

# LEARNING MANAGEMENT SYSTEM (LMS)

## Reports Quick Reference Guide

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## Subscribing to a Report

This QRG provides instructions for subscribing to a report in the LMS. Report subscriptions in the LMS allow reports to be emailed at scheduled intervals to any valid email address. The reports delivered via email do not require LMS access to review.

Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

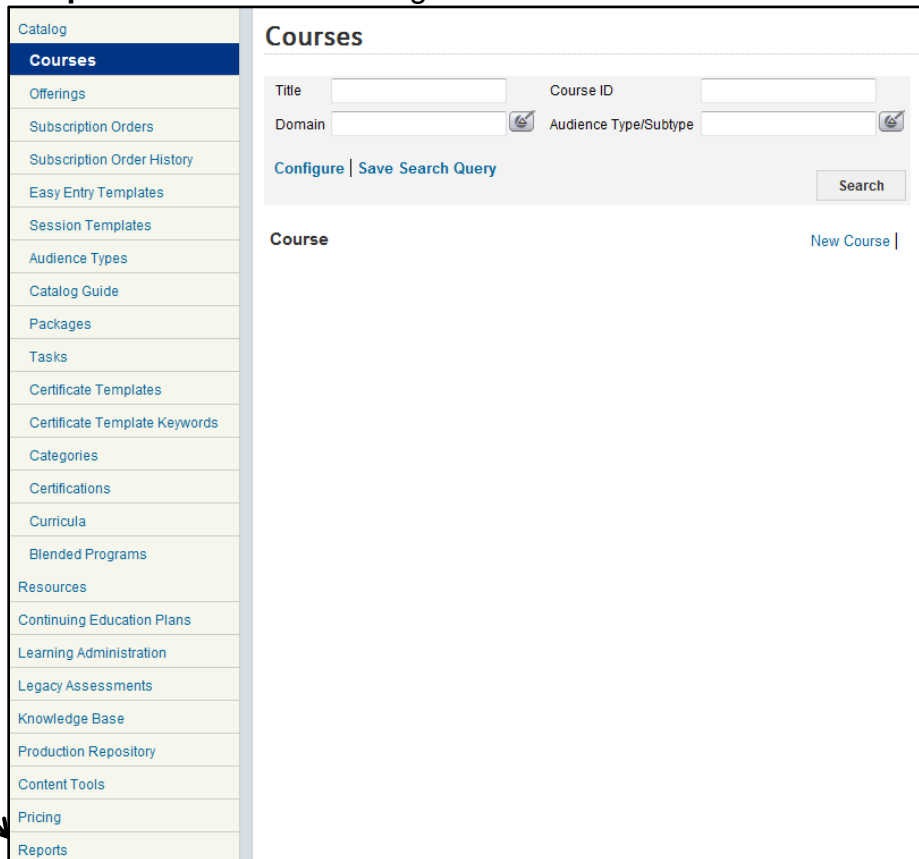


Figure 2 – Reports link

Enter the name of the report in the Name field and click the **Search** button.

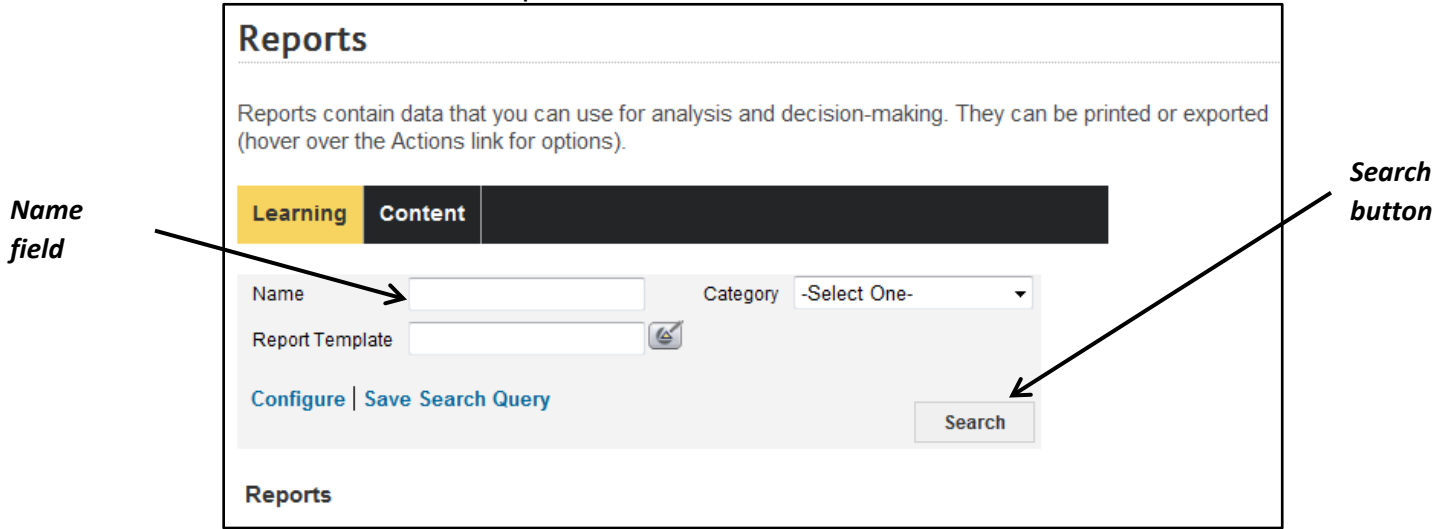


Figure 3 – Name field and Search button

Click the **Actions** link for the report. The NIH Registrations Needing Approval report will be used for the purposes of demonstration.

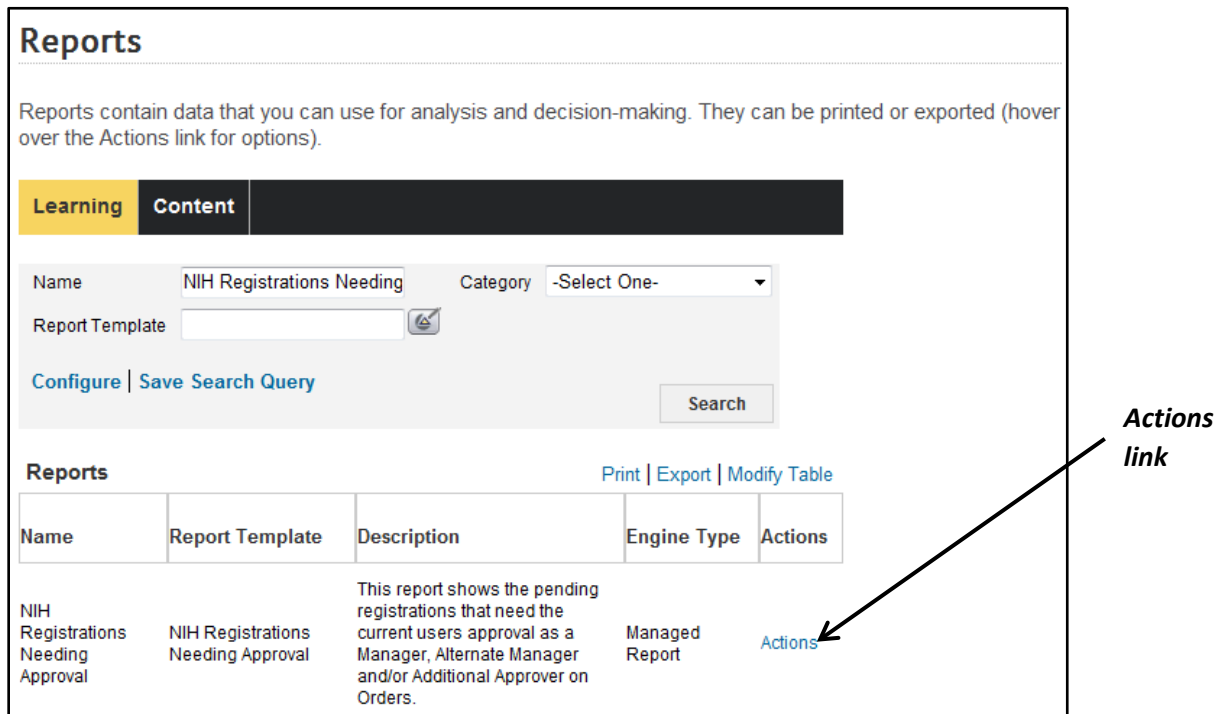


Figure 4 – Actions link

Click the **Subscribe** link in the Actions activity menu.

The screenshot shows the 'Reports' section of a web application. At the top, there are tabs for 'Learning' and 'Content'. Below the tabs is a search area with a text input containing 'NIH Registrations Needing Approval', a 'Category' dropdown menu set to '-Select One-', and a 'Report Template' field. There are 'Configure' and 'Save Search Query' links, and a 'Search' button. Below the search area is a table of reports. The first report is 'NIH Registrations Needing Approval' with a description: 'This report shows the pending registrations that need the current users approval as a Manager, Alternate Manager and/or Additional Approver on Orders.' and an 'Engine Type' of 'Managed Report'. An 'Actions' menu is open over the 'Actions' link in the table, showing options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Subscribe link' to the 'Subscribe' option in the menu.

Figure 5 – Subscribe link on the Actions activity menu

Click the **New Report Subscription** link.

The screenshot shows the 'Report Subscription for NIH Registrations Needing Approval' page. The breadcrumb trail is 'Run Reports > Report Subscri...'. Below the breadcrumb is the title 'Report Subscription' and a 'New Report Subscription' link. Below the link is a grey box containing the text 'No items found'. An arrow points from the text 'New Report Subscription link' to the 'New Report Subscription' link.

Figure 6 – New Report Subscription link

The Report Subscription page is displayed for the NIH Registrations Needing Approval report.

### Report Subscription for NIH Registrations Needing Approval

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

**Report Subscription Name\***

**Description\***

**To Email Address(es) (Enter one or more email addresses separated by semi-colons (;). Example: jdoe@email.com; msmith@email.com)\***   
Character Limit:255

**Subject\***

**Mail Text\***   
Character Limit:255

**Report Format\***

**Occurs**  Daily  Weekly  Monthly  
Occurs Daily  
Every\*  day(s)

**Frequency**  Once  Every  Hour(s)   
Frequency-Once  
Start Time\*  :   a.m.  p.m.  
Start Date\*

Figure 7 – Report Subscription page

Complete the following mandatory fields:

- Report Subscription Name – enter a meaningful name for the report
- Description – enter a brief description for the scheduled report
- To Email Address(es) – enter the full email address (e.g., `firstname.lastname@nih.gov`), multiple addresses should be separated by a semi-colon (;)
- Subject – this field will populate the Subject field of the email messages sent from the LMS
- Mail Text – this field will populate the Body of the email messages sent from the LMS; include contact information so that the recipients can opt-out of the report if they no longer want to receive it
- Report Format – select Adobe Format or MS Excel 97-2000
- Occurs – choose the occurrence based on the following information:
  - Daily Occurrence – this option delivers the report every set number of days. Entering a value of 1 would send the report daily; entering a value of 2 would send it every other day; entering a value of 3 would send it every third day.
  - Weekly Occurrence – this option delivers the report each week on the specified days. Click the checkbox to include the day in the delivery cycle.
  - Monthly Occurrence – this option delivers the report every set number of months on the set day number. Entering a value of 1 for the month and 15 for the day of the month would send the report on the 15<sup>th</sup> day of each month;

entering a value of 3 for the month and 28<sup>th</sup> for the day of the month would send the report on the 28<sup>th</sup> day of every third month (for a quarterly report).

- Frequency – use the default option of Once
- Start Time – the Start Time should be set take place outside of core business hours (8:00AM – 5:00PM). This will improve the overall responsiveness LMS reporting for all users during normal business hours.
- Start Date – the Start Date is the date that the report subscription becomes active, not the date that the report will be sent. The subscription engine will then

After all of the required fields have been, click the **Preview Report** button 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 you entered.

Click the **Save** button to activate the report subscription. The report will be sent to email recipients entered at the times designated.

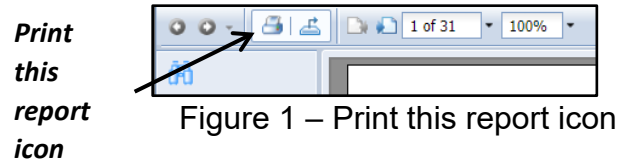
If you experience trouble with this process, please refer to the [LMS Support Page](#).



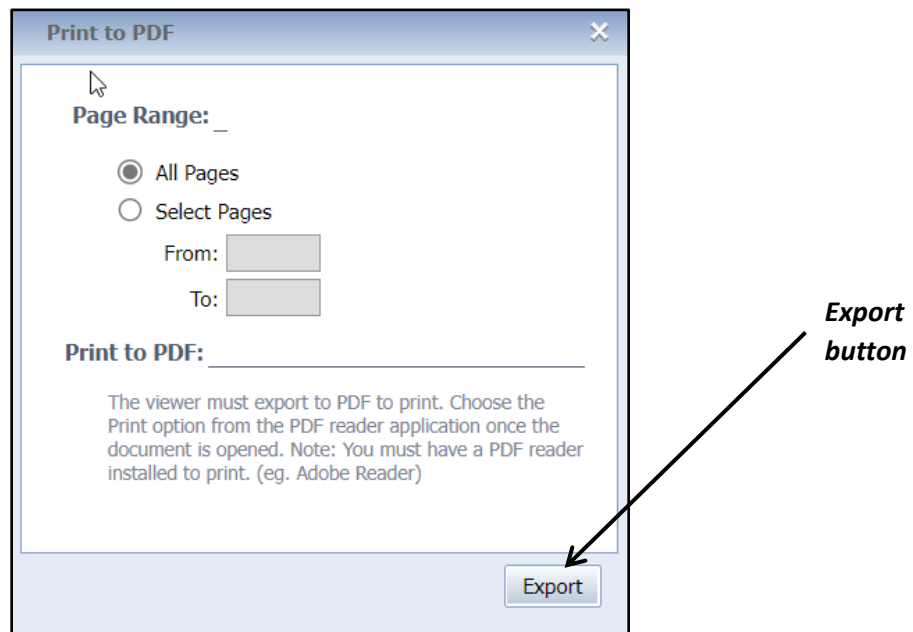
## Printing a Report

This QRG provides instructions for printing a report in the LMS.

After generating a report, click the **Print this report** icon.



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



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

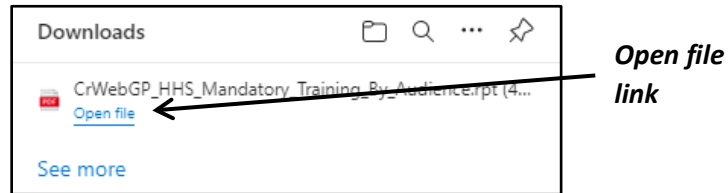


Figure 3 – Open file link

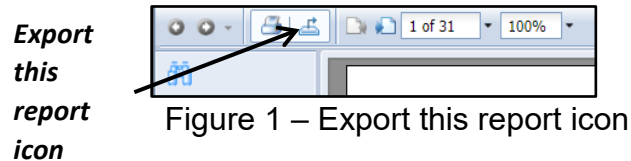
Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Exporting a Report to Excel

This QRG provides instructions for exporting a report to Microsoft Excel from the LMS.

After generating a report, click the **Export this report** icon.



Select **Microsoft Excel (97-2003) Data-Only** from the File Format dropdown list on the Export message box.

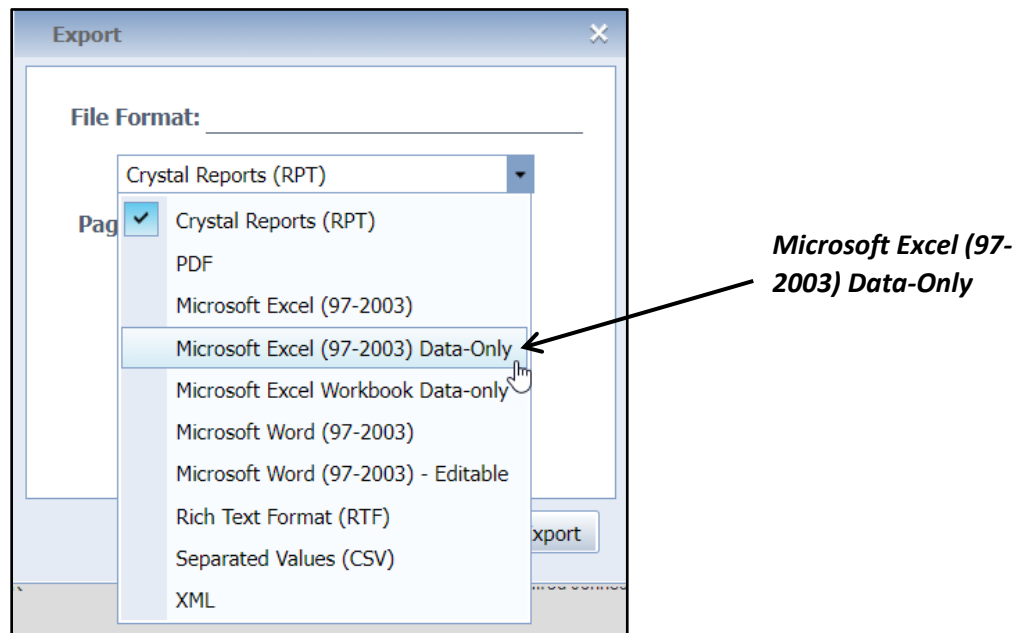


Figure 2 – File format dropdown list

Click the **Export** button on the Export message box.

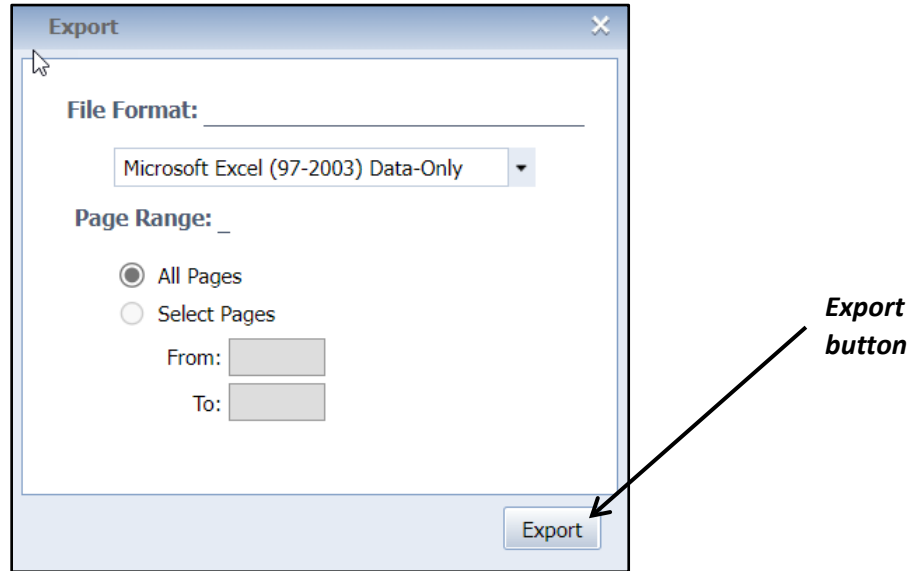


Figure 3 – Export button

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into an Excel file. A notification will display at the top of the screen in the Microsoft Edge browser when the file has been created. Click the **Open file** link on the notification to open the file in Microsoft Excel.

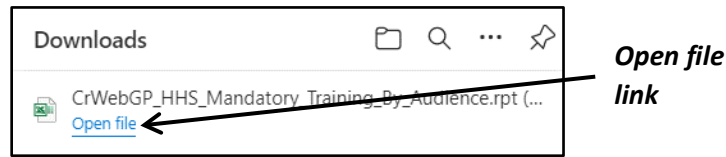


Figure 3 – Open file link

Row 1 of the spreadsheet will display the report header information. Row 2 will display the report column headings.

	A	B	C	D	E	F	G	H
1	HHS Mandatory Training by Audience Type	Course Title:	NIH LMS Content Administrator	Course Equivalents:	Yes	Person Type:		Summary Report Totals
2	POS ORG	ORG ID	LAST NAME	FIRST NAME	HHSID	EOD DATE	PERSON TYPE	MANAGER

Figure 4 – Excel spreadsheet

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the Certification Dashboard by Learner Report

This QRG provides instructions for generating the Certification Dashboard by Learners report. The report creates a list of your certifications, their statuses and expiration dates, based on selected parameters.

Log into the LMS.

NOTE: For instructions about logging on, refer to the [Log-On Instructions \(TS02-L\)](#) QRG.

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

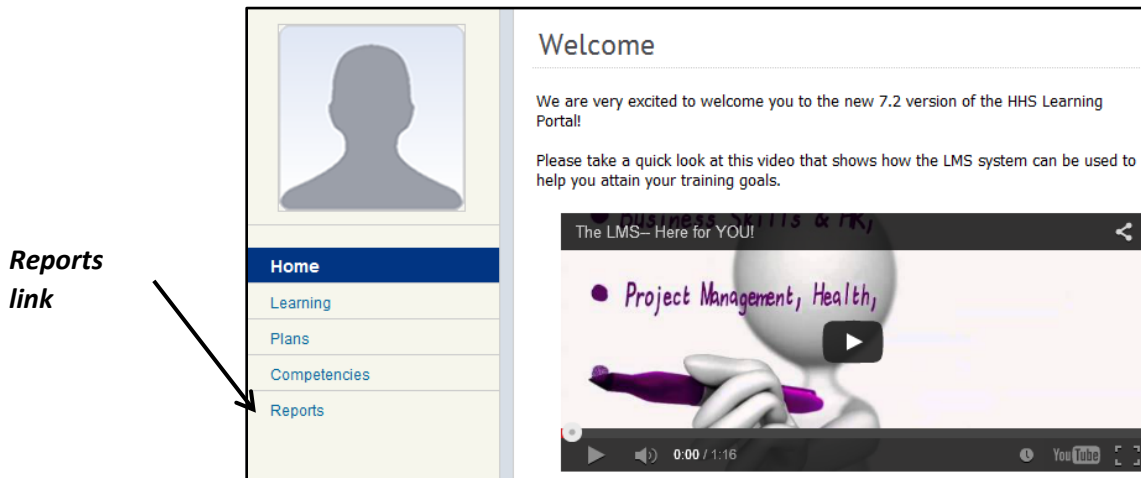


Figure 1 – Reports link

Enter Certification Dashboard By Learner into the Name field and click the **Search** button.

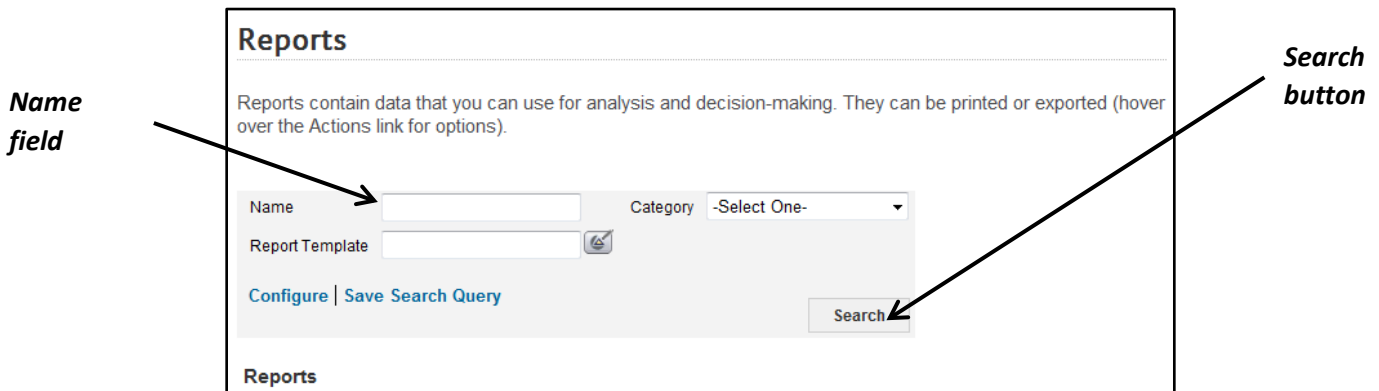


Figure 2 – Name field and Search button

Click the **Actions** link.

**Reports**

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

Name: Certification Dashboard    Category: -Select One-

Report Template:

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

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

Name	Report Template	Description	Engine Type	Actions
Certification Dashboard By Learner	Certification Dashboard By Learner	This report enables a learner to see all certification-related information.	Managed Report	<a href="#">Actions</a>

**Actions link**

Figure 3 – Actions link

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

**Reports**

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

Name: Certification Dashboard    Category: -Select One-

Report Template:

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

**Reports**    [Print](#) | [Export](#) | [Modify T](#)

Name	Report Template	Description	Engine Type	Actions
Certification Dashboard By Learner	Certification Dashboard By Learner	This report enables a learner to see all certification-related information.	Managed Report	<a href="#">Actions</a>

**Actions**

- [Email](#)
- [Execute](#)
- [Subscribe](#)

**Execute link**

Figure 4 – Execute link on the Actions activity menu

Select a checkbox for each of the certification status types you wish to display.

**Report Parameters - Certification Dashboard By Learner**

Show Status Acquired

In Progress

Expired

Assigned

Overdue

Revoked

Expired-Reassigned

Expired-In-progress

Expired-Overdue

At Risk

Number Of Days To Expire

Generate Report Cancel

Figure 5 – Certification Dashboard by Learner report parameters page

By default, the Number of Days to Expire is populated with 30 days. This is the number of days in the future to report on expiring certifications. To view all of your certifications, regardless of the expiration date, clear to the field.

Click the **Generate Report** button.

**Report Parameters - Certification Dashboard By Learner**

Show Status Acquired

In Progress

Expired

Assigned

Overdue

Revoked

Expired-Reassigned

Expired-In-progress

Expired-Overdue

At Risk

Number Of Days To Expire

Generate Report Cancel

*Generate Report button*

Figure 6 – Generate Report button

Click the **Print this report** icon.

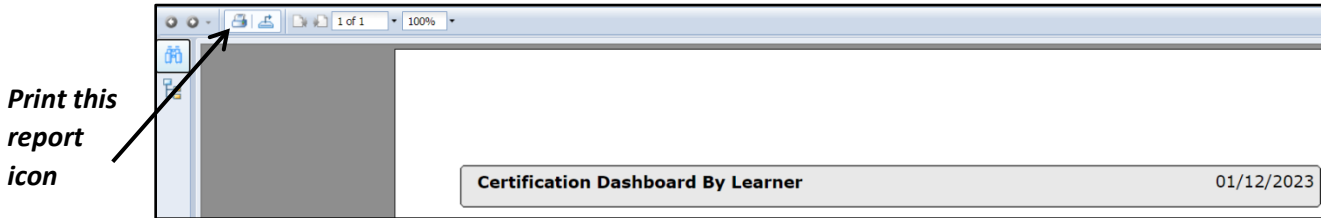


Figure 7 – Print this report button

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

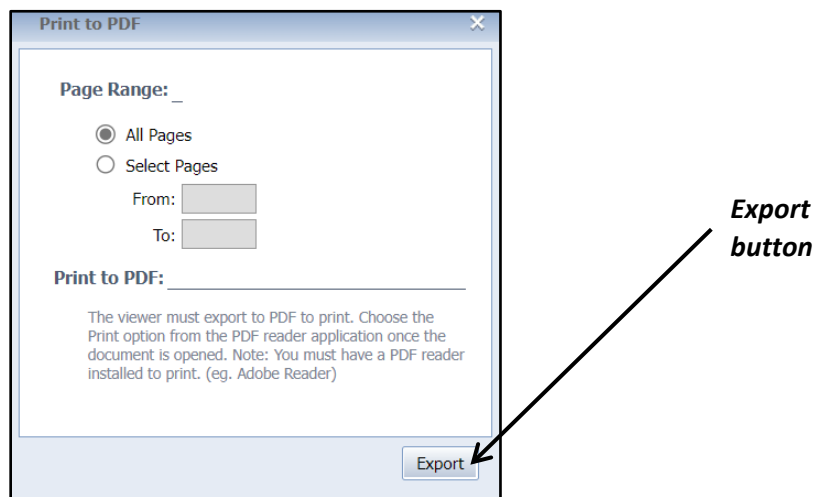


Figure 8 – Export button

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



Figure 9 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).



## Running the Enrollment Dashboard for Manager Report

The Enrollment Dashboard for Manager Report will provide a comprehensive list of enrollments and completions for a one or all of your Direct Reports (Learners). The report can be filtered to show all or a selection of training activities.

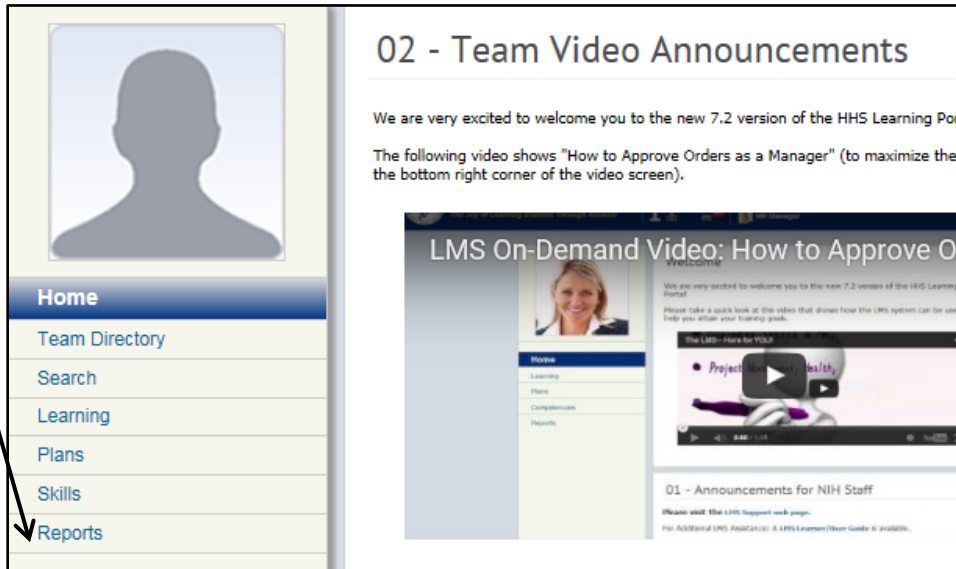
Log into the LMS.  
Select the **My Team** icon.



My Team  
icon

Figure 1 – My Team icon in the Menu Bar

From the My Team page, select the **Reports** link in the left navigation menu.



Reports link

Figure 2 – Reports link in the left navigation menu

In the Name field, type **Enrollment Dashboard for Manager** and select the **Search**.

Figure 3 – Reports Search Screen

Select the **Actions** link for the Enrollment Dashboard for Manager Report, then **Execute**.

Reports

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

Name: Enrollment Dashboard fo Category: -Select One-  
Report Template: [icon] Engine Type: -Select One-  
Configure | Save Search Query Search

Print | Export | Modify T

Name	Report Template	Description	Engine Type	Actions
Enrollment Dashboard for Manager	Enrollment Dashboard for Manager	This report displays all learner enrollments for a given Manager's direct reports	Managed Report	Actions

Figure 4 – Reports search screen with an arrow pointing to the Execute link

To run the report for all of your Direct Reports in your supervisory chain, skip searching for a Learner Name. To run the report for a specific Direct Report, select the **Learner Name** pick icon.

*Learner Name  
pick icon*

Report Parameters - Enrollment Dashboard for Manager

Learner Name [input] [pick icon]

Offering Start Date After\* 08/31/2016 [calendar icon]  
Offering Start Date Before\* 11/29/2016 [calendar icon]

Show Scheduled Offerings   
Show Self-Paced Offerings   
Show Physical Offerings   
Show Cancelled/Late Cancelled/Dropped Enrolls   
Show Confirmed Enrolls   
Show Back Ordered Enrolls   
Show Delivered/ Shipped Enrolls   
Show Enrolls for Pending Approval   
Show Graph   
Show Summary   
Sort by -Select One-  
Show Terminated Users   
Display unformatted records

Generate Report Cancel

Figure 5 – The Enrollment Dashboard for Manager report parameters screen

Enter the First Name and/or Last Name of the Learner in the appropriate fields and then select the **Search** button.

**Search Person, Internal**

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

Population\*  Username

Person ID  First Name

Last Name  Organization

Manager Search Depth\*  Location

Domain  Person Type

Security Roles  Manager

Include All Suborganizations

Figure 6 – The Search Person, Internal screen

Select the checkmark for the name of the Learner in the search results section.

**People**

Showing first 25 out of 31 results

Select	First Name	Last Name	Username
<input type="checkbox"/>	NIH	Learner	NIHLEARNE
<input type="checkbox"/>	NIH	LEARNER	NIHLEARNE
<input type="checkbox"/>	NIH	LEARNER01	NIHLEARNE

Figure 7 – The search results for the Search Person, Internal screen

Insert a date range in the **Offering Start Date After** and **Offering Start Date Before** date range using MM/DD/YYYY format.

Additional parameters to consider for report filtering:

- Scheduled Offerings = Instructor-led training
- Self-Paced Offerings = Online training
- Physical Offerings = *not used in NIH*
- Cancelled/Late Cancelled/Dropped Enrollments
- Confirmed Enrollments
- Back Ordered Enrollments = *not used in NIH*
- Delivered/Shipped Enrollments = enrollments that have been completed
- Enrollments Pending Approval
- Show Graph = will display a graph that shows all direct reports training statuses include Cancelled, Delivered, Pending Approval, and Confirmed
- Show summary = will display a graph that shows all direct reports training statuses include Cancelled, Delivered, Pending Approval, and Confirmed

### Report Parameters - Enrollment Dashboard for Manager

Learner Name

Offering Start Date After\*

Offering Start Date Before\*

Show Scheduled Offerings

Show Self-Paced Offerings

Show Physical Offerings

Show Cancelled/Late Cancelled/Dropped Enrolls

Show Confirmed Enrolls

Show Back Ordered Enrolls

Show Delivered/ Shipped Enrolls

Show Enrolls for Pending Approval

Show Graph

Show Summary

Sort by

Show Terminated Users

Display unformatted records

Figure 8 – The Enrollment Dashboard for Manager report parameters screen

Select the **Generate Report** button to continue.

To print the report or save as a \*.PDF document, click the **Print this report** icon.

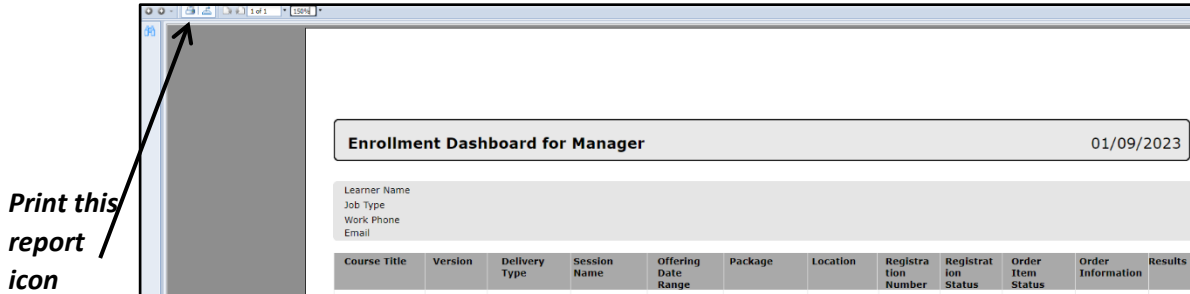


Figure 9 – The report output screen for the Enrollment Dashboard for Manager Report

Select the **Export** button on the Print to PDF message box.

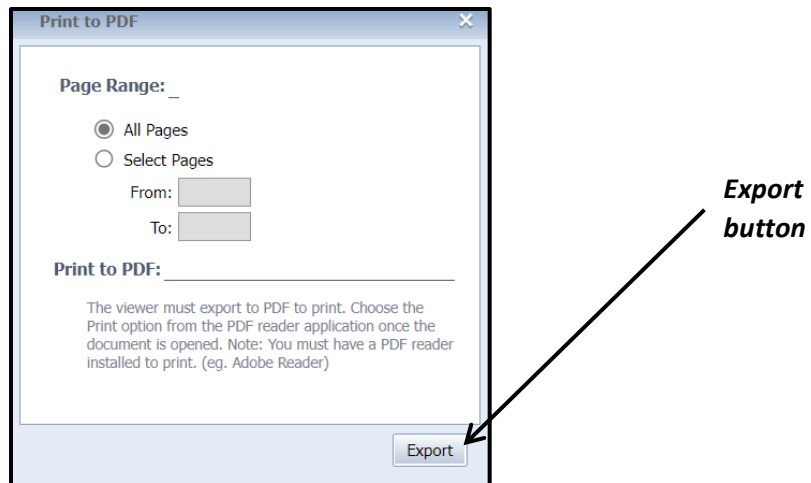


Figure 10 – Export button

Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Select the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

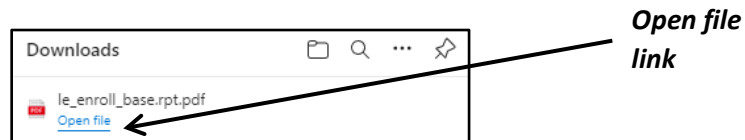


Figure 11 – Open file link

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the HHS Accounts: Deactivated/To-Be-Deactivated Report

This report provides a list of learner accounts that will be deactivated by a specific date or a list of learner accounts that have already been deactivated. One practical application of this report is to set up a weekly subscription to the report, having the report return what LMS accounts will be deactivated during the following week. The learner account email addresses are provided on the report.

Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

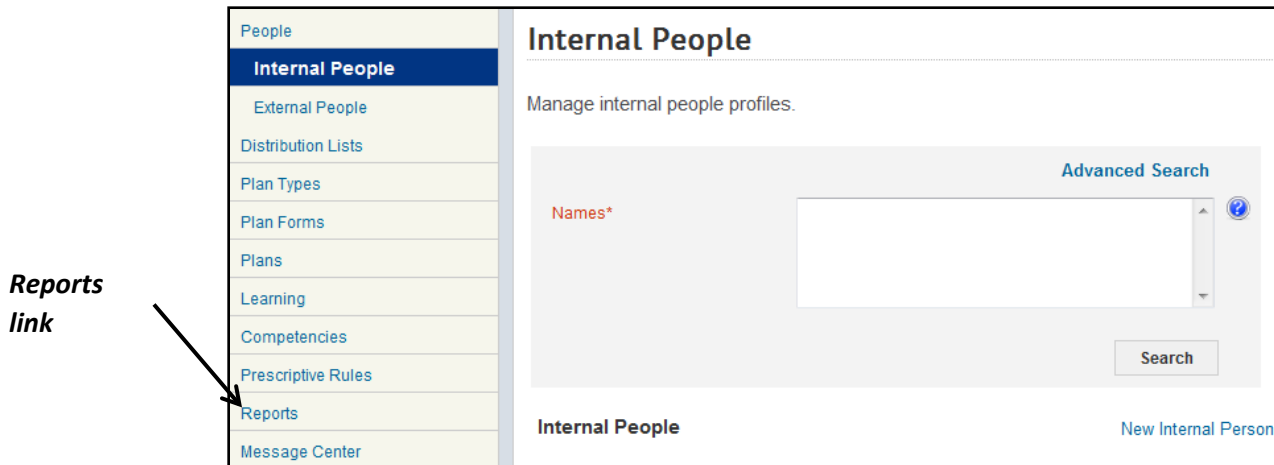


Figure 2 – Reports link

Enter HHS Accounts in the Name field and click the Search button.

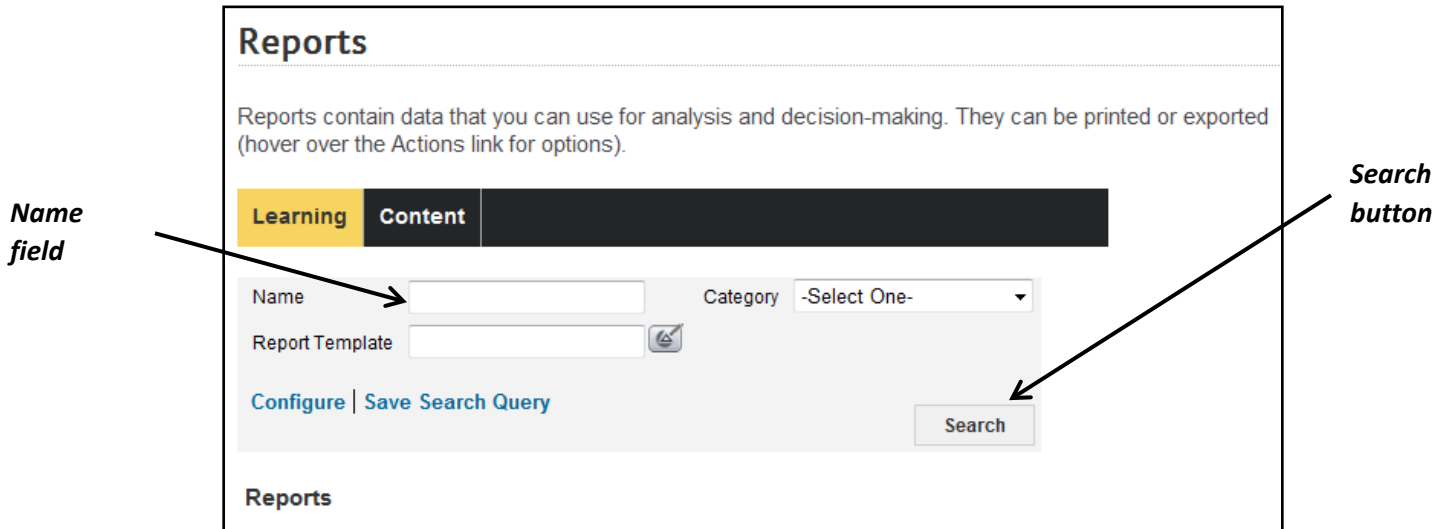


Figure 3 – Name field and Search button

Click the **Actions** link for the HHS Accounts: Deactivated/To-Be-Deactivated Report.

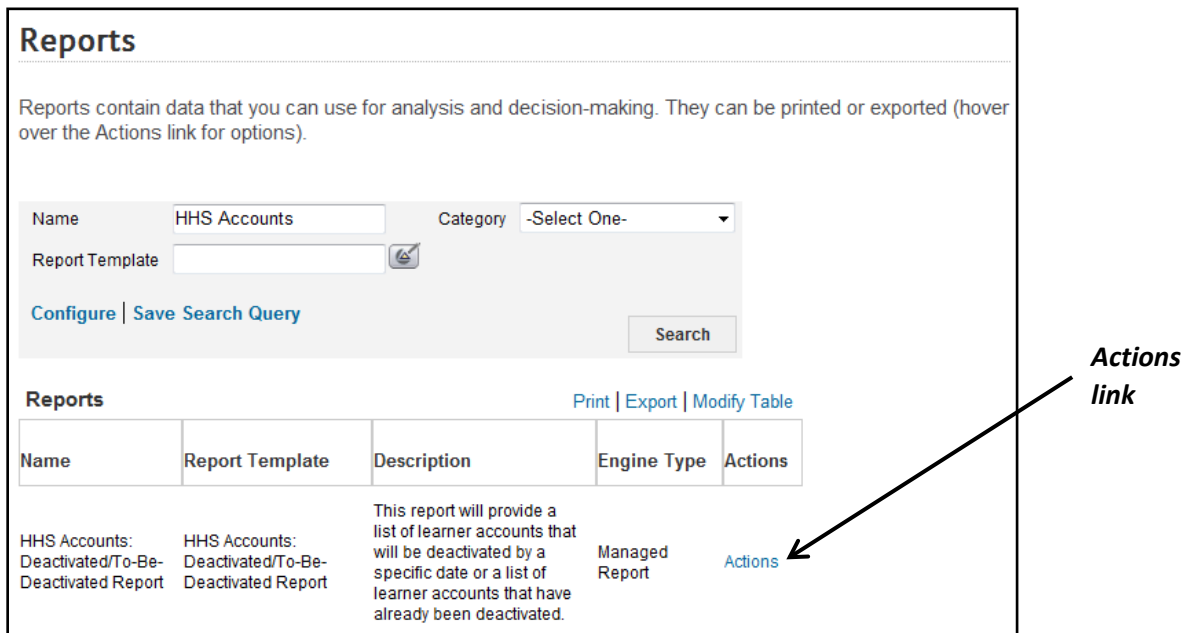


Figure 4 – Actions link



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

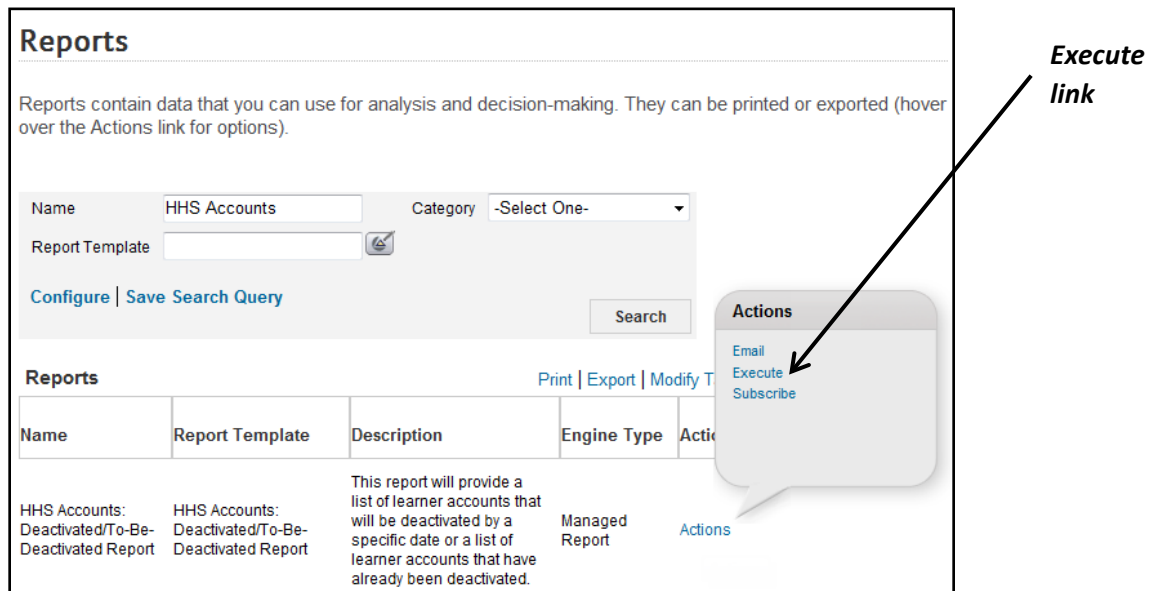


Figure 5 – Execute link on the Actions activity menu

By default, the Report Type pull-down menu is populated as Deactivated. For Learner accounts pending deactivation, select the **To Be Deactivated** option.

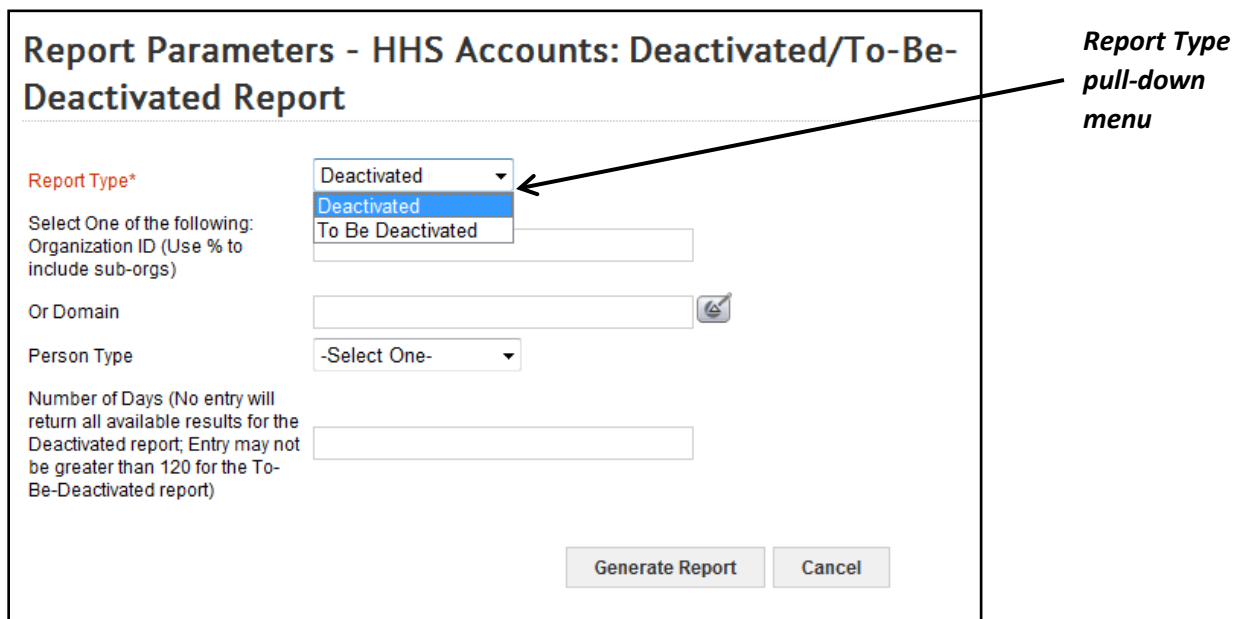


Figure 6 – Report Type pull-down menu



You must populate either the Organization ID or Domain fields. In this example, the Organization ID field will be used – enter the Organization ID in the organization ID field. You can use a percent symbol (%) as a wildcard field to capture all the sub-Organizations.

**Report Parameters - HHS Accounts: Deactivated/To-Be-Deactivated Report**

Report Type\*

Select One of the following:  
Organization ID (Use % to include sub-orgs)

Or Domain

Person Type

Number of Days (No entry will return all available results for the Deactivated report; Entry may not be greater than 120 for the To-Be-Deactivated report)

Figure 7 – Organization ID field

To filter the results for a specific Person Type, click the **Person Type** pull-down menu. Filtering based on the Person Type is not required.

**Report Parameters - HHS Accounts: Deactivated/To-Be-Deactivated Report**

Report Type\*

Select One of the following:  
Organization ID (Use % to include sub-orgs)

Or Domain

Person Type

Number of Days (No entry will return all available results for the Deactivated report; Entry may not be greater than 120 for the To-Be-Deactivated report)

*Organization ID field*

*Person Type pull-down menu*

Figure 8 – Person Type pull-down menu

The Number of Days field is only required for the To Be Deactivated version of the report. Enter a value between 1 and 120 (1 day to 120 days in the future). For the Deactivated version of the report, leave this field blank.

**Report Parameters - HHS Accounts: Deactivated/To-Be-Deactivated Report**

**Report Type\*** To Be Deactivated ▾

Select One of the following:  
Organization ID (Use % to include sub-orgs) HN%

Or Domain

Person Type -Select One- ▾

Number of Days (No entry will return all available results for the Deactivated report; Entry may not be greater than 120 for the To-Be-Deactivated report)

Generate Report Cancel

*Number of Days field*

Figure 9 – Number of Days field

Click the **Generate Report** button.

**Report Parameters - HHS Accounts: Deactivated/To-Be-Deactivated Report**

**Report Type\*** To Be Deactivated ▾

Select One of the following:  
Organization ID (Use % to include sub-orgs) HN%

Or Domain

Person Type -Select One- ▾

Number of Days (No entry will return all available results for the Deactivated report; Entry may not be greater than 120 for the To-Be-Deactivated report) 120

Generate Report Cancel

*Generate Report button*

Figure 10 – Generate Report button

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

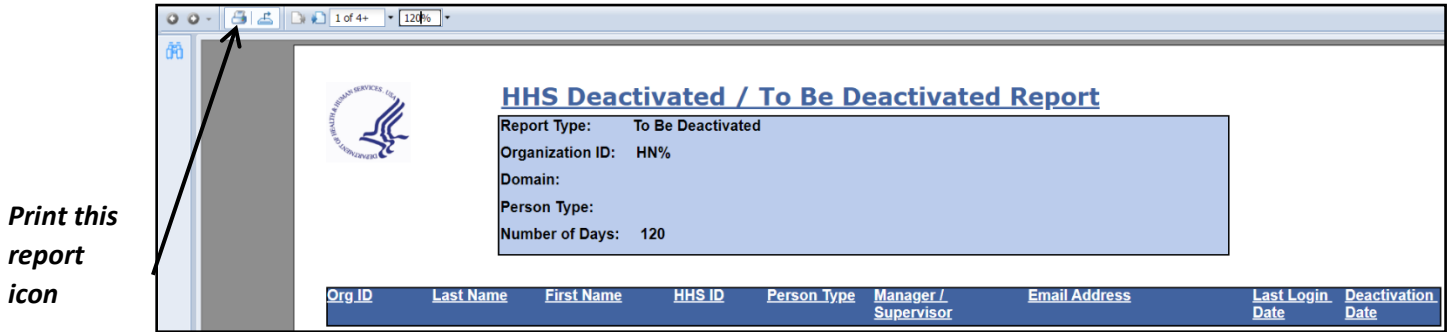


Figure 11 – Print this report button

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

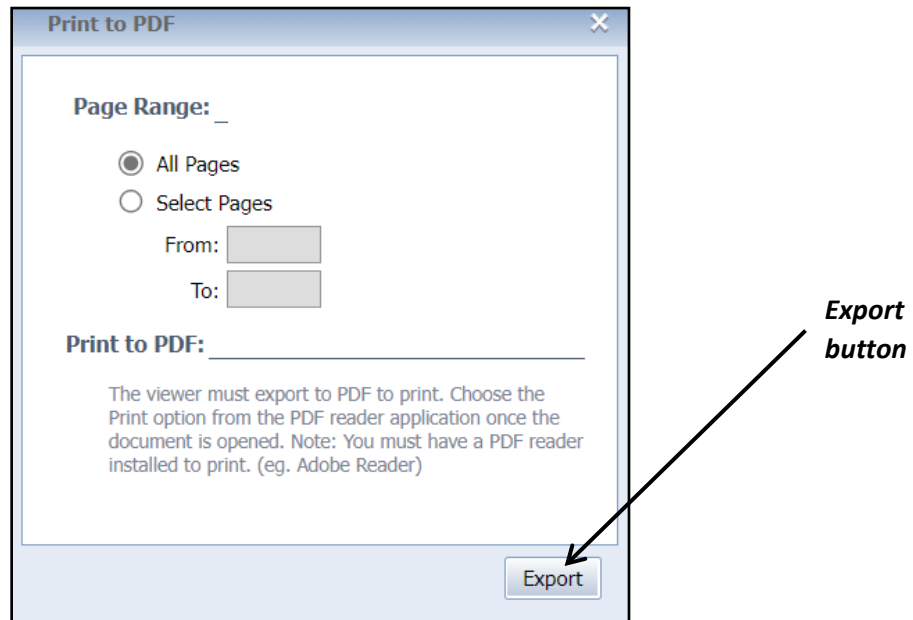


Figure 12 – Export button

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

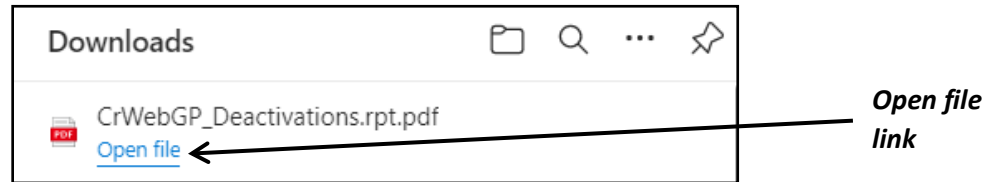


Figure 13 – Open file link

Print the file from Adobe Reader/Acrobat.

**If you experience trouble with this process, please refer to the [LMS Support Page](#).**

## Running the HHS All Approvers by Org Report

This QRG provides instructions for generating the HHS All Approvers by Org Report. This report creates a list of all Learners and their Approvers – the Learner’s Managers, Alternate Managers, and Additional Approver for Orders for a specified Organization and sub-Organizations. This report is important for verifying the approval chains for organizations.

Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

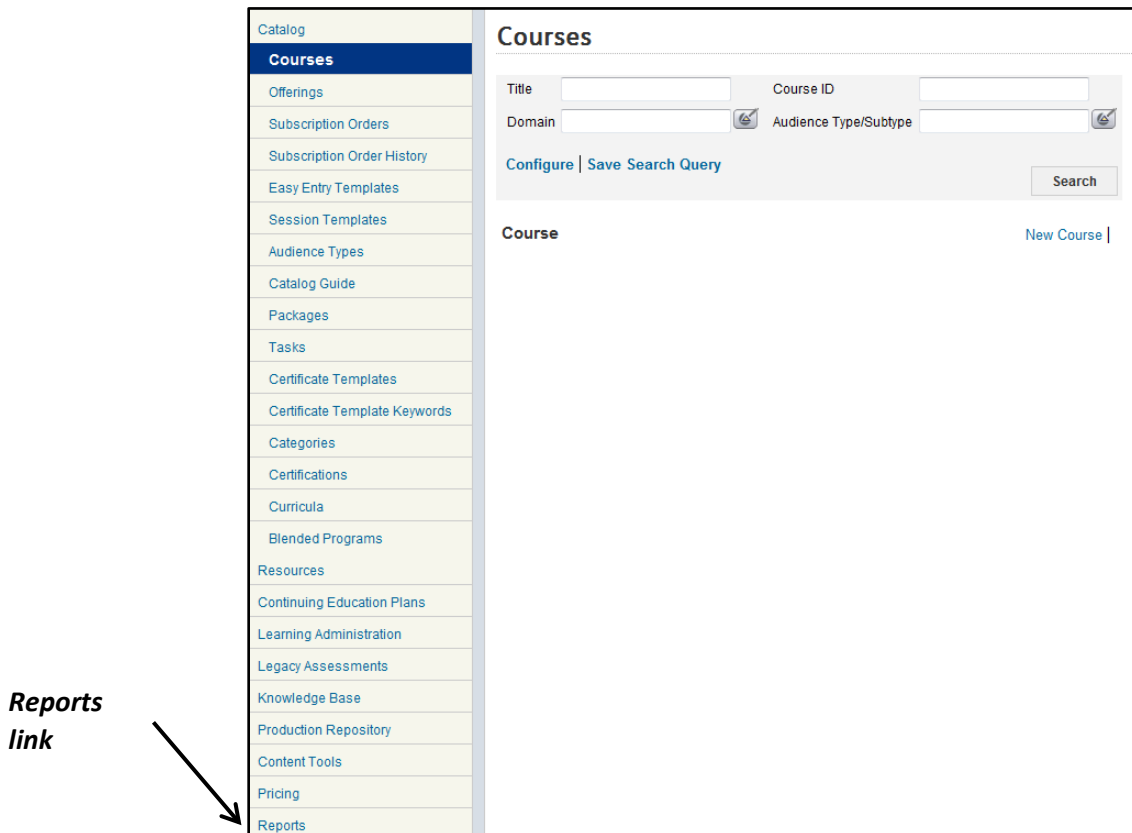


Figure 2 – Reports link

Enter “HHS All” in the **Name** field and click **Search**.

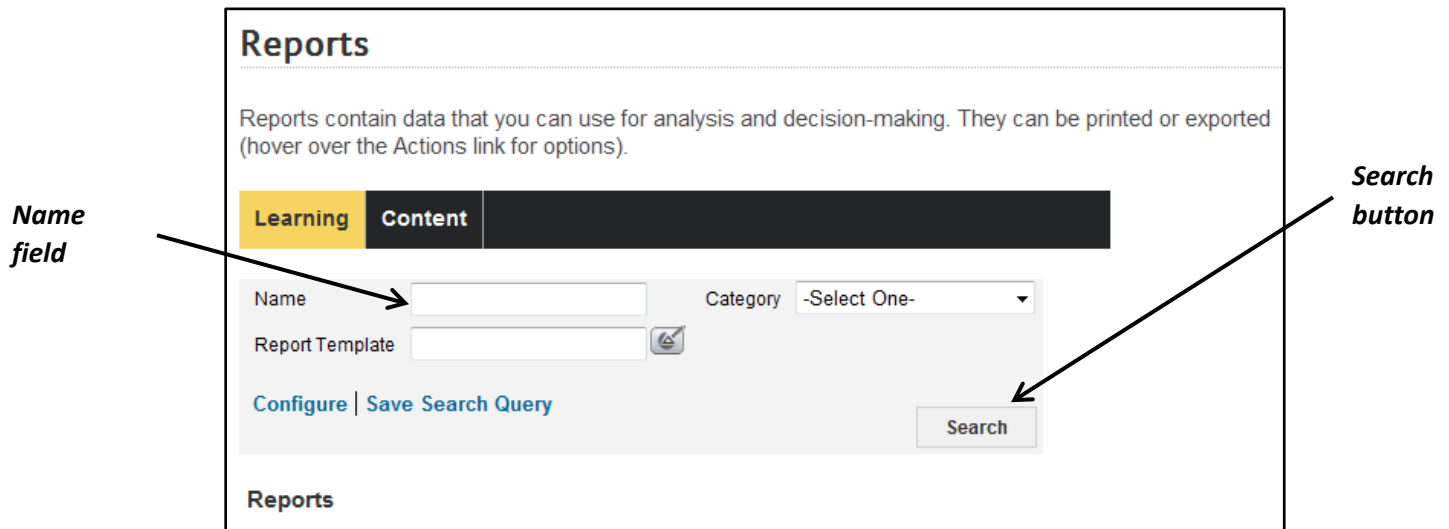


Figure 3 – Name field and Search button

Click the **Actions** link for the HHS All Approvers by Org Report.

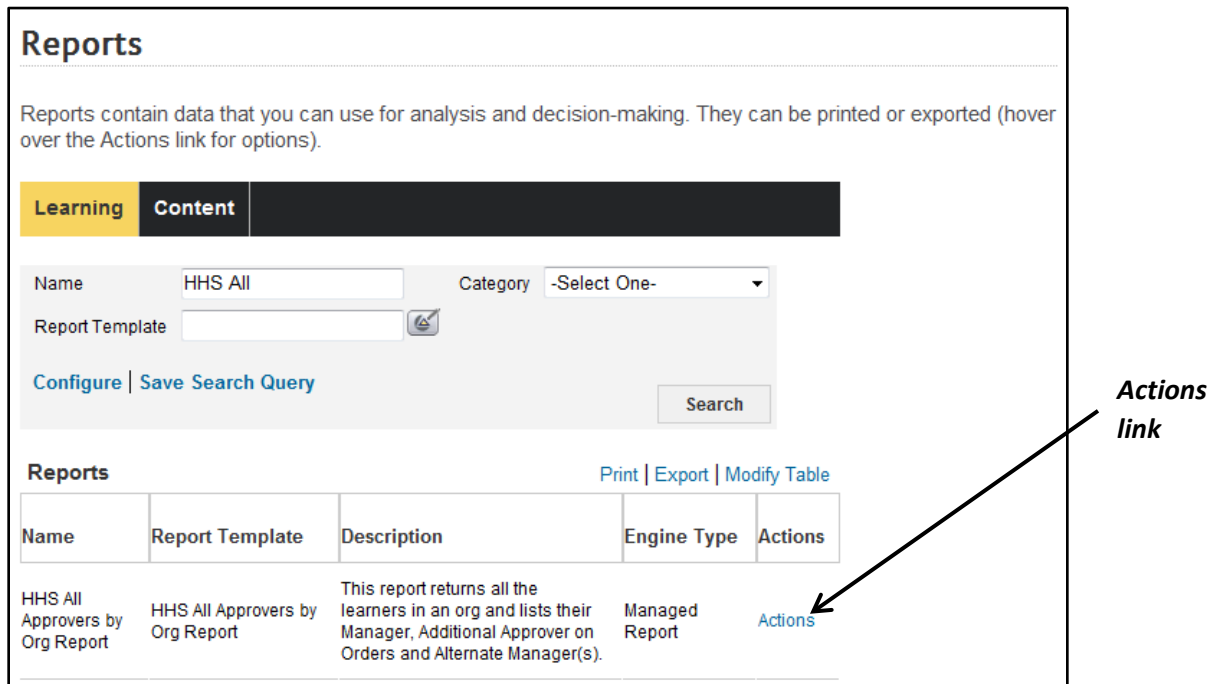


Figure 4 – Actions link

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

The screenshot shows the 'Reports' section of a web application. At the top, there is a header with 'Learning' and 'Content' tabs. Below this is a search area with fields for 'Name' (containing 'HHS All'), 'Category' (a dropdown menu), and 'Report Template'. There are also 'Configure' and 'Save Search Query' links, and a 'Search' button. Below the search area is a table of reports. The first report is 'HHS All Approvers by Org Report'. To the right of the table, there is an 'Actions' menu with options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the Actions menu.

Figure 5 – Execute link on the Actions activity menu

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

The screenshot shows the 'Report Parameters - HHS All Approvers by Org Report' form. It features a single input field labeled 'Org Name (Use % to include sub-orgs)\*'. Below the input field are two buttons: 'Generate Report' and 'Cancel'. An arrow points from the text 'Org Name field' to the input field.

Figure 6 – Org Name field

Click the **Generate Report** link.

**Report Parameters - HHS All Approvers by Org Report**

Org Name (Use % to include sub-orgs)\*

*Generate  
Report  
button*

Figure 7 – Generate Report button

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

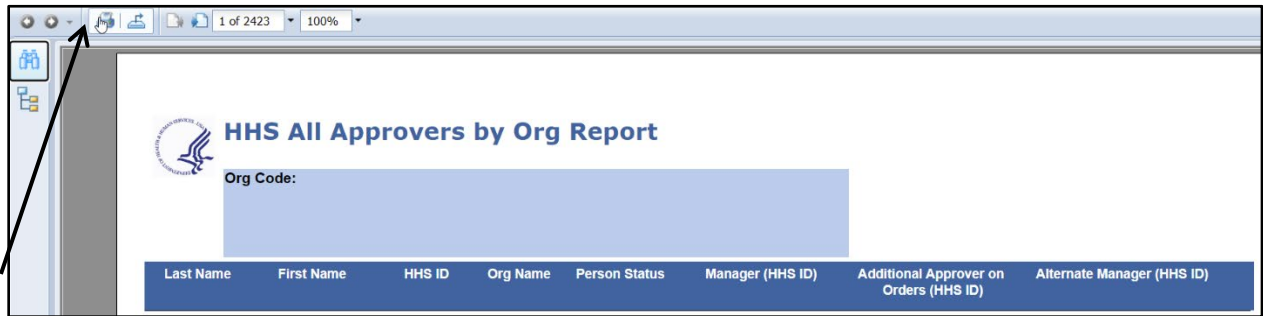


Figure 8 – Print this report button



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

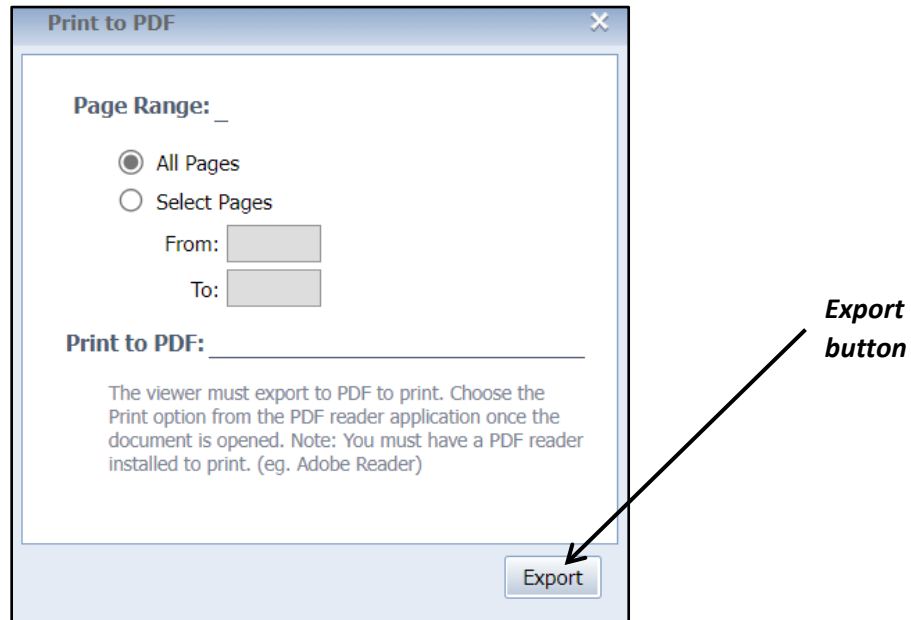


Figure 9 – Export button

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



Figure 10 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the HHS Certification/Curriculum Compliance/Exception Report

This report delivers data on Learners in an Organization (or its Sub-Orgs) to determine whether the Learner has completed a specific certification or curriculum during a specified date range. The results can be further refined using the Employee EOD Date, Certification/Curriculum Domain, and Person Type.

Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

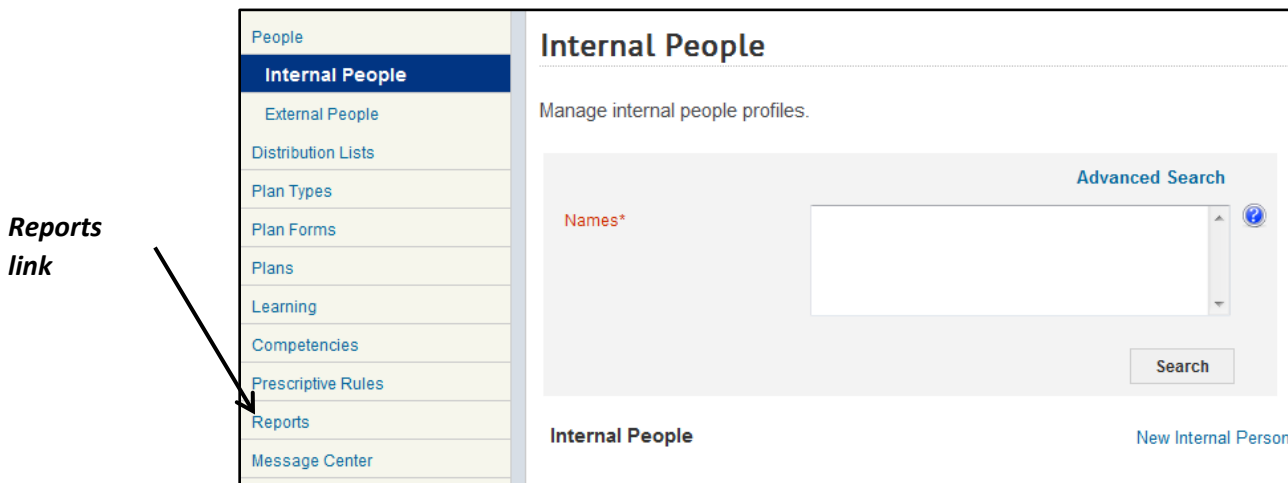


Figure 2 – Reports link

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

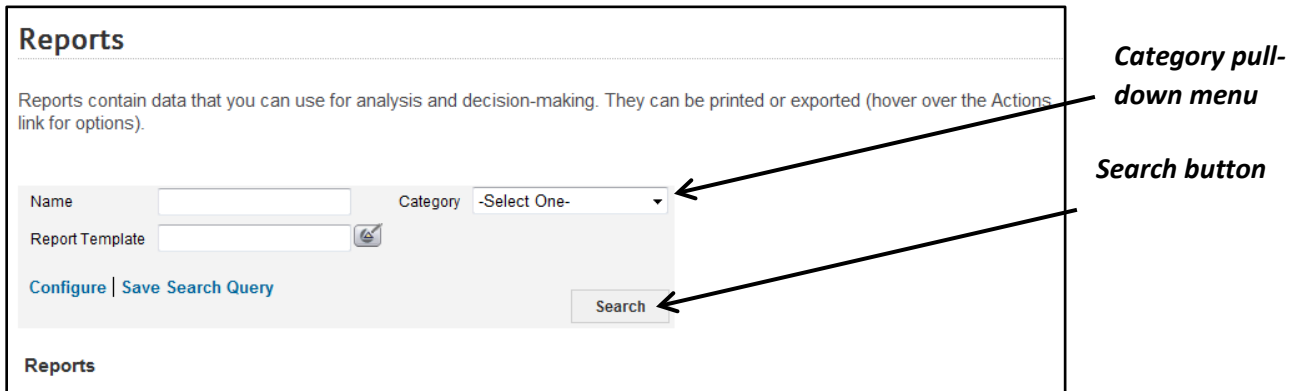


Figure 3 – Category pull-down menu and Search button

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

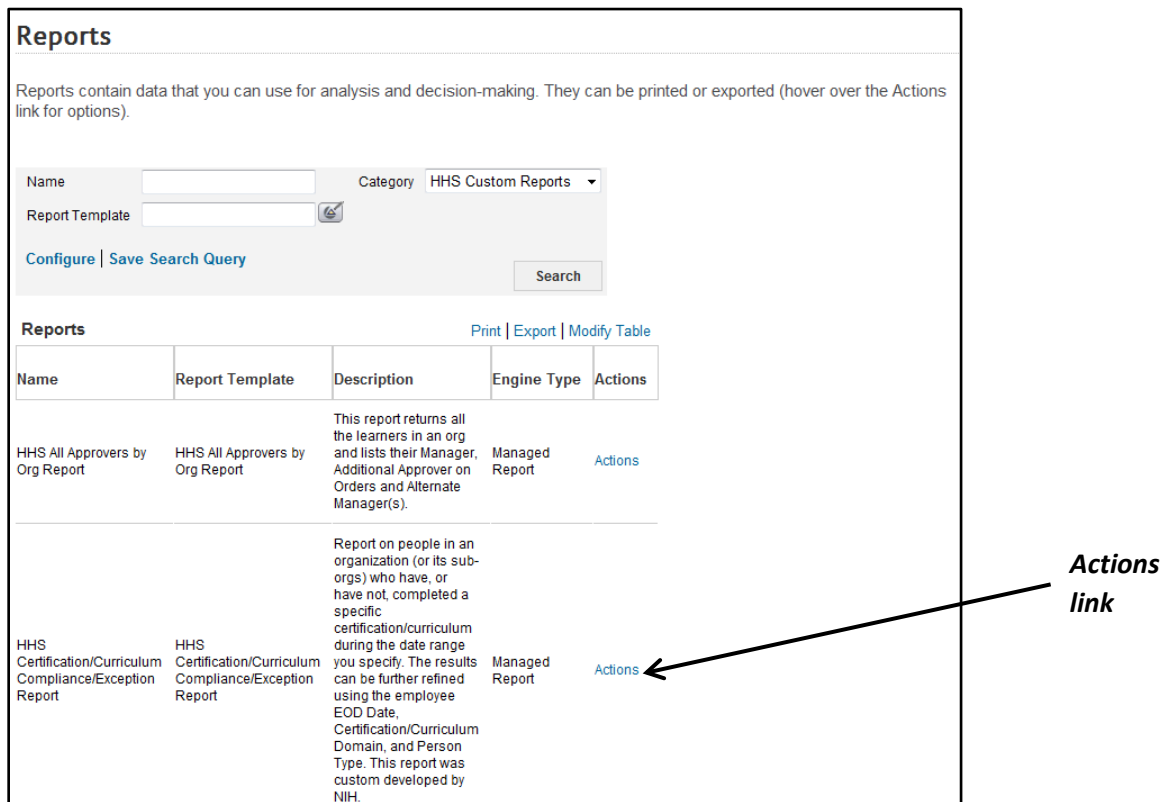


Figure 4 – Actions link

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

**Reports**

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

Name  Category **HHS Custom Reports**

Report Template

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

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

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

**Actions**

[Email](#)

[Execute](#)

[Subscribe](#)

**Execute link**

Figure 5 – Execute link on the Actions activity menu

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

Report Parameters - HHS Certification/Curriculum Compliance/Exception Report

Select One of the following :  
 Certification Title

Curriculum Title

From Date\*

To Date\*

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

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Certification/Curriculum Domain

Person Type

Report Type\*

Person Status

**Certification Title pick icon**

Figure 6 – Certification Title pick icon

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

**Name field**

**Target Completion Duration <= field**

**Audience Type/Subtype field**

**Updated On >= field**

**Past Credit Duration <= field**

**Search button**

**Select Certifications**

Name  Updated On >=

Target Completion Duration <=  Past Credit Duration <=

Audience Type/Subtype

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

**Certifications**

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

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

**Select checkbox**

**Select Certifications**

Name  Updated On >=

Target Completion Duration <=  Past Credit Duration <=

Audience Type/Subtype

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

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

Showing 17 out of 17 results

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

Figure 8 – Select checkmark

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

Figure 9 – Curriculum Title pick icon

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

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

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

### Select Curricula

Name  Discontinued From >=

Updated On >=  Target Completion Duration <=

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

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

Showing 2 out of 2 results

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

Select checkbox

Figure 11 – Select checkbox

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

### Report Parameters - HHS Certification/Curriculum Compliance/Exception Report

Select One of the following :  
Certification Title

Curriculum Title

From Date\*

To Date\*

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

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Certification/Curriculum Domain

Person Type

Report Type\*

Person Status

From Date pick icon

To Date pick icon

Figure 12 – From Date and To Date pick icons



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

Report Parameters - HHS Certification/Curriculum Compliance/Exception Report

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

Curriculum Title: [Empty field]

From Date\*: 01/01/2010

To Date\*: 12/31/2010

Organization ID (Use % to include sub-orgs)\*: [Empty field]

EOD Start Date (mm/dd/yyyy): [Empty field]

EOD End Date (mm/dd/yyyy): [Empty field]

Certification/Curriculum Domain: [Empty field]

Person Type: -Select One-

Report Type\*: -Select One-

Person Status: -Select One-

Buttons: Generate Report, Cancel

Organization ID field

Figure 13 – Organization ID field

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

Report Parameters - HHS Certification/Curriculum Compliance/Exception Report

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

Curriculum Title: [Empty field]

From Date\*: 01/01/2010

To Date\*: 12/31/2010

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

EOD Start Date (mm/dd/yyyy): [Empty field]

EOD End Date (mm/dd/yyyy): [Empty field]

Certification/Curriculum Domain: [Empty field]

Person Type: -Select One-

Report Type\*: -Select One- (dropdown menu open)

Person Status: -Select One- (dropdown menu open)

Dropdown options: -Select One-, Compliance, Exception

Buttons: Generate Report, Cancel

Report Type pull-down menu

Figure 14 – Report Type pull-down menu

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



Click the **Generate Report** button.

Report Parameters - HHS Certification/Curriculum Compliance/Exception Report

Select One of the following :  
 Certification Title: NIH Disability Awareness Training Cert  
 Curriculum Title:   
 From Date\*: 01/01/2010  
 To Date\*: 12/31/2010  
 Organization ID (Use % to include sub-orgs)\*: HN%  
 EOD Start Date (mm/dd/yyyy):   
 EOD End Date (mm/dd/yyyy):   
 Certification/Curriculum Domain:   
 Person Type: -Select One-  
 Report Type\*: Compliance  
 Person Status: -Select One-

Generate Report Cancel

**Generate Report button**

Figure 15 – Generate Report button

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

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

**Print this report icon**

HHS Certification/Curriculum Compliance/Exception Report

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

ORG.ID	LAST.NAME	FIRST.NAME	HHSID	EOD.DATE	PERSON TYPE	PERSON STATUS	MANAGER	EMAIL	COMPLETION DATE	% COMP
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Figure 16 – Print this report button

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

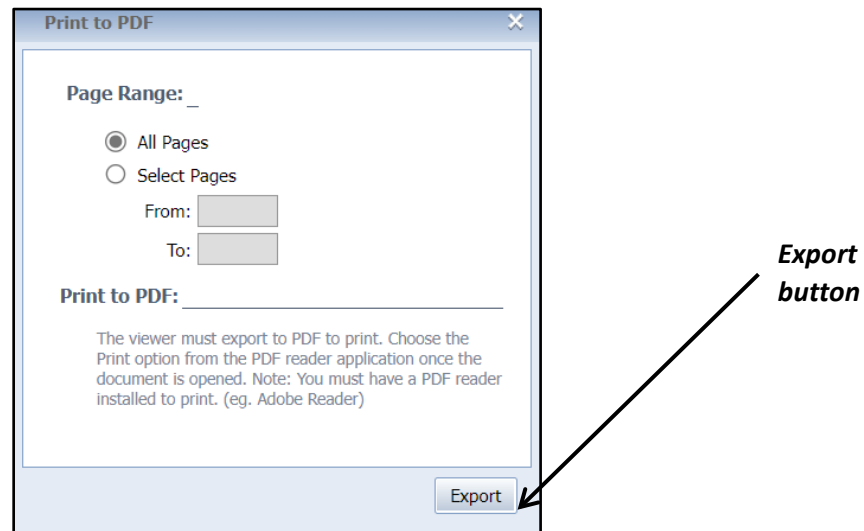


Figure 17 – Export button

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

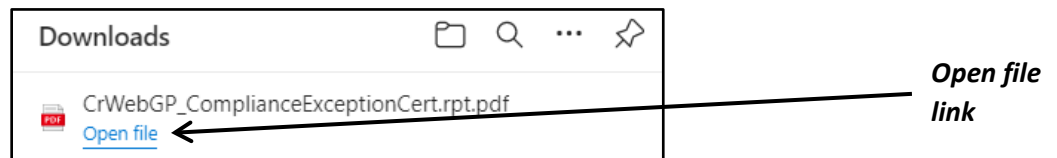


Figure 18 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the HHS Course Catalog Report

This QRG provides instructions for generating the HHS Course Catalog Report. This report allows a LMS Administrator to create a Course Catalog by Domain, Course Title, Category, Delivery Type (Instructor-led, Web-based, or All), Competency, and/or Job.

This report is especially useful to create the current list of the free SkillSoft online courses that are available in the LMS. This can be done by selecting the HHS Common Domain and select the Delivery Type of Web-Based.

Log on to the LMS.

Click on **Admin** icon.



Figure 1 – Admin icon

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

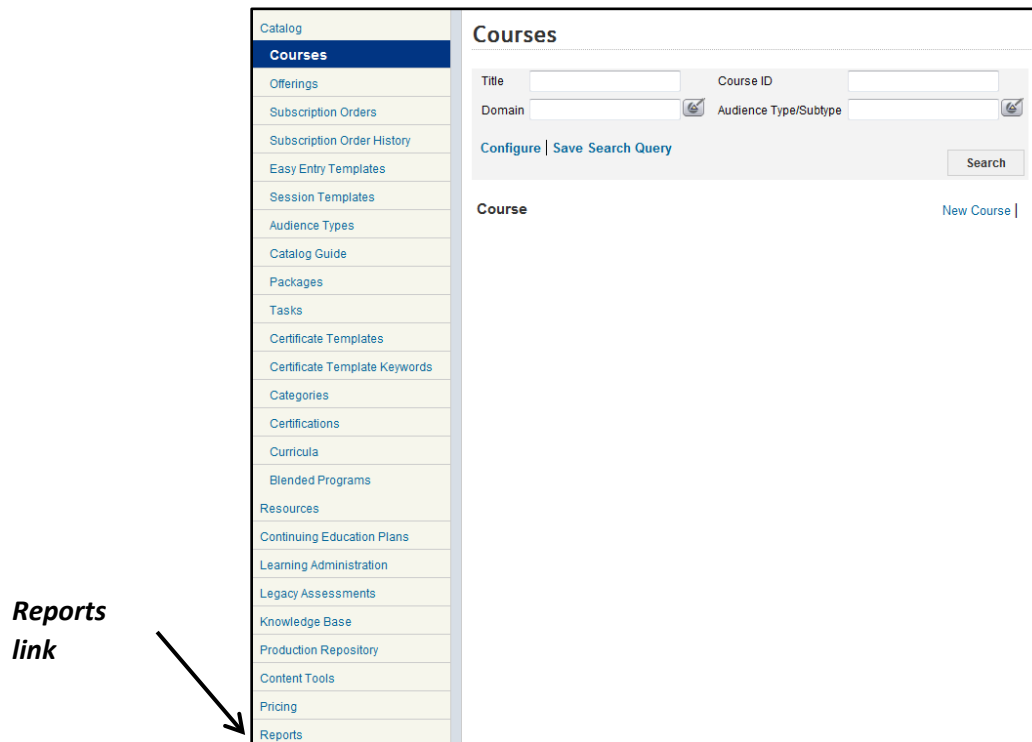


Figure 2 – Reports link

Enter HHS Course Catalog in the Name field and click the **Search** button.

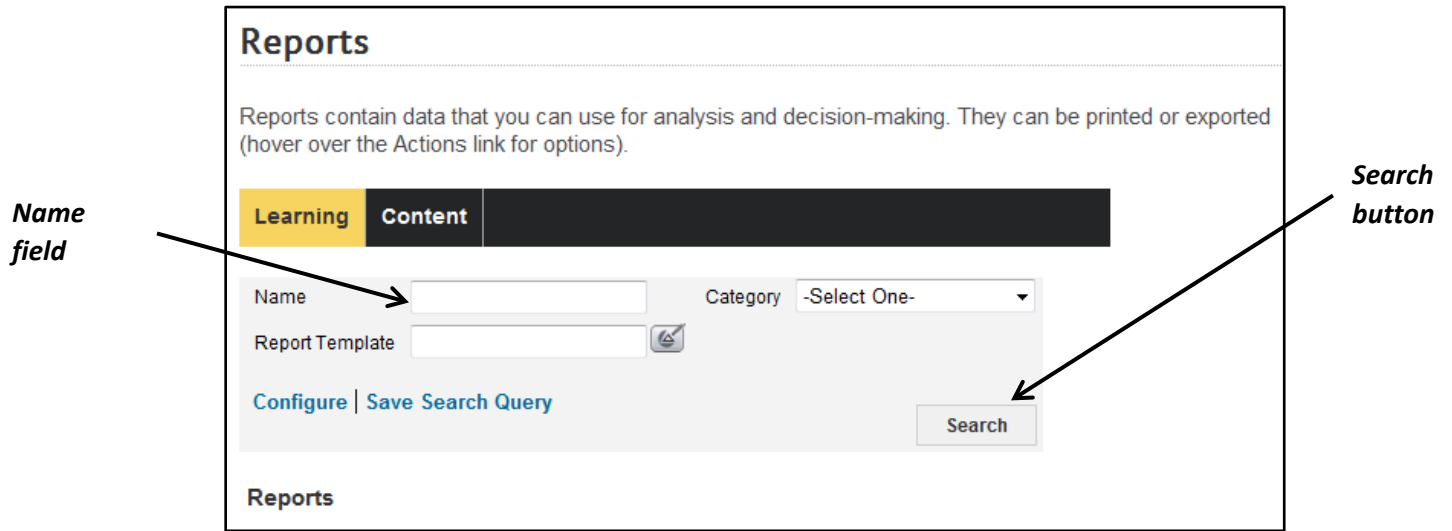


Figure 3 – Name field and Search button

Click the **Actions** link for the HHS Course Catalog Report.

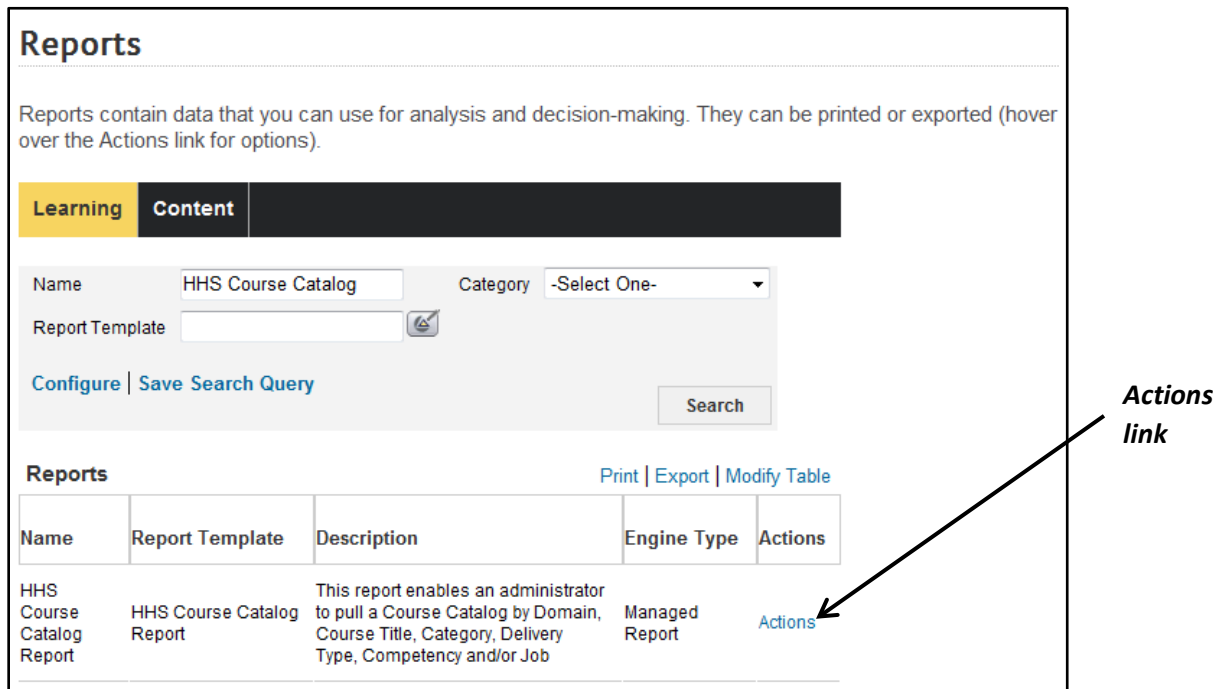


Figure 4 – Actions link

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

The screenshot shows the 'Reports' section of a web application. At the top, there are tabs for 'Learning' and 'Content'. Below the tabs, there are search filters for 'Name' (HHS Course Catalog) and 'Category' (-Select One-). A 'Search' button is present. Below the search filters, there are links for 'Configure' and 'Save Search Query'. A table of reports is displayed, with columns for 'Name', 'Report Template', 'Description', 'Engine Type', and 'Actions'. The first row in the table is for the 'HHS Course Catalog Report'. An 'Actions' menu is open over the 'Actions' column of the first row, showing options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the menu.

Figure 5 – Execute link on the Actions activity menu

Click the **Domain** pick icon.

The screenshot shows the 'Report Parameters - HHS Course Catalog Report' page. It contains several input fields: 'Domain\*' (with a pick icon), 'Course Title', 'Category' (with a pick icon), 'Competency Name' (with a pick icon), 'Delivery Type' (a dropdown menu set to '-Select One-'), 'Keyword' (with a pick icon), and 'Display Course URL' (a checkbox). At the bottom right, there are two buttons: 'Generate Report' and 'Cancel'.

Figure 6 – Domain pick icon

Enter the Domain name in the Name field and click the **Search** button. You can also simply click the **Search** button to see all Domains.



Figure 7 – Name field and Search button

Click the **Select** checkbox.

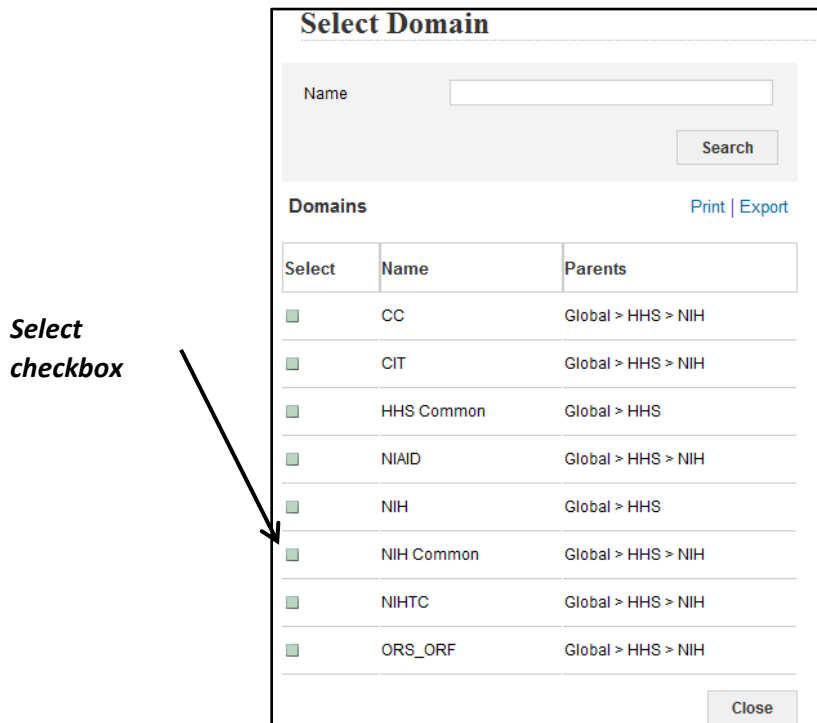


Figure 8 – Select checkbox

Using the Delivery Type pull-down menu, select either **All**, **Instruct-Led**, or **Web-Based**.

**Report Parameters - HHS Course Catalog Report**

Domain\*

Course Title

Category

Competency Name

Delivery Type

Keyword

Display Course URL

*Delivery Type pull-down menu*

Figure 9 – Delivery Type pull-down menu

Click the **Generate Report** button.

**Report Parameters - HHS Course Catalog Report**

Domain\*

Course Title

Category

Competency Name

Delivery Type

Keyword

Display Course URL

*Generate Report button*

Figure 10 – Generate Report button

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

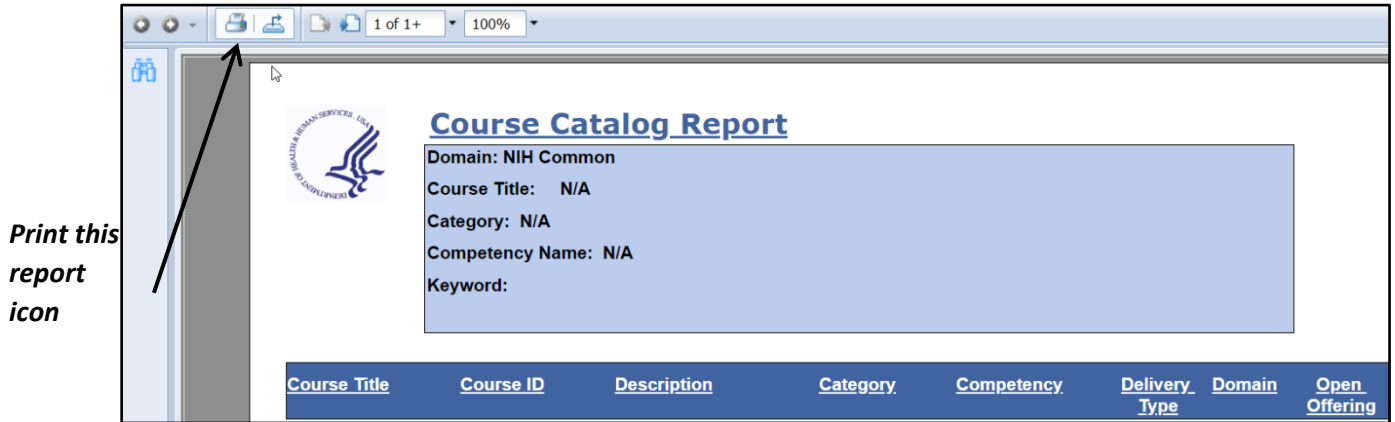


Figure 11 – Print this report button

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

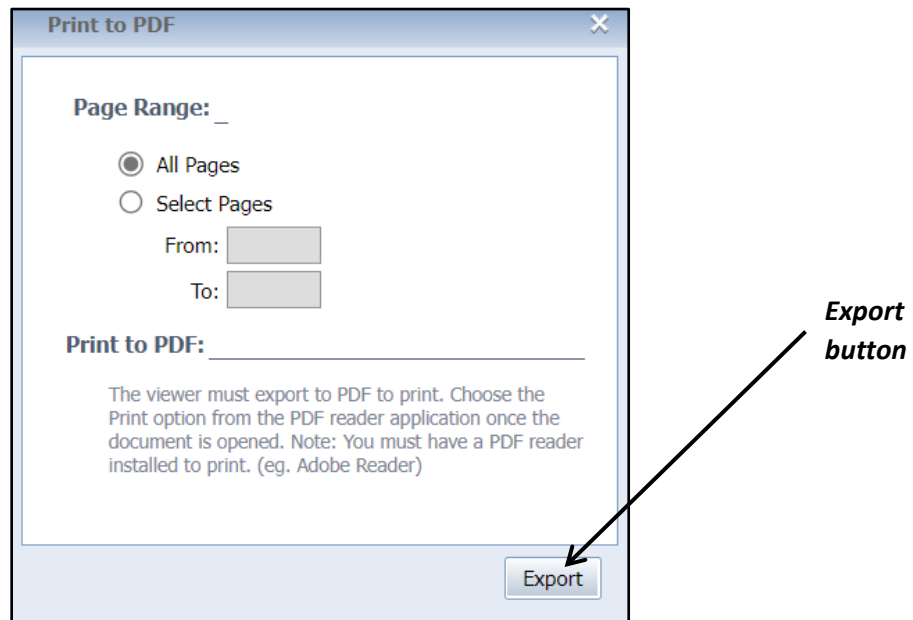


Figure 12 – Export button



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

*Open file  
link*

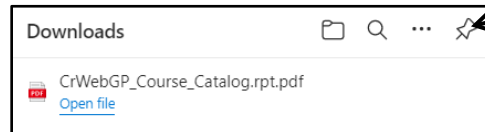


Figure 13 – Open file link

Print the file from Adobe Reader/Acrobat.

**If you experience trouble with this process, please refer to the [LMS Support Page](#).**

## Running the HHS Course Compliance/Exception Report by Organization

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

Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

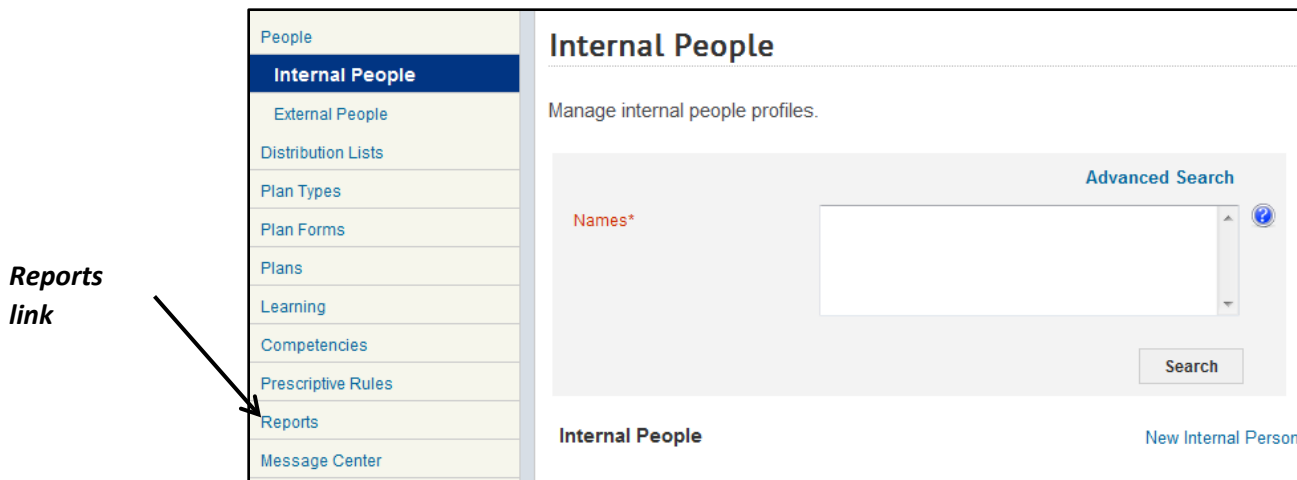


Figure 2 – Reports link

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

**Reports**

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

Name  Category **-Select One-**

Report Template

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

**Reports**

*Category pull-down menu*

*Search button*

Figure 3 – Category pull-down menu and Search button

Click the **Actions** link for HHS Course Compliance/Exception Report by Organization.

HHS Competency Summary by Job Series/Organization	HHS Competency Summary by Job Series/Organization	This report will provide competency assessment information on learner, by job series and/or organization.	Managed Report	<a href="#">Actions</a>
HHS Course Catalog Report	HHS Course Catalog Report	This report enables an administrator to pull a Course Catalog by Domain, Course Title, Category, Delivery Type, Competency and/or Job	Managed Report	<a href="#">Actions</a>
HHS Course Compliance/Exception Report by Organization	HHS Course Compliance/Exception Report by Organization	Report on people in an organization (or its sub-orgs) who have, or have not, completed a specific course or equivalent during the date range you specify. The results can be further refined using the employee EOD Date, Course Domain, and Person Type. This report was custom developed by NIH.	Managed Report	<a href="#">Actions</a>

*Actions link*

Figure 4 – Actions link

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

HHS Competency Summary by Job Series/Organization	HHS Competency Summary by Job Series/Organization	This report will provide competency assessment information on learner, by job series and/or organization.	Managed Report	Actions
HHS Course Catalog Report	HHS Course Catalog Report	This report enables an administrator to pull a Course Catalog by Domain, Course Title, Category, Delivery Type, Competency and/or Job	Managed Report	Actions
HHS Course Compliance/Exception Report by Organization	HHS Course Compliance/Exception Report by Organization	Report on people in an organization (or its sub-orgs) who have, or have not, completed a specific course or equivalent during the date range you specify. The results can be further refined using the employee EOD Date, Course Domain, and Person Type. This report was custom developed by NIH.	Managed Report	Actions

**Actions**

Email

**Execute**

Subscribe

*Execute link*

Figure 5 – Execute link on the Actions activity menu

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

Report Parameters - HHS Course Compliance/Exception Report by Organization

Course Title (Equivalents incl. in results)\*

From Date\*

To Date\*

Organization ID\*

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain

Person Type:

Person Status\*

Report Type\*

Generate Report Cancel

*Course Title pick icon*

Figure 6 – Course Title pick icon

Use the Title, Course ID, Domain, and/or Audience Type/Subtype fields and the **Search** button to search for the course.

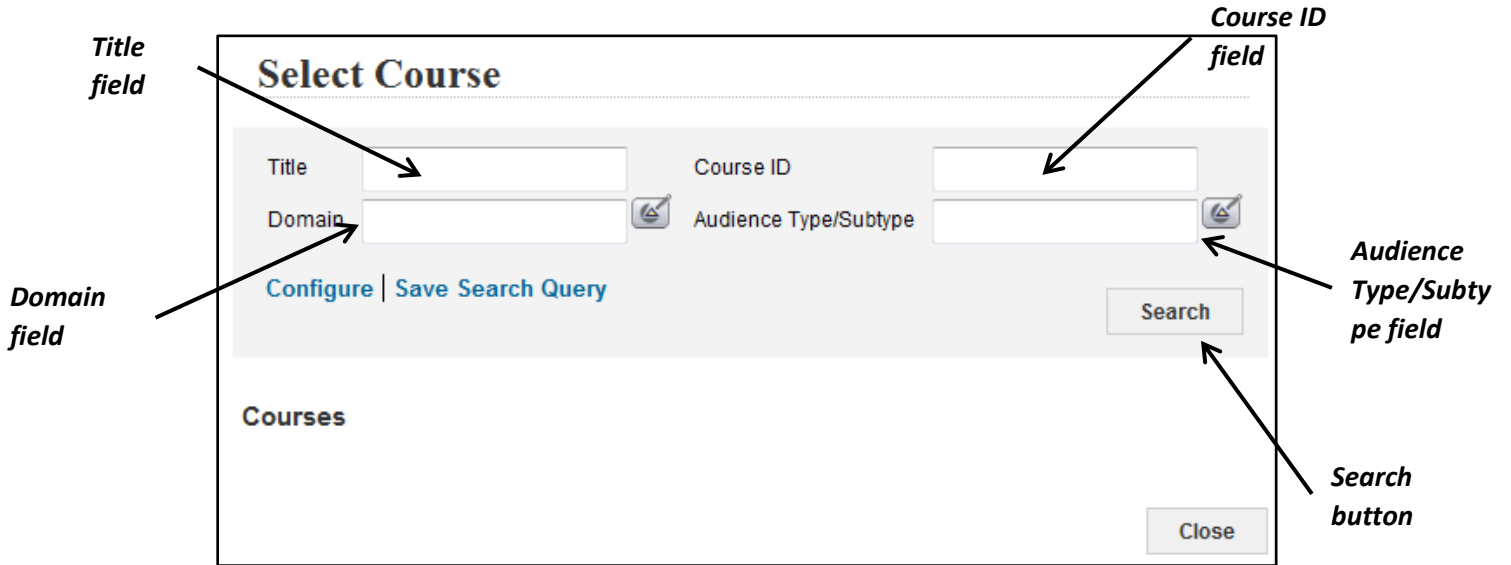


Figure 7 – Title, Course ID, Domain, and Audience Type/Subtype fields and the Search button

Click the Select checkbox to select the course.

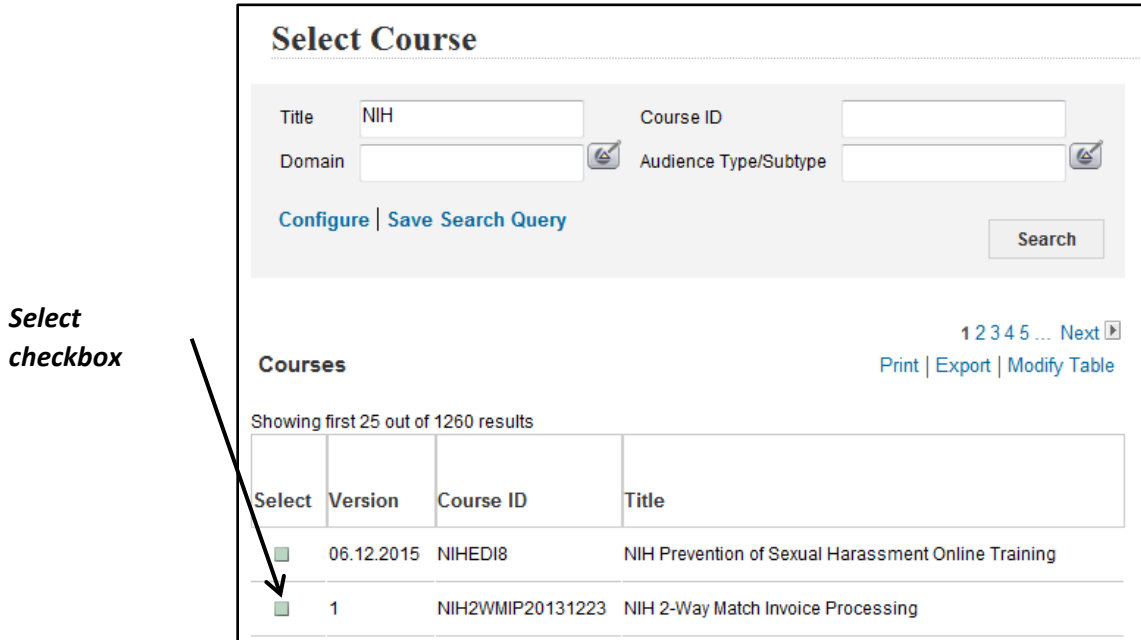




Figure 8 – Select checkbox


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

Report Parameters - HHS Course Compliance/Exception Report by Organization

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm

From Date\*  


To Date\*  

Organization ID\*  

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain  

Person Type: -Select One-

Person Status\* -Select One-

Report Type\* -Select One-

Generate Report Cancel

*From Date pick icon*

*To Date pick icon*

Figure 9 – From Date and To Date pick icons

Enter the Organization ID in the Organization ID field. Alternately, you can use the **Organization ID** pick icon to select the Organization ID.

**Report Parameters - HHS Course Compliance/Exception Report by Organization**

Course Title (Equivalents incl. in results)\*: NIH Prevention of Sexual Harassm

From Date\*: 01/01/2012

To Date\*: 12/31/2014

Organization ID\*:

Include Child Organizations:

EOD Start Date (mm/dd/yyyy):

EOD End Date (mm/dd/yyyy):

Course Domain:

Person Type: -Select One-

Person Status\*: -Select One-

Report Type\*: -Select One-

*Organization ID pick icon*

Figure 10 – Organization ID field

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

**Select Internal Organizations**

Name:  Number:

City:  Audience Type:

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

**Internal Organizations**


*Name field*

*Search button*

Figure 11 – Name field and Search button

Click the Select checkbox to select the Organization.

### Select Internal Organizations

Name  Number   
City  Audience Type  

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

**Internal Organizations** 1 2 3 4 5 ... Next ▾  
[Print](#) | [Export](#) | [Modify Table](#)

Showing first 40 out of 3777 results

Select	Name	Number	City
<input type="checkbox"/>	HN	00010462	
<input type="checkbox"/>	HN2	00010513	
<input type="checkbox"/>	HN21	00006477	

Select  
checkbox

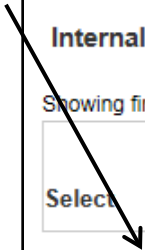


Figure 12 – Select checkbox



By default, the Include Child Organizations checkbox is selected. To only view results for a single Organization ID, remove the checkbox.

*Include Child Organizations checkbox*

Report Parameters - HHS Course Compliance/Exception Report by Organization

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm

From Date\* 01/01/2012

To Date\* 12/31/2014

Organization ID\* HN

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain

Person Type: -Select One-

Person Status\* -Select One-

Report Type\* -Select One-

Generate Report Cancel

Figure 13 – Include Child Organizations checkbox

Select the Person Status pull-down menu and select Active Accounts Only, All Accounts, or Deactivated Accounts only.

Report Parameters - HHS Course Compliance/Exception Report by Organization

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm

From Date\* 01/01/2012

To Date\* 12/31/2014

Organization ID\* HN

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain

Person Type: -Select One-

Person Status\* -Select One-  
Active Accounts Only  
All Accounts  
Deactivated Accounts Only

Report Type\* -Select One-

Generate Report Cancel

*Person Status pull-down menu*

Figure 14 – Person Status pull-down menu

To run a Compliance report, select Compliance from the Report Type pull-down menu. Select Exception from the Report Type pull-down menu to run an Exception report. Select All to view both Compliance and Exception information in the same report.

Report Parameters - HHS Course Compliance/Exception Report by Organization

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm

From Date\* 01/01/2012

To Date\* 12/31/2014

Organization ID\* HN

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain

Person Type: -Select One-

Person Status\* Active Accounts Only

Report Type\* All

Generate Report Cancel

*Report Type pull-down menu*

Figure 15 – Report Type pull-down menu

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

Select the **Generate Report** button.

Report Parameters - HHS Course Compliance/Exception Report by Organization

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassm

From Date\* 01/01/2012

To Date\* 12/31/2014

Organization ID\* HN

Include Child Organizations

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Course Domain

Person Type: -Select One-

Person Status\* Active Accounts Only

Report Type\* All

Generate Report Cancel

*Generate Report button*

Figure 16 – Generate Report button

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

**Print this report icon**

**HHS Course Compliance/Exception Report by Organization**

Course Title: NIH Prevention of Sexual Harassm

From Date: 01/01/2012	EOD Start Date:	Course Domain:
To Date: 12/31/2014	EOD End Date:	Person Status: Active
Org ID: HN	Include Child Org: True	Person Type:
		Report Type: All

**Summary**

Total Records: 41,576	# Complete: 7,808	# Incomplete: 33,768
% Complete: 19	% Incomplete: 81	

ORG ID	LASTNAME	FIRSTNAME	HHS ID	EOD DATE	PERSON TYPE	MANAGER	EMAIL	COMPLETION DATE	PAY PLAN	PERSON STATUS	SUPRV STATUS
--------	----------	-----------	--------	----------	-------------	---------	-------	-----------------	----------	---------------	--------------

Figure 17 – Print this report icon

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

**Print to PDF**

Page Range: \_

All Pages  
 Select Pages

From:   
To:

Print to PDF: \_\_\_\_\_

The viewer must export to PDF to print. Choose the Print option from the PDF reader application once the document is opened. Note: You must have a PDF reader installed to print. (eg. Adobe Reader)

**Export button**

Export

Figure 18 – Export button

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

*Open file link*

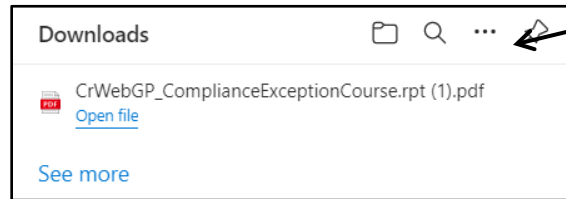


Figure 19 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the HHS Course Enrollment Details Report

The Course Enrollment Details report enables administrators to identify by course, all learner enrollment and completion details for a given date range. Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

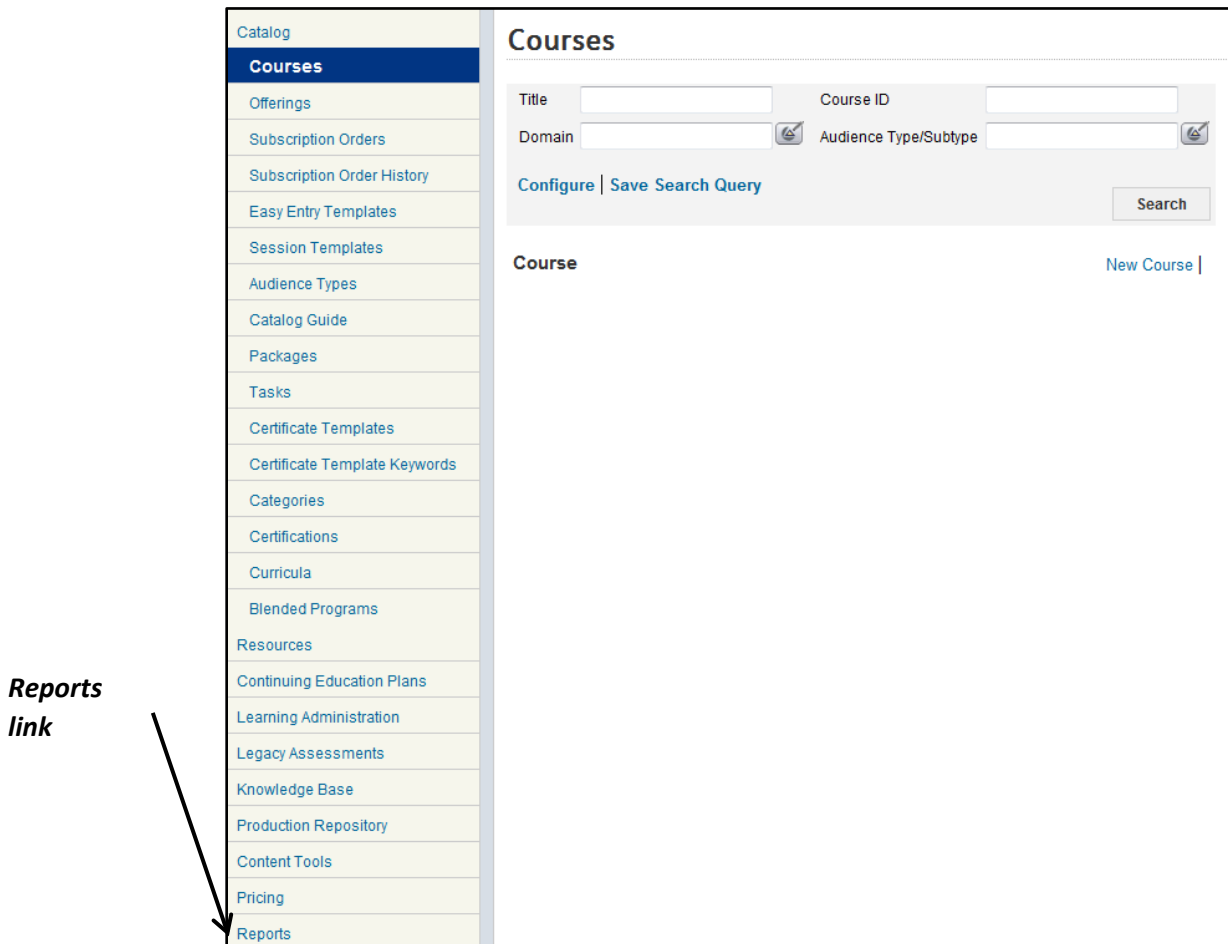


Figure 2 – Reports link

Enter HHS Course Enrollment Details in the Name field and click the **Search** button.

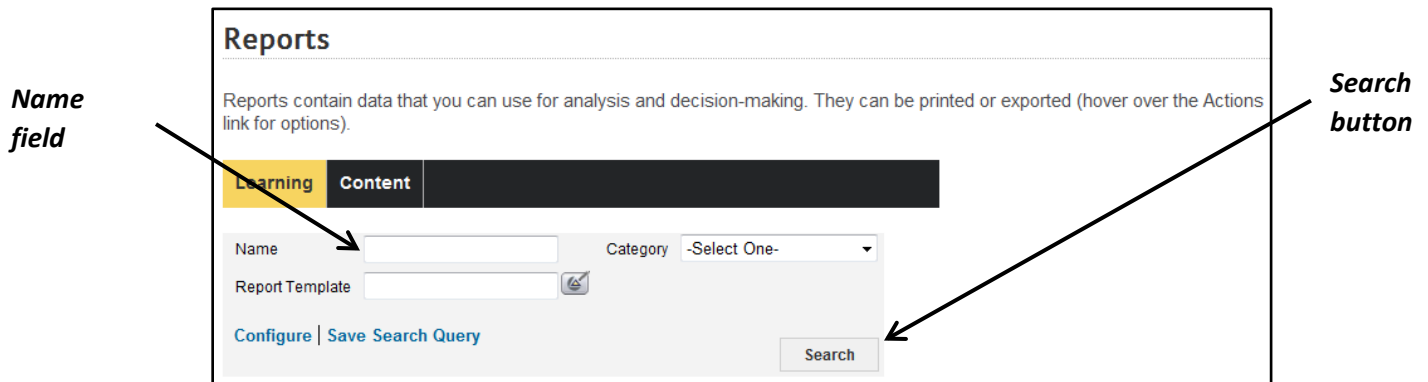


Figure 3 – Name field and Search button

Click the **Actions** link.

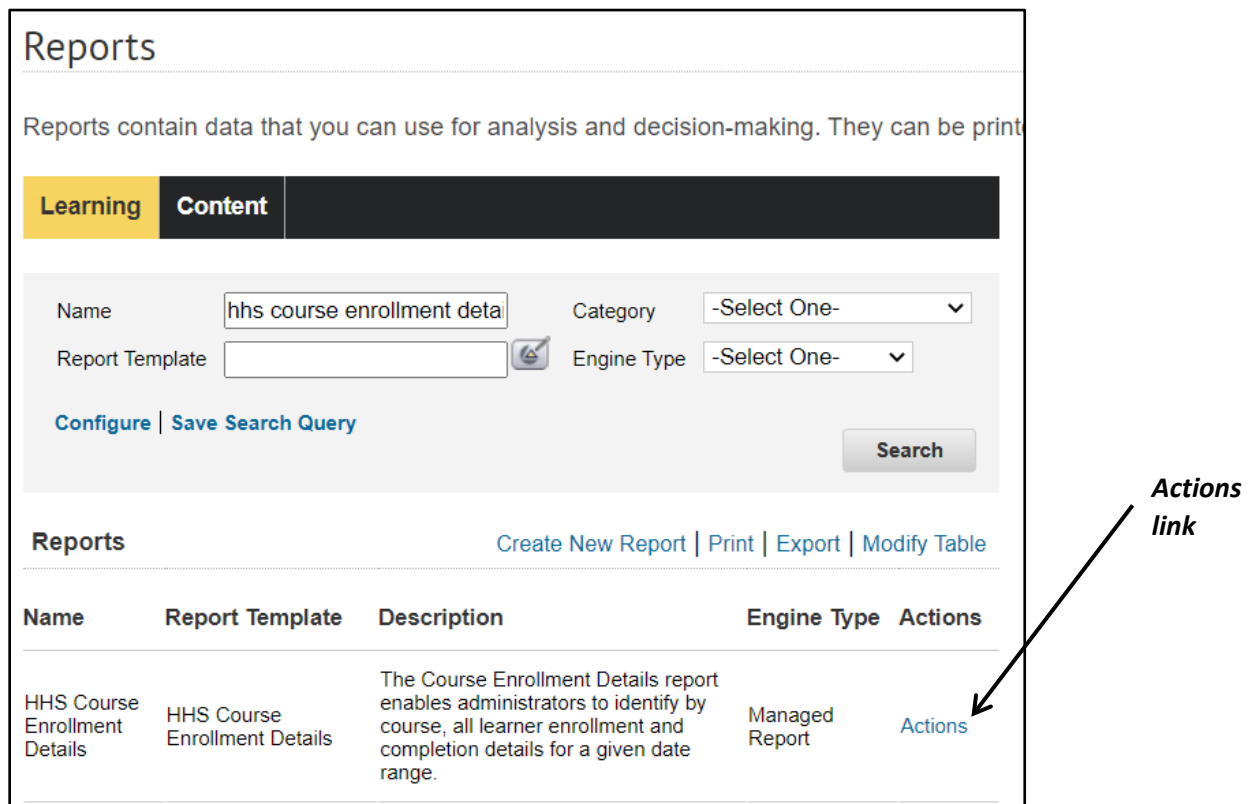


Figure 4 – Actions link

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

The screenshot shows the 'Reports' page with a search filter for 'hhs course enrollment data'. An 'Actions' menu is open over the report entry, highlighting the 'Execute' option. An arrow points from the text 'Execute link' to the 'Execute' option in the menu.

Name	Report Template	Description	Engine Type
HHS Course Enrollment Details	HHS Course Enrollment Details	The Course Enrollment Details report enables administrators to identify by course, all learner enrollment and completion details for a given date range.	Managed Report

Figure 5 – Execute link on the Actions activity menu

Click the **Course Title** pick icon.

The screenshot shows the 'Report Parameters - HHS Course Enrollment Details' form. The 'Course Title\*' field has a pick icon (a magnifying glass over a document) to its right. An arrow points from the text 'Course Title pick icon' to this icon.

Course Title\* [input field] [pick icon]

Starting Enrollment Date\* [input field] [calendar icon]

Ending Enrollment Date\* [input field] [calendar icon]

Person Type [-Select One-]

Organization ID [input field] [pick icon]

Include Child Organization

Enrollment Status [-Select One-]

Generate Report Cancel

Figure 6 – Course Title pick icon

You can search for a course using the Title, Course ID, or Domain fields. Click the **Search** button to continue.

The screenshot shows the 'Select Course' search interface. It features four input fields: 'Title', 'Course ID', 'Domain', and 'Audience Type/Subtype'. The 'Title' field is annotated with 'Title field', the 'Course ID' field with 'Course ID field', and the 'Domain' field with 'Domain field'. A 'Search' button is annotated with 'Search button'. Below the search fields are links for 'Configure' and 'Save Search Query'. At the bottom right is a 'Close' button.

Figure 7 – Title, Course ID, and Domain fields and Search button

Click the **Select** checkmark for the course.

The screenshot shows the 'Select Course' interface with search results. The search criteria are: Title: 'The No FEAR Act', Course ID: (empty), Domain: (empty), Audience Type/Subtype: (empty). Below the search fields are links for 'Configure' and 'Save Search Query', and a 'Search' button. The results section is titled 'Courses' and includes links for 'Print', 'Export', and 'Modify Table'. It shows 'Showing 3 out of 3 results' and a table with columns: 'Select', 'Version', 'Course ID', and 'Title'. The first row is highlighted, and the 'Select' checkbox is annotated with 'Select checkbox'.

Select	Version	Course ID	Title
<input checked="" type="checkbox"/>	2.0	ED6018	The No FEAR Act
<input checked="" type="checkbox"/>	2.2	FGOV_01_A01_BS_ENUS	The No FEAR Act
<input checked="" type="checkbox"/>	2.2	FGOV_01_A17_LC_ENUS	The No FEAR Act

Figure 8 – Select checkbox



Specify the date range for the report using the Starting Enrollment Date and Ending Enrollment Date fields. You can manually enter a date in MM/DD/YYYY format or use the **Starting Enrollment Date** and **Ending Enrollment Date** pick icons.

Figure 9 – Starting Enrollment Date and Ending Enrollment Date fields and pick icons

The Person Type, Organization ID and Enrollment Status parameters are optional for the report. You can choose specific values to narrow the focus of the report or skip selecting a value to include all Person Types, Organization IDs and Enrollment Statuses.

Click the **Generate Report** button to create the report.

Figure 10 – Person Type and Enrollment Status pull-down menus, Organization ID text field, and Generate Report button

Click the **Print this report** icon.

*Print this report icon*

**HHS Course Enrollment Details**

Course Name: The No FEAR Act

Starting Enrollment Date: 01/01/2023      Person Type:      Enrollment Status:

Ending Enrollment Date: 01/12/2023      Organization ID: HNA      Include Child Org: True

POS.ORG	LAST.NAME	FIRST.NAME	HHSID	EMAIL	ORG.ID	PERSON.TYPE	STATUS	ENROLLMENT.STATUS	ENROLLMENT.DATE	START.DATE	OFFERING.ID	COMPLETION.DATE
---------	-----------	------------	-------	-------	--------	-------------	--------	-------------------	-----------------	------------	-------------	-----------------

Figure 11 – Print this report button

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

**Print to PDF**

Page Range: \_

All Pages  
 Select Pages

From:   
To:

Print to PDF: \_\_\_\_\_

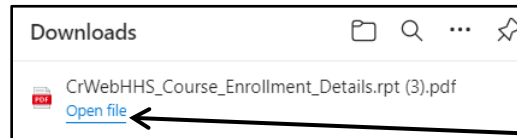
The viewer must export to PDF to print. Choose the Print option from the PDF reader application once the document is opened. Note: You must have a PDF reader installed to print. (eg. Adobe Reader)

**Export button**

Export

Figure 12 – Export button

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



*Open file  
link*

Figure 13 – Open file link

Print the file from Adobe Reader/Acrobat.

**If you experience trouble with this process, please refer to the [LMS Support Page](#) for help or assistance.**

## Running the HHS Course Enrollment Details by Audience Type Report

The Course Enrollment Details by Audience Type report enables Learning Administrators to identify all Learner enrollment details for a given date range including the course, Organization, and Audience Type/Sub-Type. This report provides the option to return course enrollments by Organization grouped by all of the Learner's Audience Type/Sub-Types, or just for a specific Audience Type/Sub-Type.

Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

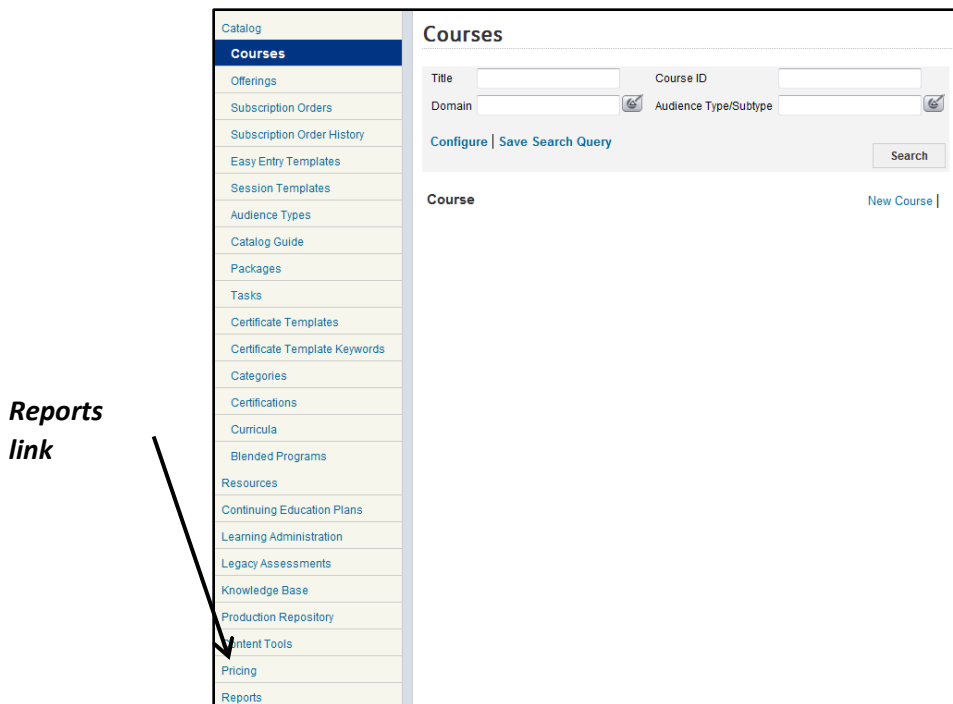


Figure 2 – Reports link

Enter HHS Course Enrollment Details by Audience Type in the Name field and click the **Search** button.

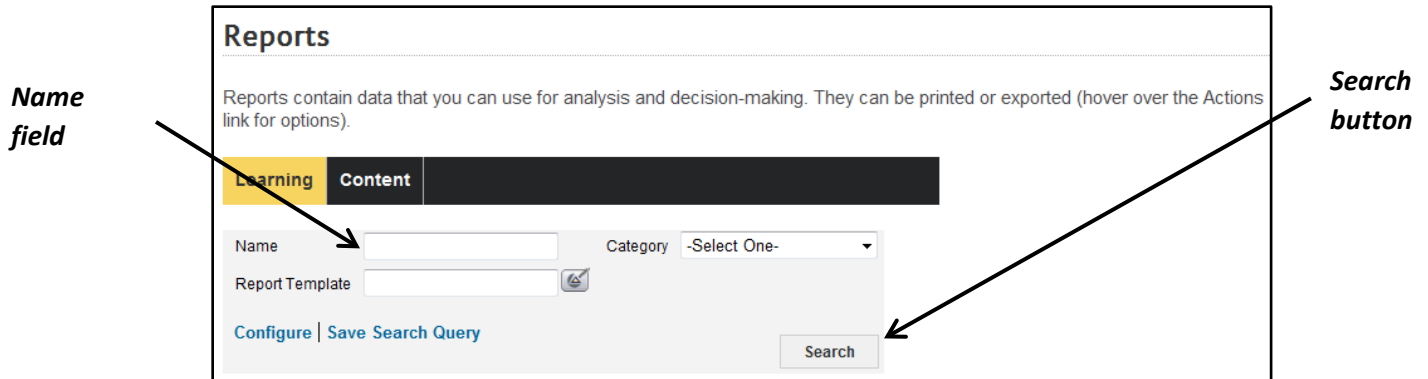


Figure 3 – Name field and Search button

Click the **Actions** link.

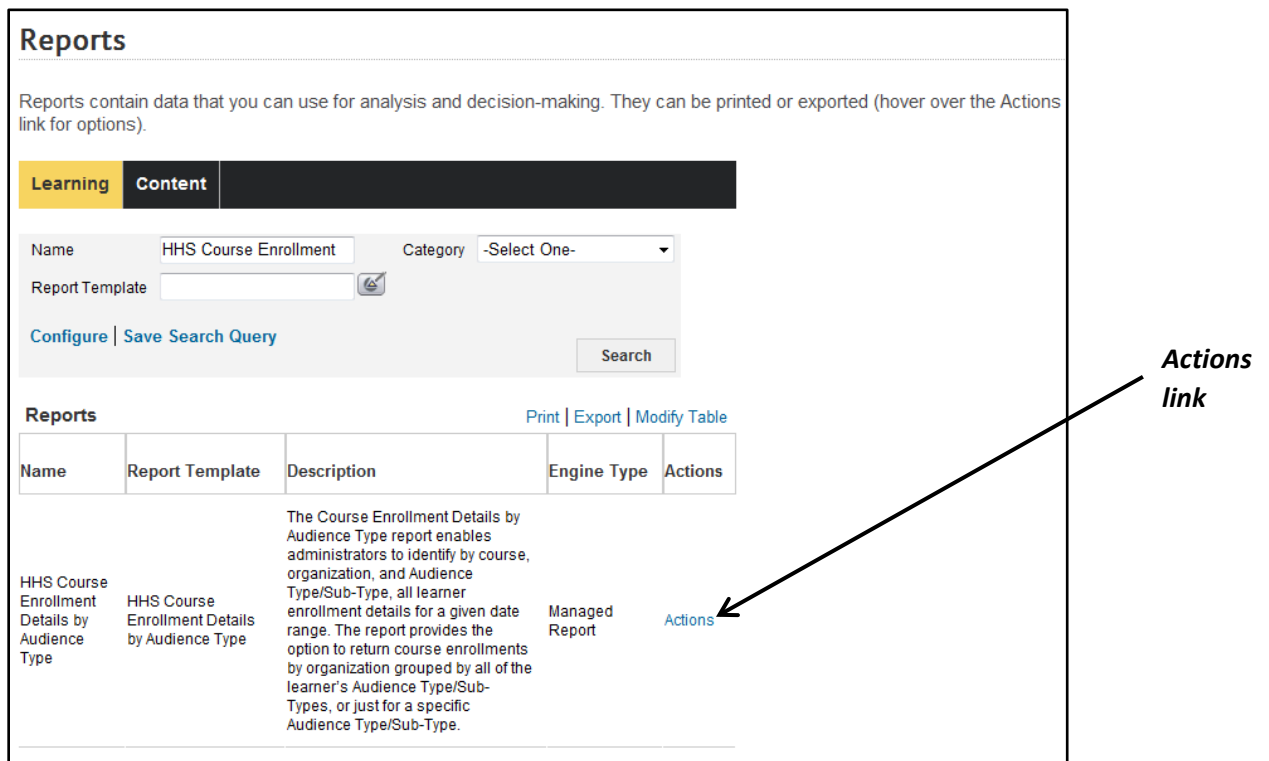


Figure 4 – Actions link

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

The screenshot shows the 'Reports' section of a web application. At the top, there are tabs for 'Learning' and 'Content'. Below the tabs, there are search filters for 'Name' (set to 'HHS Course Enrollment') and 'Category' (set to '-Select One-'). There are also buttons for 'Configure', 'Save Search Query', and 'Search'. Below the filters is a table of reports. The first report is 'HHS Course Enrollment Details by Audience Type'. An 'Actions' menu is open over the 'Actions' column of this report, showing options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the menu.

Figure 5 – Execute link on the Actions activity menu

Click the **Course Title** pick icon.

The screenshot shows the 'Report Parameters - HHS Course Enrollment Details by Audience Type' form. It contains several input fields: 'Course Title\*' (with a pick icon), 'Course Equivalents' (checkbox), 'Starting Enrollment Date\*' (calendar icon), 'Ending Enrollment Date (2 year max)\*' (calendar icon), 'Person Type' (dropdown), 'Organization ID' (text field), 'Enrollment Status' (dropdown), 'Audience Type/Sub-Type\*' (with a pick icon), and 'Exempt Audience Type' (with a pick icon). At the bottom are 'Generate Report' and 'Cancel' buttons. An arrow points from the text 'Course Title pick icon' to the pick icon next to the 'Course Title\*' field.

Figure 6 – Course Title pick icon

You can search for a course using the Title, Course ID, or Domain fields. Click the **Search** button to continue.

The screenshot shows the 'Select Course' search interface. It features four input fields: 'Title', 'Course ID', 'Domain', and 'Audience Type/Subtype'. The 'Title' field is annotated with 'Title field', the 'Course ID' field with 'Course ID field', and the 'Domain' field with 'Domain field'. A 'Search' button is annotated with 'Search button'. Below the search fields are links for 'Configure' and 'Save Search Query'. At the bottom right is a 'Close' button.

Figure 7 – Title, Course ID, and Domain fields and Search button

Click the **Select** checkmark for the course.

The screenshot shows the 'Select Course' interface with search results. The search criteria are: Title: 'The No FEAR Act', Course ID: (empty), Domain: (empty), Audience Type/Subtype: (empty). Below the search fields are links for 'Configure' and 'Save Search Query', and a 'Search' button. The results section is titled 'Courses' and includes links for 'Print', 'Export', and 'Modify Table'. It shows 'Showing 3 out of 3 results' and a table with three rows. The first row is highlighted, and its 'Select' checkbox is annotated with 'Select checkbox'.

Select	Version	Course ID	Title
<input checked="" type="checkbox"/>	2.0	ED6018	The No FEAR Act
<input type="checkbox"/>	2.2	FGOV_01_A01_BS_ENUS	The No FEAR Act
<input type="checkbox"/>	2.2	FGOV_01_A17_LC_ENUS	The No FEAR Act

Figure 8 – Select checkbox

To use Course Equivalents in the report, select the **Course Equivalents checkbox** (this is optional).

*Course  
Equivalents  
checkbox*

Report Parameters - HHS Course Enrollment Details by Audience Type

Course Title\* The No FEAR Act

Course Equivalents

Starting Enrollment Date\*

Ending Enrollment Date (2 year max)\*

Person Type -Select One-

Organization ID

Enrollment Status -Select One-

Audience Type/Sub-Type\*

Exempt Audience Type

Generate Report Cancel

Figure 9 – Course Equivalents checkbox

Specify the date range for the report using the Starting Enrollment Date and Ending Enrollment Date fields. You can manually enter a date in MM/DD/YYYY format or use the **Starting Enrollment Date** and **Ending Enrollment Date** pick icons.

Report Parameters - HHS Course Enrollment Details by Audience Type

Course Title\* The No FEAR Act

Course Equivalents

Starting Enrollment Date\*

Ending Enrollment Date (2 year max)\*

Person Type -Select One-

Organization ID

Enrollment Status -Select One-

Audience Type/Sub-Type\*

Exempt Audience Type

Generate Report Cancel

*Starting  
Enrollment  
Date pick icon*

*Ending  
Enrollment  
Date pick icon*

Figure 10 – Starting Enrollment Date and Ending Enrollment Date fields and pick icons



Select the **Audience Type/Sub-Type** pick icon.

Report Parameters - HHS Course Enrollment Details by Audience Type

Course Title\* The No FEAR Act

Course Equivalents

Starting Enrollment Date\* 01/01/2013

Ending Enrollment Date (2 year max)\* 12/31/2013

Person Type -Select One-

Organization ID

Enrollment Status -Select One-

Audience Type/Sub-Type\*

Exempt Audience Type

Generate Report Cancel

*Mandatory Audience Type/Sub-Type pick icon*

Figure 11 – Audience Type/Sub-Type pick icon

From the **Audience Type/Sub Type** pull-down menu, select Audience Sub Type.

Select Audience Type / Audience Sub Type

Name

Audience Type/SubType Audience Type

Show System Generated

Search

Select Audience Type

Close

*Audience Type/SubType pull-down menu*

Figure 12 – Audience Type/SubType pull-down menu

Enter the name of an Audience SubType in the **Name** field and select the **Search** button. You can use the percent symbol (%) to perform a wildcard search. To return all completions for all of NIH, enter NIH – all in the Audience Type/Sub-Type field.

**Select Audience Type / Audience Sub Type**

Name  Audience Type/SubType Audience SubType ▾

Show System Generated

Search

Select Audience Sub Type

Close

*Name field*

*Search button*

Figure 13 – Name field and Search button

Select the checkbox for the name of the Audience SubType to use it in the report.

**Select Audience Type / Audience Sub Type**

Name nih supervisor Audience Type/SubType Audience SubType ▾

Show System Generated

Search

Select Audience Sub Type [Print](#) | [Export](#)

Showing 1 out of 1 results

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

*Select checkbox*

Figure 14 – Select checkbox

To include Exemptions on the report, select the **Exempt Audience Type** pick icon (this step is optional).

Report Parameters - HHS Course Enrollment Details by Audience Type

Course Title\* The No FEAR Act

Course Equivalents

Starting Enrollment Date\* 01/01/2013

Ending Enrollment Date (2 year max)\* 12/31/2013

Person Type -Select One-

Organization ID

Enrollment Status -Select One-

Audience Type/Sub-Type\* NIH Supervisors

Exempt Audience Type

Generate Report Cancel

Figure 15 – Exempt Audience Type/Sub-Type pick icon

From the **Audience Type/SubType** pull-down menu, select Audience SubType.

Select Audience Type / Audience Sub Type

Name  Audience Type/SubType Audience Type

Show System Generated

Search

Select Audience Type

Close

Figure 16 – Audience Type/SubType pull-down menu

Enter the name of an Exempt Audience SubType in the **Name** field and select the **Search** button. You can use the percent symbol (%) to perform a wildcard search.

**Select Audience Type / Audience Sub Type**

Name  Audience Type/SubType Audience SubType ▼

Show System Generated

Search

Select Audience Sub Type

Close

*Name field*

*Search button*

Figure 17 – Name field and Search button

Select the checkbox for the name of the Audience SubType to use it in the report.

**Select Audience Type / Audience Sub Type**

Name FLSA Audience Type/SubType Audience SubType ▼

Show System Generated

Search

Select Audience Sub Type [Print](#) | [Export](#)

Showing 1 out of 1 results

Select	Name
<input checked="" type="checkbox"/>	FLSA 2016 Exemptions

*Select checkbox*

Figure 18 – Select checkbox

The Person Type, Organization ID and Enrollment Status parameters are optional for the report. You can choose specific values to narrow the focus of the report or skip selecting a value to include all Person Types, Organization IDs and Enrollment Statuses.

Enter a percent symbol (%) as a wildcard in the Organization ID field to capture all the sub organizations.

Click the **Generate Report** button to create the report.

**Report Parameters - HHS Course Enrollment Details by Audience Type**

Course Title\* The No FEAR Act

Course Equivalents

Starting Enrollment Date\* 01/01/2013

Ending Enrollment Date (2 year max)\* 12/31/2013

Person Type -Select One-

Organization ID

Enrollment Status -Select One-

Audience Type/Sub-Type\* NIH Supervisors

Exempt Audience Type FLSA 2016 Exemptions

Generate Report Cancel

*Person Type pull-down menu*

*Organization ID text field*

*Enrollment Status pull-down menu*

*Generate Report button*

Figure 19 – Person Type and Enrollment Status pull-down menus, Organization ID text field, and Generate Report button

Click the **Print this report** icon.

**HHS Course Enrollment Details by Audience Type**

Course Name: The No FEAR Act

Course Equivalents: False

Starting Enrollment Date: 01/01/2013

Ending Enrollment Date: 12/31/2013

Person Type:

Organization ID:

Enrollment Status:

Audience Type: NIH Supervisors

Exempt Audience Type: FLSA 2016 Exemptions

*Print this report icon*

POS ORG	ORG ID	LAST NAME	FIRST NAME	HHSID	EMAIL ADDRESS	PERSON TYPE	STATUS	ENROLLMENT STATUS	ENROLLMENT DATE	START DATE	OFFERING ID	COMPLETION DATE	SUPERVISORY CODE
---------	--------	-----------	------------	-------	---------------	-------------	--------	-------------------	-----------------	------------	-------------	-----------------	------------------

Figure 20 – Print this report button

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

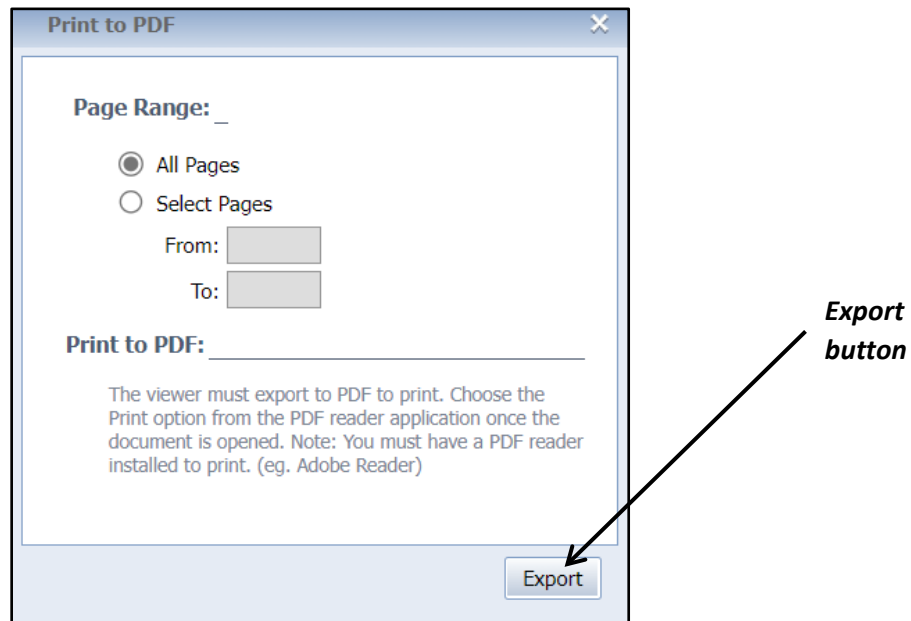


Figure 21 – Export button

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



Figure 22 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#) for help or assistance.

## Running the HHS Enrollment Snapshot Report

This report delivers the roster details for offerings of a given Owner, Course or Domain in a specified date range – the date range cannot exceed one (1) year.

Log into the LMS.

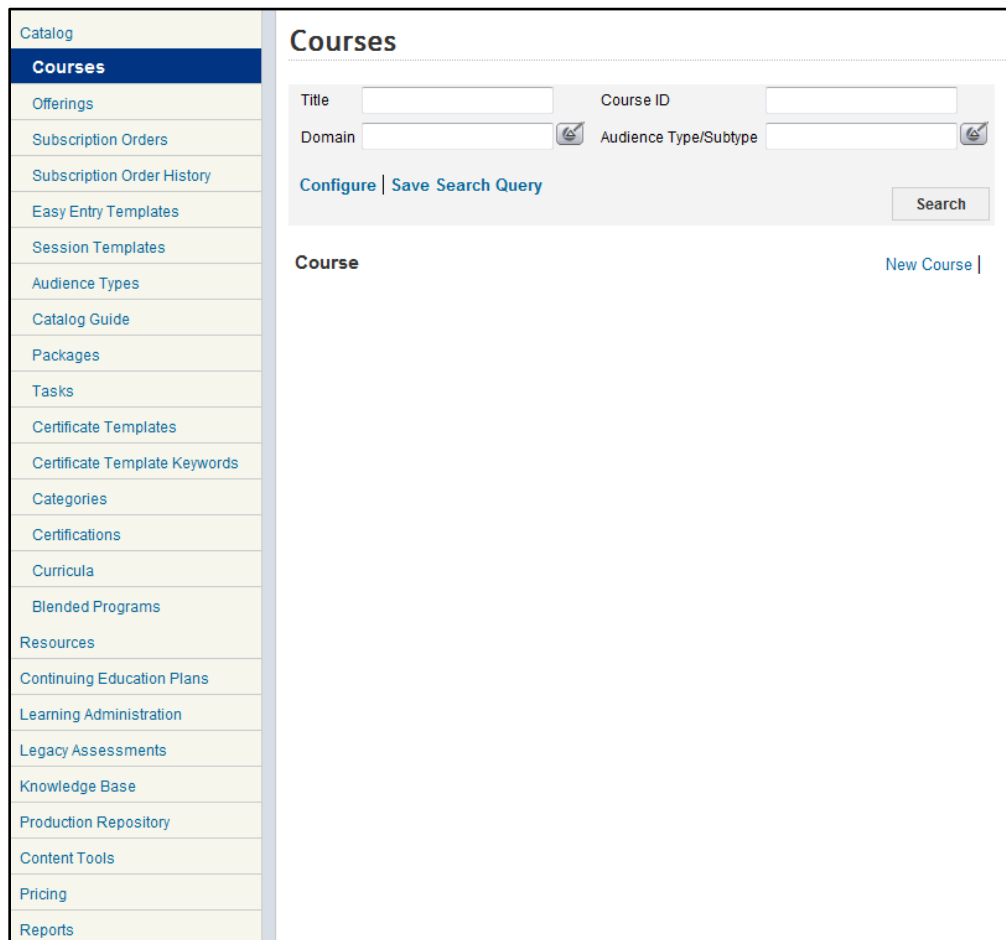
Click the **Admin** icon.



*Admin icon*

Figure 1 – Admin icon

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



*Reports link*

Figure 2 – Reports link

Enter HHS Enrollment Snapshot in the Name field and click the **Search** button.

**Reports**

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

**Learning** **Content**

Name  Category

Report Template

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

**Reports**

Figure 3 – Name field and Search button

Click the **Actions** link for the HHS Enrollment Snapshot Report.

**Reports**

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

**Learning** **Content**

Name  Category

Report Template

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

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

Name	Report Template	Description	Engine Type	Actions
HHS Enrollment Snapshot Report	HHS Enrollment Snapshot Report	This report returns a snapshot of roster details for offerings of a given owner, course or domain in a given date range. ** Note: One of the following parameters shall also be required: Offering Owner, Course ID, Domain. The Date range not to exceed one year.	Managed Report	<a href="#">Actions</a>

Figure 4 – Actions link



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

The screenshot shows a 'Reports' page with a search bar and a table of reports. An 'Actions' menu is open over the first report, showing options: Email, Execute, and Subscribe. An arrow points from the text 'Execute link' to the 'Execute' option in the menu.

Name	Report Template	Description	Engine Type	Actions
HHS Enrollment Snapshot Report	HHS Enrollment Snapshot Report	This report returns a snapshot of roster details for offerings of a given owner, course or domain in a given date range. ** Note: One of the following parameters shall also be required: Offering Owner, Course ID, Domain. The Date range not to exceed one year.	Managed Report	Actions

Figure 5 – Execute link on the Actions activity menu

In addition to the mandatory From Date and To Date fields, you must populate the Offering Owner, Customer Service Representative, Course ID, or Domain fields. Use the respective pick icons to select the Offering Owner, Course ID, or Domain. In this example, Domain will be used – click the **Domain** pick icon.

The screenshot shows the 'Report Parameters - HHS Enrollment Snapshot Report' form. It includes fields for 'From Date\*', 'To Date(Date range not to exceed 1 year)\*', and several pick icons for 'Offering Owner', 'Offering Customer Service Representative', 'Course ID', and 'Domain'. There are also checkboxes for display options and 'Generate Report' and 'Cancel' buttons.

Figure 6 – Offering Owner, Customer Service Representative, Course ID, and Domain pick icons

Click the **Search** button.

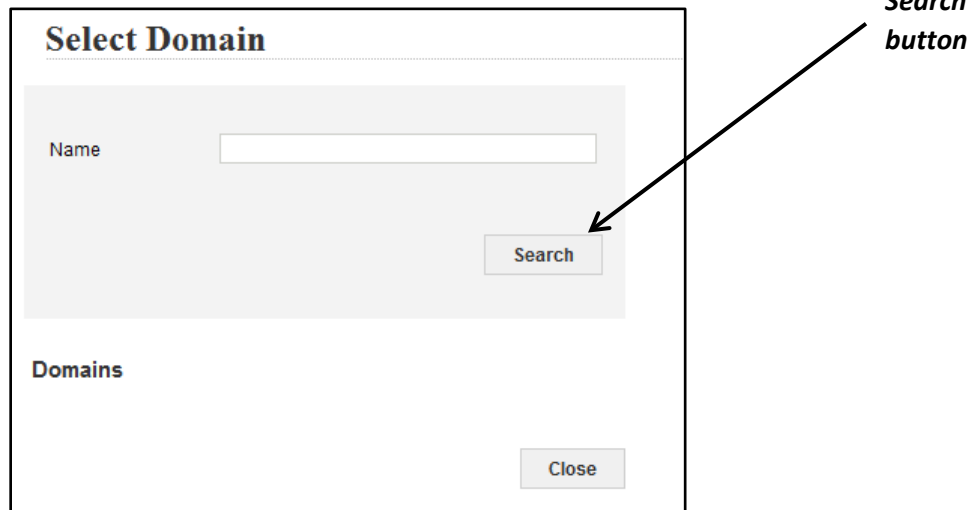


Figure 7 – Search button

Click the **Select** checkbox to select the Domain.

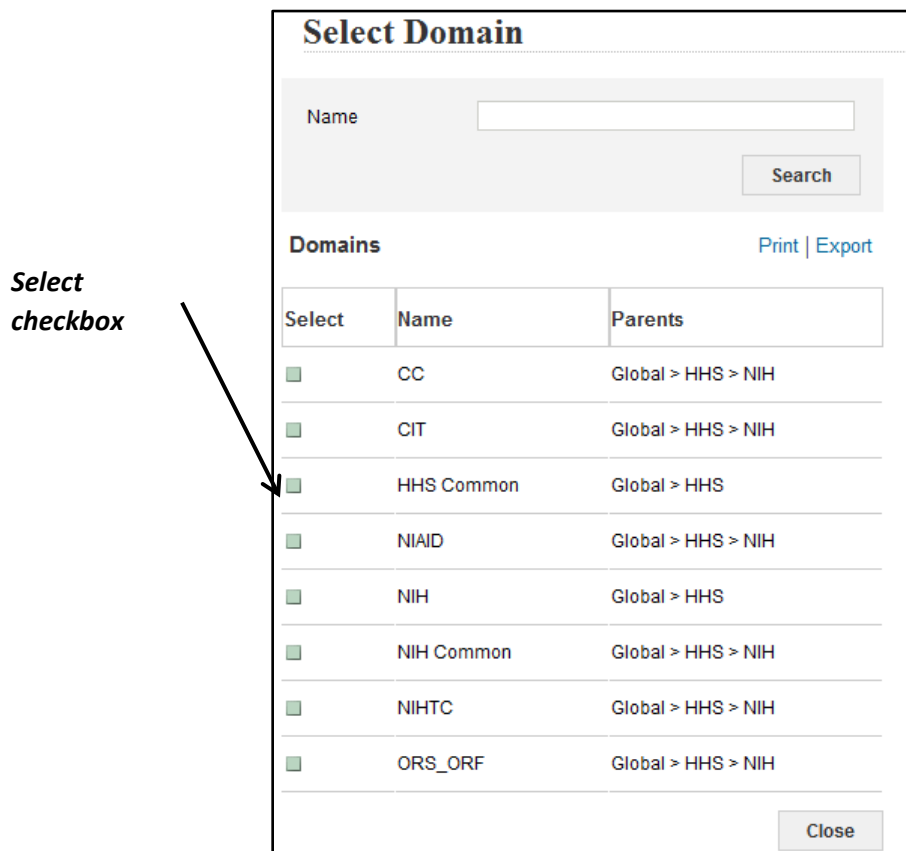





Figure 8 – Select checkbox


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


Report Parameters - HHS Enrollment Snapshot Report


From Date\*   ← *From Date pick icon*


To Date(Date range not to exceed 1 year)\*   ← *To Date pick icon*

Select one of the following:  
Offering Owner  

Offering Customer Service Representative  

Course ID  

Domain  

Offering Status\*  

Select to display column in report output: Display Course Title

Display Delivery Type

Display Offering Status

Display Offering Date Cancelled

Display Customer Service Representative

Display Instructor

Display NIHTC Max Count

Figure 9 – From Date and To Date pick icons

**NOTE:** The date range cannot exceed one (1) year.

By default, the Offering Status field is populated with Open-Normal. Click the **Offering Status** pull-down menu to select another value.

Report Parameters - HHS Enrollment Snapshot Report

From Date\* 01/01/2016

To Date(Date range not to exceed 1 year)\* 01/01/2017

Select one of the following:  
Offering Owner

Offering Customer Service Representative

Course ID

Domain HHS Common

Offering Status\* Open - Normal

Select to display column in report output: Display Course Title

Display Delivery Type

Display Offering Status

Display Offering Date Cancelled

Display Customer Service Representative

Display Instructor

Display NIHTC Max Count

Generate Report Cancel

*Offering status*

Figure 10 – Offering Status Pull-Down Menu

Click the **Generate Report** icon.

**Report Parameters - HHS Enrollment Snapshot Report**

**From Date\*** 01/01/2016

**To Date(Date range not to exceed 1 year)\*** 01/01/2017

Select one of the following:  
Offering Owner

Offering Customer Service Representative

Course ID

Domain: HHS Common

**Offering Status\*** Open - Normal

Select to display column in report output:

- Display Course Title
- Display Delivery Type
- Display Offering Status
- Display Offering Date Cancelled
- Display Customer Service Representative
- Display Instructor
- Display NIHTC Max Count

**Generate Report** **Cancel**

*Generate Report button*

Figure 11 – Generate Report button

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

**HHS Enrollment Snapshot Report**

From Date: 01/01/2016

To Date: 01/01/2017

Offering Owner:

Customer Service Representative:

Course ID:

Domain: HHS Common

Offering Status: Open - Normal

Display Course Title: False

Display Delivery Type: False

Display Offering Status: False

Display Offering Date Cancelled: False

Display Customer Service Representative: False

Display Instructor: False

Display NIHTC Max Count: False

*Print this report icon*

Figure 12 – Print this report icon

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

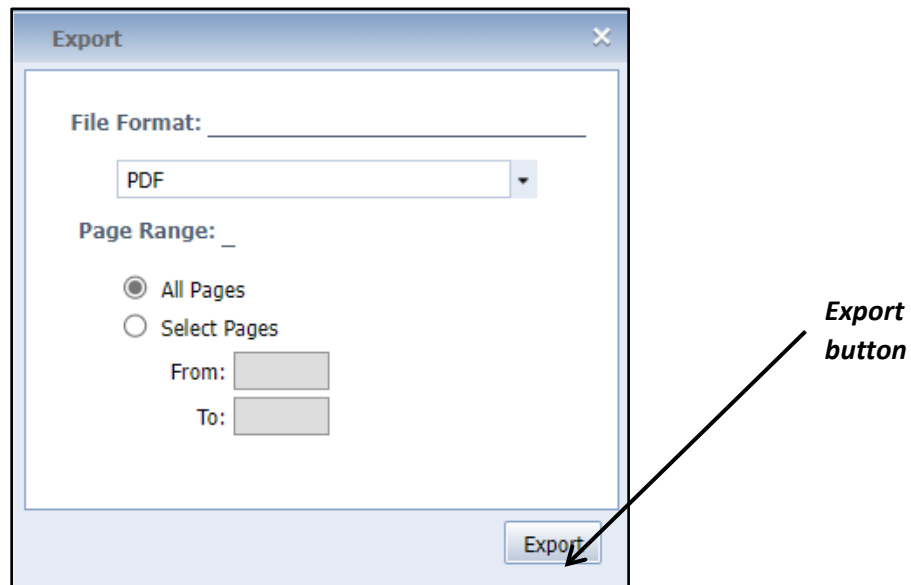


Figure 13 – Export button

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

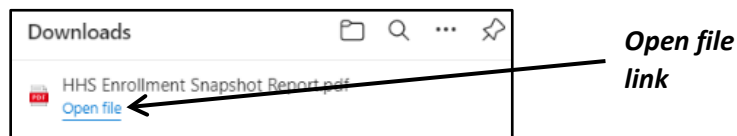


Figure 14 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the HHS Mandatory Training by Audience Type Report

This report delivers data based on audience for NIH staff to determine whether or not they completed a specific mandatory course during a specified date range.

The report can also be configured to show NIH staff that are exempt (i.e. staff are not required to take the training) from the mandatory training initiative. This report returns only the last, most recent completions (in the event the course was completed multiple times in that timeframe).

Log into the LMS.

Select the **Admin** icon.



Figure 1 – Admin icon

Select the **Reports** link in the left navigation menu.

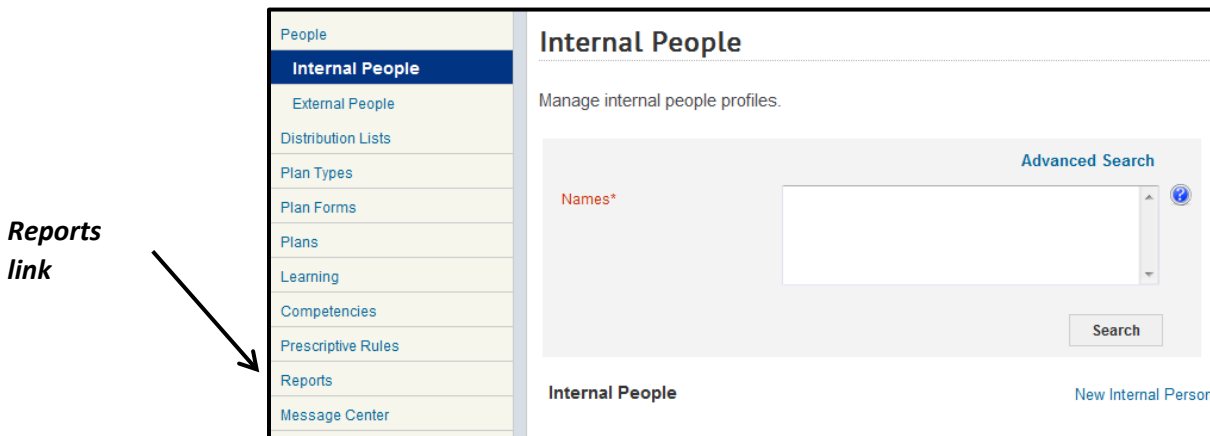


Figure 2 – Reports link

Enter HHS Mandatory in the Name field and select the **Search** button.

*Name field* →

*Search button* →

### Reports

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

Name  Category -Select One-

Report Template

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

Figure 3 – Name field and Search button

Select the **Actions** link for the HHS Mandatory Training by Audience Type Report.

### Reports

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

Name  Category -Select One-

Report Template

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

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

Name	Report Template	Description	Engine Type	Actions
HHS Mandatory Training by Audience Type Report	HHS Mandatory Training by Audience Type Report	Report on people in an organization (or its sub-orgs) who have, or have not, completed a specific course or equivalent during the date range you specify by an audience type. You may also exempt an audience type from the report. The results can be further refined using the Person Type or Person Status.	Managed Report	<a href="#">Actions</a>

*Actions link* →

Figure 4 – Actions link



Select the **Execute** link on the Actions activity menu.

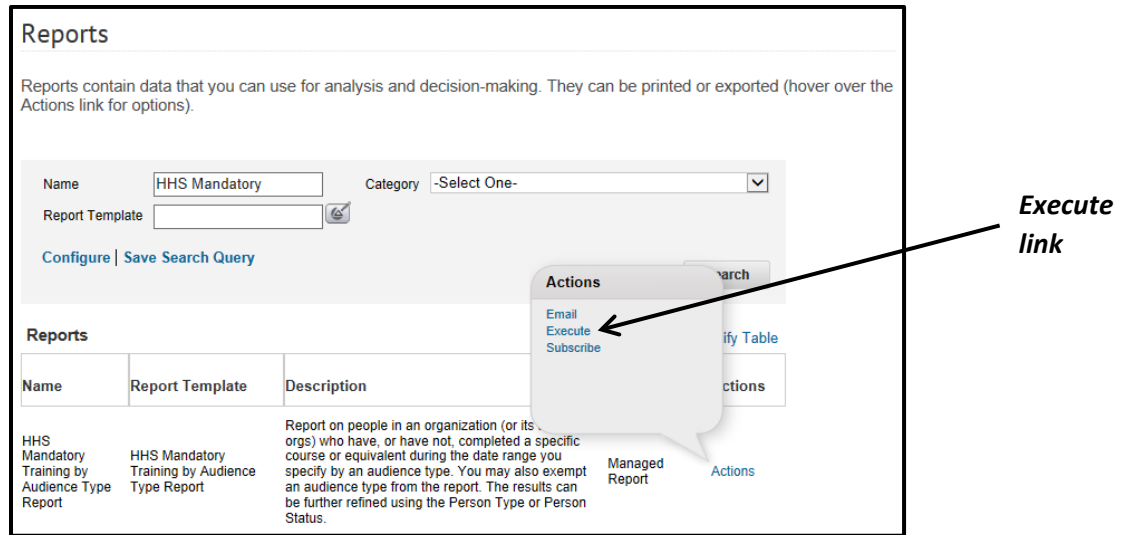


Figure 5 – Execute link on the Actions activity menu

Select the **Course Title** pick icon.

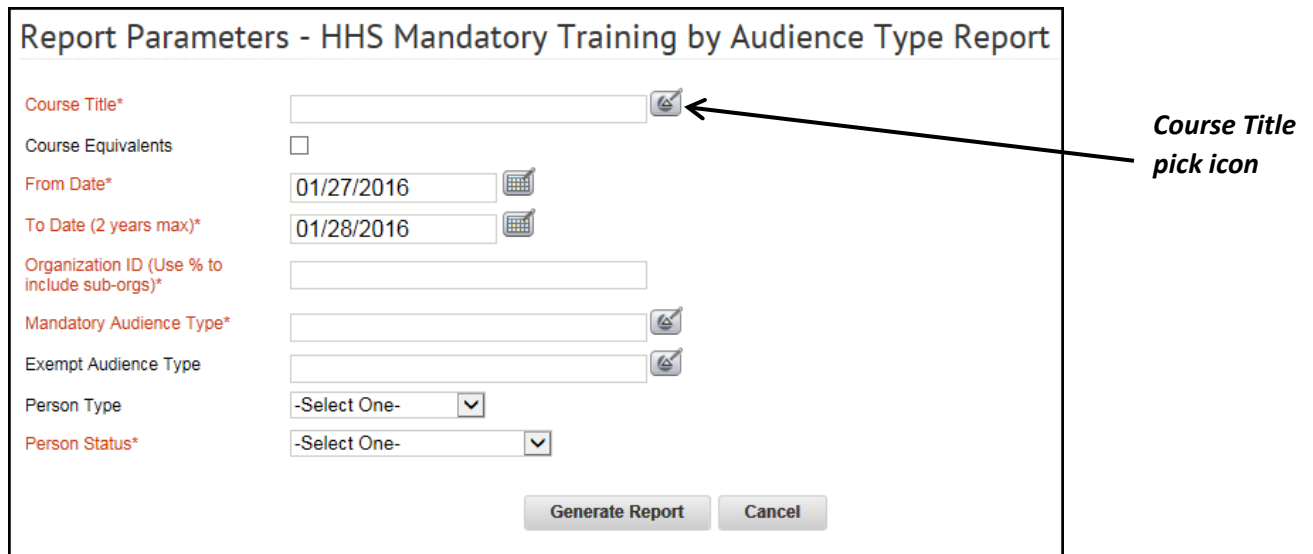


Figure 6 – Course Title pick icon

Use the Title, Course ID, Domain, and/or Audience Type/Subtype fields and the **Search** button to search for the course

*Title field* →

### Select Course

Title  Course ID

Domain  Audience Type/Subtype

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

**Courses**

*Search button* →

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

Select the checkbox for the name of the Course to use it in the report.

*Select checkbox* →

### Select Course

Title  Course ID

Domain  Audience Type/Subtype

Version

You have a saved query.

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

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

Showing 2 out of 2 results

Select	Version	Course ID	Title
<input type="checkbox"/>		HHS-FLSA2015	Fair Labor Standards Act (FLSA) 101 for Managers and Supervisors
<input type="checkbox"/>		NIH_FLSA2015_PDF	Fair Labor Standards Act (FLSA) 101 for Supervisors and Managers PDF

Figure 8 – Select checkbox

To use Course Equivalents in the report, select the **Course Equivalents** checkbox.

*Course  
Equivalents  
checkbox*

Report Parameters - HHS Mandatory Training by Audience Type Report

Course Title\* Fair Labor Standards Act (FLSA) 1

Course Equivalents

From Date\* 01/27/2016

To Date (2 years max)\* 01/28/2016

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

Mandatory Audience Type\*

Exempt Audience Type

Person Type -Select One-

Person Status\* -Select One-

Generate Report Cancel

Figure 9 – Course Equivalents checkbox

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

*From Date  
pick icon*

Report Parameters - HHS Mandatory Training by Audience Type Report

Course Title\* Fair Labor Standards Act (FLSA) 1

Course Equivalents

From Date\* 01/27/2016

To Date (2 years max)\* 01/28/2016

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

Mandatory Audience Type\*

Exempt Audience Type

Person Type -Select One-

Person Status\* -Select One-

Generate Report Cancel

*To Date  
pick icon*

Figure 10 – From Date and To Date pick icons

Add your Organization ID to the **Organization ID** field. You can use a percent symbol (%) to search for all sub-Organizations.

**Report Parameters - HHS Mandatory Training by Audience Type Report**

Course Title\* Fair Labor Standards Act (FLSA) 1

Course Equivalents

From Date\* 01/27/2016

To Date (2 years max)\* 01/28/2016

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

Mandatory Audience Type\*

Exempt Audience Type

Person Type -Select One-

Person Status\* -Select One-

Generate Report Cancel

*Organization ID field*

Figure 11 – Organization ID field

Select the **Mandatory Audience Type** pick icon.

**Report Parameters - HHS Mandatory Training by Audience Type Report**

Course Title\* Fair Labor Standards Act (FLSA) 1

Course Equivalents

From Date\* 01/27/2016

To Date (2 years max)\* 01/28/2016

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

Mandatory Audience Type\*

Exempt Audience Type

Person Type -Select One-

Person Status\* -Select One-

Generate Report Cancel

*Mandatory Audience Type pick icon*

Figure 12 – Mandatory Audience Type pick icon

From the **Audience Type/SubType** pull-down menu, select Audience SubType.

Select Audience Type / Audience Sub Type

Name  Audience Type/SubType Audience Type

Show System Generated

Search

Select Audience Type

Close

*Audience Type/SubType pull-down menu*

Figure 13 – Audience Type/SubType pull-down menu

Enter the name of a Mandatory Audience SubType in the **Name** field and select the **Search** button. You can use the percent symbol (%) to perform a wildcard search.

Select Audience Type / Audience Sub Type

Name  Audience Type/SubType Audience SubType

Show System Generated

Search

Select Audience Sub Type

Close

*Name field*

*Search button*

Figure 14 – Name field and Search button

Select the checkbox for the name of the Audience SubType to use it in the report.

Select  
checkbox

Figure 15 – Select checkbox

To include Exemptions on the report, select the **Exempt Audience Type** pick icon (this step is optional).

Exempt  
Audience Type  
pick icon

Figure 16 – Exempt Audience Type pick icon

From the **Audience Type/SubType** pull-down menu, select Audience SubType.

Select Audience Type / Audience Sub Type

Name  Audience Type/SubType Audience Type

Show System Generated

Select Audience Type

*Audience Type/SubType pull-down menu*

Figure 17 – Audience Type/SubType pull-down menu

Enter the name of an Exempt Audience SubType in the **Name** field and select the **Search** button. You can use the percent symbol (%) to perform a wildcard search.

Select Audience Type / Audience Sub Type

Name  Audience Type/SubType Audience SubType

Show System Generated

Select Audience Sub Type

*Name field*

*Search button*

Figure 18 – Name field and Search button



Select the checkbox for the name of the Audience SubType to use it in the report.

Select checkbox

Select Audience Type / Audience Sub Type

Name: FLSA Audience Type/SubType: Audience SubType

Show System Generated:

Search

Select Audience Sub Type [Print](#) | [Export](#)

Showing 1 out of 1 results

Select	Name
<input type="checkbox"/>	FLSA 2016 Exemptions

Figure 19 – Select checkbox

From the Person Status pull-down menu, select **All Accounts**.

Report Parameters - HHS Mandatory Training by Audience Type Report

Course Title\*: Fair Labor Standards Act (FLSA) 1

Course Equivalents:

From Date\*: 01/27/2016

To Date (2 years max)\*: 01/28/2016

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

Mandatory Audience Type\*: NIH Supervisors

Exempt Audience Type: FLSA 2016 Exemptions

Person Type: -Select One-

Person Status\*: -Select One-

Generate Report Cancel

Person Status pull-down menu

Figure 20 – Person Status pull-down menu



Select the **Generate Report** button.

**Report Parameters - HHS Mandatory Training by Audience Type Report**

Course Title\* Fair Labor Standards Act (FLSA) 1

Course Equivalents

From Date\* 01/27/2016

To Date (2 years max)\* 01/28/2016

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

Mandatory Audience Type\* NIH Supervisors

Exempt Audience Type FLSA 2016 Exemptions

Person Type -Select One-

Person Status\* All Accounts

**Generate Report** **Cancel**

*Generate Report button*

Figure 21 – Generate Report button

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

*Print this report icon*

**HHS Mandatory Training by Audience Type**

Course Title: Fair Labor Standards Act (FLSA) 101 for Managers and Supervisors

Course Equivalents: Yes      Person Type:

From Date: 01/27/2016      To Date: 01/28/2016      Person Status: All

Org ID: HNA%

Mandatory Audience Type: NIH Supervisors

Exempt Audience Type: FLSA 2016 Exemptions

Summary Report Totals	
Total Learners in Report	603
Total Learners Completed	0
Total Learners Incomplete	603
Total Learners Exempt	0
Completion rate	0.00%
Exception rate	100.00%

POS. ORG. ORG. ID LAST. NAME FIRST. NAME HHSID EOO. DATE PERSON. TYPE MANAGER EMAIL AUDIENCE. TYPE COMPLETION. DATE PAY. PLAN PERSON. STATUS SUPPLY. CODE

Figure 22 – Print this report button

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

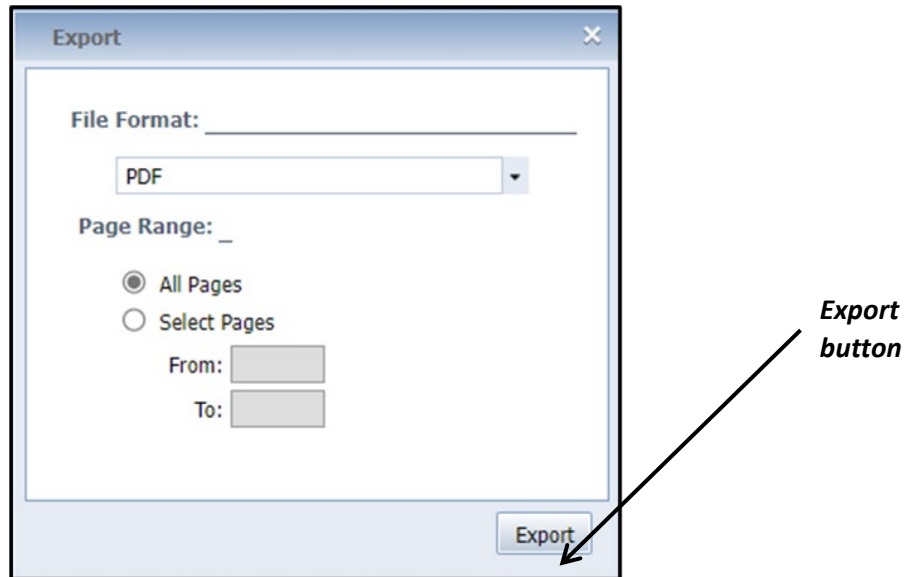


Figure 23 – Export button

Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

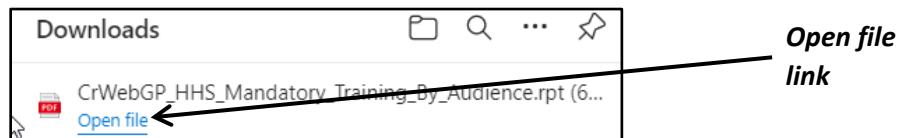


Figure 24 – Open file link

Print or save the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the HHS Training Completion Detail Report

This report delivers training completion information for a specific course in an Organization (or its sub-Orgs) for a specified date range. This report will display all completions for a Learner that occurred during that time period. The results can be further refined using the employee EOD Dates, Person Type, and Person Status.

Log on to the LMS.

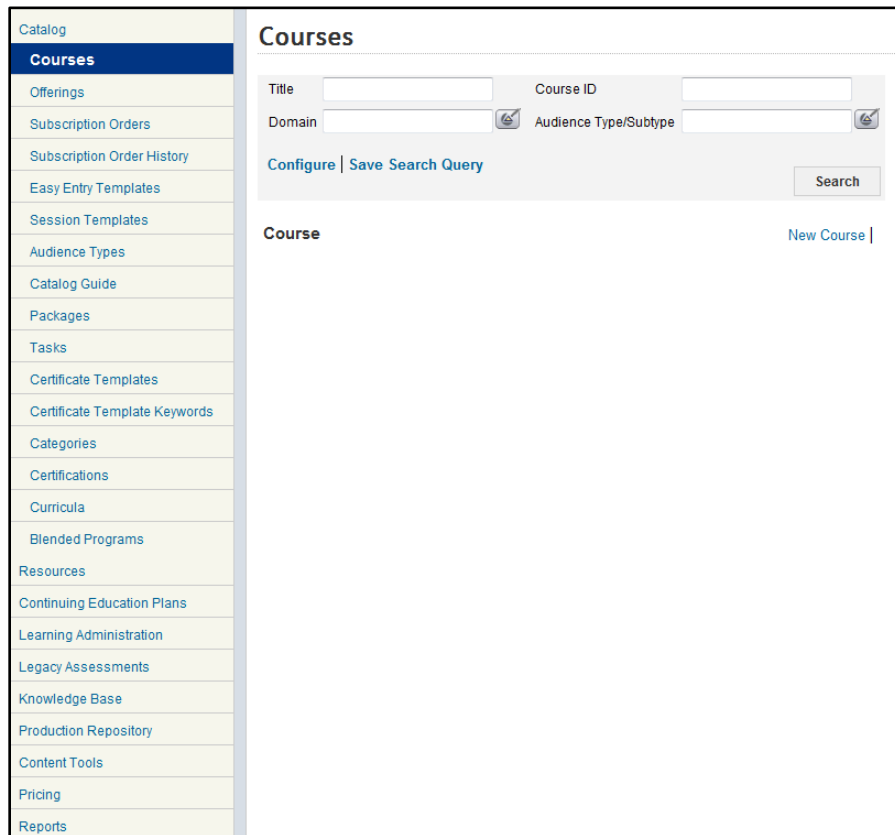
Click on **Admin** icon.



*Admin  
icon*

Figure 1 – Admin icon

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



*Reports  
link*

Figure 2 – Reports link

Enter HHS Training Completion Detail in the Name field and click the **Search** button.

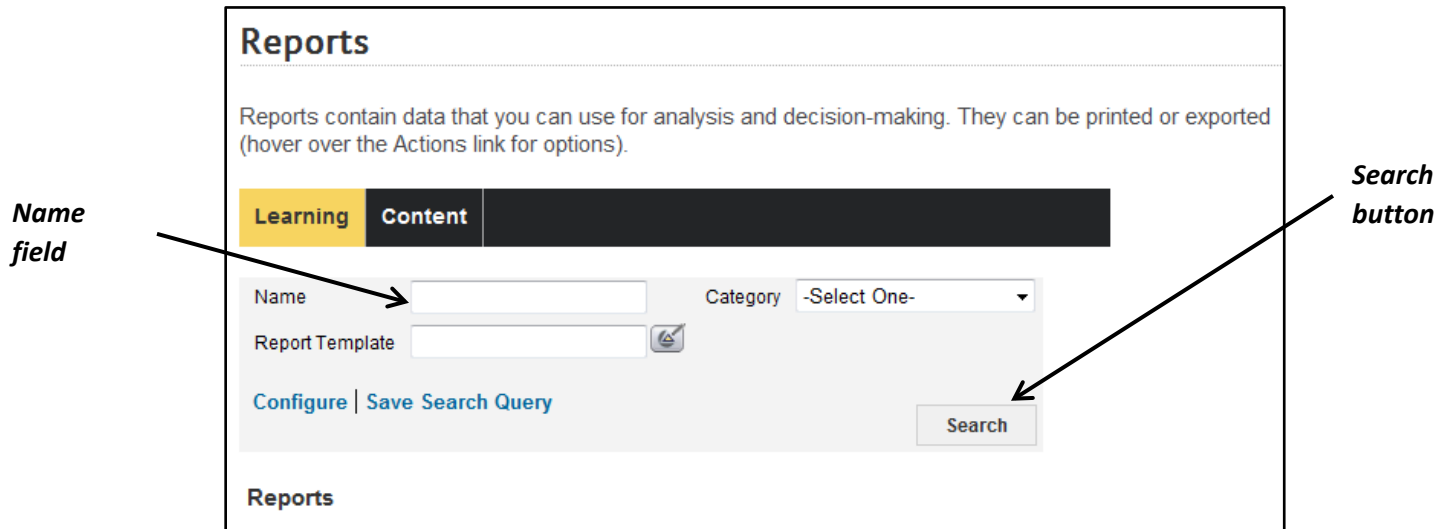


Figure 3 – Name field and Search button

Click the **Actions** link.

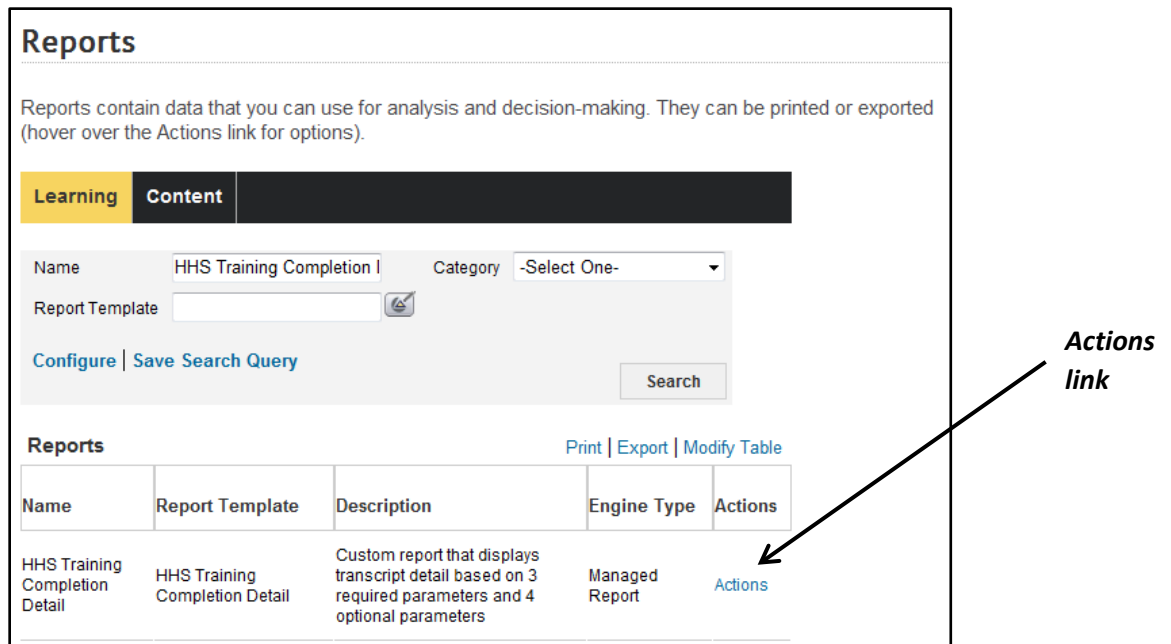


Figure 4 – Actions link

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

The screenshot shows the 'Reports' page. At the top, there are tabs for 'Learning' and 'Content'. Below the tabs, there are input fields for 'Name' (HHS Training Completion), 'Category' (-Select One-), and 'Report Template'. There are also links for 'Configure', 'Save Search Query', and a 'Search' button. Below this is a table of reports. The first row is 'HHS Training Completion Detail'. To the right of the table, there is an 'Actions' menu with options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the Actions menu.

Name	Report Template	Description	Engine Type	Actions
HHS Training Completion Detail	HHS Training Completion Detail	Custom report that displays transcript detail based on 3 required parameters and 4 optional parameters	Managed Report	Actions

Figure 5 – Execute link on the Actions activity menu

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

The screenshot shows the 'Report Parameters - HHS Training Completion Detail' form. It has several input fields: 'Course Title (Equivalents incl. in results)\*', 'Completion Start Date\*', 'Completion End Date\*', 'Organization ID (Use % to include sub-orgs)\*', 'EOD Start Date (mm/dd/yyyy)', 'EOD End Date (mm/dd/yyyy)', 'Person Type' (-Select One-), and 'Person Status' (-Select One-). At the bottom, there are 'Generate Report' and 'Cancel' buttons. An arrow points from the text 'Course Title pick icon' to the pick icon (a small square with a magnifying glass) next to the 'Course Title' field.

Figure 6 – Course Title pick icon

Use the Title, Course ID, Domain, and/or Audience Type/Subtype fields and the **Search** button to search for the course.

The screenshot shows the 'Select Course' search interface. It features four input fields: 'Title', 'Course ID', 'Domain', and 'Audience Type/Subtype'. Below these fields are links for 'Configure' and 'Save Search Query', and a 'Search' button. A 'Close' button is located at the bottom right. Labels with arrows point to the 'Title' field (labeled 'Name field'), 'Domain' field (labeled 'Domain field'), 'Course ID' field (labeled 'Course ID field'), 'Audience Type/Subtype' field (labeled 'Audience Type/Subtype field'), and the 'Search' button (labeled 'Search button').

Figure 7 – Name, Course ID, Domain, and Audience Type/Sub type fields and Search button

Click the **Select** checkbox to select the course.

The screenshot shows the 'Select Course' interface with search results. The search criteria are: Title: NIH, Course ID: (empty), Domain: (empty), Audience Type/Subtype: (empty). Below the search criteria are links for 'Configure', 'Save Search Query', and 'Search'. The results section is titled 'Courses' and includes a table with columns: Select, Version, Course ID, and Title. The first two rows of results are visible. An arrow points to the 'Select' checkbox in the first row.

Select	Version	Course ID	Title
<input type="checkbox"/>	06.12.2015	NIHEDI8	NIH Prevention of Sexual Harassment Online Training
<input type="checkbox"/>	1	NIH2WMIP20131223	NIH 2-Way Match Invoice Processing

Figure 8 – Select checkbox

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

**Report Parameters - HHS Training Completion Detail**

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassme

Completion Start Date\*

Completion End Date\*

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

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Person Type -Select One-

Person Status -Select One-

Generate Report Cancel

*Completion Start Date pick icon*

*Completion End Date pick icon*

Figure 9 – Completion Start Date and Completion End Date pick icons

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

**Report Parameters - HHS Training Completion Detail**

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassme

Completion Start Date\* 01/01/2010

Completion End Date\* 12/31/2011

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

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Person Type -Select One-

Person Status -Select One-

Generate Report Cancel

*Organization ID field*

Figure 10 – Organization ID field



Click the **Generate Report** button.

**Report Parameters - HHS Training Completion Detail**

Course Title (Equivalents incl. in results)\* NIH Prevention of Sexual Harassme

Completion Start Date\* 01/01/2010

Completion End Date\* 12/31/2011

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

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Person Type -Select One-

Person Status -Select One-

Generate Report Cancel

*Generate Report button*

Figure 11 – Generate Report button

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

*Print this report icon*

**HHS Training Completion Detail**

Course Title: NIH Prevention of Sexual Harassment Online Training  
(includes equivalents)

Org Code: HN%

From Date: 01/01/2010 EOD Start Date: Person Type:

To Date: 12/31/2011 EOD End Date: Person Status:

ORG ID	LAST NAME	FIRST NAME	HHS ID	EOD DATE	MANAGER	EMAIL	COMPLETION DATE	PERSON TYPE	PERSON STATUS	PAY PLAN	SUPER STATUS
--------	-----------	------------	--------	----------	---------	-------	-----------------	-------------	---------------	----------	--------------

Figure 12 – Print this report icon



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

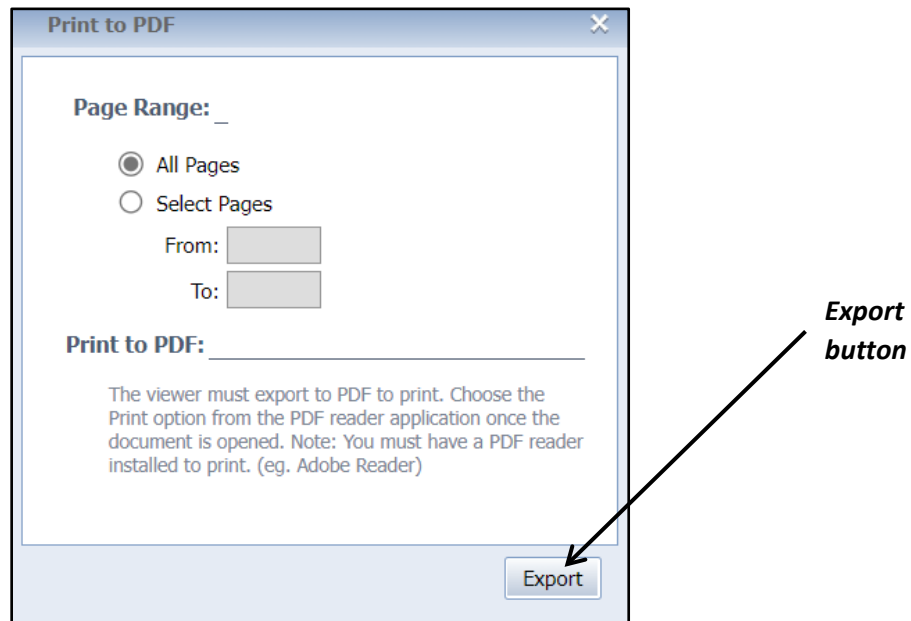


Figure 13 – Export button

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

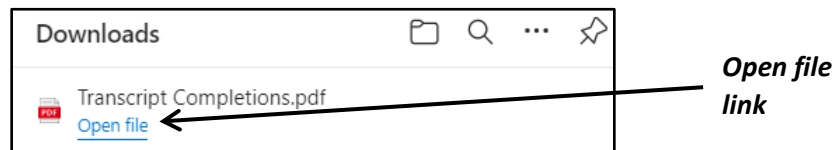


Figure 14 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the HHS Training Completion Details – Wildcard Report

This report delivers data for training completions on Learners in an Organization (or its sub-Orgs) based upon a partial Course Title during a specified date range. The partial Course Title must be at least 8 alphanumeric characters. The report data can be further refined using the Employee EOD Dates, Person Type, and Person Status.

Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

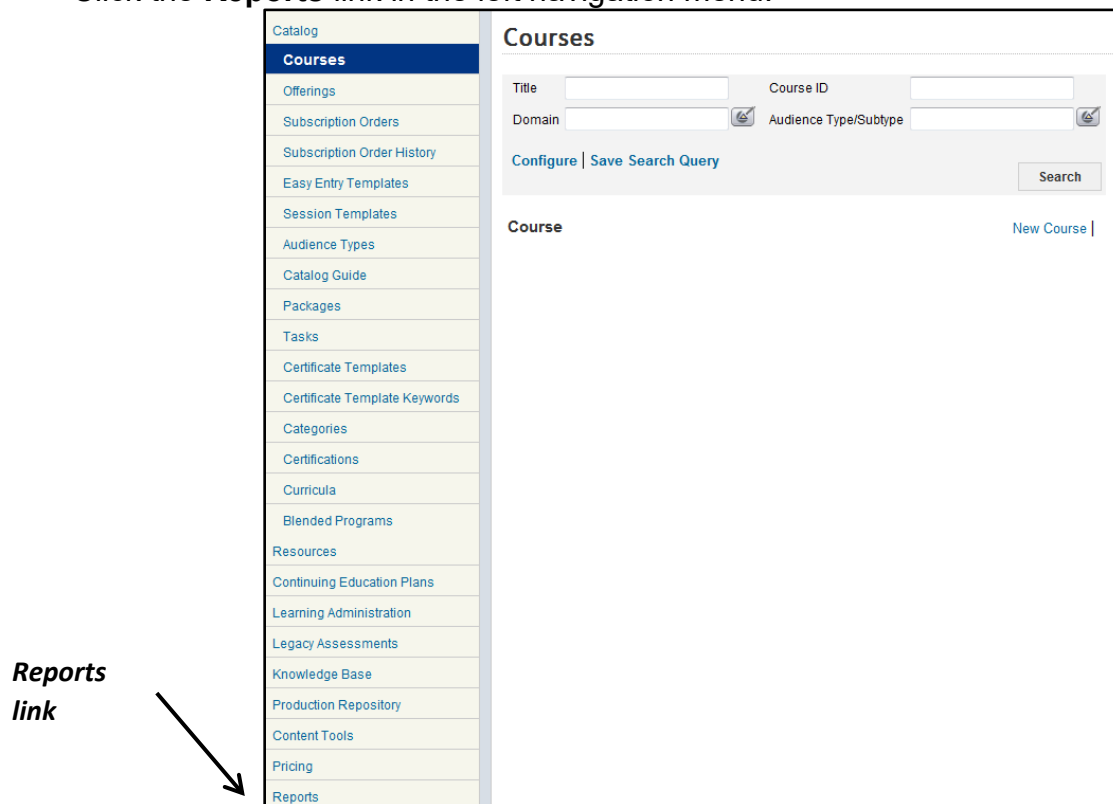


Figure 2 – Reports link

Enter %wildcard in the **Name** field and click the **Search** button.

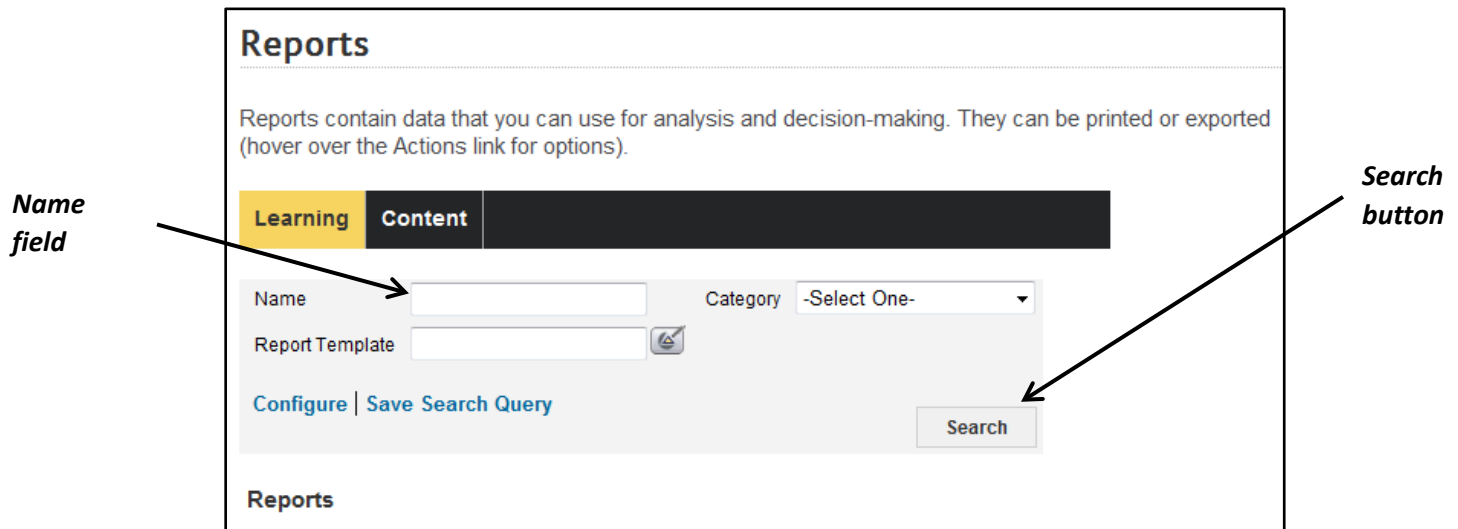


Figure 3 – Name field and Search button

Click the **Actions** link for the HHS Training Completion Details – Wildcard report.

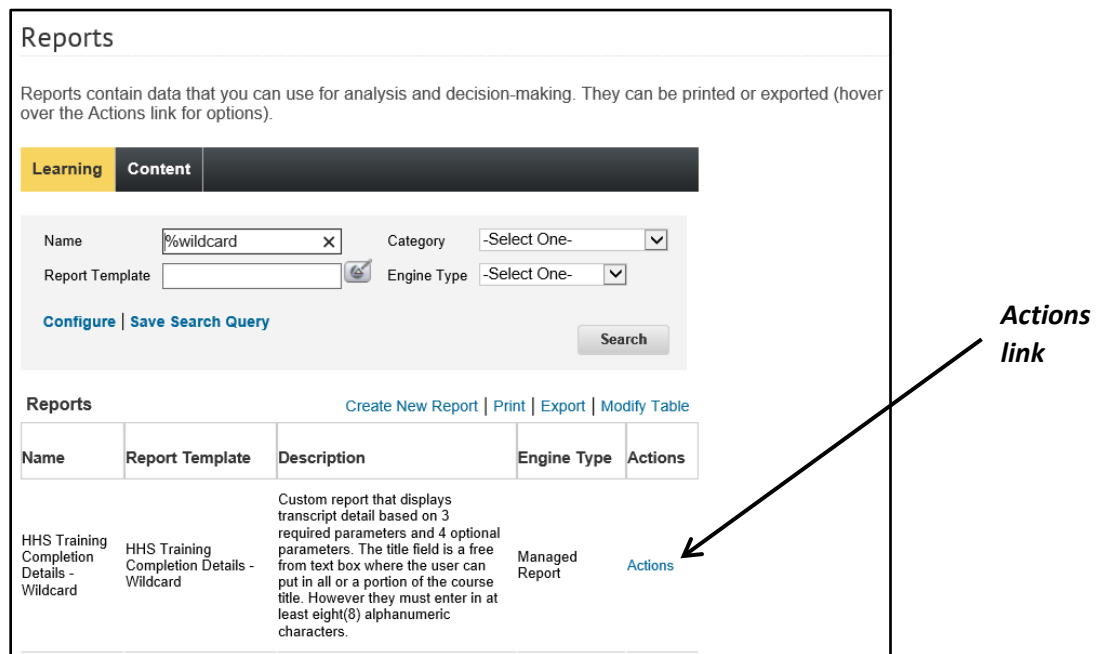


Figure 4 – Actions link

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

The screenshot shows the 'Reports' section of a web application. At the top, there are tabs for 'Learning' and 'Content'. Below the tabs, there are search filters for 'Name' (containing '%wildcard'), 'Category' (set to '-Select One-'), 'Report Template', and 'Engine Type' (set to '-Select One-'). There are links for 'Configure' and 'Save Search Query', and a 'Search' button. Below the filters is a table of reports. The first report is 'HHS Training Completion Details - Wildcard'. An 'Actions' link is visible next to this report, and a tooltip menu is open over it, showing options: 'Execute', 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the tooltip.

Figure 5 – Execute link on the Actions activity menu

Enter at least eight (8) alphanumeric characters in the Course Title field. These characters can be found anywhere in the course titles for the completions to include in the report.

The screenshot shows the 'Report Parameters' form for the report 'HHS Training Completion Details - Wildcard'. The form includes several input fields: 'Course Title (you must enter at least eight(8) alphanumeric characters)\*', 'Completion Start Date\*', 'Completion End Date\*', 'Organization ID (Use % to include sub-orgs)\*', 'EOD Start Date (mm/dd/yyyy)', 'EOD End Date (mm/dd/yyyy)', 'Person Type' (set to '-Select One-'), and 'Person Status' (set to 'Full Time'). There are 'Generate Report' and 'Cancel' buttons at the bottom. An arrow points from the text 'Course Title field' to the 'Course Title' input field.

Figure 6 – Course Title field

Enter the Completion Start Date and Completion End Date in the appropriate fields in MM/DDD/YYYY format. Alternately, you can use the **Completion Start Date** and **Completion End Date** pick icons to select the date.

Report Parameters - HHS Training Completion Details - Wildcard

Course Title (you must enter at least eight(8) alphanumeric characters)\*

Completion Start Date\*

Completion End Date\*

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

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Person Type

Person Status

*Completion Start Date field*

*Completion End Date field*

Figure 6 – Completion Start Date and Completion End Date pick icons

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

Report Parameters - HHS Training Completion Details - Wildcard

Course Title (you must enter at least eight(8) alphanumeric characters)\*

Completion Start Date\*

Completion End Date\*

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

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Person Type

Person Status

*Organization ID field*

Figure 8 – Organization ID field

By default, the Person Status field is populated with Full Time. Click the **Person Status** pull-down menu to select another value.

Report Parameters - HHS Training Completion Details - Wildcard

Course Title (you must enter at least eight(8) alphanumeric characters)\*: Microsoft

Completion Start Date\*: 01/01/2018

Completion End Date\*: 12/31/2018

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

EOD Start Date (mm/dd/yyyy):

EOD End Date (mm/dd/yyyy):

Person Type: -Select One-

Person Status: Full Time

Generate Report Cancel

*Person Status pull-down menu*

Figure 9 – Person Status pull-down menu

Click the **Generate Report** button.

Report Parameters - HHS Training Completion Details - Wildcard

Course Title (you must enter at least eight(8) alphanumeric characters)\*: Microsoft

Completion Start Date\*: 01/01/2018

Completion End Date\*: 12/31/2018

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

EOD Start Date (mm/dd/yyyy):

EOD End Date (mm/dd/yyyy):

Person Type: -Select One-

Person Status: Full Time

Generate Report Cancel

*Generate Report button*

Figure 10 – Generate Report button

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

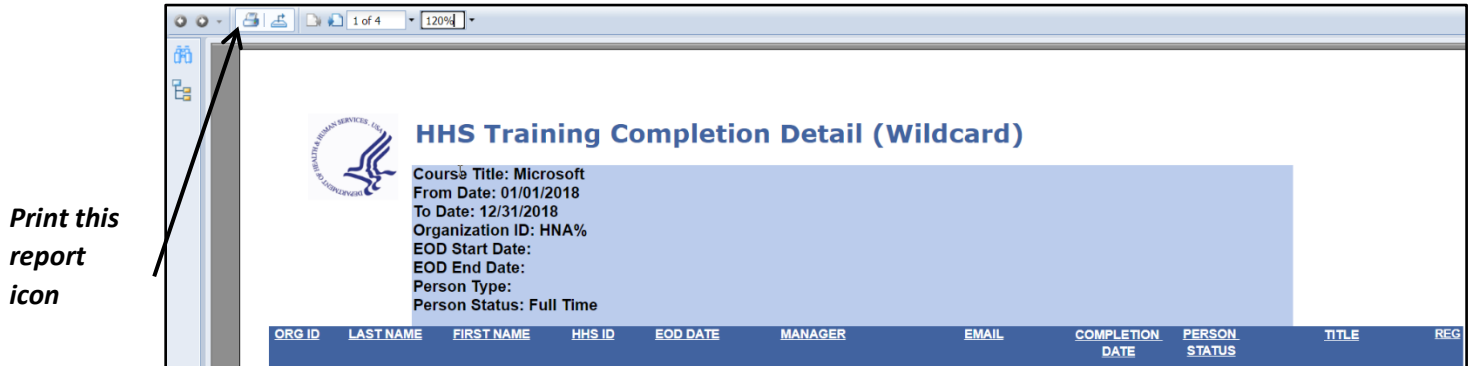


Figure 11 – Print this report button

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

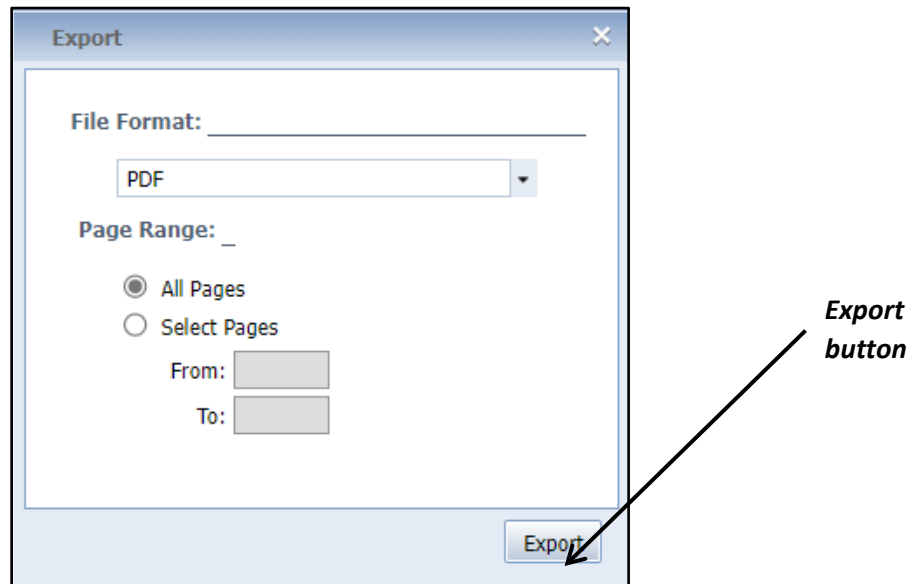


Figure 12 – Export button

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

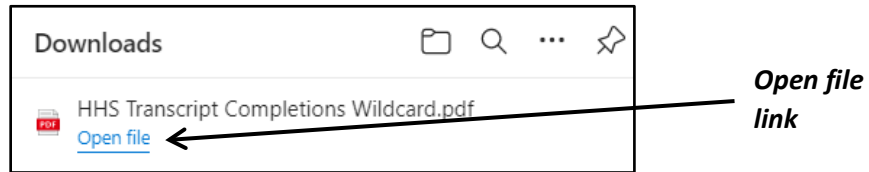


Figure 13 – Open file link

Print the file from Adobe Reader/Acrobat.

**If you experience trouble with this process, please refer to the [LMS Support Page](#).**



## Running the HHS Training Completions by Offering Domain Report

This report delivers Learner completion details for offerings for a specified date range not to exceed 365 days.

Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

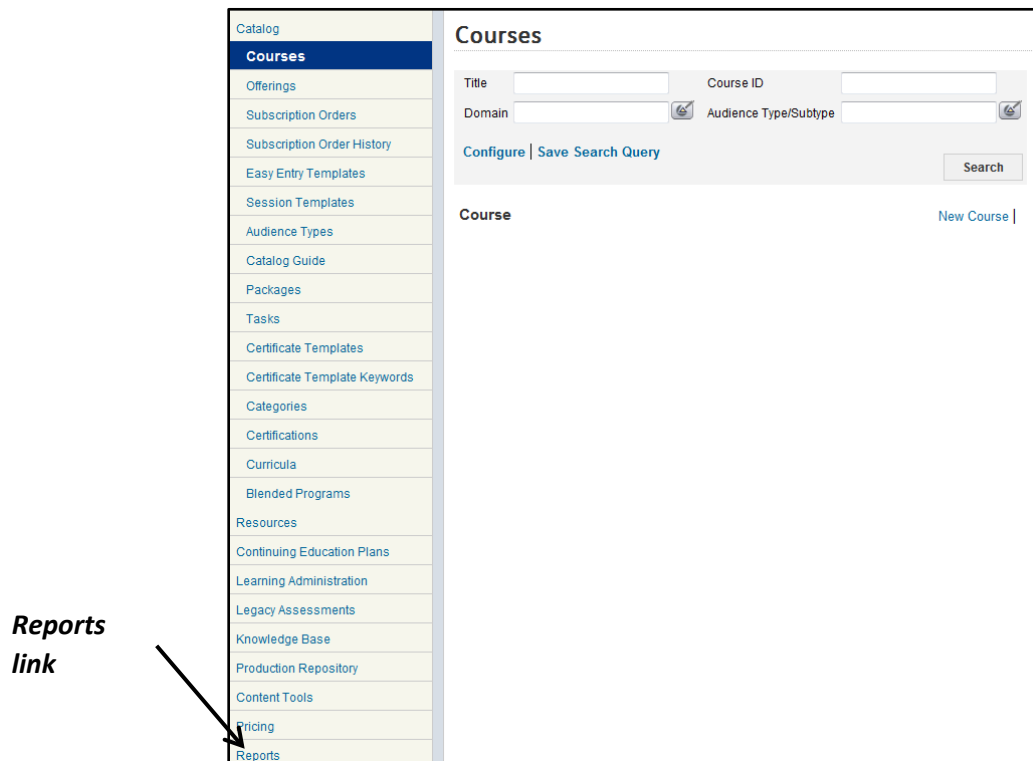


Figure 2 – Reports link

Enter HHS Training Completions by Offering Domain in the Name field and click the **Search** button.

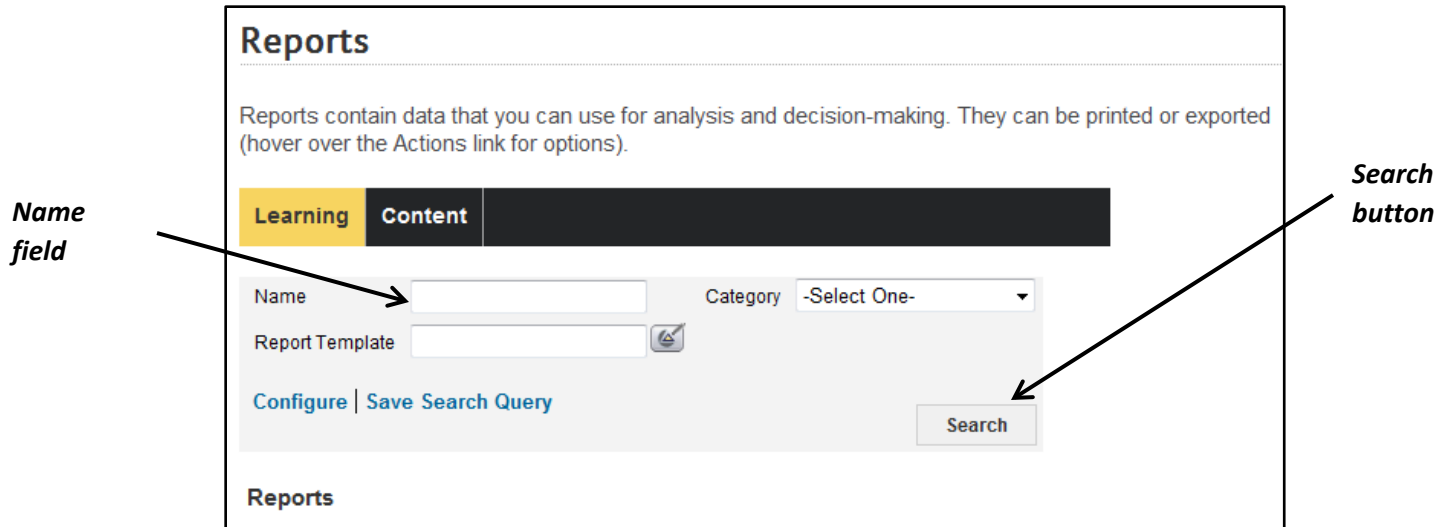


Figure 3 – Name field and Search button

Click the **Actions** link for the HHS Training Completions Report.

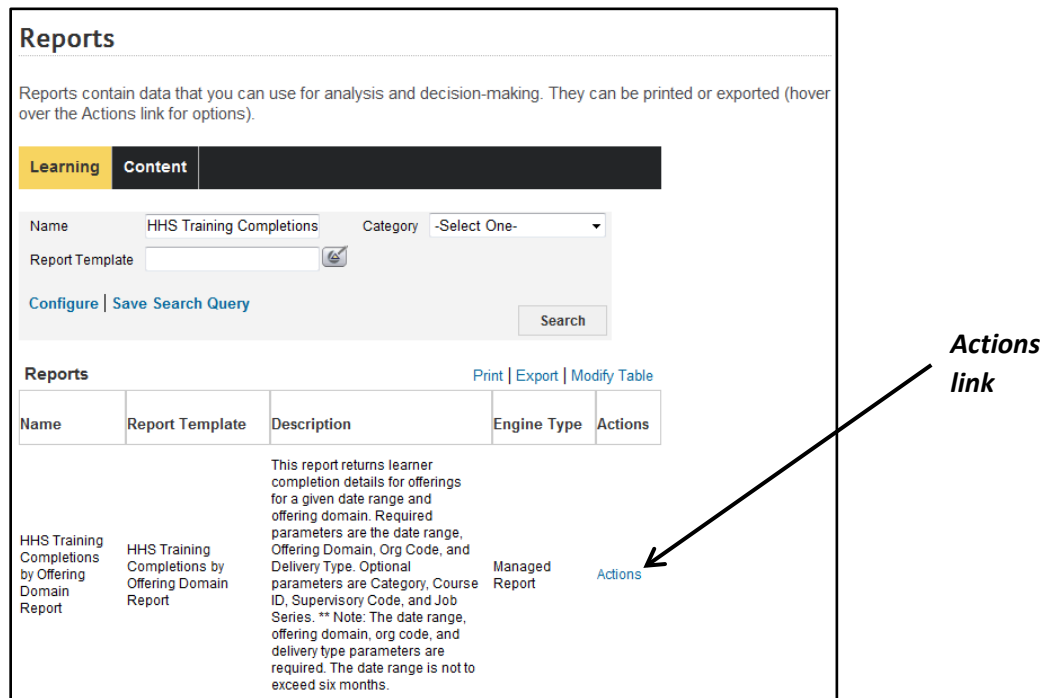


Figure 4 – Actions link

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

**Reports**

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

**Learning** **Content**

Name:  Category:

Report Template:

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

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


Name	Report Template	Description	Engine Type	Actions
HHS Training Completions by Offering Domain Report	HHS Training Completions by Offering Domain Report	This report returns learner completion details for offerings for a given date range and offering domain. Required parameters are the date range, Offering Domain, Org Code, and Delivery Type. Optional parameters are Category, Course ID, Supervisory Code, and Job Series. ** Note: The date range, offering domain, org code, and delivery type parameters are required. The date range is not to exceed six months.	Managed Report	<div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> <b>Actions</b>  <a href="#">Email</a>  <a href="#">Execute</a>  <a href="#">Subscribe</a> </div>


*Execute link*


Figure 5 – Execute link on the Actions activity menu

By default, the date range is automatically populated with the last 6 months. Enter the From Date and To Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the **From Date** and **To Date** pick icons to select the date.

Report Parameters - HHS Training Completions by Offering Domain Report


Completion Date From\* 04/20/2017 

Completion Date To (Date range not to exceed 365 days)\* 10/17/2017 


Offering Domain\* 


Include Sub Domains


Include HHS Common Domain


Organization ID\* 

Include Child Organizations


Delivery Type\* -Select One- 

Category 

Course ID 

Audience Type 

Supervisory Status

Job Series 

Generate Report Cancel

*From Date pick icon*

*To Date pick icon*

Figure 6 – From Date and To Date pick icons

**NOTE:** The date range cannot exceed 365 days.

Click the **Offering Domain** pick icon.

Report Parameters - HHS Training Completions by Offering Domain Report

Completion Date From\* 04/20/2017

Completion Date To (Date range not to exceed 365 days)\* 10/17/2017

Offering Domain\*

Include Sub Domains

Include HHS Common Domain

Organization ID\*

Include Child Organizations

Delivery Type\* -Select One-

Category

Course ID

Audience Type

Supervisory Status

Job Series

Generate Report Cancel

*Offering Domain pick icon*

Figure 7 – Offering Domain pick icon

Click the **Search** button.

Select Domain

Name

Search

Domains

Close

*Search button*

Figure 8 – Search button

Click the **Select** checkbox to select a Domain.

Select  
checkbox

### Select Domain

Name

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

Select	Name	Parents
<input type="checkbox"/>	NIH	Global > HHS
<input type="checkbox"/>	NIH CC	Global > HHS > NIH
<input type="checkbox"/>	NIH CIT	Global > HHS > NIH
<input type="checkbox"/>	NIH Common	Global > HHS > NIH
<input type="checkbox"/>	NIH NCI CBIIT	Global > HHS > NIH
<input type="checkbox"/>	NIH NIAID	Global > HHS > NIH
<input type="checkbox"/>	NIH OEP	Global > HHS > NIH
<input type="checkbox"/>	NIH OHR	Global > HHS > NIH
<input type="checkbox"/>	NIH ORS_ORF	Global > HHS > NIH
<input type="checkbox"/>	NIHTC	Global > HHS > NIH

Figure 9 – Select checkbox

Optional parameters are the **Include Sub Domains** and **Include HHS Common Domain**. Click on the **Include Sub Domains** checkbox if you would like to include all of the completions of the sub domains of the offering domain that was selected. Click on **Include HHS Common Domain** if you would like to include all of the SkillSoft online training completions.

Enter the Org ID using the **Organization ID** pick icon. The **Include Child Organizations** checkbox allows for the capture all of the sub-Orgs.

Report Parameters - HHS Training Completions by Offering Domain Report

Completion Date From*	04/20/2017	
Completion Date To (Date range not to exceed 365 days)*	10/17/2017	
Offering Domain*	NIH	
Include Sub Domains	<input checked="" type="checkbox"/>	
Include HHS Common Domain	<input type="checkbox"/>	
Organization ID*		
Include Child Organizations	<input checked="" type="checkbox"/>	
Delivery Type*	All	
Category		
Course ID		
Audience Type		
Supervisory Status		
Job Series		

*Organization ID  
pick icon*

Figure 10 – Organization ID field

Select an option from the **Delivery Type** pull-down menu.

The screenshot shows a web form titled "Report Parameters - HHS Training Completions by Offering Domain Report". The form contains several input fields and checkboxes. The "Delivery Type" field is currently open, displaying a list of options: "-Select One-", "All", "Book", "Coaching", "Conference Session", "DVD/CD", "Instructor Led", "Mentoring", "Online Training", "On the Job Training", "Recorded Training", "Seminar", "Tailored ILT", "Virtual Class", "Webinar", and "Written Material". An arrow points from the text "Delivery Type pull-down menu" to the open dropdown menu.

Figure 11 – Delivery Type pull-down menu

Click the **Generate Report** button.

The screenshot shows the same web form as in Figure 11, but the "Delivery Type" dropdown menu is now closed and set to "All". An arrow points from the text "Generate Report button" to the "Generate Report" button at the bottom of the form.

Figure 12 – Generate Report button



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

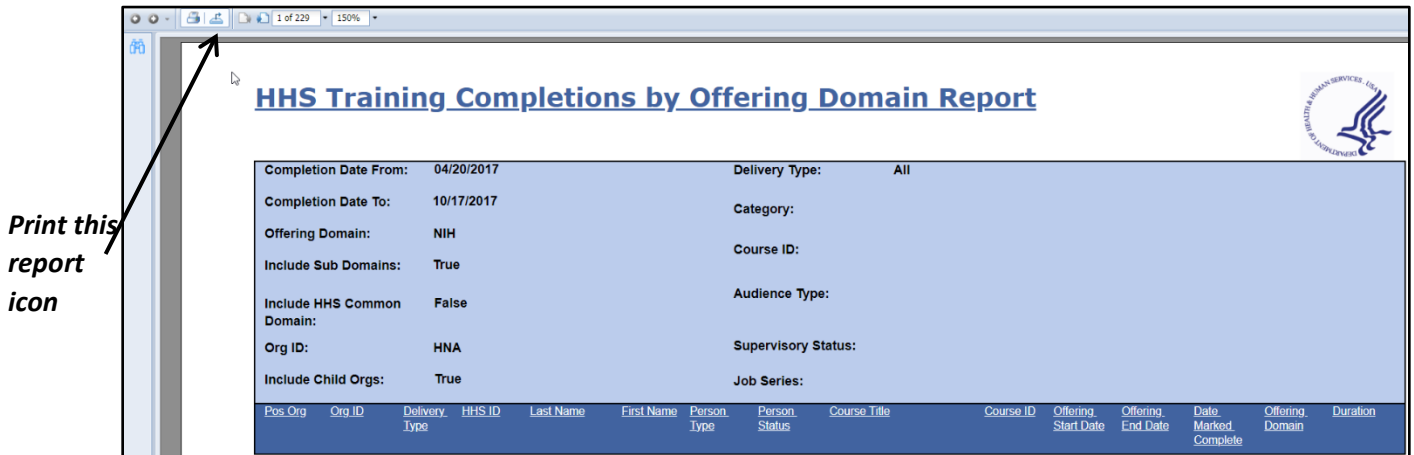


Figure 13 – Print this report icon

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

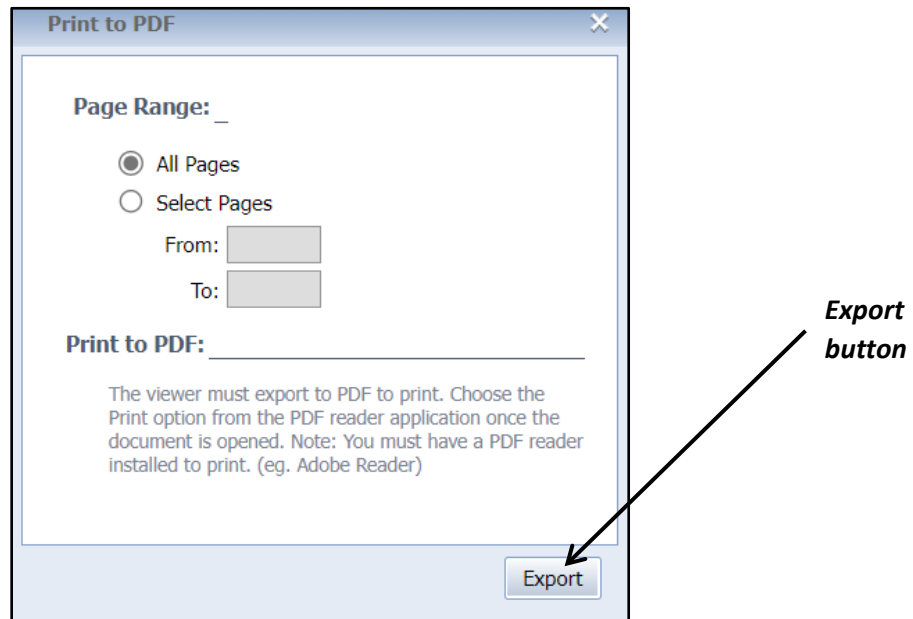


Figure 14 – Export button

Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

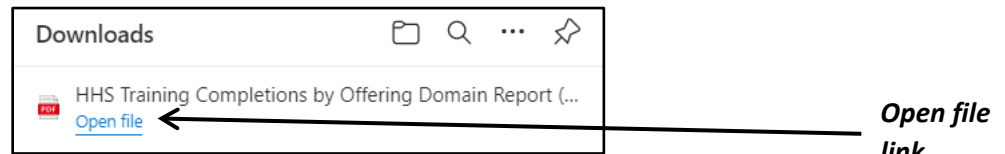


Figure 15 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the HHS Training Completions by Org Report

This report delivers Learner completion details for offerings for a specified date range not to exceed 365 days. This report includes external items (either entered manually or by a feed), and specific Fields of Study credits (i.e. NIH Supervisory CLPs, for example).

Log into the LMS.

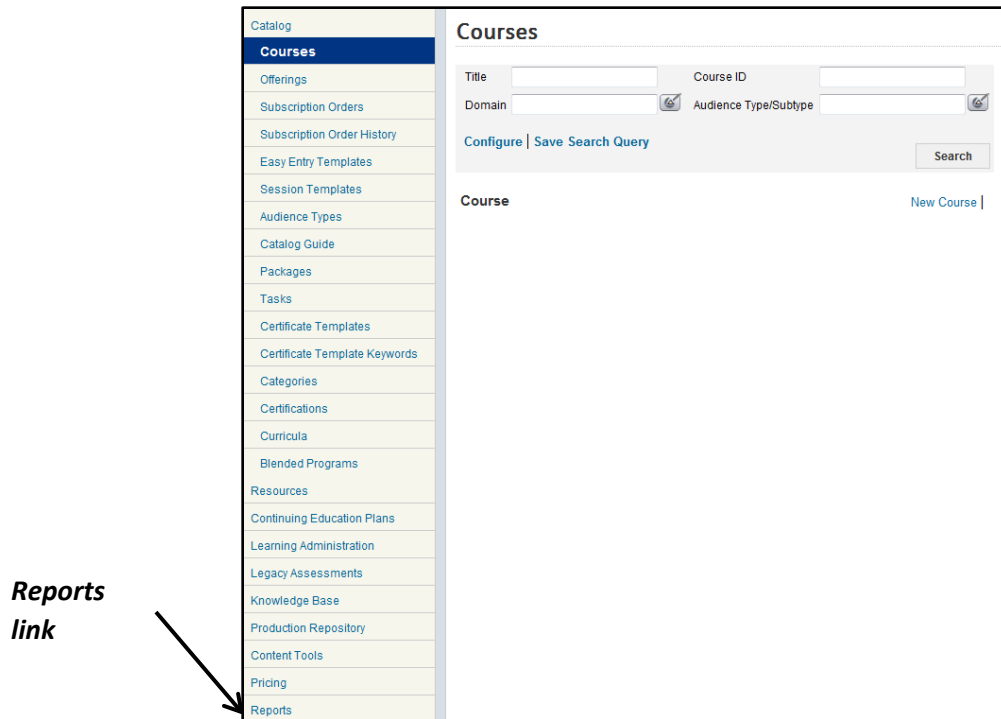
Click the **Admin** icon.



Admin icon

Figure 1 – Admin icon

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



Reports  
link

Figure 2 – Reports link

Enter HHS Training Completions by Org in the Name field and click the **Search** button.

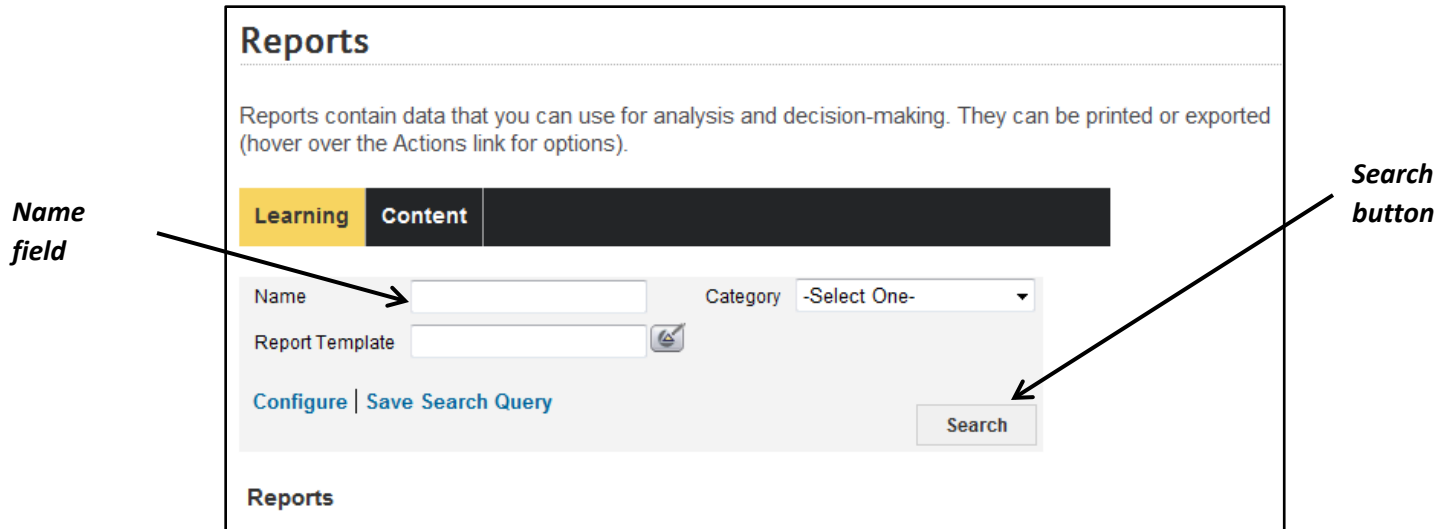


Figure 3 – Name field and Search button

Click the **Actions** link for the HHS Training Completions by Org Report.

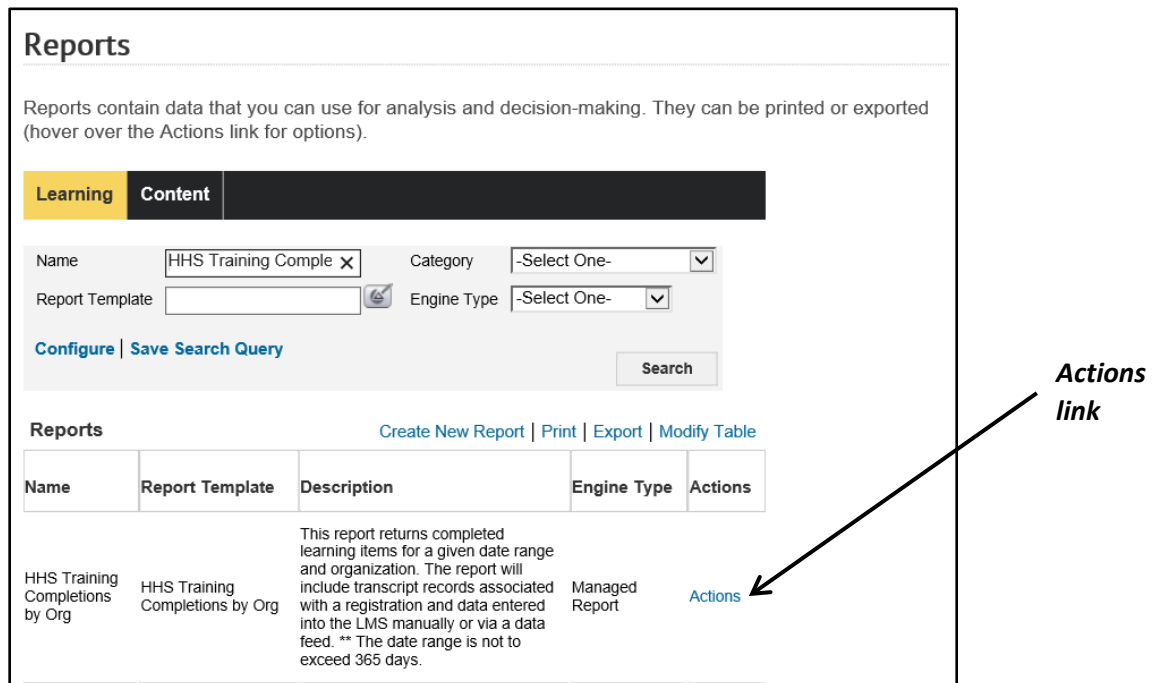


Figure 4 – Actions link

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

**Reports**

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

**Learning** **Content**

Name: HHS Training Completior Category: -Select One-  
Report Template: [icon] Engine Type: -Select One-  
[Configure](#) | [Save Search Query](#) [Search](#)

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

Name	Report Template	Description	Engine Type	Acti
HHS Training Completions by Org	HHS Training Completions by Org	This report returns completed learning items for a given date range and organization. The report will include transcript records associated with a registration and data entered into the LMS manually or via a data feed. ** The date range is not to exceed 365 days.	Managed Report	<a href="#">Actions</a>

**Actions**  
[Email](#)  
[Execute](#)  
[Subscribe](#)

*Execute link*

Figure 5 – Execute link on the Actions activity menu

By default, the date range is automatically populated with the last year. Enter the From Date and To Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the **From Date** and **To Date** pick icons to select the date. **NOTE:** The date range cannot exceed 365 days.

**Report Parameters - HHS Training Completions by Org**

Completion Date From\* 11/22/2016 [pick icon] ← *From Date pick icon*

Completion Date To (Date range not to exceed 365 days)\* 11/22/2017 [pick icon] ← *To Date pick icon*

Organization ID\* [input] [icon]

Include Child Organizations

Field of Study [input] [icon]

Include Completed Learning Items without FOS

Audience Type [input] [icon]

[Generate Report](#) [Cancel](#)


Figure 6 – From Date and To Date pick icons

Click the **Organizational ID** pick icon.


**Report Parameters - HHS Training Completions by Org**

Completion Date From\* 11/22/2016


Completion Date To (Date range not to exceed 365 days)\* 11/22/2017

Organization ID\*   ← *Org ID pick icon*

Include Child Organizations

Field of Study  

Include Completed Learning Items without FOS

Audience Type  


Generate Report Cancel

Figure 7 – Org ID pick icon

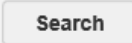
Enter the desired Organization ID **Name** and click the **Search** button.

**Select Internal Organizations**

Name HNA Number

City  Audience Type  

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

Search  ← *Search button*

**Internal Organizations**

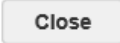
Close 

Figure 8 – Search button

Click the **Select** checkbox to select a Domain.

**Select Internal Organizations**

Name:  Number:  City:  Audience Type:

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

**Internal Organizations** 1 2 3 4 5 ... Next ▾  
[Print](#) | [Export](#) | [Modify Table](#)

Showing first 25 out of 483 results

Select	Name	Number	City
<input type="checkbox"/>	HNA	00033430	
<input type="checkbox"/>	HNA1	00025491	

Select checkbox

Figure 9 – Select checkbox

Optional parameters are **Field of Study** and **Audience Type**. If no **Field of Study** parameter is entered, the Credits column on the report will show an aggregate total of all the credits from all of the Fields of Study that are assigned to that item. (In some cases there are more than one).

The **Include Completed Learning Items without FOS** checkbox is checked by default to include all items that do not include Field of Study credits as well as those that may be selected.

Click the **Generate Report** button.

**Report Parameters - HHS Training Completions by Org**

Completion Date From\*

Completion Date To (Date range not to exceed 365 days)\*

Organization ID\*

Include Child Organizations

Field of Study

Include Completed Learning Items without FOS

Audience Type

Generate Report button

Figure 10 – Generate Report button

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

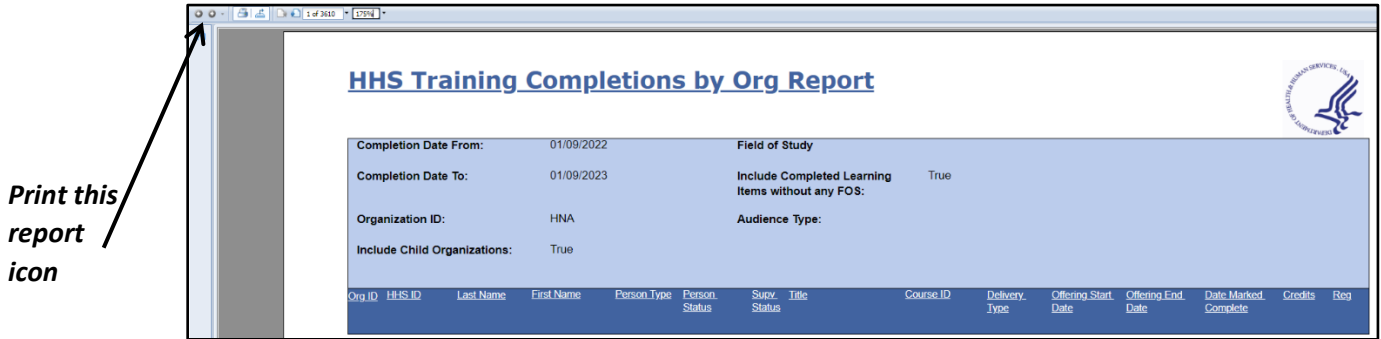


Figure 11 – Print this report icon

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

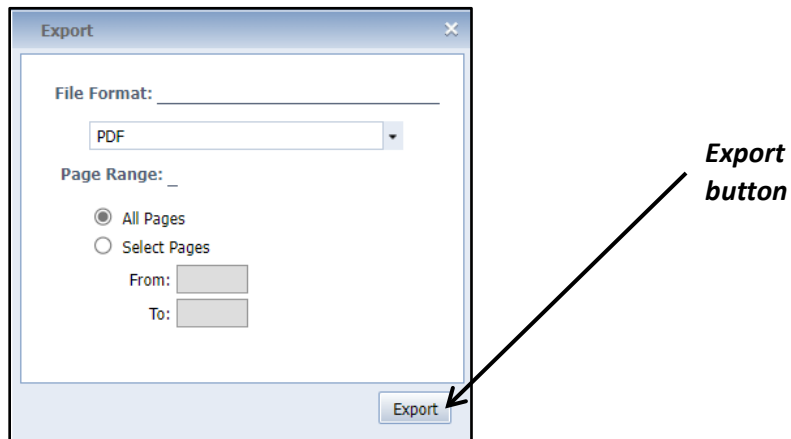


Figure 12 – Export button

Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Click the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

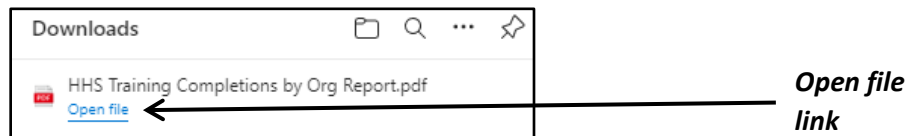


Figure 13 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).



## Running the NIH All Approvers by AAO Report

This QRG provides instructions for generating the NIH All Approvers by AAO Report. This report creates a list of all Learners and their Approvers – the Learner’s Managers, Alternate Managers, and Additional Approver for Orders (AAO) for a specified AAO. This report is important for verifying the approval chains for a specific AAO.

Log on to the LMS.

Click on **Admin** icon.



Figure 1 – Admin icon

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

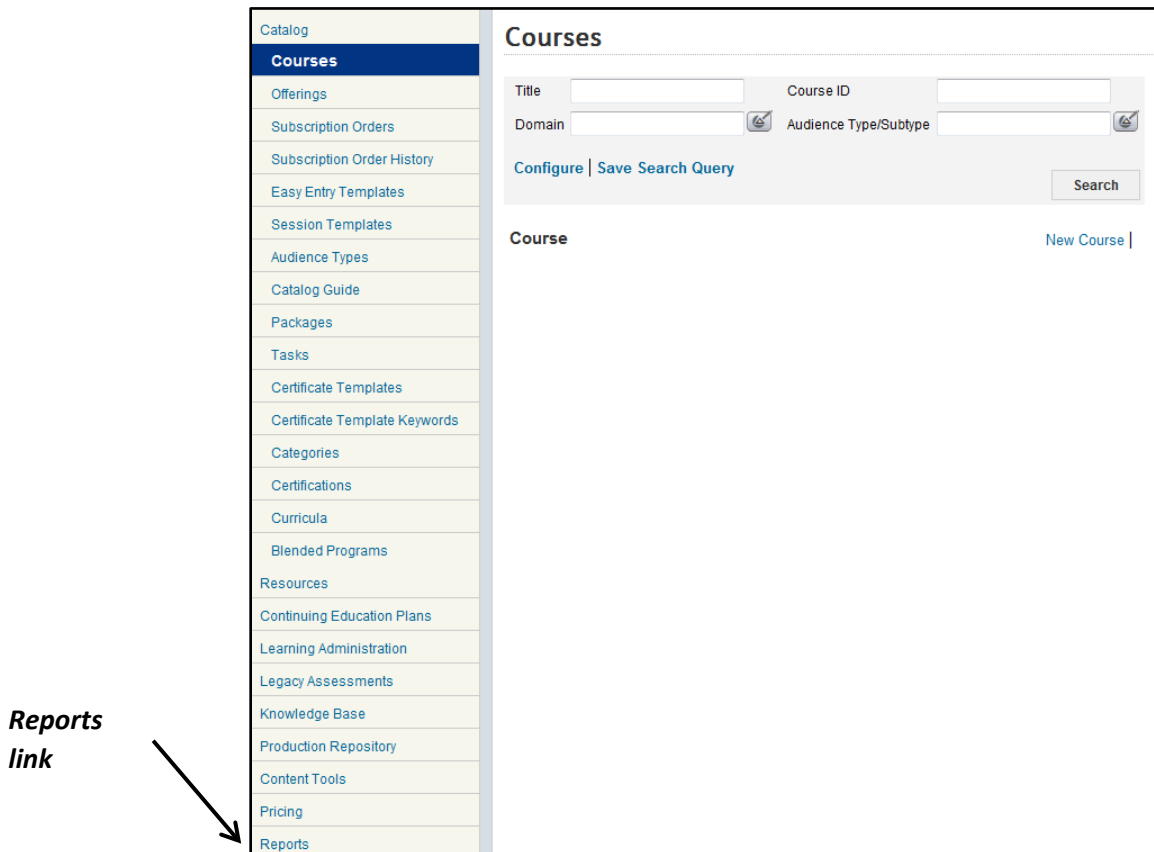


Figure 2 – Reports link

Enter NIH All Approvers by AAO in the Name field and click the **Search** button.

**Reports**

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

**Learning** **Content**

Name  Category **-Select One-**

Report Template

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

**Reports**

Figure 3 – Name field and Search button

Click the **Actions** link for the NIH All Approvers by AAO Report.

**Reports**

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

**Learning** **Content**

Name  Category **-Select One-**

Report Template

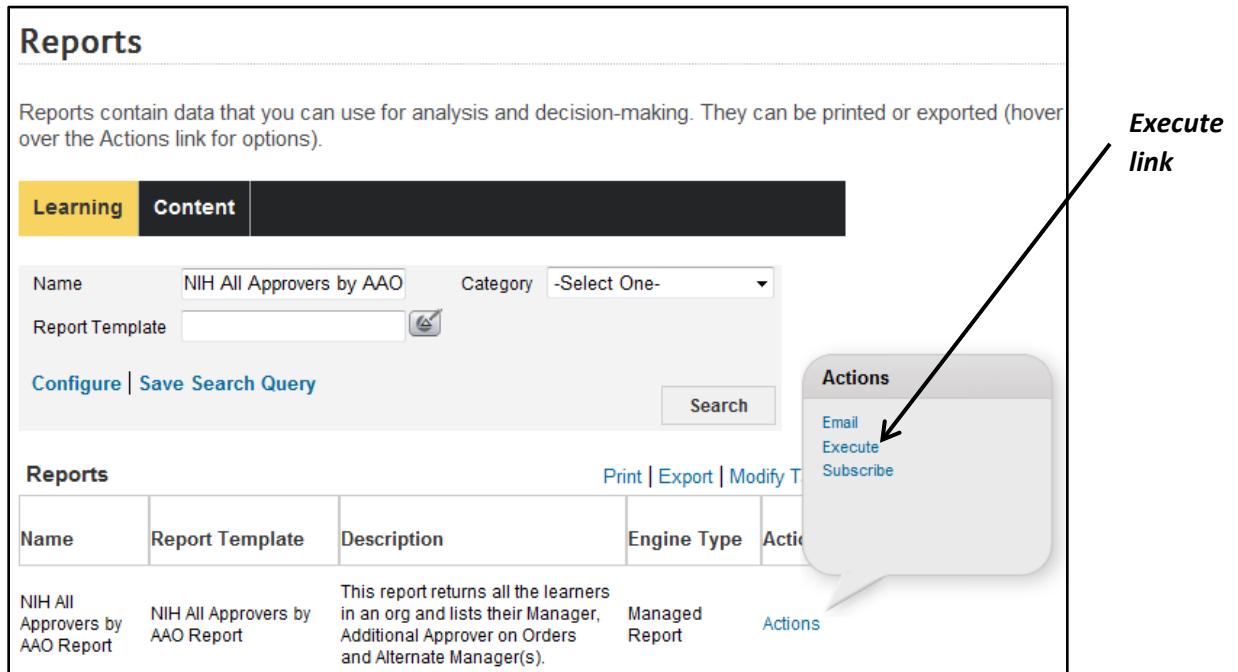
[Configure](#) | [Save Search Query](#)

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

Name	Report Template	Description	Engine Type	Actions
NIH All Approvers by AAO Report	NIH All Approvers by AAO Report	This report returns all the learners in an org and lists their Manager, Additional Approver on Orders and Alternate Manager(s).	Managed Report	<a href="#">Actions</a>

Figure 4 – Actions link

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



The screenshot shows the 'Reports' section of a web application. At the top, there are tabs for 'Learning' and 'Content'. Below the tabs, there is a search area with fields for 'Name' (containing 'NIH All Approvers by AAO') and 'Category' (set to '-Select One-'). There is also a 'Report Template' field and a 'Search' button. Below the search area, there are links for 'Configure' and 'Save Search Query'. A table of reports is displayed, with columns for 'Name', 'Report Template', 'Description', 'Engine Type', and 'Actions'. The first row in the table is for 'NIH All Approvers by AAO Report'. An 'Actions' menu is open over the 'Actions' column of this row, showing options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the menu.

Figure 5 – Execute link on the Actions activity menu

Click the **Additional Approver On Order (AAO)** pick icon.



The screenshot shows the 'Report Parameters - NIH All Approvers by AAO Report' page. It features a form with a label 'Additional Approver On Order (AAO)\*' and an input field. To the right of the input field is a pick icon (a small square with a magnifying glass). An arrow points from the text 'Additional Approver On Order (AAO) pick icon' to this icon. Below the input field are two buttons: 'Generate Report' and 'Cancel'.

Figure 6 – Additional Approver On Order (AAO) pick icon

Enter the last name an AAO in the Last Name field and click the Search button.

*Last Name field*

**Search Person, Internal**

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

Population\*  First Name

Last Name  Person ID

Username  Manager

Organization  Location

Domain  Person Type

Security Roles  Terminated After

Terminated Before  Include All Suborganizations

---

**People**

*Search button*

Figure 7 – Last Name field and Search button

Click the Select checkbox to select the AAO.

*Select checkbox*

**Search Person, Internal**

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

Population\*  First Name

Last Name  Person ID

Username  Manager

Organization  Location

Domain  Person Type

Security Roles  Terminated After

Terminated Before  Include All Suborganizations

---

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

Showing 1 out of 1 results

Select	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	Additional	Approver	APPROVER01		00420382	HNAM		OLEUNG

Figure 8 – Select checkbox

Click the **Generate Report** button.



Figure 9 – Generate Report button

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

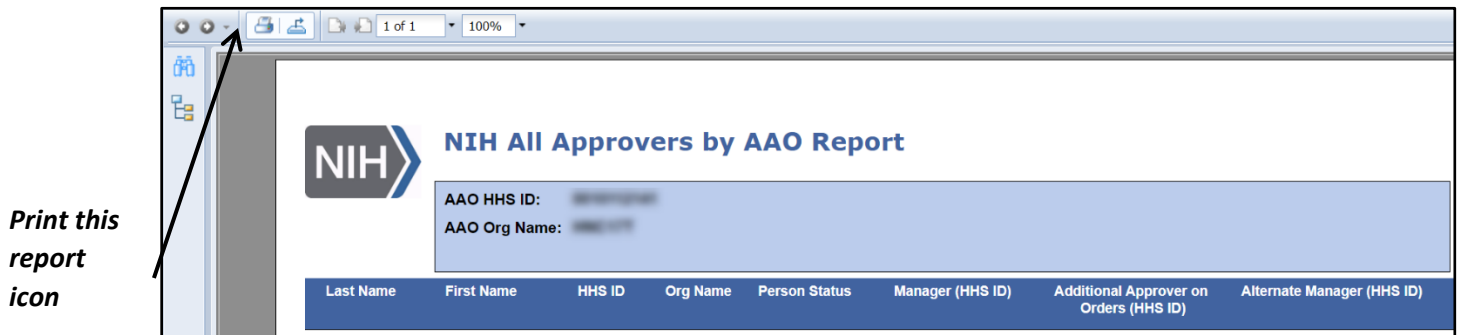
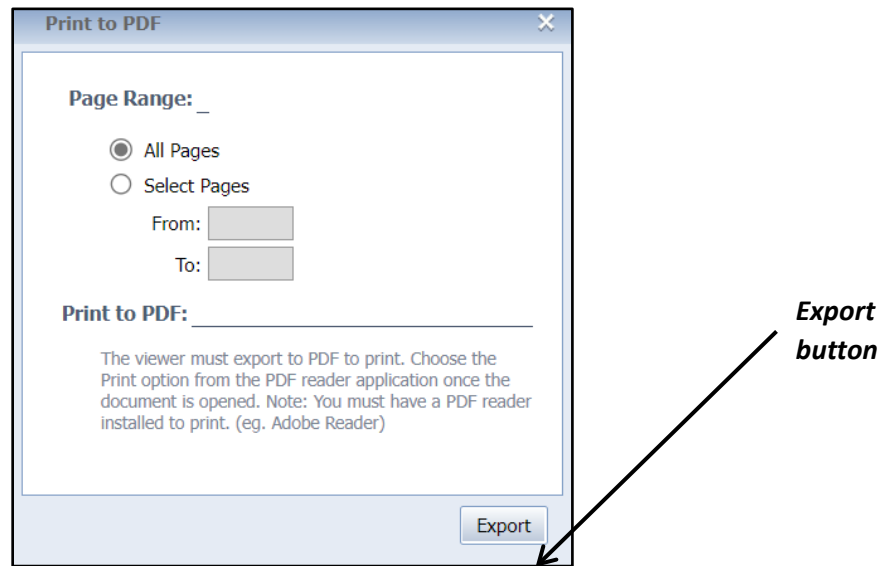
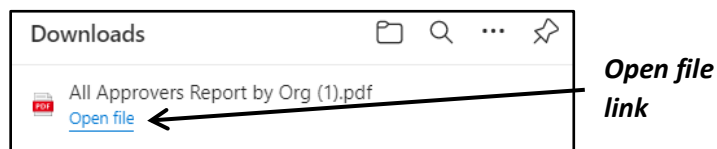


Figure 10 – Print this report icon

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



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



Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the NIH CLP Transcript Completions Report

This QRG will guide approvers through the task of running the NIH CLP Transcript Completions report. This report allows Learners or Administrators to generate a report showing all transcript items that contain a specific Field of Study for a specific date range. The report can be run either for a specific Learner or Org Code.

Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

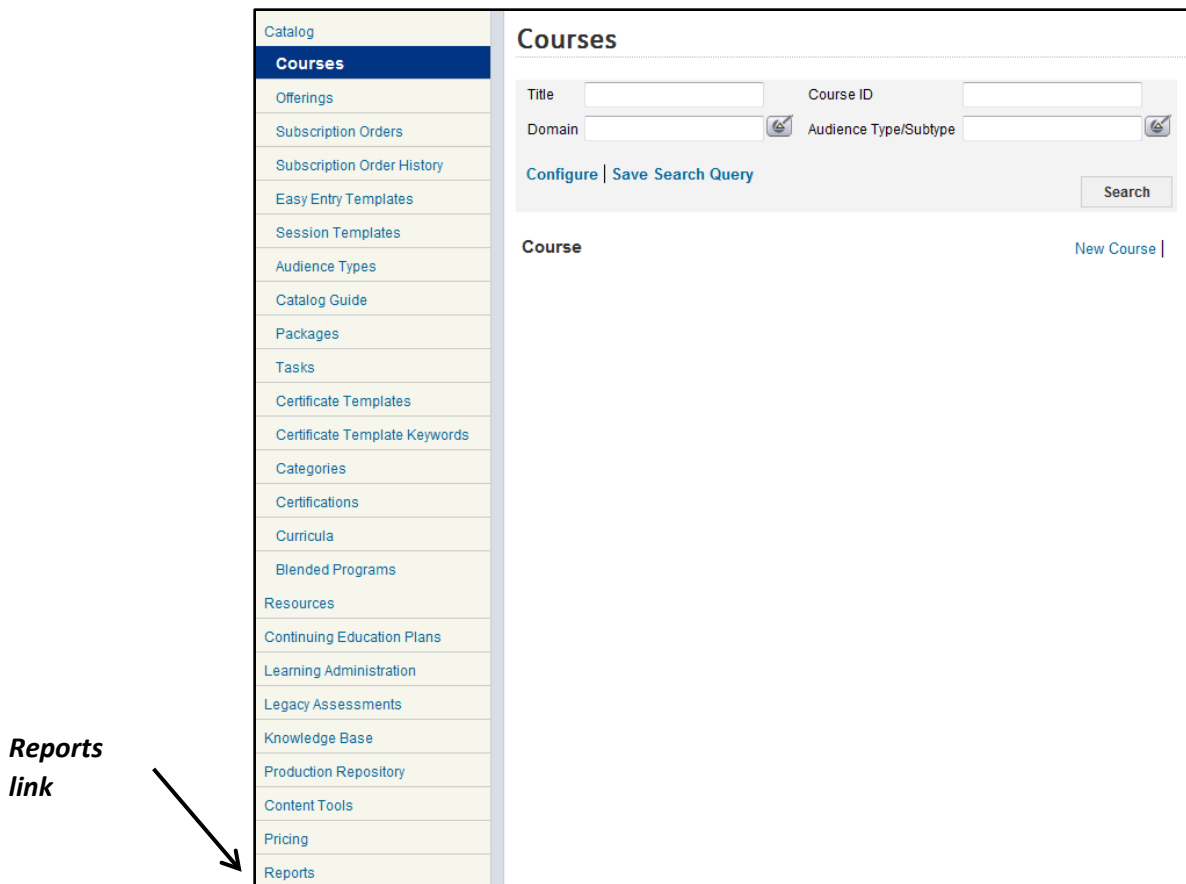


Figure 2 – Reports link

Enter NIH CLP in the Name field and click the **Search** button.

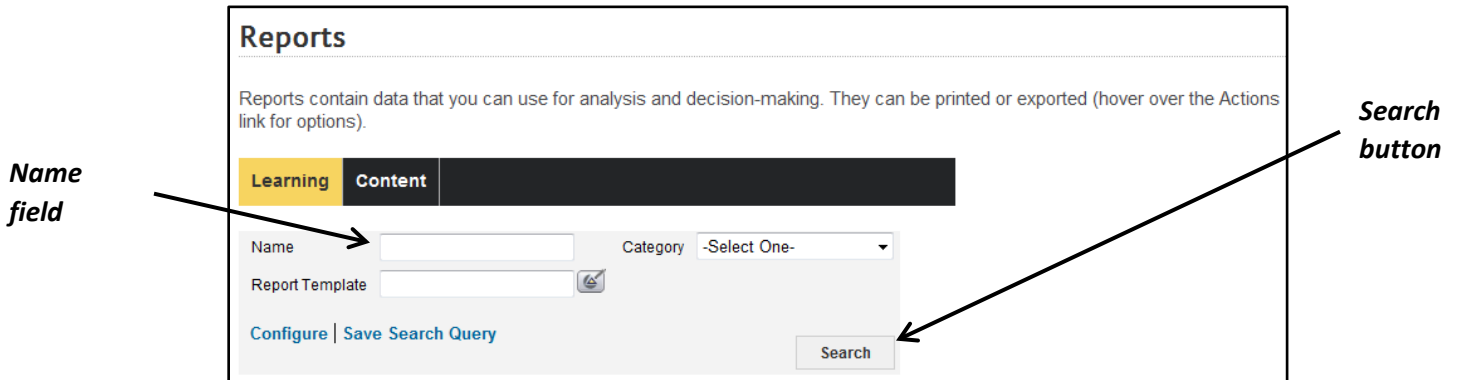


Figure 3 – Name field and Search button

Click the **Actions** link.

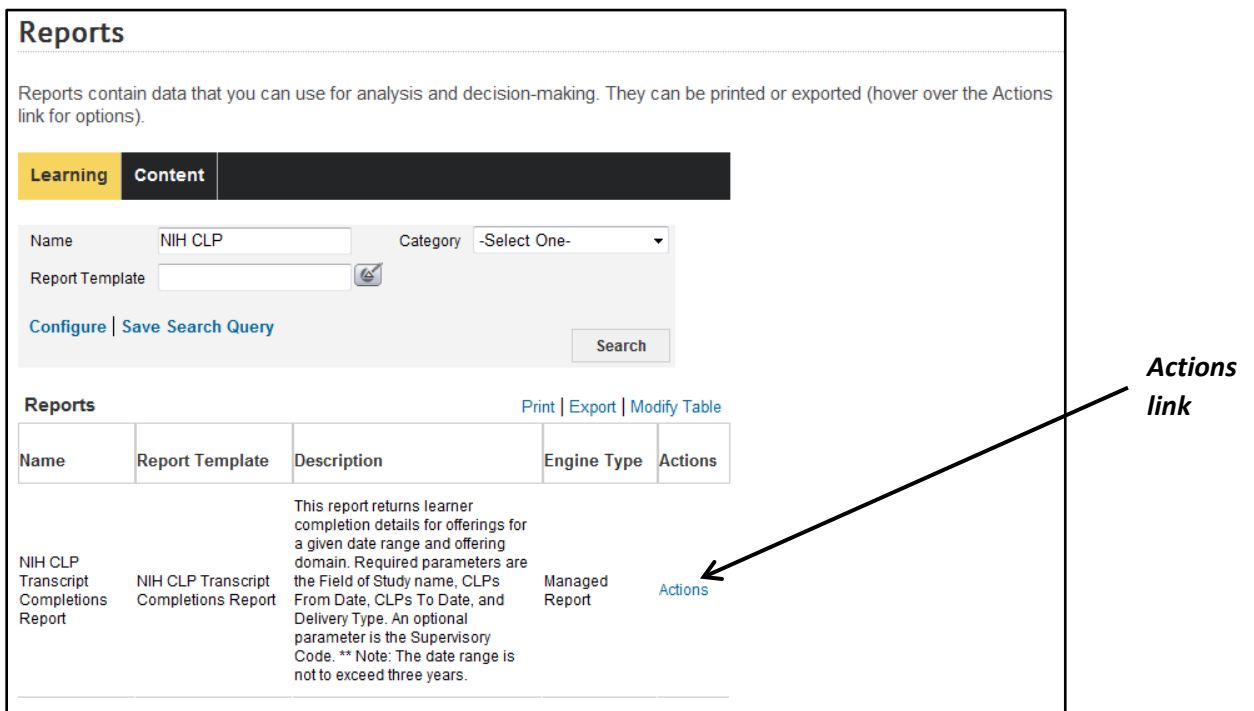


Figure 4 – Actions link



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

The screenshot shows the 'Reports' section of the application. At the top, there are tabs for 'Learning' and 'Content'. Below these are search filters for 'Name' (NIH CLP) and 'Category' (-Select One-). A table lists reports, with the first row being 'NIH CLP Transcript Completions Report'. An 'Actions' menu is open over the 'Actions' column of this row, showing options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the menu.

Figure 5 – Execute link on the Actions activity menu

Click the **Field of Study Name** pick icon and then search for the Field of Study that is desired.

The screenshot shows the 'Report Parameters - NIH CLP Transcript Completions Report' form. It includes fields for 'Field of Study Name\*', 'CLPs From Date\*' (01/10/2020), 'CLPs To Date (Date range not to exceed 3 years)\*' (01/09/2023), 'Supervisory Status' (-Select One-), 'Enter Org ID or Person Name: Organization ID (2 characters required. Use % to include sub-orgs)', and 'Person Name'. A pick icon (a magnifying glass over a document) is located to the right of the 'Field of Study Name\*' field. An arrow points from the text 'Field of Study pick icon' to this icon.

Figure 6 – Field of Study pick icon

Enter the name of a Field of Study in the Name field and click the **Search** button. You can also just click the **Search** button to view all Fields of Study.



Figure 7 – Name field and Search button

Click the **Select** checkbox for a specific Field of Study to add it to the report.

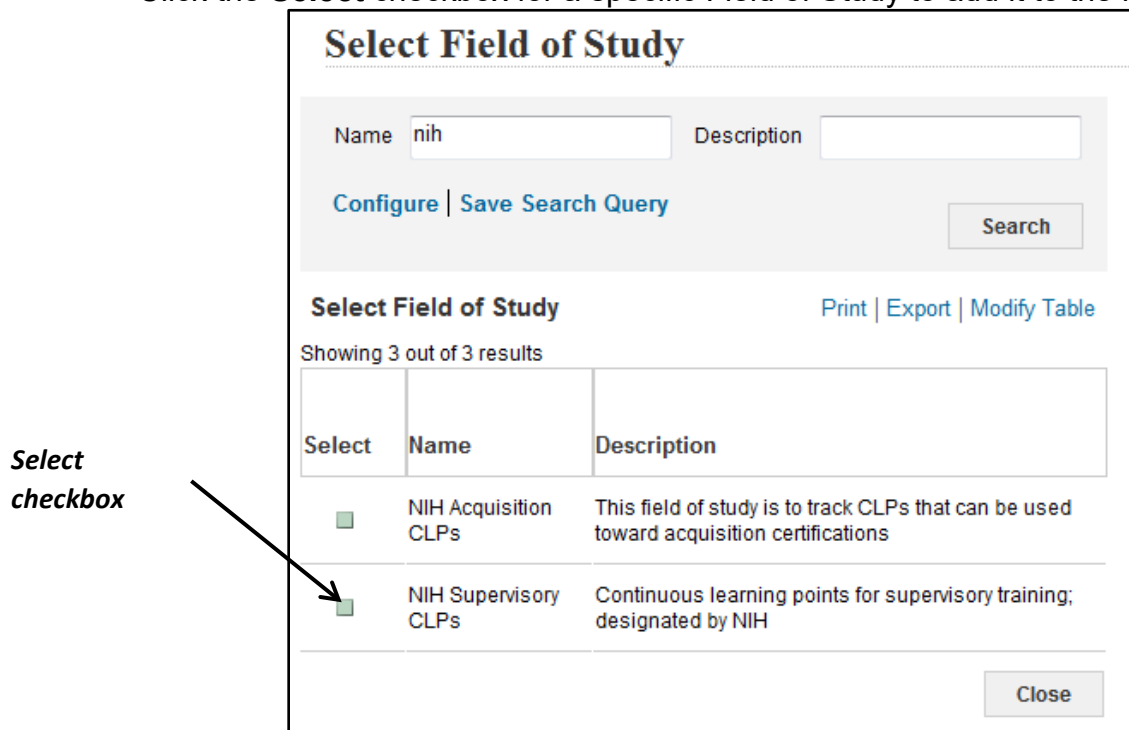


Figure 8 – Select checkmark

The CLPs From Date and CLPs To Date fields will be populated with the last calendar year date range by default. You can use the CLPs From Date and CLPs To Date fields to change the date range, manually entering a date in MM/DD/YYYY format, or you can use the CLPs From Date and CLPs To Date pick icons to select a date range.

**NOTE:** The date range for the report cannot exceed 3 years.

Figure 9 – CLPs From Date and CLPs To Date pick icons

The Supervisory Code pull-down is an optional parameter for the report, you can choose a specific value to narrow the focus of the report or skip selecting a value to include all Supervisory Codes.

Organization ID and Person Name are optional parameters for this report.

Enter an Org Code in the Org Code field. You can enter a full Org Code (e.g., AB1234) or you can search for multiple Org Codes using the percent symbol (%) as a wildcard (e.g., AB%).

The Person Name field is an optional parameter for the report, you can choose a specific value to narrow the focus of the report to a single Learner or skip selecting a value to include all Learners within the specified Org Code.

Click the **Generate Report** button.

**Report Parameters - NIH CLP Transcript Completions Report**

Field of Study Name\*

CLPs From Date\*

CLPs To Date (Date range not to exceed 3 years)\*

Supervisory Status

Enter Org ID or Person Name:  
Organization ID (2 characters required. Use % to include sub-orgs)

Person Name

**Generate Report** **Cancel**

**Generate Report**

Figure 10 – Generate Report button

Click the **Print this report** icon.

**Print this report icon**

**NIH CLP Transcript Completions Report**

Field of Study Name: NIH Supervisory CLPs      Supervisory Status:

CLPs From Date: 01/10/2020      Organization ID: HNA%

CLPs To Date: 01/09/2023      Person Name:

Org ID	Last Name	First Name	HHS ID	Suprv. Status	Course Name	Course ID	Offering Start Date	Offering End Date	Compl. Date	CLP's (Credits)
--------	-----------	------------	--------	---------------	-------------	-----------	---------------------	-------------------	-------------	-----------------

Figure 11 – Print this report button

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

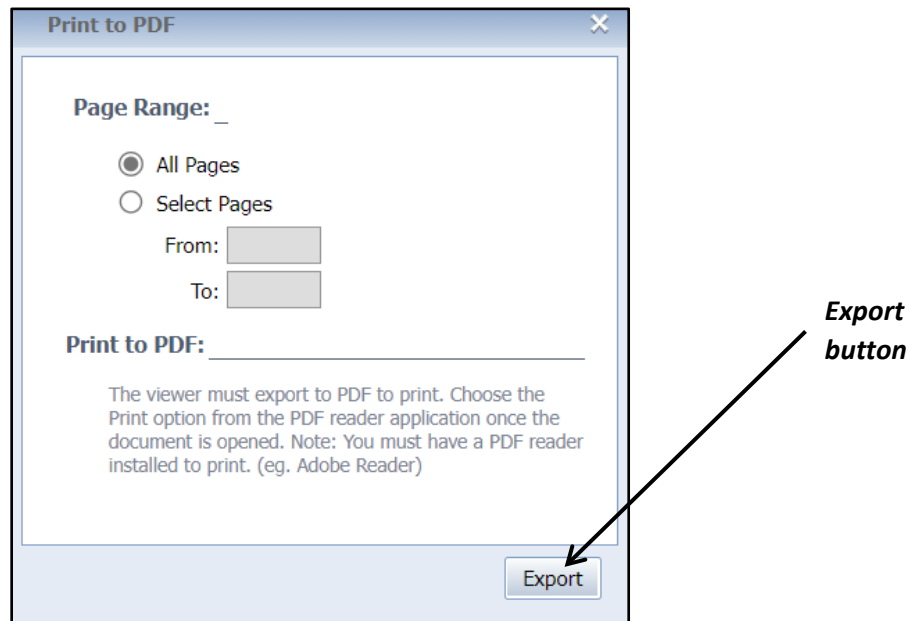


Figure 12 – Export button

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

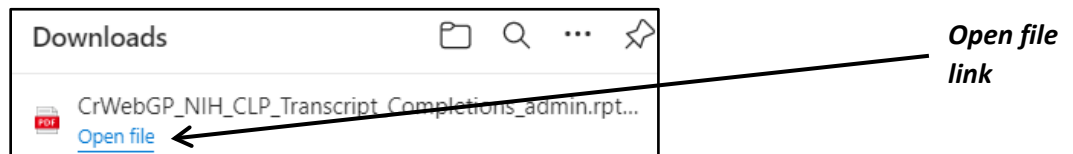


Figure 13 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the NIH CLP Transcript Completions Report for Learner

This QRG will guide approvers through the task of running the NIH CLP Transcript Completions Report for Learner. This report allows Learners to generate a report showing all transcript items that contain a Field of Study for a specific date range. The report can be run either for the Learner themselves.

Log into the LMS.

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

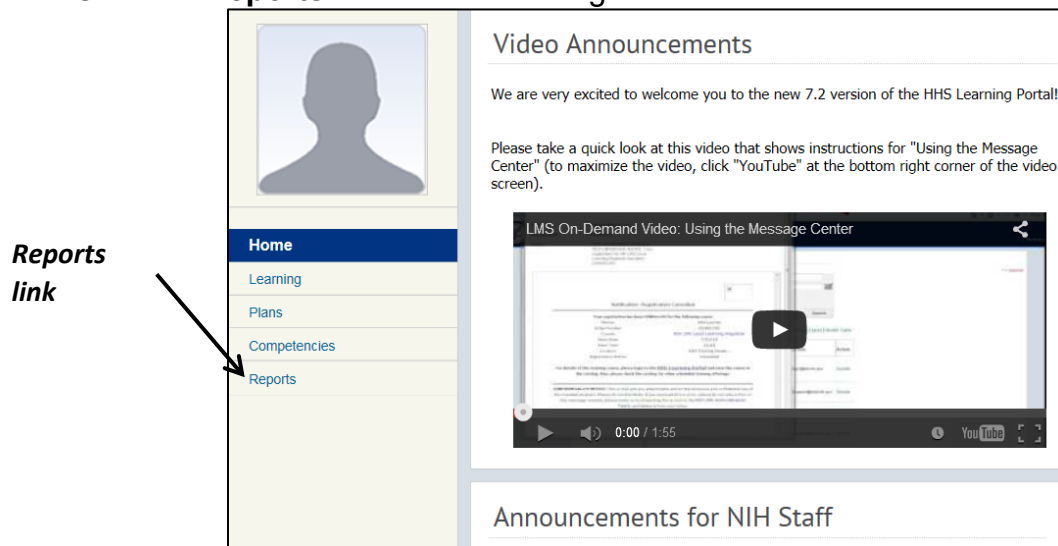


Figure 1 – Reports link

Enter NIH CLP in the Name field and click the **Search** button.

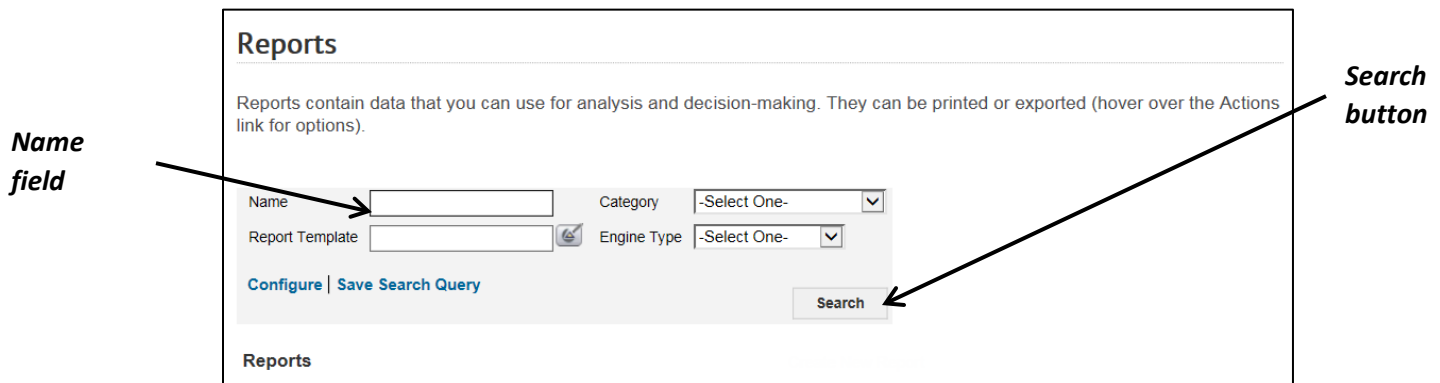


Figure 2 – Name field and Search button

Click the **Actions** link.

**Reports**

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

Name:  Category:    
 Report Template:   Engine Type:    
[Configure](#) | [Save Search Query](#)

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

Name	Report Template	Description	Engine Type	Actions
NIH CLP Transcript Completions Report for Learner	NIH CLP Transcript Completions Report for Learner	This report displays the credits earned by the learner for each field of study attached to the course/offering post course completion for a given date range. ** Note: The date range is not to exceed three years.	Managed Report	<a href="#">Actions</a>

**Actions link**

Figure 3 – Actions link

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

**Reports**

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

Name:  Category:    
 Report Template:   Engine Type:    
[Configure](#) | [Save Search Query](#)

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

Name	Report Template	Description	Engine Type	Acti
NIH CLP Transcript Completions Report for Learner	NIH CLP Transcript Completions Report for Learner	This report displays the credits earned by the learner for each field of study attached to the course/offering post course completion for a given date range. ** Note: The date range is not to exceed three years.	Managed Report	<a href="#">Actions</a>

**Actions**

[Email](#)

[Execute](#)

[Subscribe](#)

**Execute link**

Figure 4 – Execute link on the Actions activity menu



The report parameters screen appears. The CLPs From Date and CLPs To Date fields will be populated with the last three calendar years date range by default. You can use the CLPs From Date and CLPs To Date fields to change the date range, manually entering a date in MM/DD/YYYY format, or you can use the CLPs From Date and CLPs To Date pick icons to select a date range.

**NOTE:** The date range for the report cannot exceed 3 years.

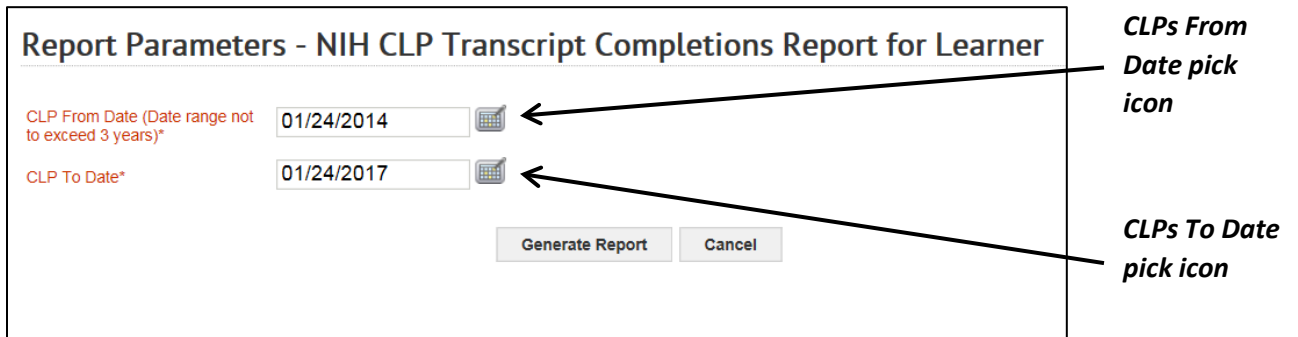


Figure 5 – CLPs From Date and CLPs To Date pick icons

Click the **Generate Report** button.

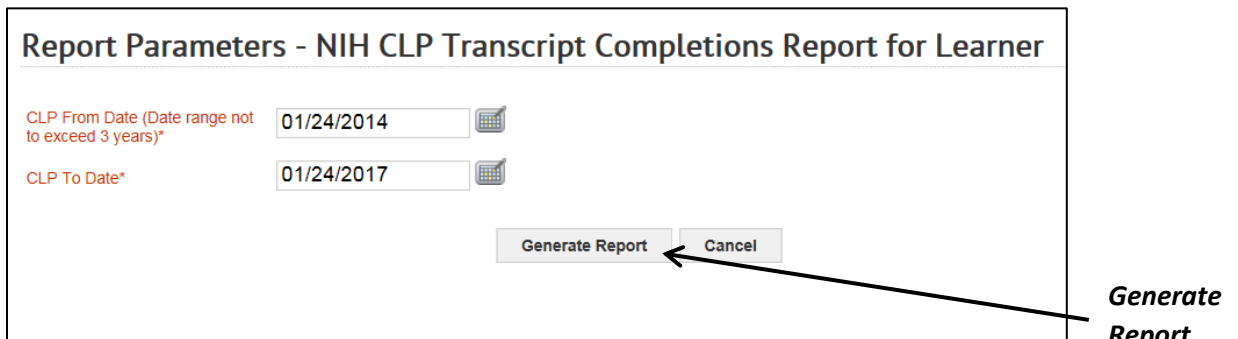


Figure 6 – Generate Report button



Click the **Print this report** icon.

*Print this  
report  
icon*

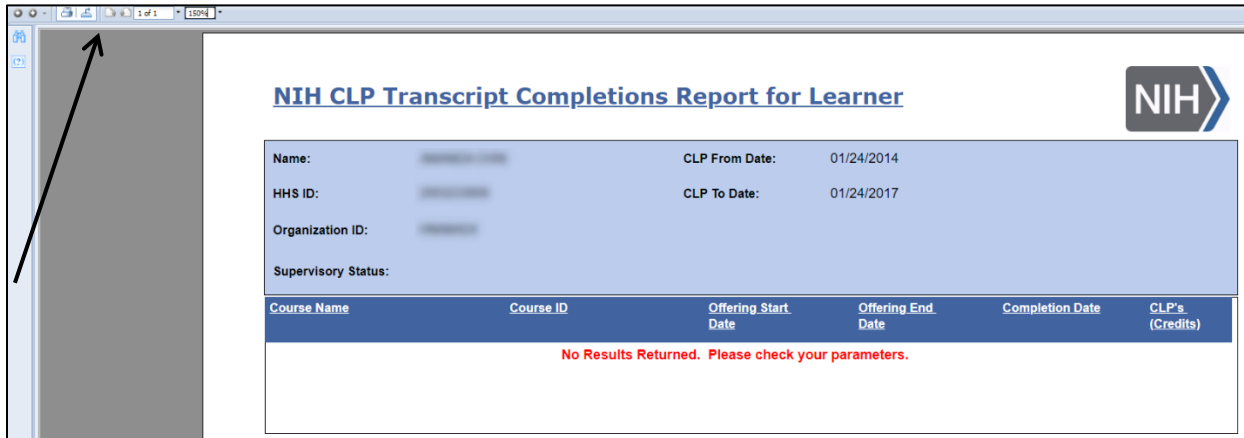
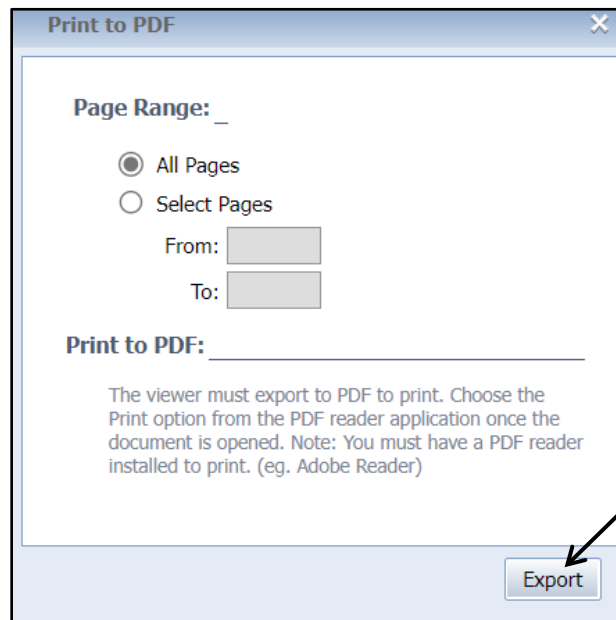


Figure 7 – Print this report button

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



*Export  
button*

Figure 8 – Export button

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

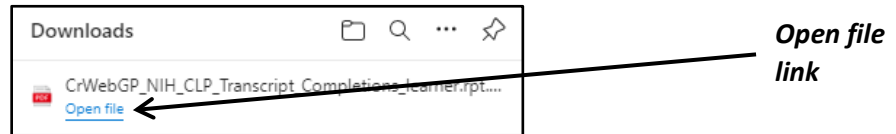


Figure 9 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the NIH Missing NED Servicing AOs by Org Report

This QRG provides instructions for generating the NIH Missing NED Servicing AOs by Org Report. This report creates a list of all NIH staff who are missing the Servicing AO in the NIH Enterprise Directory (NED) for a specified Organization and sub-Organizations. This report is important for ensuring that the AAO in the LMS is correct for organizations that have “opted-in” to the NED Servicing AO→LMS AAO data feed process.

Log into the LMS.

Click the **Admin** icon.



Figure 1 – Admin icon

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

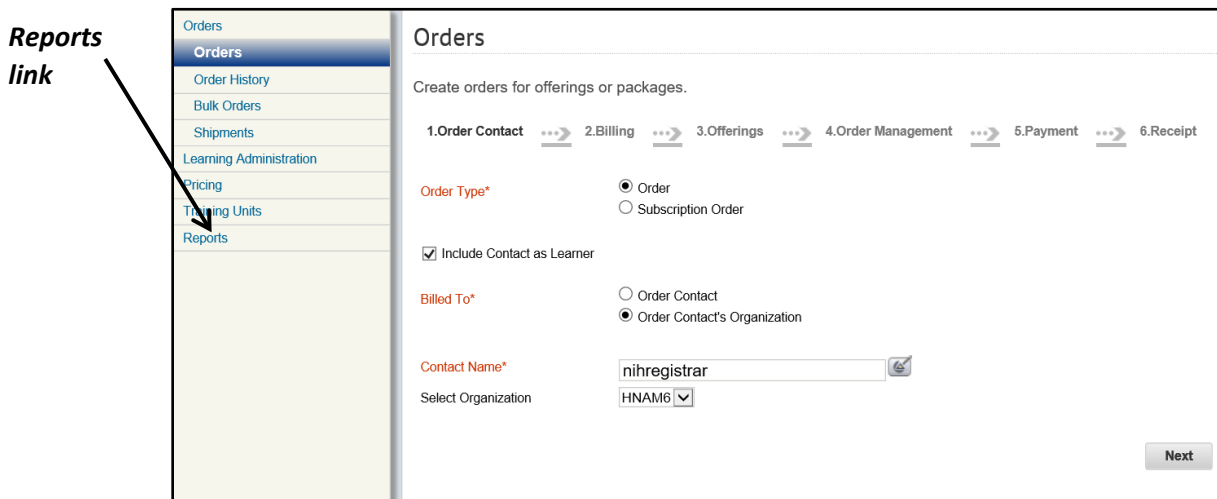


Figure 2 – Reports link

Enter “NIH Missing” in the **Name** field and click **Search**.

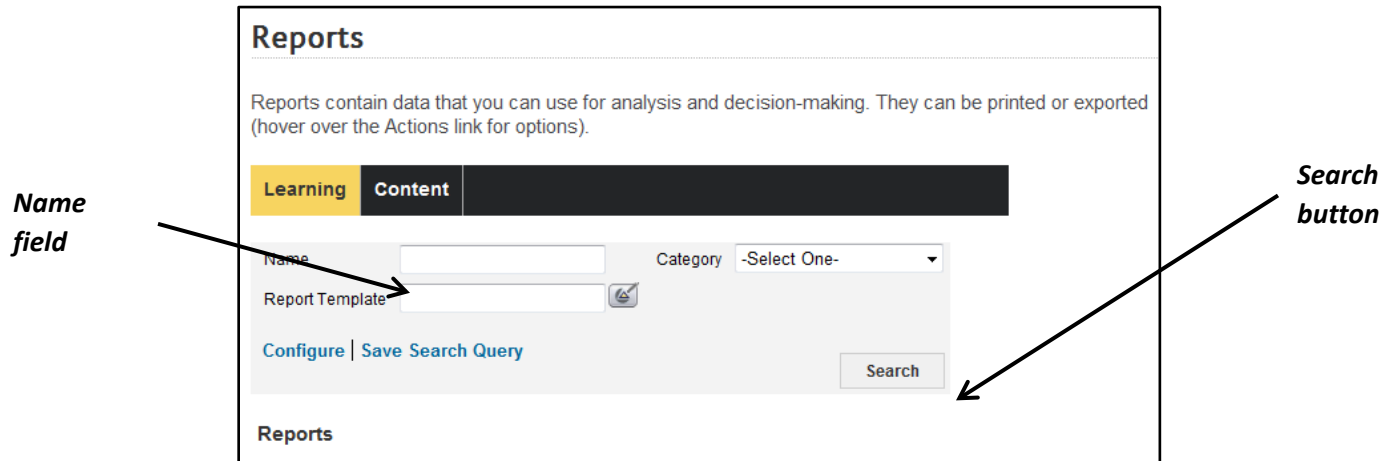


Figure 3 – Name field and Search button

Click the **Actions** link for the HHS All Approvers by Org Report.

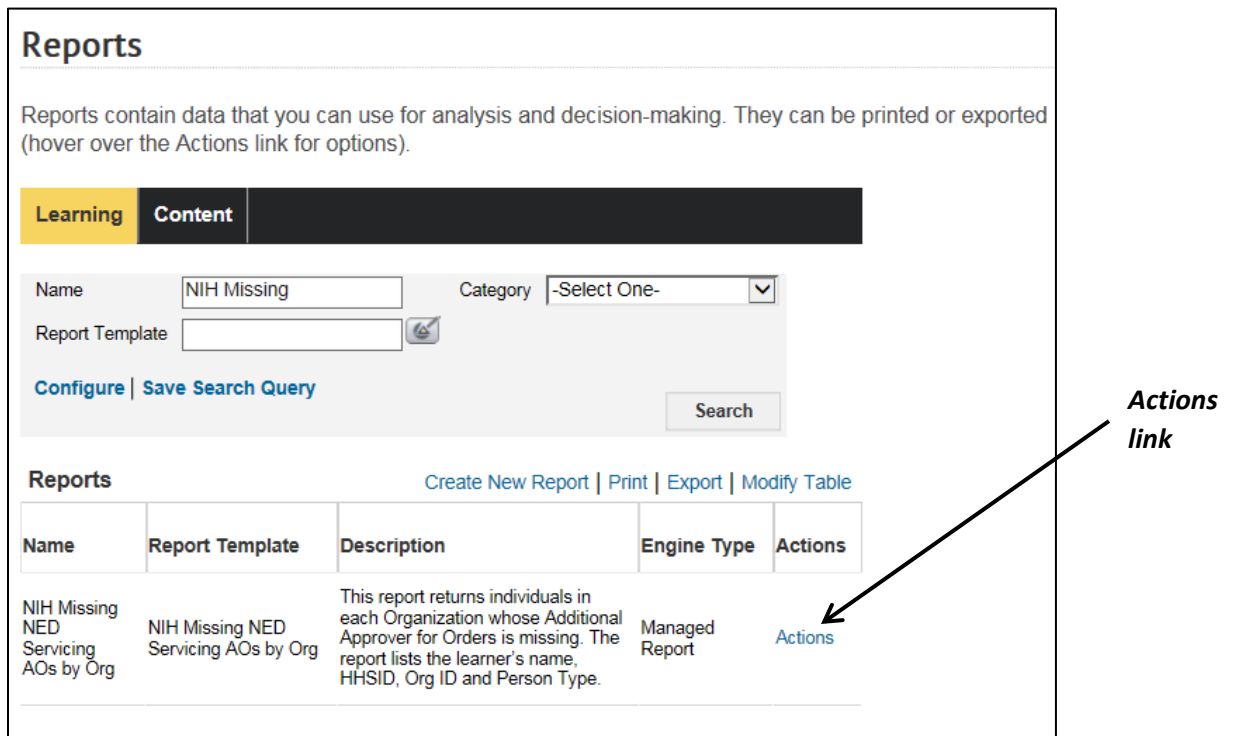


Figure 4 – Actions link

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

The screenshot shows the 'Reports' section of a web application. At the top, there is a header with 'Learning' and 'Content' tabs. Below this, there are search filters for 'Name' (set to 'NIH Miss') and 'Category' (set to '-Select One-'). A 'Search' button is present. Below the search filters, there is a table of reports. The first report is 'NIH Missing NED Servicing AOs by Org'. To the right of the table, an 'Actions' menu is open, showing options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the menu.

Figure 5 – Execute link on the Actions activity menu

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

The screenshot shows the 'Report Parameters' form for the report 'NIH Missing NED Servicing AOs by Org'. The form has a title bar and a main content area. In the main content area, there is a text input field for 'Org Code (2 characters minimum required. Use % to include sub-orgs)\*'. An arrow points from the text 'Org Name field' to this input field. Below the input field, there are two buttons: 'Generate Report' and 'Cancel'.

Figure 6 – Org Name field

Click the **Generate Report** link.

**Report Parameters - NIH Missing NED Servicing AOs by Org**

Org Code (2 characters minimum required. Use % to include sub-orgs)\*

*Generate Report button*

Figure 7 – Generate Report button

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

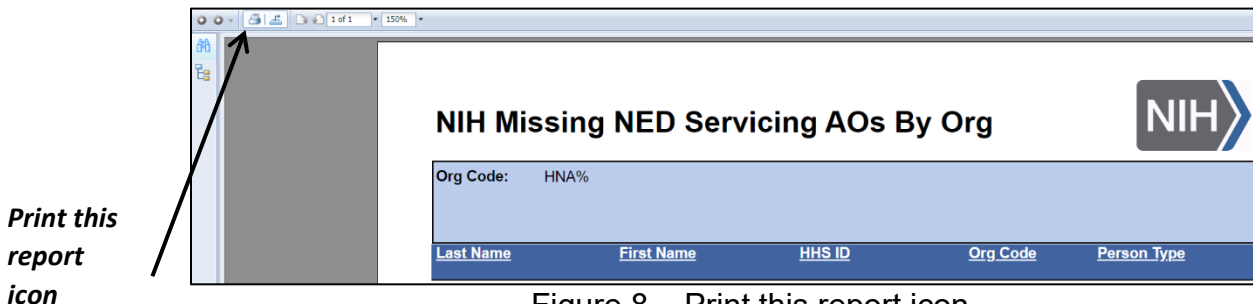


Figure 8 – Print this report icon

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

**Print to PDF**

Page Range: \_

All Pages  
 Select Pages

From:   
To:

Print to PDF: \_\_\_\_\_

The viewer must export to PDF to print. Choose the Print option from the PDF reader application once the document is opened. Note: You must have a PDF reader installed to print. (eg. Adobe Reader)

*Export button*

Figure 9 – Export button

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

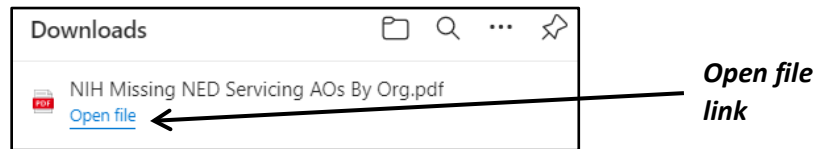


Figure 10 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the NIH Order Approvals by Org/Approver Report

This QRG provides instructions for generating the NIH Order Approvals by Org/Approver Report. This report lists all fully approved NIHTC orders (not cancelled or dropped) by Org or Approver. These are order approvals made by a Manager, Alternate Manager, Alternate Approver for Orders (AAO), or an LMS Administrator during a specified date range (not to exceed 365 days). This report can create a list of approved training that an approver can submit to their Budget Officer.

Log into the LMS.

Click the Admin icon.



Figure 1 – Admin icon

Click the Reports link from the left navigation menu.

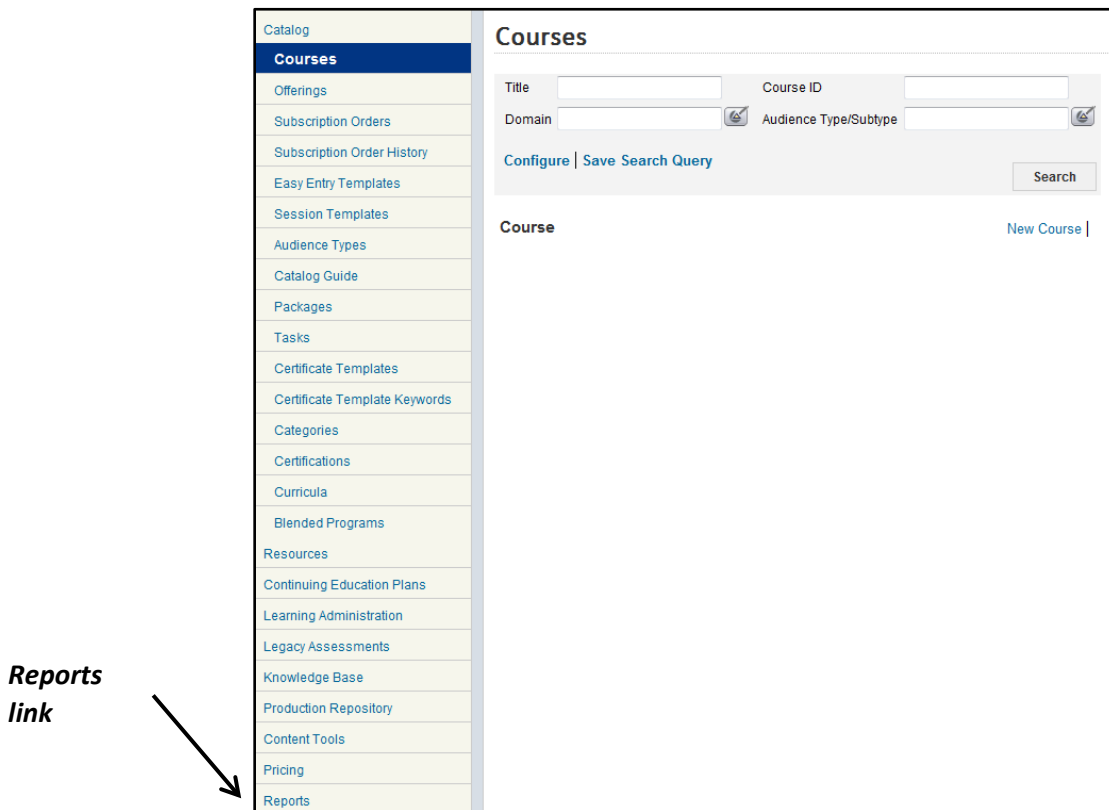


Figure 2 – Reports link



Enter NIH Order Approvals by Org/Approver in the Name field and click the **Search** button.

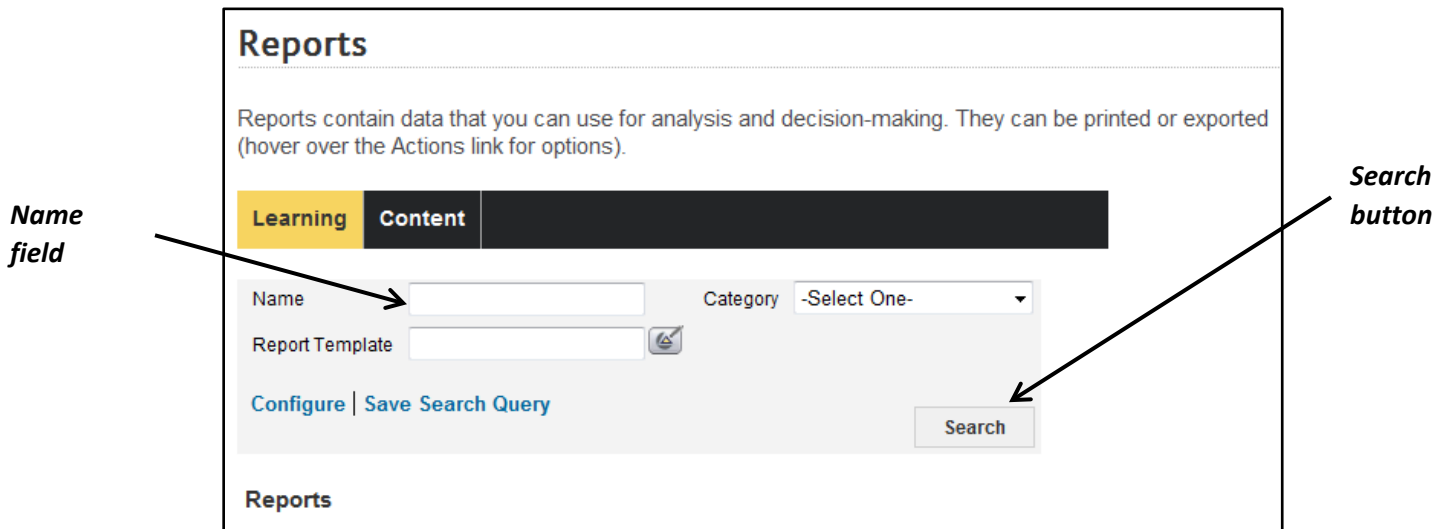


Figure 3 – Name field and Search button

Click the **Actions** link for the NIH Order Approvals by Org/Approver Report.

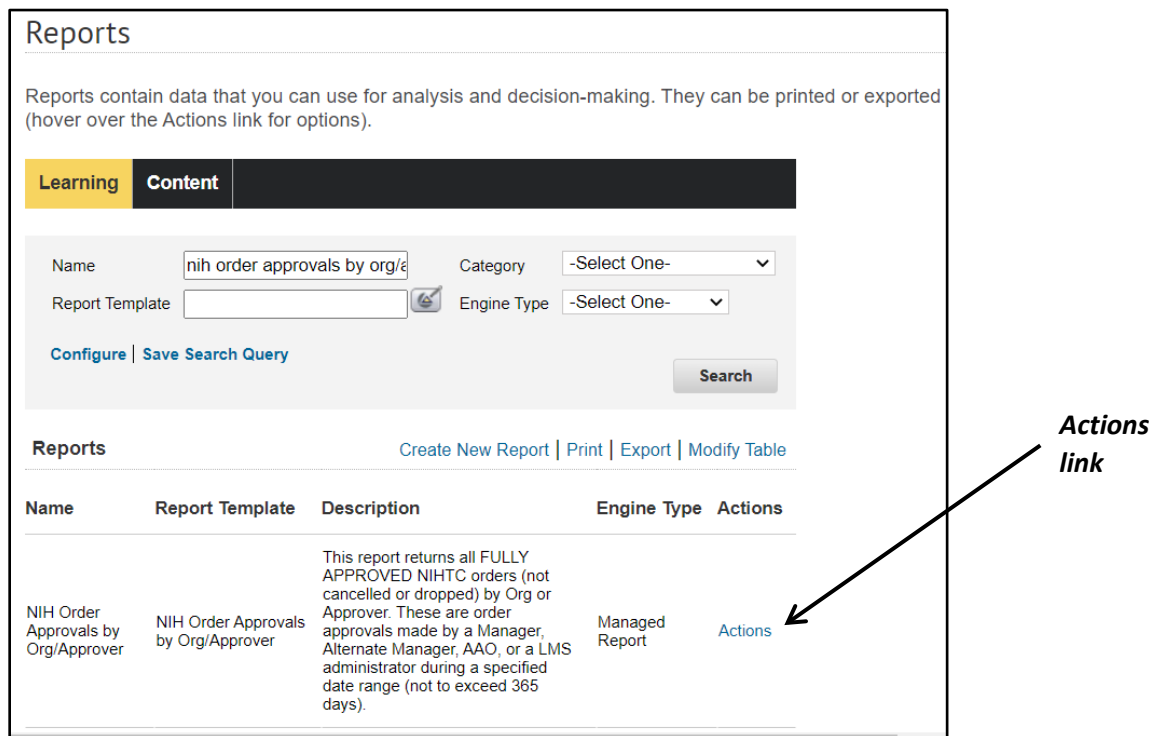


Figure 4 – Actions link

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

The screenshot shows the 'Reports' page with a search bar and a table of reports. An 'Actions' menu is open over the first report, showing options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the menu.

Name	Report Template	Description	Engine Type
NIH Order Approvals by Org/Approver	NIH Order Approvals by Org/Approver	This report returns all FULLY APPROVED NIHTC orders (not cancelled or dropped) by Org or Approver. These are order approvals made by a Manager, Alternate Manager, AAO, or a LMS administrator during a specified date range (not to exceed 365 days).	Managed Report

Figure 5 – Execute link on the Actions activity menu

The default date range for the report is the last one (1) day. If you want to change the date range, enter the From Order Approval Date and To Order Approval Date in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the **From Order Approval Date** and **To Order Approval Date** pick icons to select the date.

The screenshot shows the 'Report Parameters - NIH Order Approvals by Org/Approver' form. Two arrows point from the text 'From Order Approval Date pick icon' and 'To Order Approval Date pick icon' to the calendar icons next to the date input fields.

From Order Approval Date\* 01/12/2022

To Order Approval Date\* (the date range must not exceed 365 days)\* 01/12/2023

Org Name (Use % to include sub-orgs)

Approver Name (If Org and Approver not populated, default to user running report)

Generate Report Cancel

Figure 6 – From Order Approval Date and To Order Approval Date pick icons

Click the **Generate Report** button.

Report Parameters - NIH Order Approvals by Org/Approver

From Order Approval Date\*

To Order Approval Date\* (the date range must not exceed 365 days)\*

Org Name (Use % to include sub-orgs)

Approver Name (If Org and Approver not populated, default to user running report)

**Generate Report button**

Figure 7 – Generate Report button

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

Print Date 1/12/2023

**NIH Order Approvals by Org/Approver**

From Order Approval Date: 01/12/2022 Org Name:

To Order Approval Date: 01/12/2023 Approver Username:

**Note: This report returns all FULLY APPROVED orders that were not cancelled or dropped**

HHS ID	Leamer Name	Order Creation Date	Order Number	Document # Order Line Item	Course Title	Course ID	Start Date	End Date	Price	CAN	Approval Date	Approver Name	Approver HHS ID
--------	-------------	---------------------	--------------	----------------------------	--------------	-----------	------------	----------	-------	-----	---------------	---------------	-----------------

**Print this report icon**

Figure 8 – Print this report icon

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

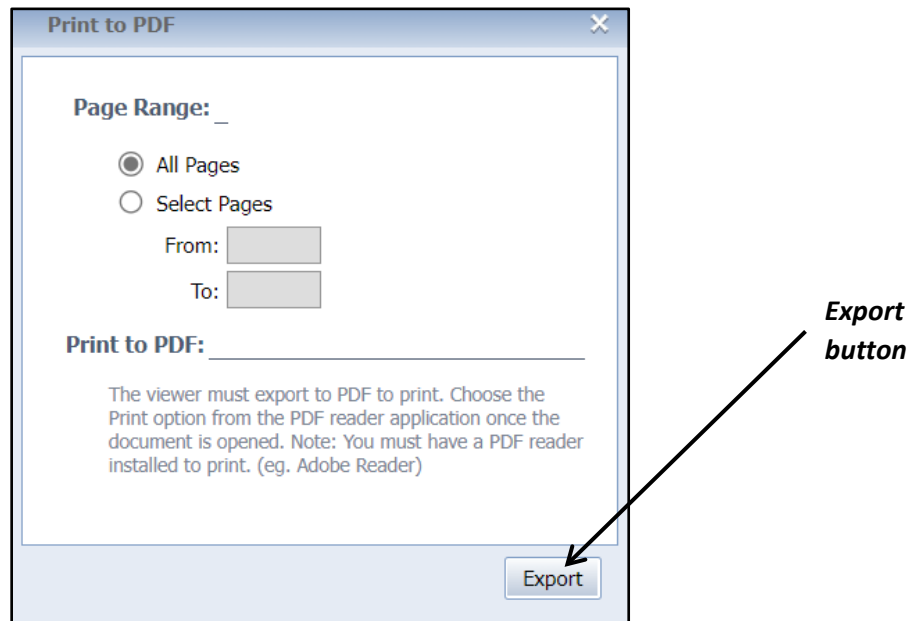


Figure 9 – Export button

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



Figure 10 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the NIH Order Reconciliation Report

This QRG provides instructions for generating the NIH Order Reconciliation Report. This report is needed to reconcile the NIHTC training orders in the LMS with the NIH Business System (NBS) financial transaction data. The results can be further refined using the Organization, Document Number, or a specific CAN. This report can be used to determine what orders are still in Pending Approval state for a specific Org Code.

Log on to the LMS.

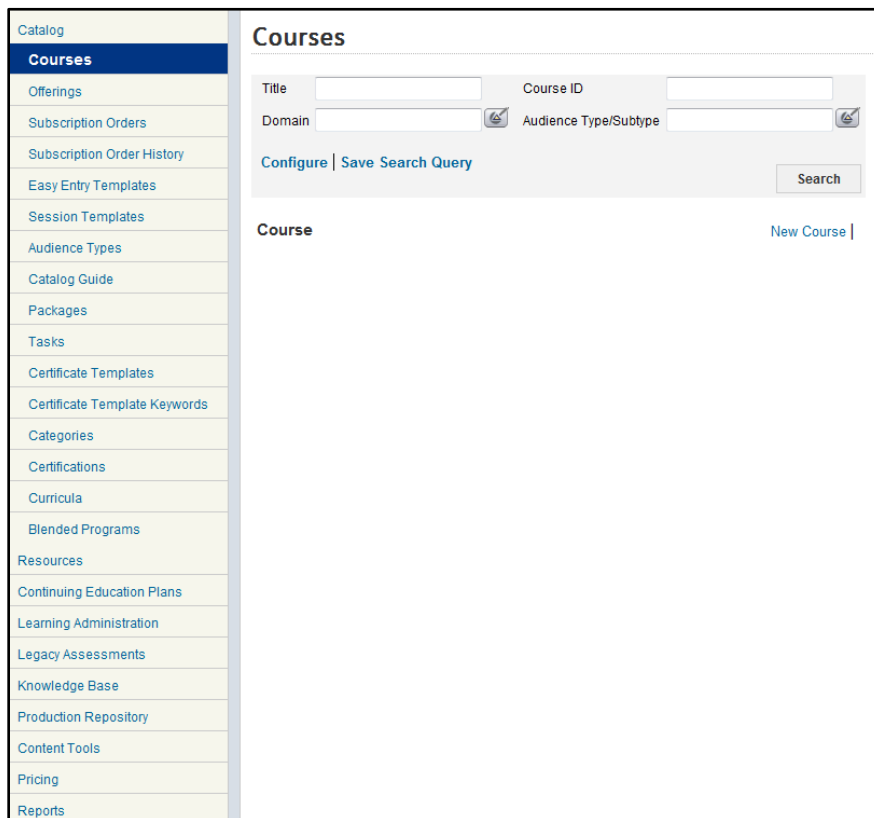
Click the **Admin** icon.



*Admin  
icon*

Figure 1 – Admin icon

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



*Reports  
link*

Figure 2 – Reports link

Enter NIH Order Reconciliation in the Name field and click the **Search** button.

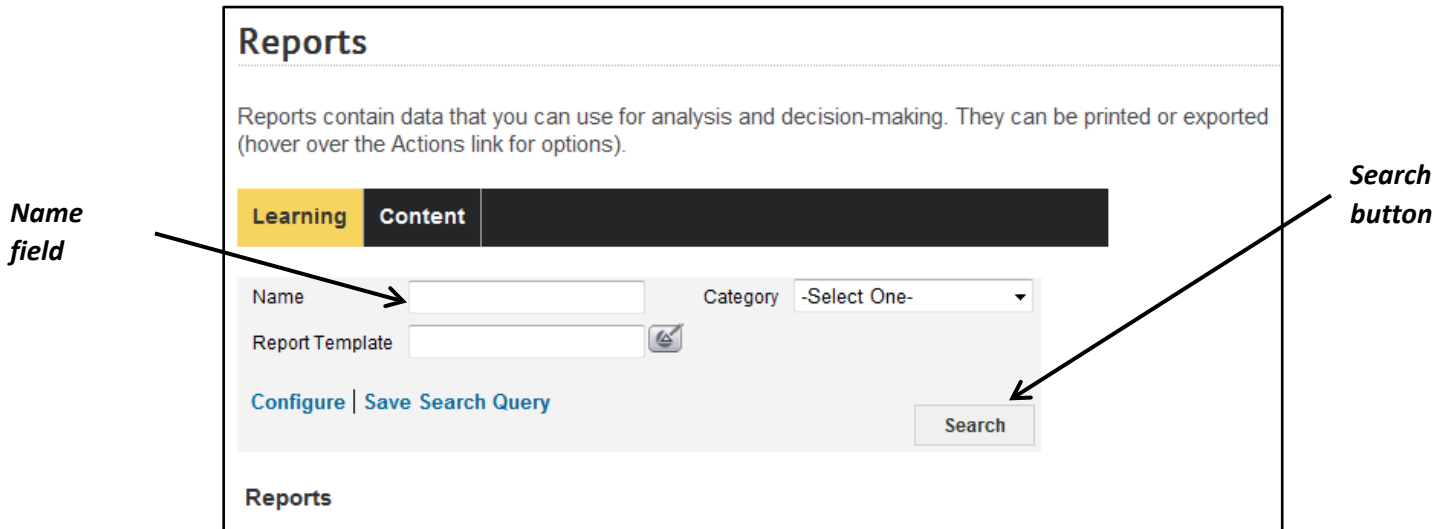


Figure 3 – Name field and Search button

Click the **Actions** link for the NIH Order Reconciliation Report.

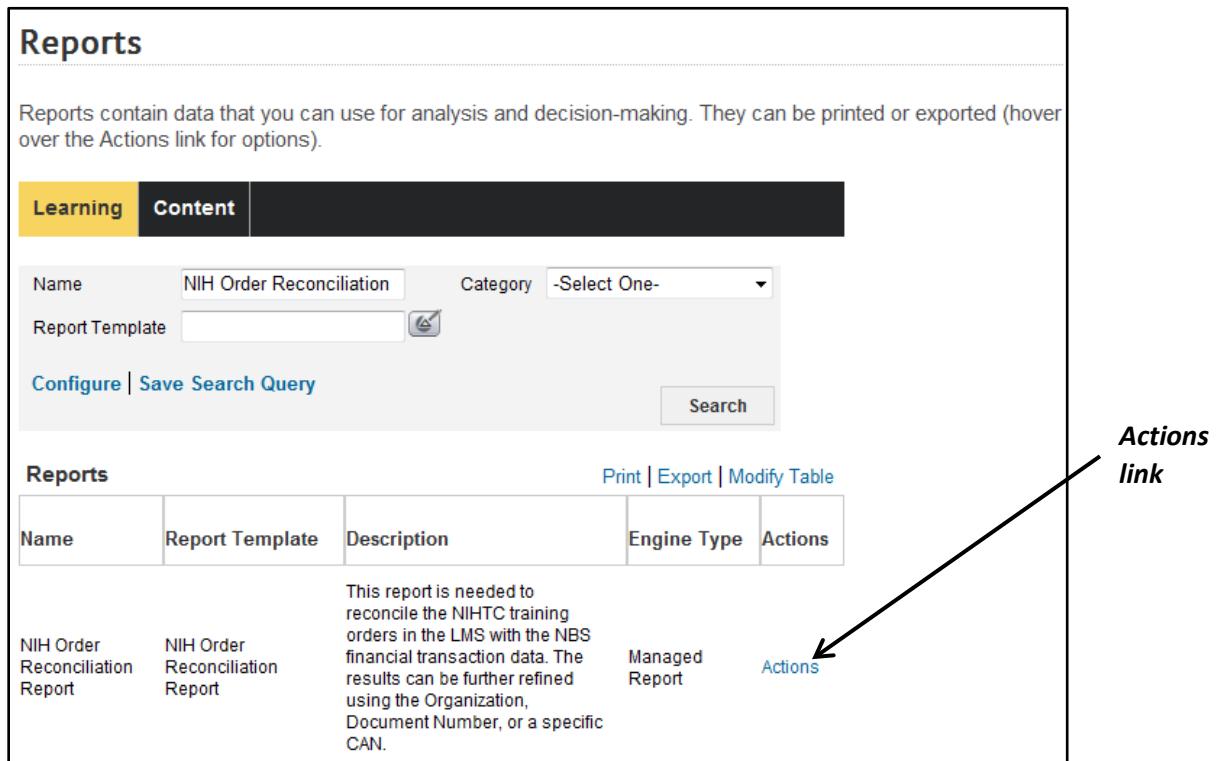


Figure 4 – Actions link

Click the **Execute** link from the Actions activity menu.

The screenshot shows the 'Reports' section of a web application. At the top, there are tabs for 'Learning' and 'Content'. Below the tabs, there are search filters for 'Name' (set to 'NIH Order Reconciliation') and 'Category' (set to '-Select One-'). There is also a 'Report Template' field and a 'Search' button. Below the search filters, there are links for 'Configure' and 'Save Search Query'. A table of reports is displayed, with one report highlighted: 'NIH Order Reconciliation Report'. To the right of the table, there is an 'Actions' menu with options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the Actions menu.

Figure 5 – Execute link on the Actions activity menu

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

The screenshot shows the 'Report Parameters - NIH Order Reconciliation Report' form. It has several input fields: 'From Offering Start Date\*' (with value 01/12/2023), 'To Offering Start Date (the date range must not exceed 15 months)\*' (with value 01/12/2023), 'Organization ID (must be two (2) character minimum, use % to include sub-orgs)', 'Document # / Order Line Item (you must enter eight (8) numeric characters Ex: 01435560)', 'CAN # (you must enter seven (7) numeric characters Ex: 8339269)', and 'Course Owner'. There are two calendar icons (pick icons) next to the date fields. Arrows point from the text 'From Order Creation Date pick icon' to the first calendar icon and from 'To Order Creation Date pick icon' to the second calendar icon. At the bottom, there are 'Generate Report' and 'Cancel' buttons.

Figure 6 – From Order Creation Date and To Order Creation Date pick icons

**NOTE:** The date range in the From Order Creation Date and To Order Creation Date fields cannot exceed one (1) year.



Click the **Generate Report** button.

**Report Parameters - NIH Order Reconciliation Report**

From Offering Start Date\*

To Offering Start Date (the date range must not exceed 15 months)\*

Enter at least one option:  
Organization ID (must be two (2) character minimum, use % to include sub-orgs)

Document # / Order Line Item (you must enter eight (8) numeric characters Ex: 01435560)

CAN # (you must enter seven (7) numeric characters Ex: 8339269)

Course Owner

**Generate Report** **Cancel**

*Generate Report button*

Figure 7 – Generate Report button

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

*Print this report icon*

**NIH Order Reconciliation Report**

Organization ID:  
Document Number:  
CAN Number:  
From Offering Start Date: 01/12/2023  
To Offering Start Date: 01/12/2023  
Course Owner:

Org ID	Order Creation Date	Order #	Order Line Item	Order Item Status	Learner Name	Person Type	Course Title	Course ID	Offering ID	Offering Start Date	CAN	NBS Process Status	Price	Reg Status
--------	---------------------	---------	-----------------	-------------------	--------------	-------------	--------------	-----------	-------------	---------------------	-----	--------------------	-------	------------

Figure 8 – Print this report icon



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

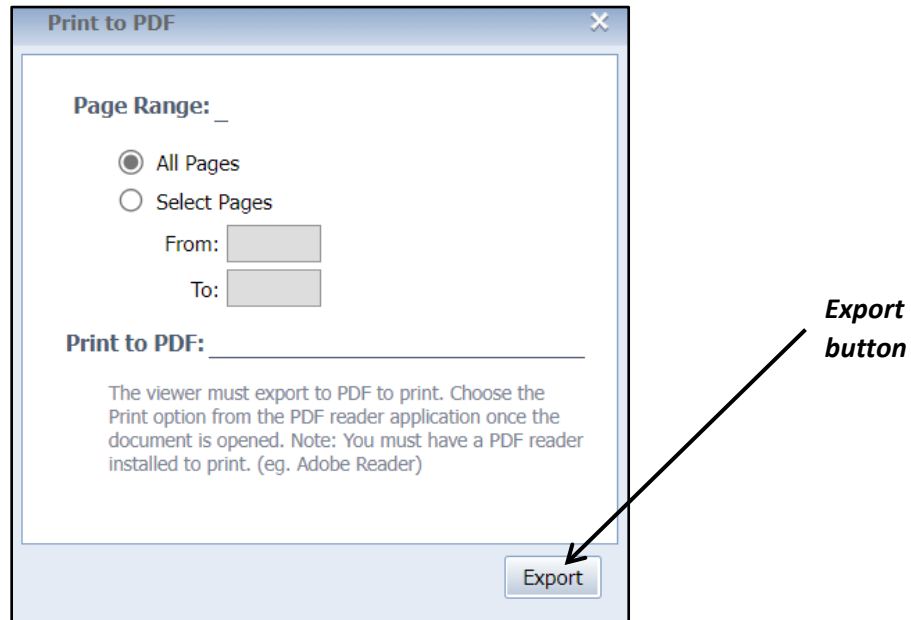


Figure 9 – Export button

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

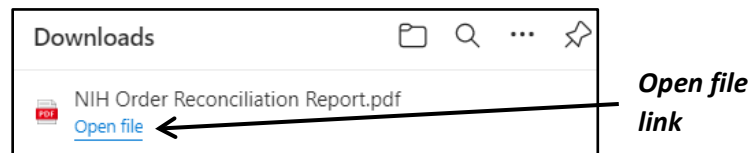


Figure 10 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the NIH Registrations Needing Approval Report

This section will guide approvers through the task of running the NIH Registrations Needing Approval report. This report allows you to easily view key information, such as the CAN, for any orders pending your approval. All registrations pending approval are listed in this report, regardless of whether or not your approval point has been reached in the approval chain.

The report also allows you to view another approver's pending approvals, so you can take action on behalf of someone who would normally be unable to make the approval themselves.

When one of your team members is added to an order needing approval, you will receive an email notification from the LMS stating that there is a registration pending your approval.

Log on to the LMS.

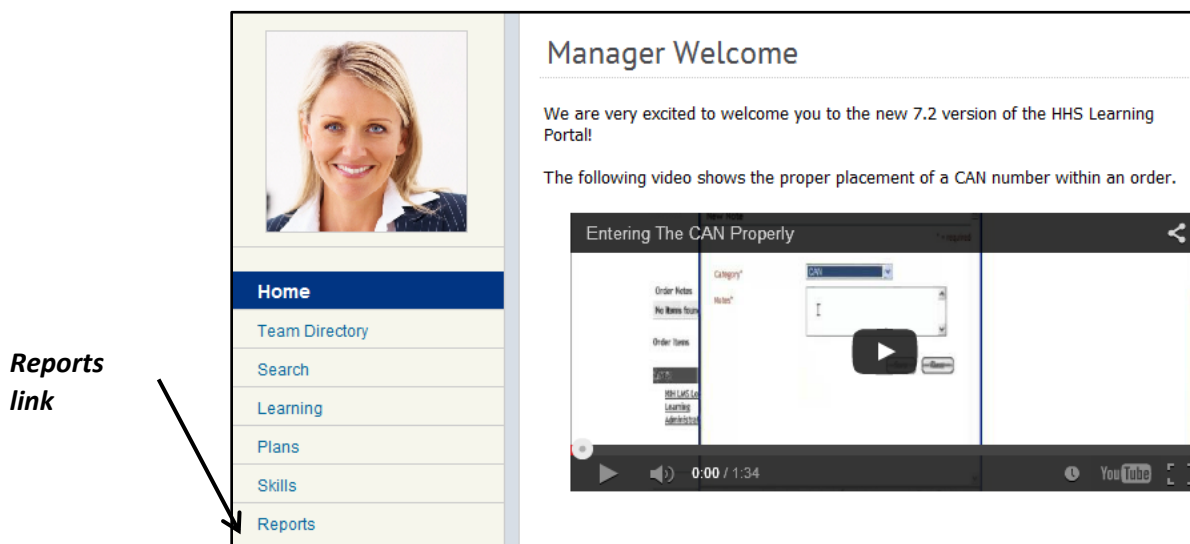
Select the **My Team** icon.



*My  
Team  
icon*

Figure 1 – My Team icon

Select the **Reports** link on the bottom left of the page.



*Reports  
link*

Figure 2 – Reports link

Enter NIH Registrations in the Name field and select the **Search** button.

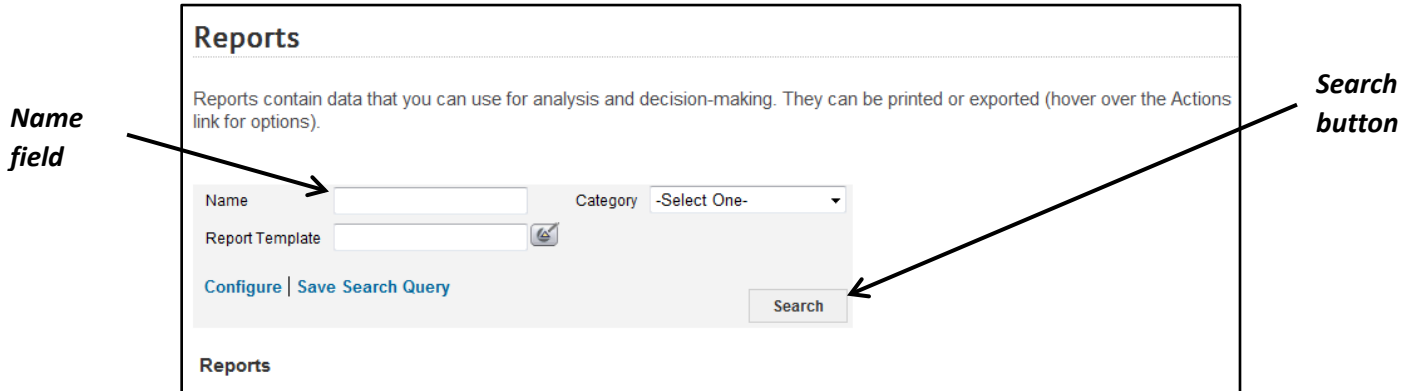


Figure 3 – Name field and Search button

In the Reports table, select the **Actions** link for the NIH Registrations Needing Approval report.

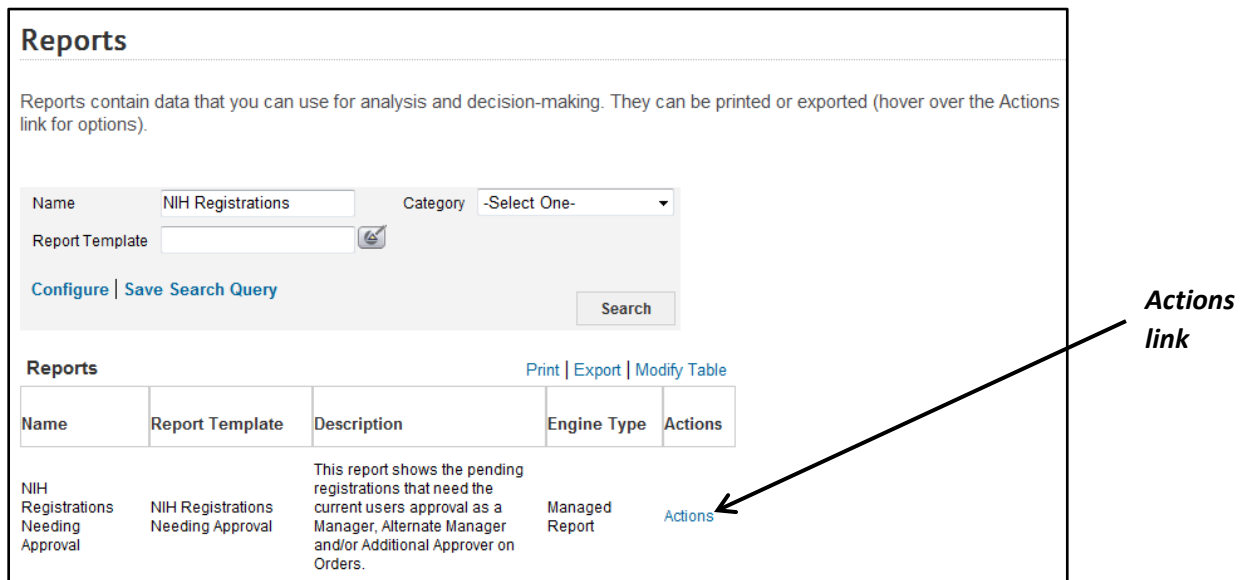


Figure 4 – Actions link

Select the **Execute** from the Actions activity menu.

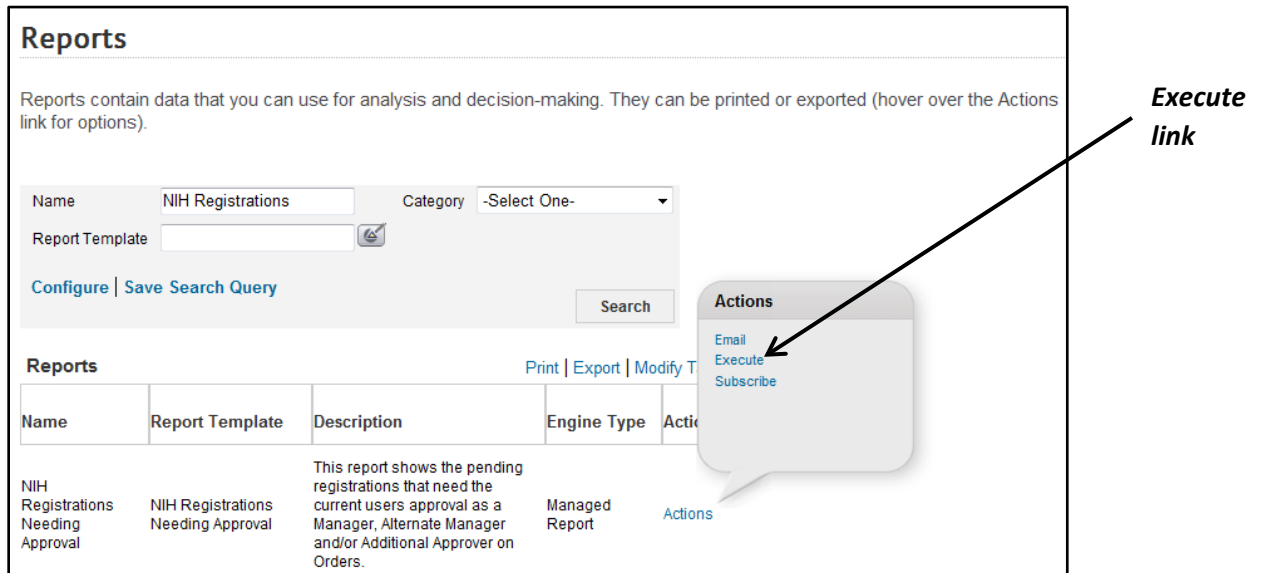


Figure 5 – Execute link on the Actions activity menu

To generate the list of your own pending approvals, select the **Generate Report** button.

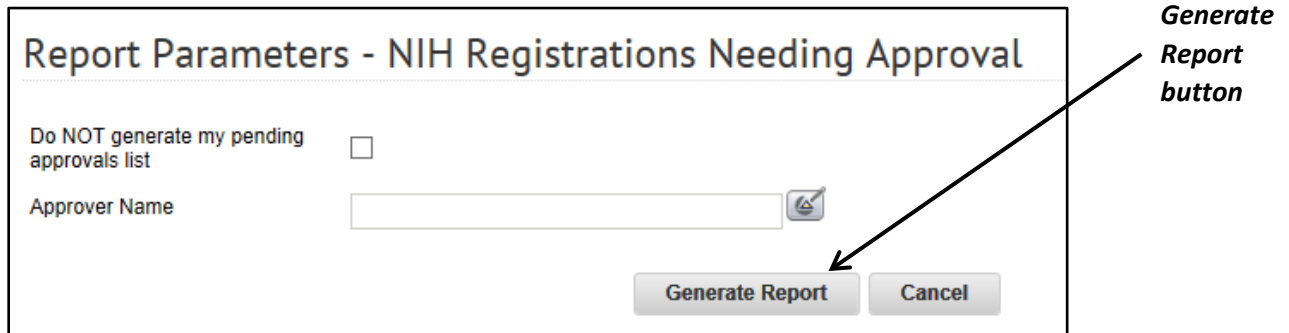


Figure 6 – Generate Report button

To generate the list of another approver's pending approvals, select the **Do NOT generate my pending approvals list** checkmark and then select the **Approver Name** pick icon.

*Do NOT generate my pending approvals list checkbox*

Report Parameters - NIH Registrations Needing Approval

Do NOT generate my pending approvals list

Approver Name

Generate Report Cancel

*Approver Name pick icon*

Figure 7 – Do NOT generate my pending approvals list checkbox and Approver Name pick icon

Enter the first and last name of the other approver in the **First Name** and **Last Name** fields and select the **Search** button.

*Last Name field*

Search Person, Internal

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

Population: Internal

Last Name

First Name

Person ID

Manager

Location

Person Type: -Select One-

Terminated After

Terminated Before

Include All Suborganizations

Search

*First Name field*

*Search button*

Figure 8 – First Name and Last Name fields and Search button

Select the checkbox for the name of the other approver.

Search Person, Internal

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

Population\* Internal  
Last Name alternate  
Username  
Organization  
Domain  
Security Roles -Select One-  
Terminated Before  
First Name nih  
Person ID  
Manager  
Location  
Person Type -Select One-  
Terminated After  
Include All Suborganizations

Search

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

Showing 1 out of 1 results

Select	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	ALTERNATEMANAGER	NIHALTERNATEMANAGER		00390467	HNAM6		

Select checkbox

Figure 9 – Select checkbox

Select the **Generate Report** button.

Report Parameters - NIH Registrations Needing Approval

Do NOT generate my pending approvals list

Approver Name NIHALTERNATEMANAGER

Generate Report Cancel

Generate Report button

Figure 10 – Generate Report button

Review the information included in the report to determine accuracy, paying attention to the CAN to ensure the proper obligation of funds. Any orders without a CAN will display as N/A.

**NOTE:** Refer to LMS QRG [TS73-S: Review/Add CAN on an order—Manager or Alternate Manager](#) or [TS74-A: Review/Add CAN on an order-AAO](#) to modify a CAN if necessary.

To continue the process and approve the order, refer to the following LMS QRGs, depending on your role in the approval chain:

[TS75-S: Approve Orders—Manager](#)  
[TS76-S: Approve Orders—Alternate Manager](#)  
[TS71-A: Approving Orders—AAO](#)

To print the report, select the **Print this report** icon.

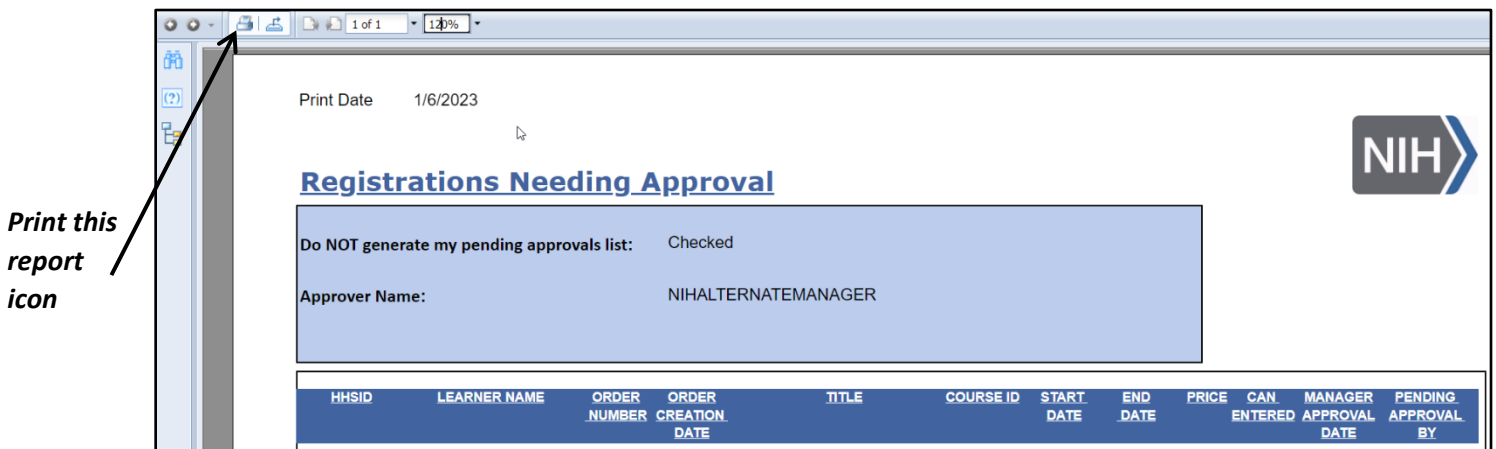


Figure 11 – Print this report icon

Select the Export button on the Print to PDF message box.

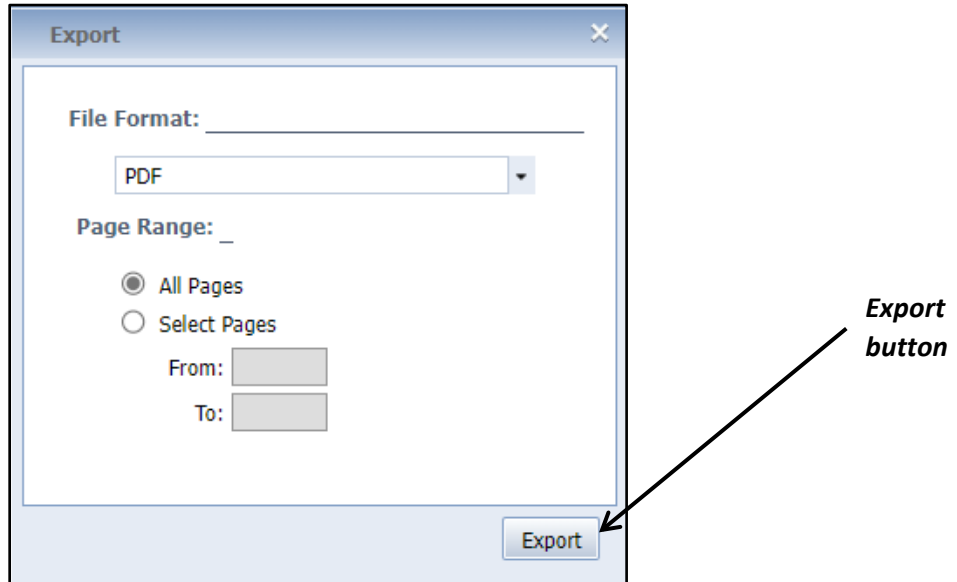


Figure 12 – Export button

Depending on the amount of data in the report, it could take up to five minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Select the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

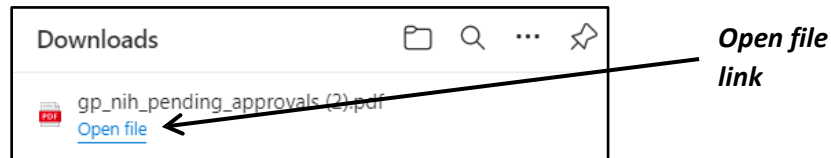


Figure 13 - Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).



## Running the NIH Roster Report

This report enables administrators to identify all Learners enrolled in a specific offering, including email addresses, by registration status, and print a class sign-in sheet.

Log into the LMS.

Click on **Admin** icon.



Figure 1 – Admin icon

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

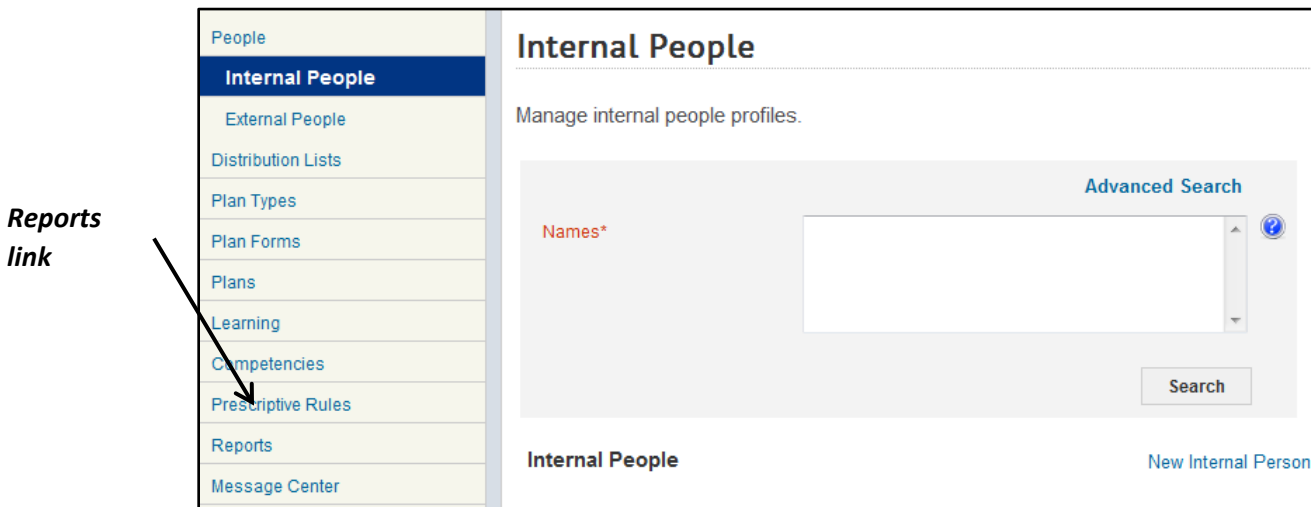


Figure 2 – Reports link

Enter NIH Roster in the Name field and click the **Search** button.

*Name  
field*

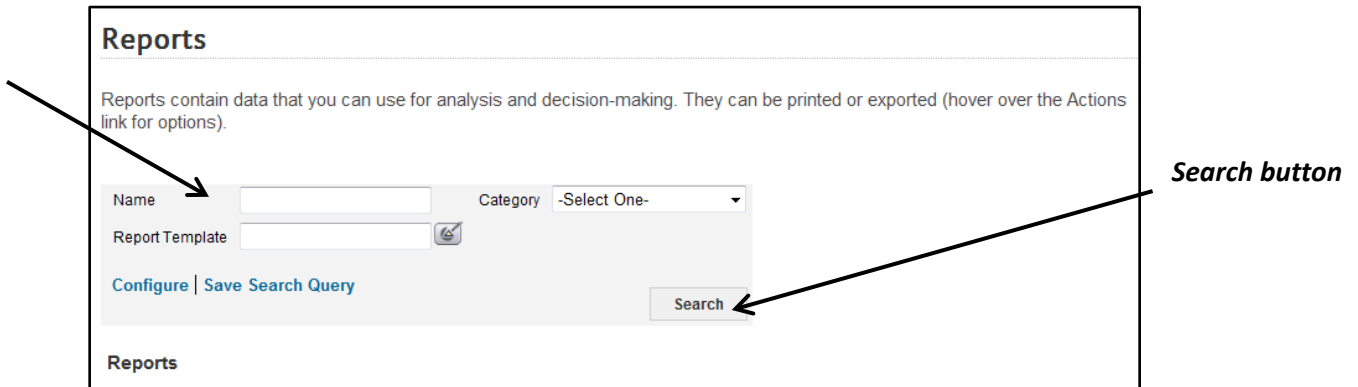


Figure 3 – Name field and Search button

Click the **Actions** link for the NIH Roster Report.

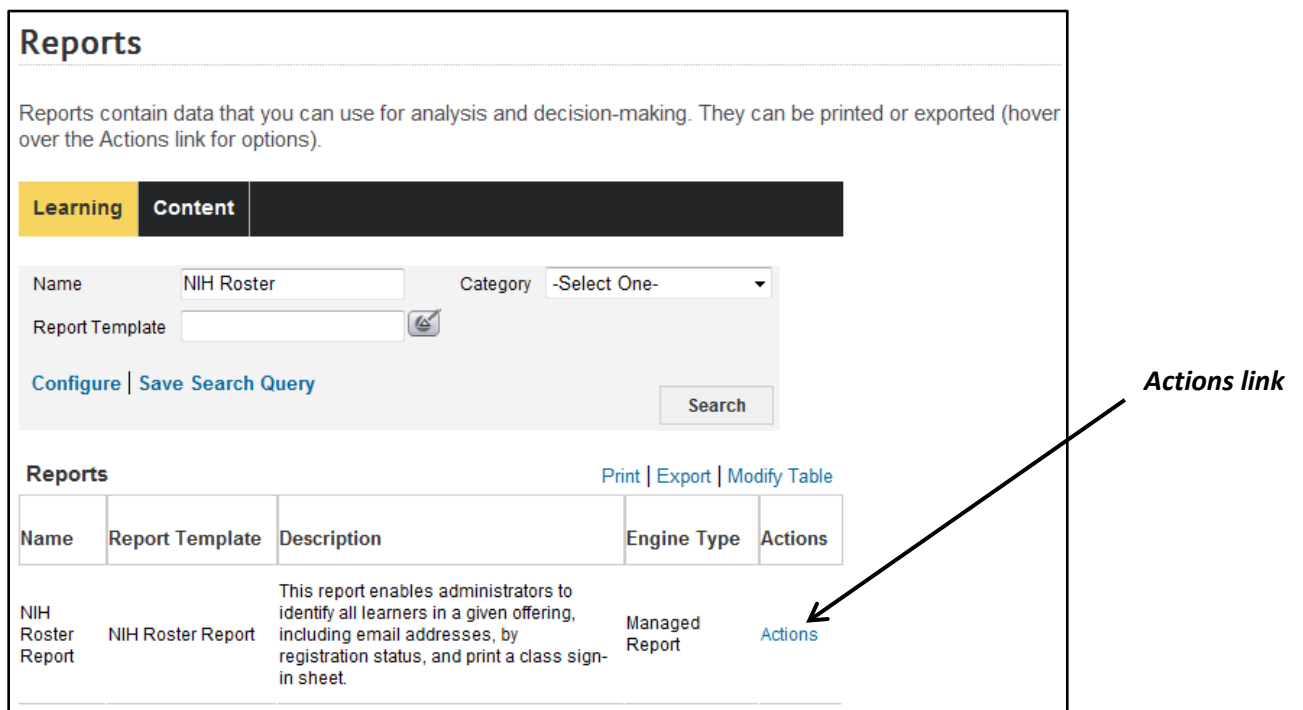


Figure 4 – Actions link

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

The screenshot shows the 'Reports' section of a web application. At the top, there are tabs for 'Learning' and 'Content'. Below the tabs, there are search filters for 'Name' (NIH Roster) and 'Category' (-Select One-). A 'Search' button is present. Below the search filters, there are links for 'Configure' and 'Save Search Query'. A table of reports is displayed, with columns for 'Name', 'Report Template', 'Description', 'Engine Type', and 'Actions'. The first row shows 'NIH Roster Report' with a description: 'This report enables administrators to identify all learners in a given offering, including email addresses, by registration status, and print a class sign-in sheet.' The 'Actions' column for this report contains a link labeled 'Actions'. A tooltip menu is open over this link, showing options: 'Email', 'Execute', and 'Subscribe'. An arrow points from the text 'Execute link' to the 'Execute' option in the tooltip.

Figure 5 – Execute link on the Actions activity menu

Click the **Offering Number** pick icon.

The screenshot shows the 'Report Parameters - NIH Roster Report' page. It features a form with the following elements:
 

- 'Offering Number(Offering cannot exceed more than 5 sessions)\*': A text input field with a pick icon (a small square with a triangle) to its right. An arrow points from the text 'Offering Number pick icon' to this icon.
- 'Only Waitlisted\*': A dropdown menu currently set to 'No'.
- 'Generate Report' and 'Cancel' buttons at the bottom right.

Figure 6 – Offering Number pick icon

Note: When the **Only Waitlisted** parameter is set to “Yes”, the report will return approved and pending approval waitlisted enrollments only.

To search for the offering, you can use the **Title**, **ID**, **Domain**, **Audience Type/Subtype**, **Start Date >=**, **End Date <=**, **Course ID**, and **Language** fields, and/or the **Delivery** pull-down menu. Once you have entered the search criteria, click the **Search** button.

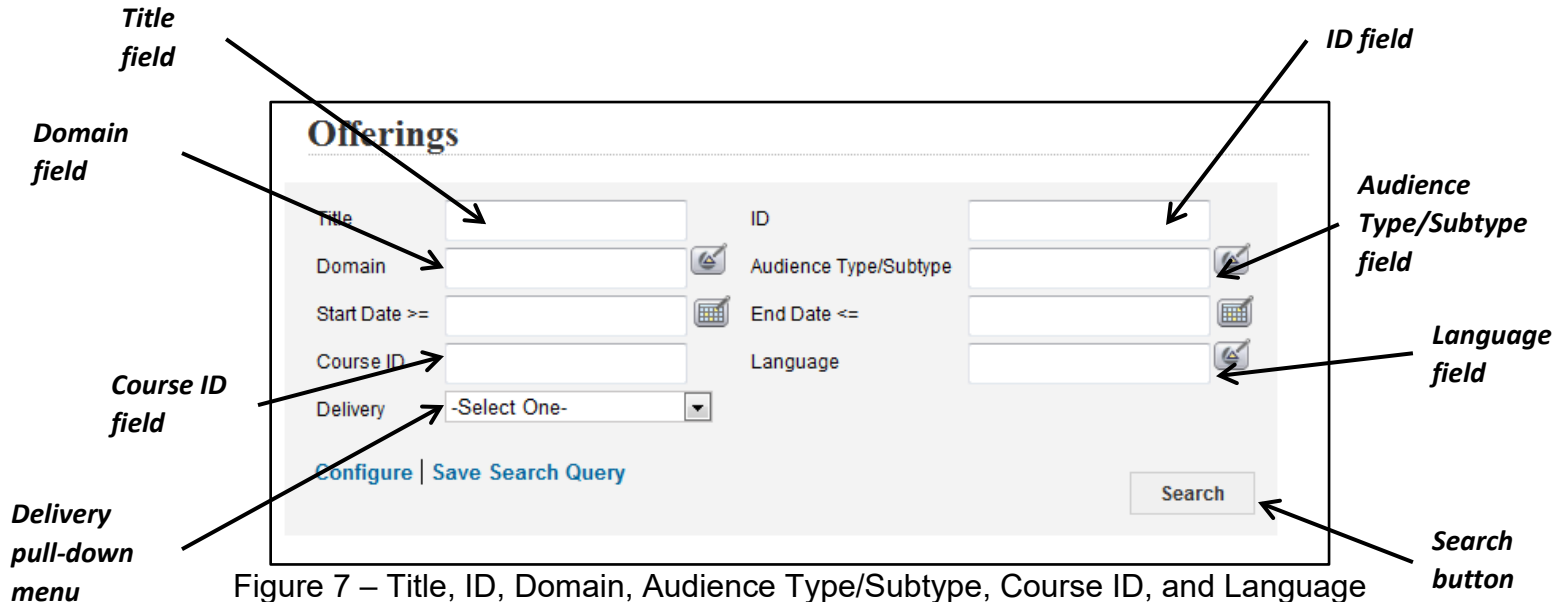


Figure 7 – Title, ID, Domain, Audience Type/Subtype, Course ID, and Language fields, the Delivery pull-down menu, and the Search button

You can also enter the **Start Date** and **End Date** in the appropriate fields in MM/DD/YYYY format. Alternately, you can use the **Start Date >=** and **End Date <=** pick icons to select the date.

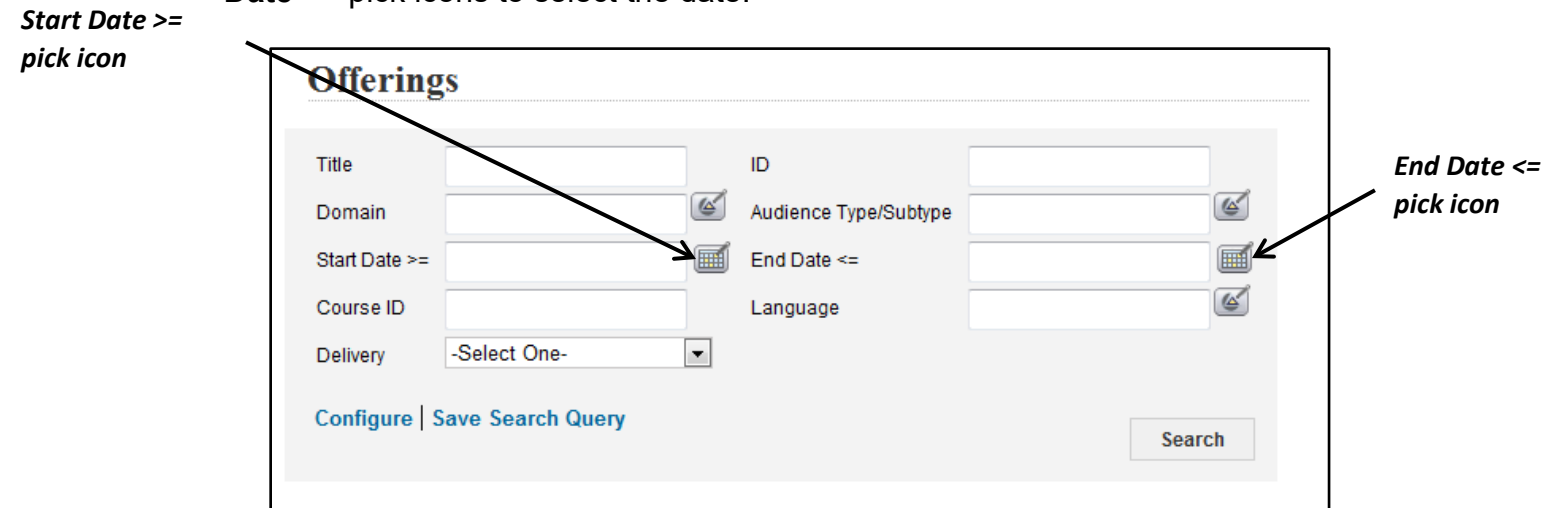


Figure 8 – Start Date >= and End Date <= pick icons

Click the **Select** checkmark to select the offering.

**Offerings**

Title  ID

Start Date >= 01/01/2010  End Date <= 12/31/2010

Enrollment Closes Before <=  Open Enrollment Date >=

Language  Domain

Audience Type/Subtype  Status -Select One-

Location  Course ID

Delivery Instructor led

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

1 2 3 4 5 ... Next  |  |

Showing first 25 out of 195 results

Select	Title	ID	Course ID	Start Date	End Date	Location	Language
<input type="checkbox"/>	NIH-Holding Employees Accountable	00019382	NIHTCMGT1127	10/26/2010	10/27/2010	6116 Executive Blvd	English
<input type="checkbox"/>	NIH NHGRI Federal Benefits	00018463	NIHNHGRIADM109	02/25/2010	02/25/2010	31 Center Dr	English
<input type="checkbox"/>	Microsoft Office Word 2007	00016915	IT8251	05/26/2010	05/26/2010	HHS University	English

Select checkbox

Figure 9 – Select checkmark

Click the **Generate Report** button.

**Report Parameters - NIH Roster Report**

Offering Number(Offering cannot exceed more than 5 sessions)\*

Only Waitlisted\*

Generate Report button

Figure 10 – Generate Report button

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



Figure 11 – Print this report button

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

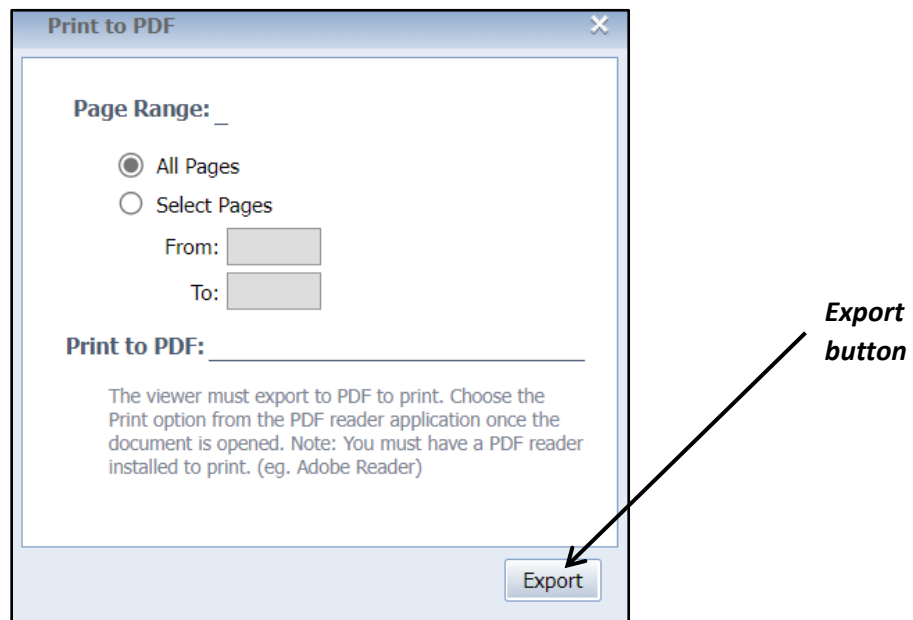


Figure 12 – Export button

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

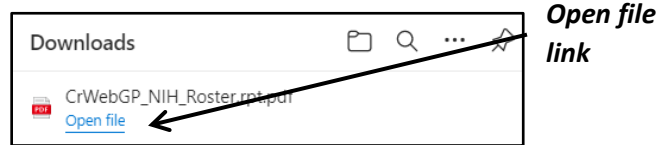


Figure 13 – Open file link

Print the file from Adobe Reader/Acrobat.

If you experience trouble with this process, please refer to the [LMS Support Page](#).

## Running the NIH Transcript Report

The NIH Transcript report will provide a comprehensive list of all completions recorded in the HHS Learning Portal (LMS) for a specified date range. The completions displayed in the report are limited to the Learner who has logged into the LMS.

Log into the LMS.

**NOTE:** For instructions about logging on, refer to the [Log-On Instructions \(TS02-L\)](#) QRG.

From the LMS Home Page, select the **Reports** link in the left navigation menu.

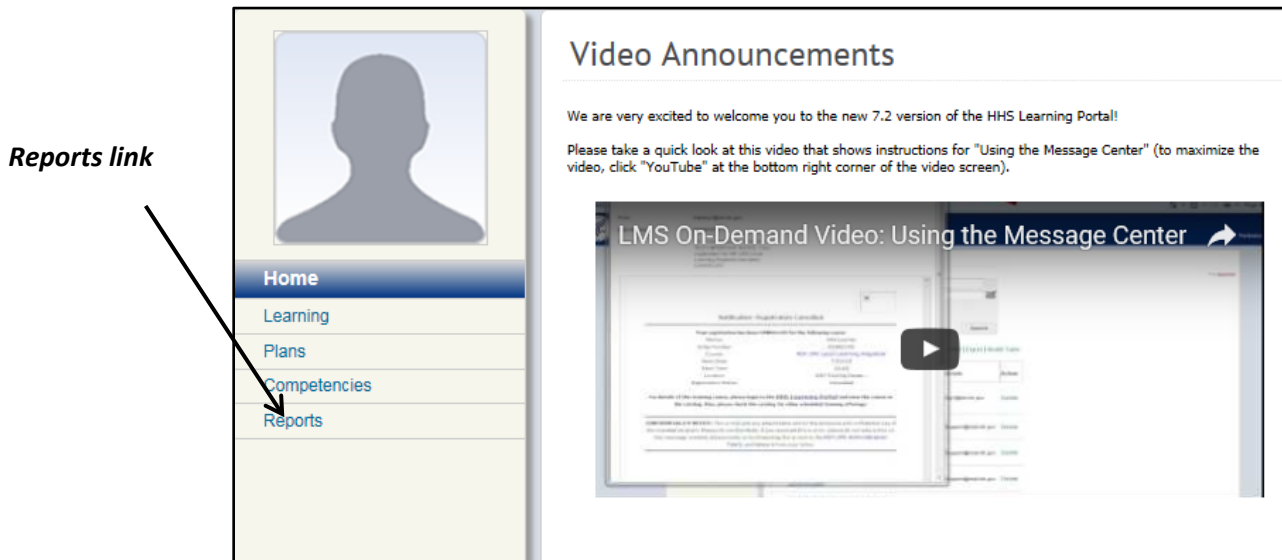


Figure 1 – Reports link in the left navigation menu

Enter NIH Transcript in the **Name** field and select the **Search** button.

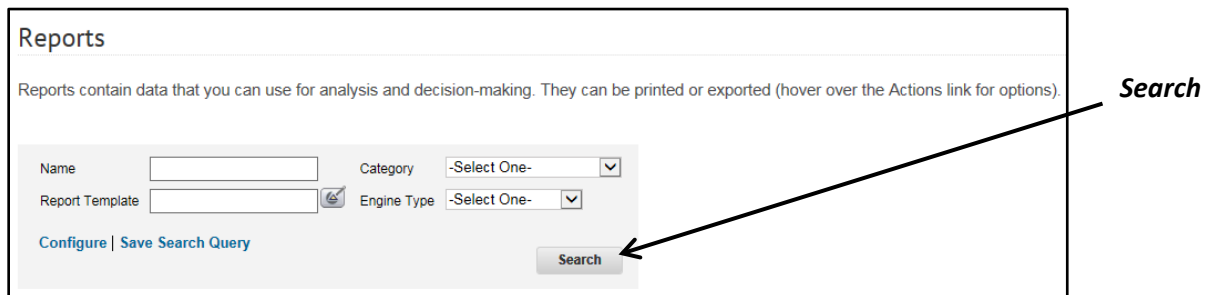


Figure 2 – Name field and Search button



Select the **Actions** link for the NIH Transcript report. Select **Execute**.

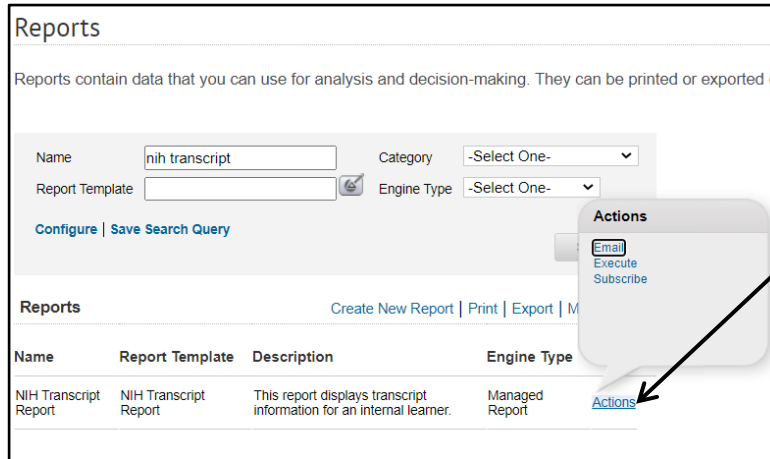


Figure 3 – Actions link for the NIH Transcript report

Enter the **Completion Date After** and **Completion Date Before** in the appropriate fields in MM/DD/YYYY format. Alternate, you can use the Completion Date After and Completion Date Before pick icons to select the dates.

Select the **Generate Report** button to continue.

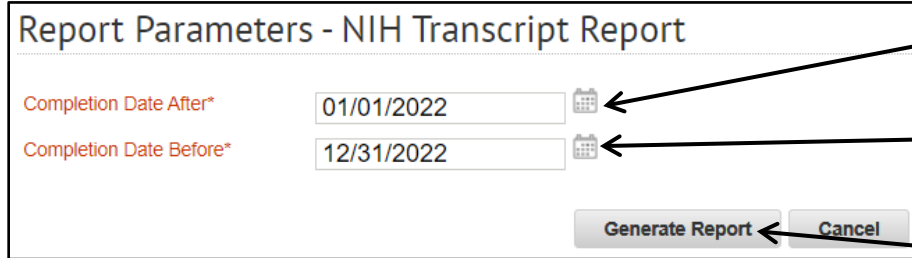


Figure 4 – Generate Report button

To print the report or save as a \*.PDF document, click the **Print this report** icon.



Figure 5 – Print this report button

Select the **Export** button on the Print to PDF message box.

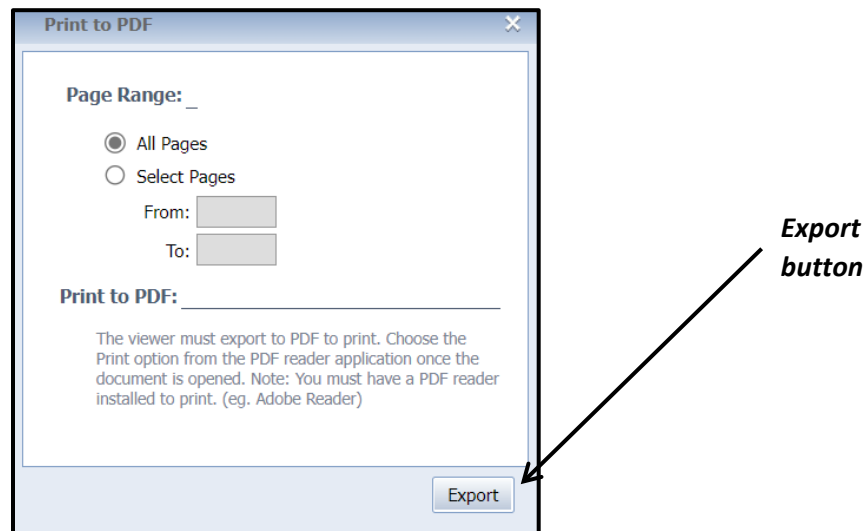


Figure 6 – Export button

Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification will display at the top of the screen in the Microsoft Edge browser when the pdf has been created. Select the **Open file** link on the notification to open the pdf file in Adobe Reader/Acrobat.

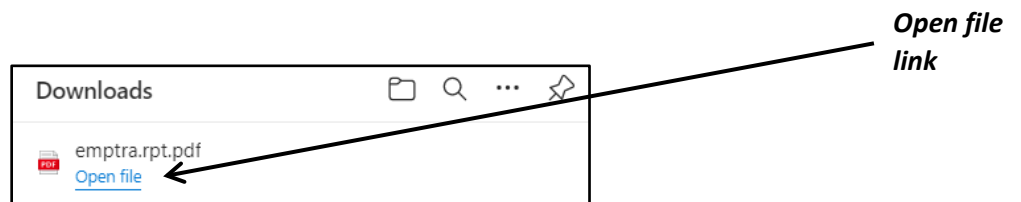


Figure 7 – Open file link

If you experience trouble with this process, please refer to the [LMS Support Page](#).