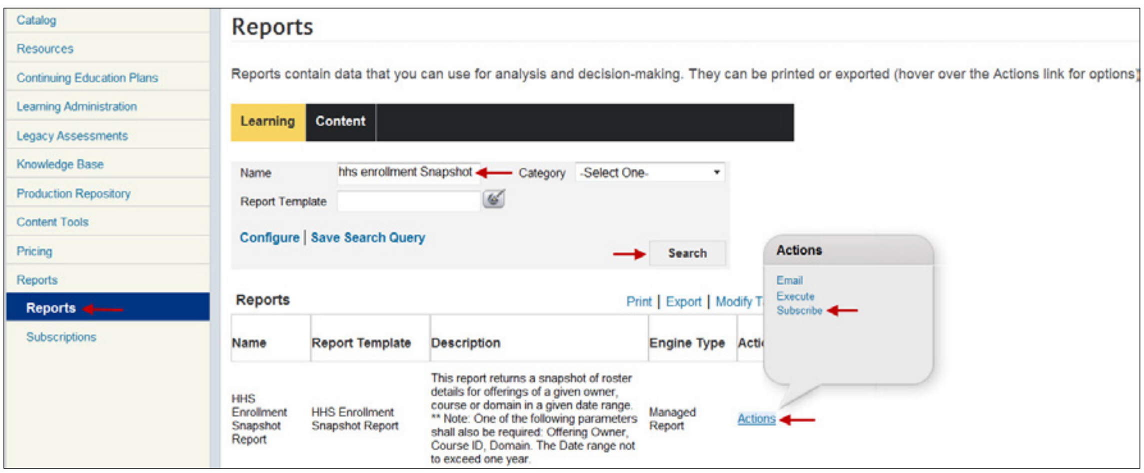
12. The report will be sent to all people with valid emails in the To field.

SUBSCRIBE TO A REPORT

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

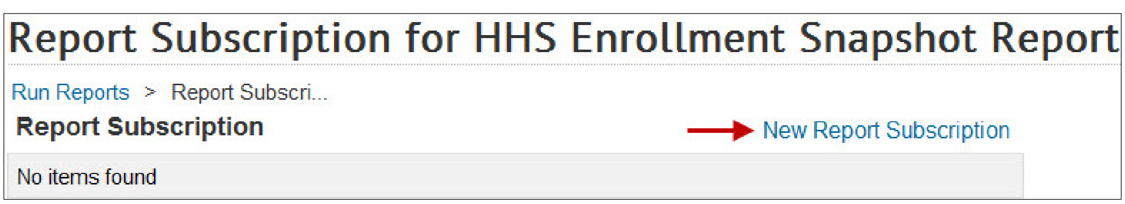
1. Click the **Admin Icon**.

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

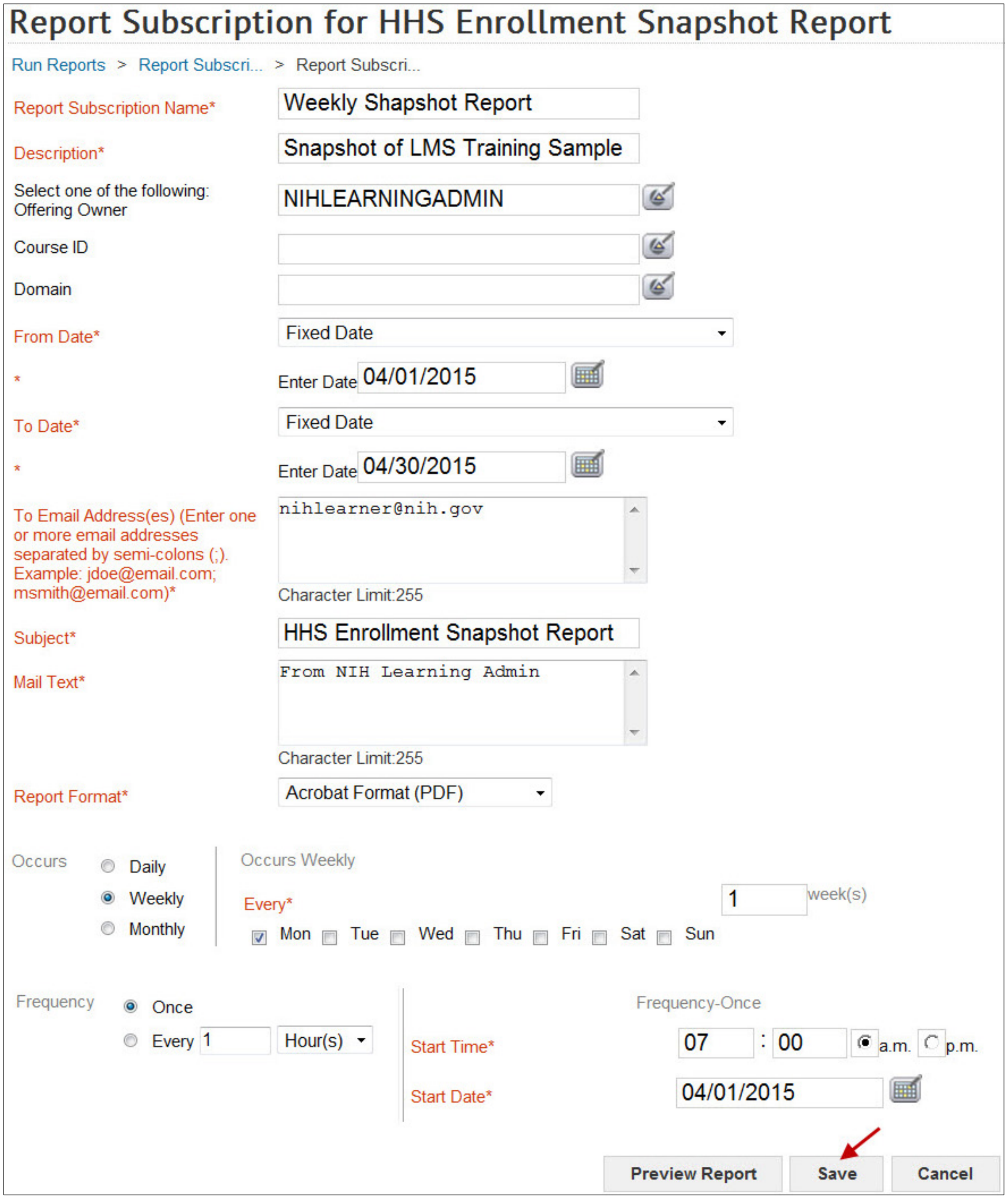


7. Click the **New Report Subscription link**.

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



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



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

SELECTING THE OCCURRENCE OF A REPORT SUBSCRIPTION

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

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

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

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

SELECTING THE FREQUENCY OF A REPORT SUBSCRIPTION

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

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

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

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

SAVING A REPORT SUBSCRIPTION

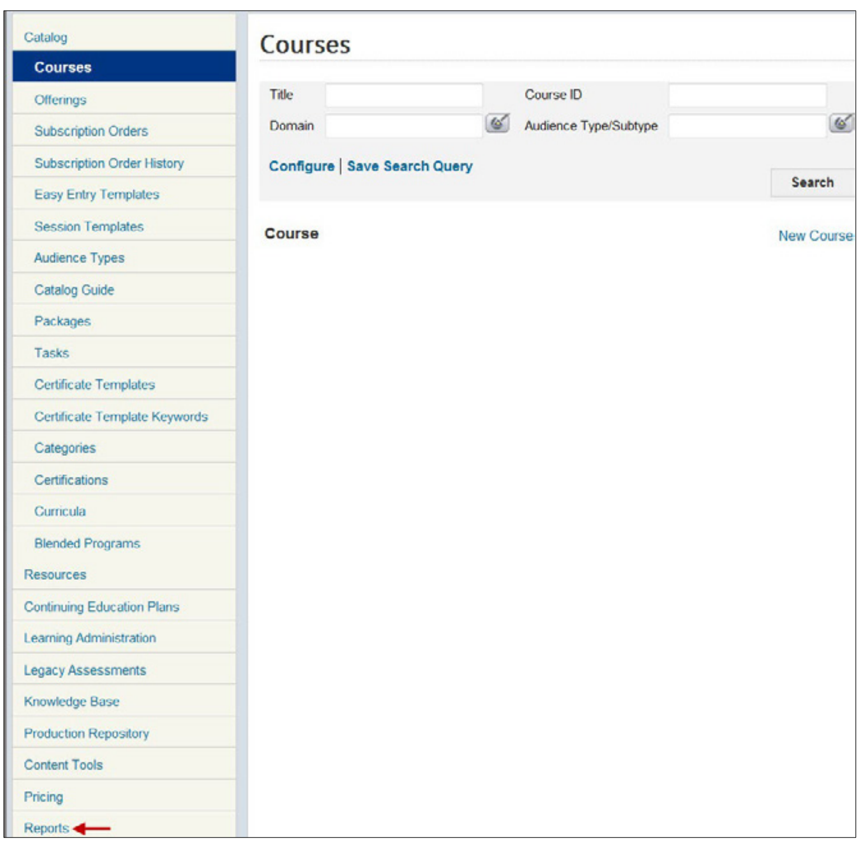
1. After all report subscription parameters have been entered, click **Preview Report** to see the report as it will appear. Verify that the report contains the correct data. If not, close the report and adjust the parameters that were previously entered.
2. Click **Save** to activate the report subscription.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

LOCATE AND EDIT A SUBSCRIPTION

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

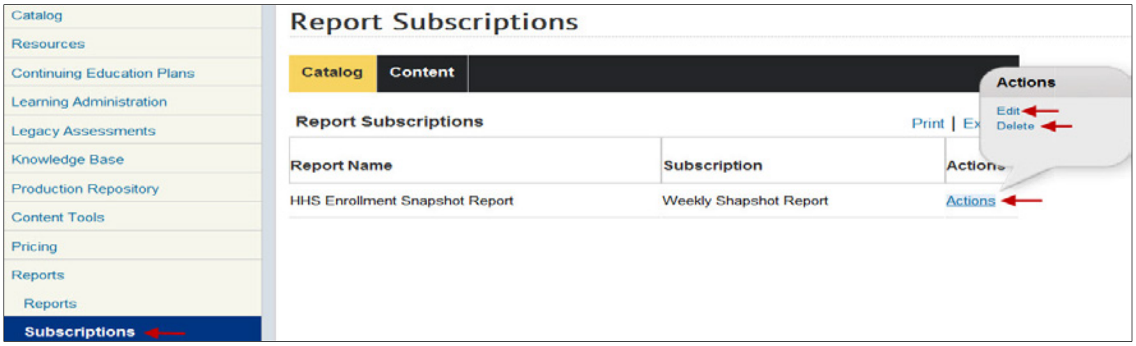
1. Click the **Admin Icon**.

2. Click **Reports** in the left menu.



3. Click Subscriptions in the left menu.

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



HELPFUL INFORMATION

LINKS AND RESOURCES

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

- HRSS Help Desk
  Submit a help ticket:
  https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx

  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.)
  https://hr.nih.gov/hr-systems/lms

APPENDIX A – ORGANIZATION CODES

Organization (org) Codes are also referred to as SAC Codes

HN All of NIH

HNA (OD) Immediate Office of the Director

HNB (NIAMS) National Institute of Arthritis and Musculoskeletal and Skin Diseases
HNC (NCI) National Cancer Institute

HND (NCCAM) National Center for Complementary and Alternative Medicine
HNE (NCMHD) National Center on Minority Health and Health Disparities

HNF (FIC) John E. Fogarty International Center for Advanced Study in the Health Sciences
HNG (CSR) Center for Scientific Review

HNH (NHLBI) National Heart, Lung, and Blood Institute
HNJ (CC) Clinical Center

HNK (NIDDK) National Institute of Diabetes and Digestive and Kidney Diseases
HNL (NLM) National Library of Medicine

HNM (NIAID) National Institute of Allergy and Infectious Diseases
HNN (NIA) National Institute on Aging

HNP (NIDCR) National Institute of Dental and Craniofacial Research
HNQ (NINDS) National Institute of Neurological Disorders and Stroke
HNR (NCRR) National Center for Research Resources

HNS (NIGMS) National Institute of General Medical Sciences

HNT (NICHD) National Institute of Child Health and Human Development
HNU (CIT) Center for Information Technology

HNV (NIEHS) National Institute of Environmental Health Sciences
HNW (NEI) National Eye Institute

HN2 (NINR) National Institute of Nursing Research

HN3 (NIDCD) National Institute on Deafness and Other Communication Disorders
HN4 (NHGRI) National Human Genome Research Institute

HN5 (NIAAA) National Institute on Alcohol Abuse and Alcoholism
HN6 (NIDA) National Institute on Drug Abuse

HN7 (NIMH) National Institute of Mental Health

HN8 (NIBIB) National Institute of Biomedical Imaging and Bioengineering
HN9 (NCATS) National Center for Advancing Transitional Sciences

APPENDIX B - ENTERPRISE HUMAN RESOURCES INTEGRATION (EHRI) FIELDS

LMS REQUIRED FIELDS	EHRI REQUIRED FIELDS	NON REQUIRED FIELDS

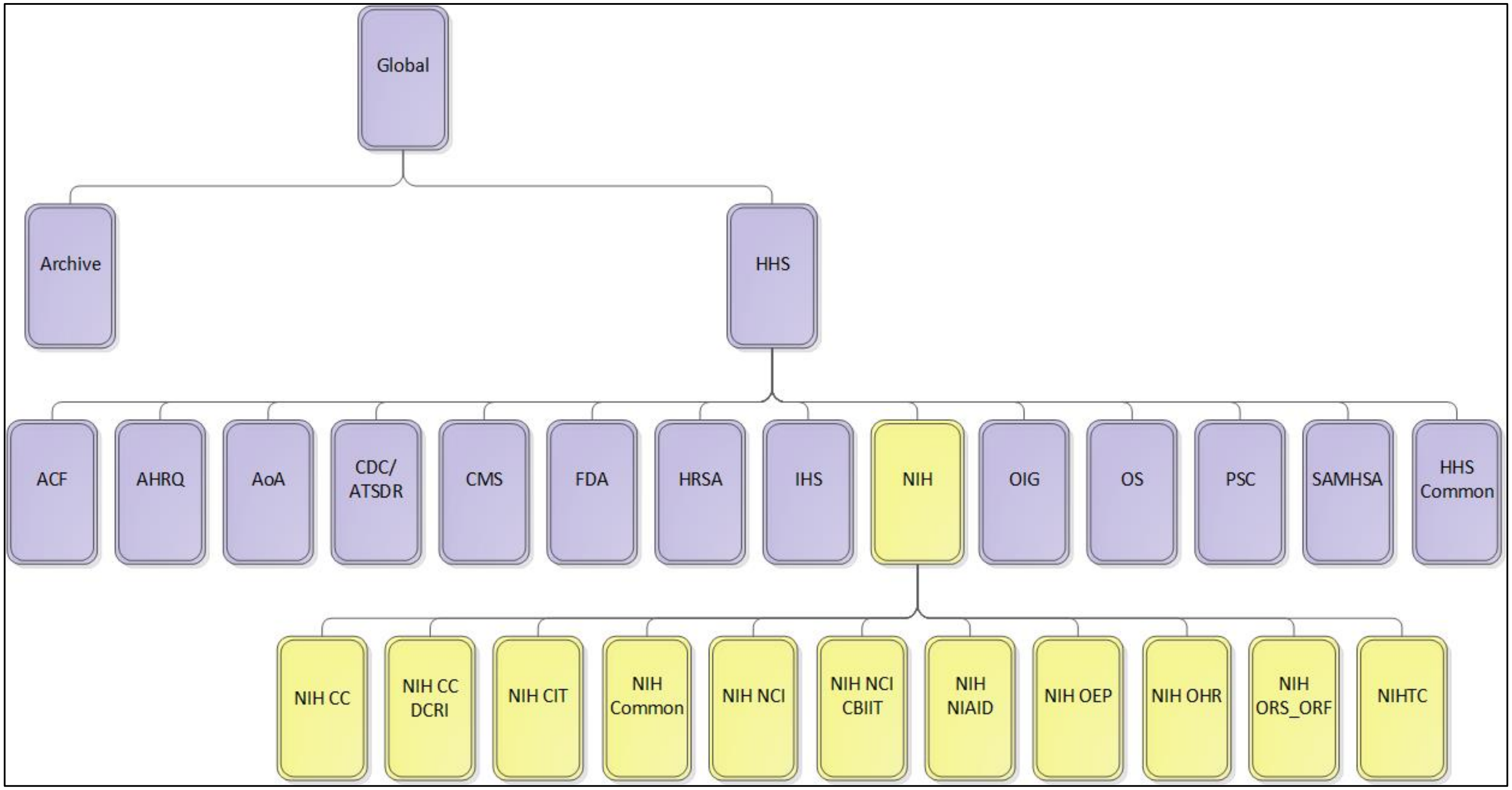
FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Item/Event Name*	Item or Event Title	Microsoft Excel 2007 for PC Users
Description	Description of the Item or Event entering Character limit: 1000	This class will expand the learner's knowledge of Microsoft Excel 2007.
Offering Start Date	Date the class started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

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
ID*	Unique ID that identifies this entry	User Initials + Completion Date = JM09132008 where user = Jaime Martinez and Completion Date = 09/13/2008
Location	Location where course was taken. It could be a building or a city.	Examples: **Executive Plaza North** or **Rockville**
Marked Complete by	Search for the username of the person entering this record (yourself).	At first your username will display but once the record is saved the field will display your name.
Continued Service Agreement Required Indicator (1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Accreditation Indicator (1102)	Indicates that the course has been accredited by an accreditation body.	N => No NA => Non Applicable Y => Yes
Training Accreditation Organization Type (1103)	The name and description of the accreditation organization	**Leave empty** if unknown.
Course ID From Vendor (1105)	The course ID as assigned by the vendor	**Leave empty** if unknown.
EHRI: Training Source Type (1120)	Source of the training which has been completed by the employee.	Foreign Governments and Organizations; Government External; Government Internal; Government State/Local; Non-government
EHRI: Default Training Purpose (1122)	Code representing the purpose of the training completed by the employee	Develop Unavailable skills; Future Staffing Needs; Improve Present Performance; Mandatory Training; New Work Assignment; Program/Mission Change; Retention

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

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
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**

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


Global
Archive
HHS
ACF
AHRQ
AoA
CDC/ ATSDR
CMS
FDA
HRSA
IHS
NIH
OIG
OS
PSC
SAMHSA
HHS Common
NIH CC
NIH CC DCRI
NIH CIT
NIH Common
NIH NCI
NIH NCI CBIIT
NIH NIAID
NIH OEP
NIH OHR
NIH ORS_ORF
NIHTC