Office of Human Resources hr.nih.gov

LEARNING MANAGEMENT SYSTEM (LMS)

Reports Quick Reference Guide

Contents

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.

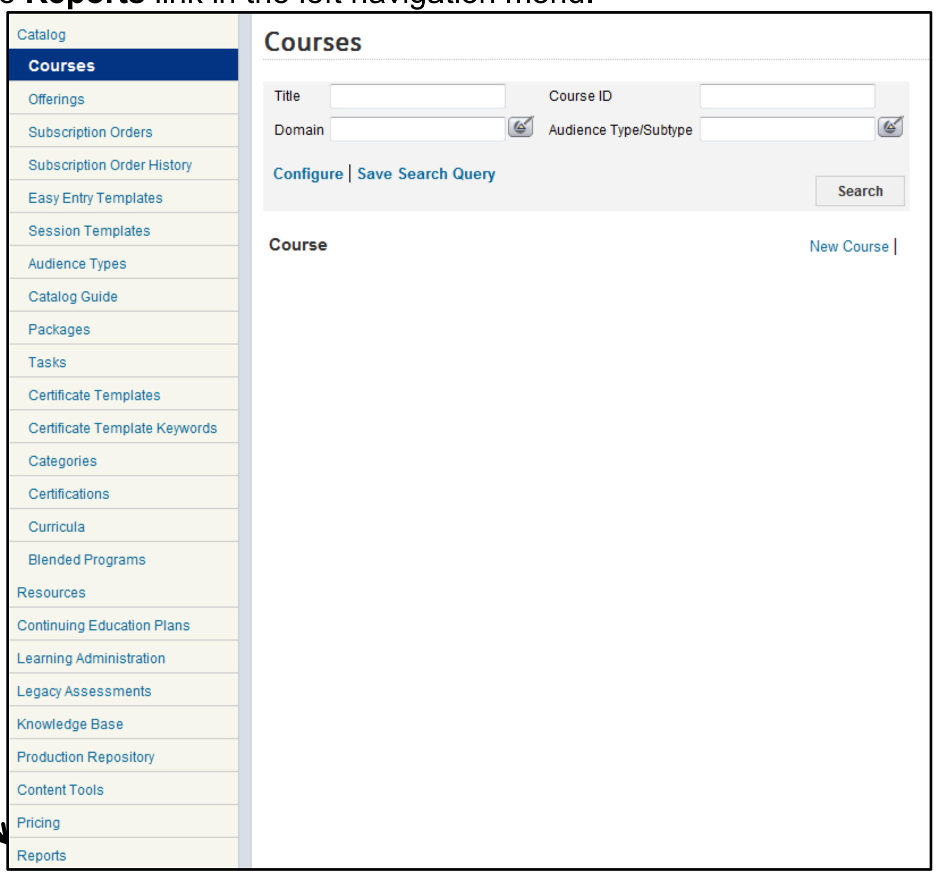
Log into the LMS.

Click the **Admin** icon.

Admin icon

Figure 1 – Admin icon

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



Reports link

Figure 2 – Reports link

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

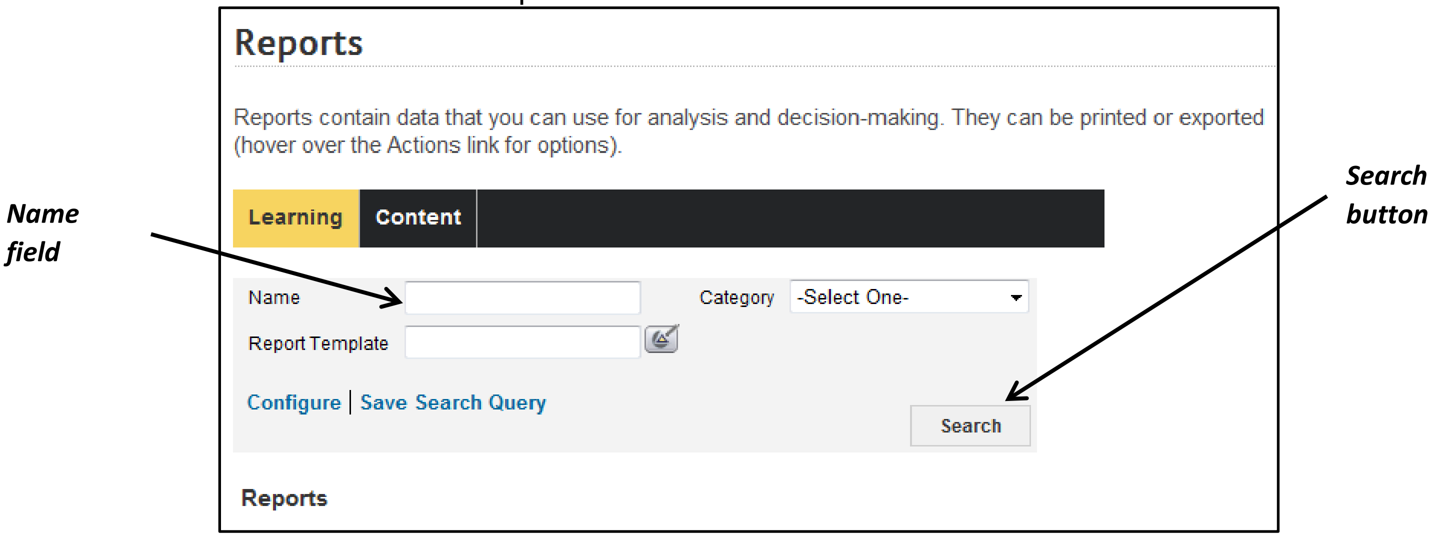


Figure 3 – Name field and Search button

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

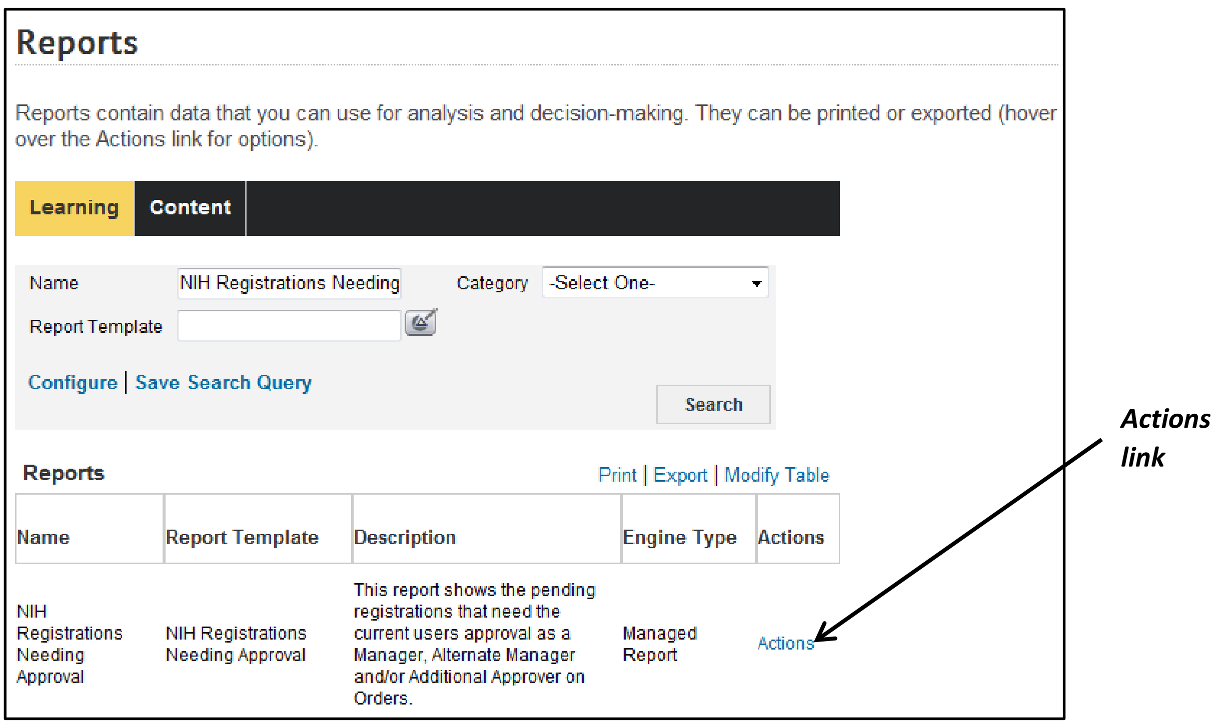


Figure 4 – Actions link

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

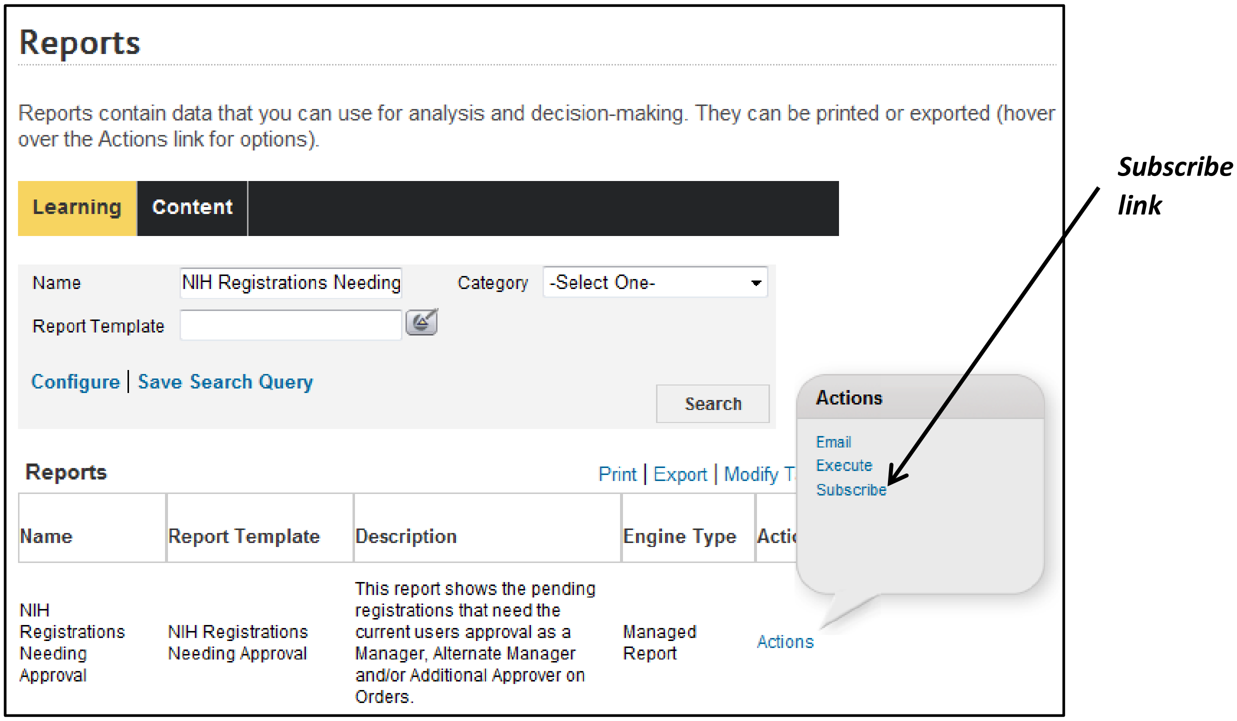


Figure 5 – Subscribe link on the Actions activity menu

Click the **New Report Subscription** link.

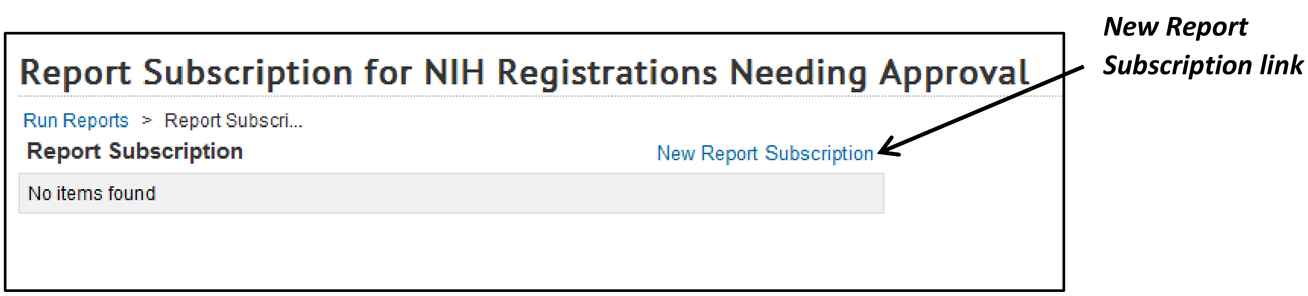


Figure 6 – New Report Subscription link

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

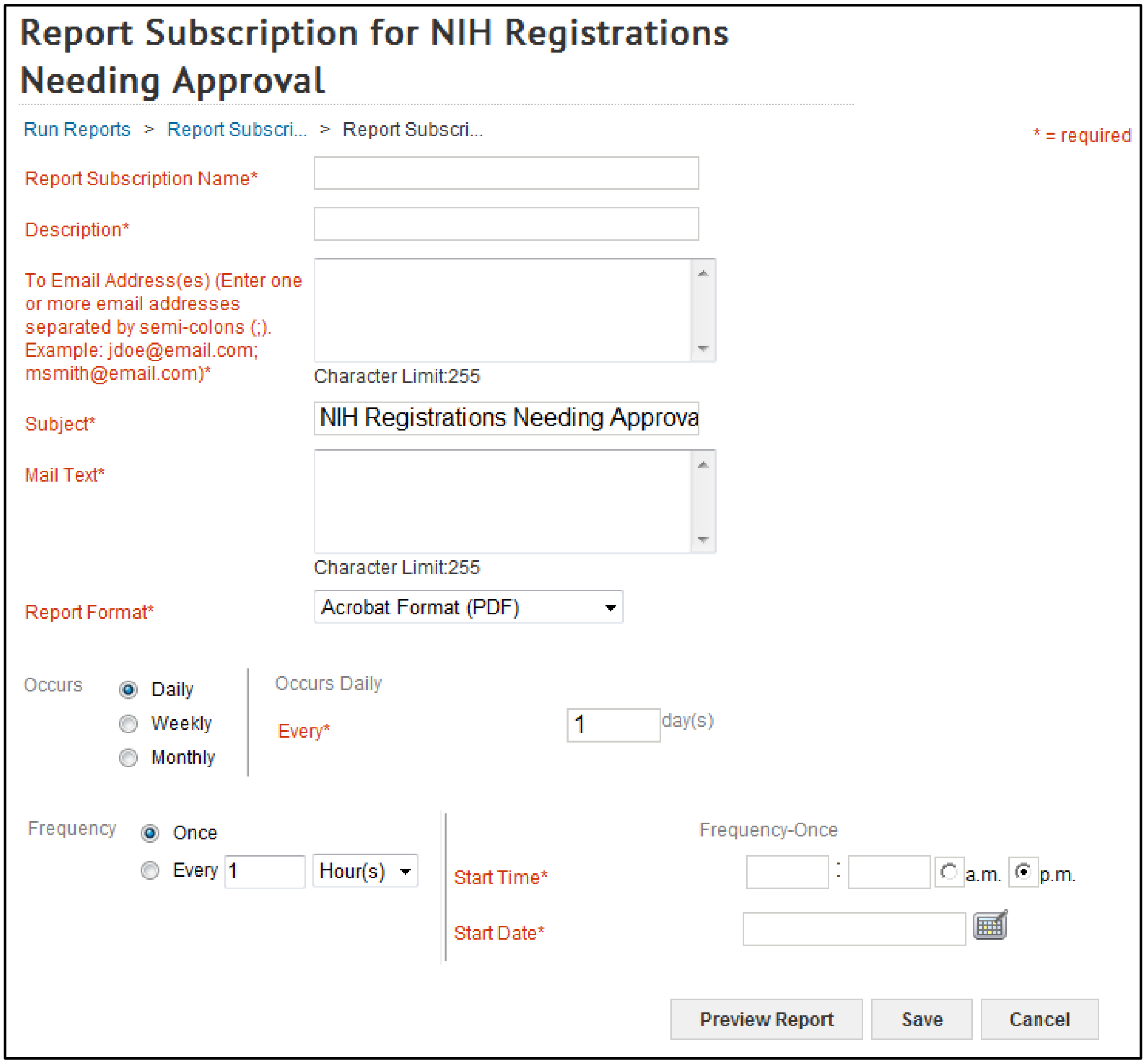


Figure 7 – Report Subscription page

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:

o 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.

o Weekly Occurrence – this option delivers the report each week on the specified days. Click the checkbox to include the day in the delivery cycle.

o 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 15th day of each month;

entering a value of 3 for the month and 28th for the day of the month would send the report on the 28th 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.

Print this report icon

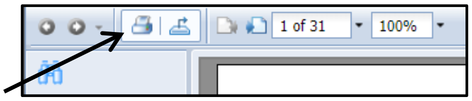
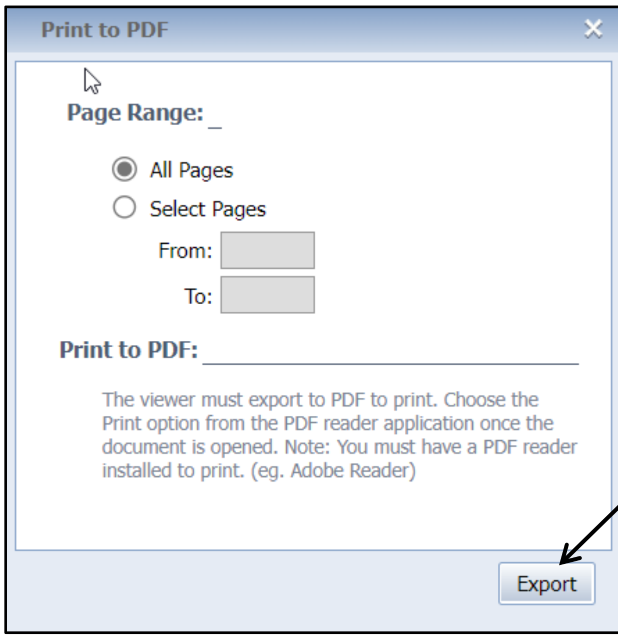


Figure 1 – Print this report icon

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



Export button

Figure 2 – 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.

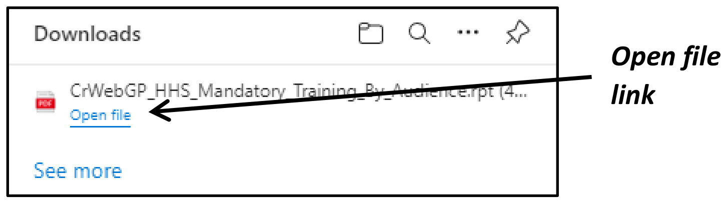


Figure 3 – Open file link

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.

Export this report icon

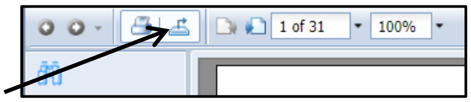
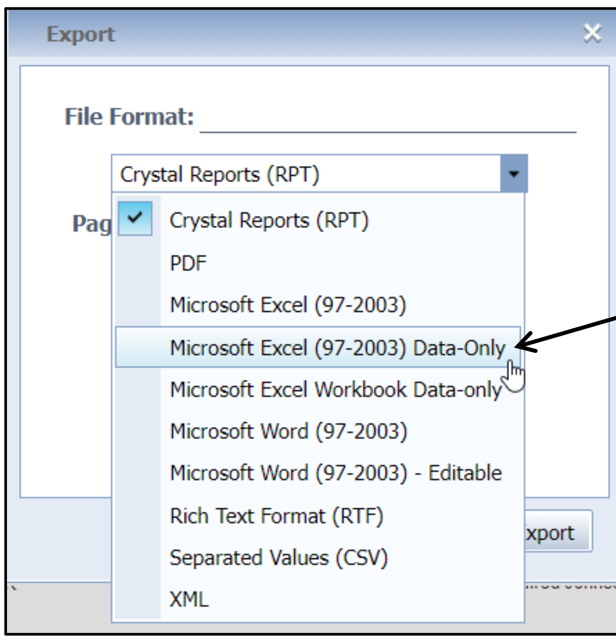


Figure 1 – Export this report icon

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



Microsoft Excel (97-2003) Data-Only

Figure 2 – File format dropdown list

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

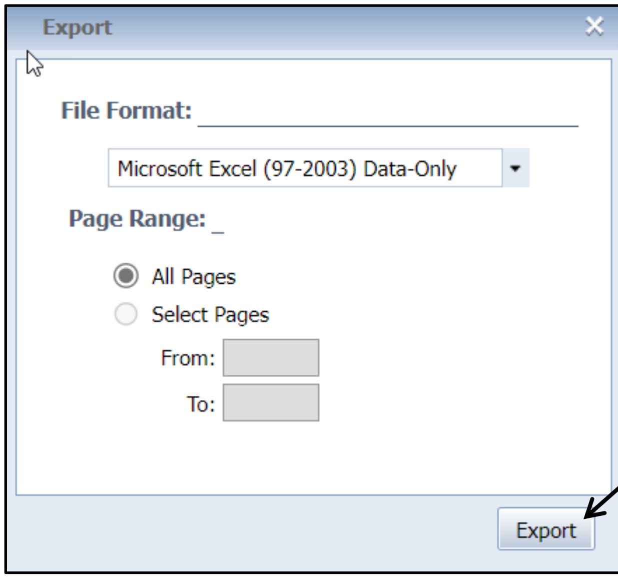


Figure 3 – Export button

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.

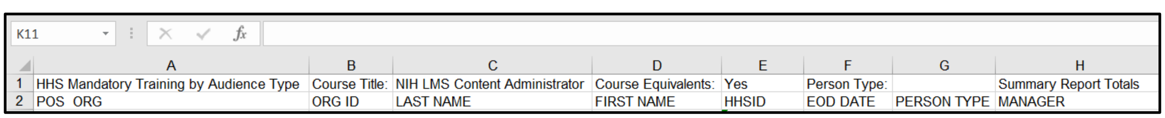


Figure 4 – Excel spreadsheet

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.

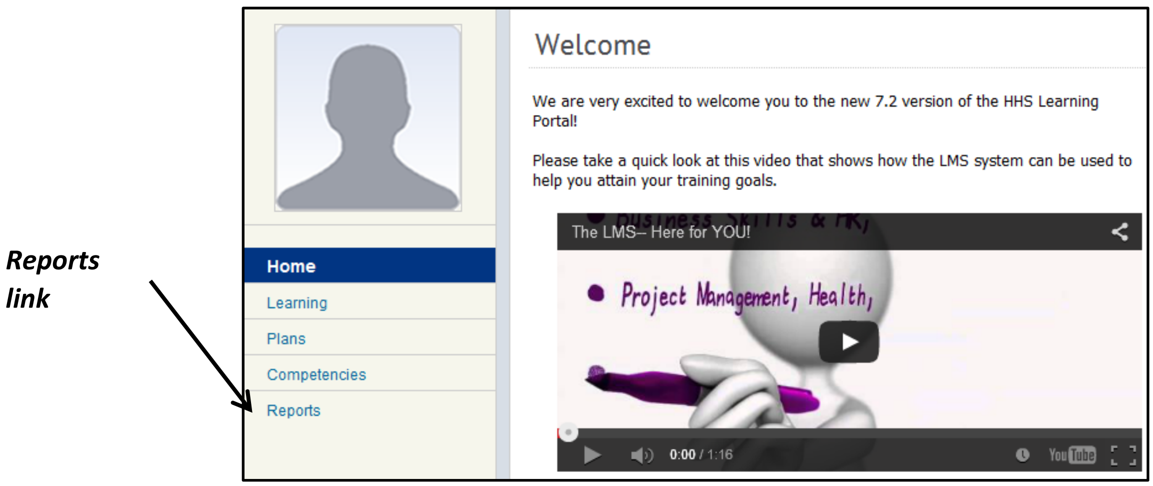


Figure 1 – Reports link

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

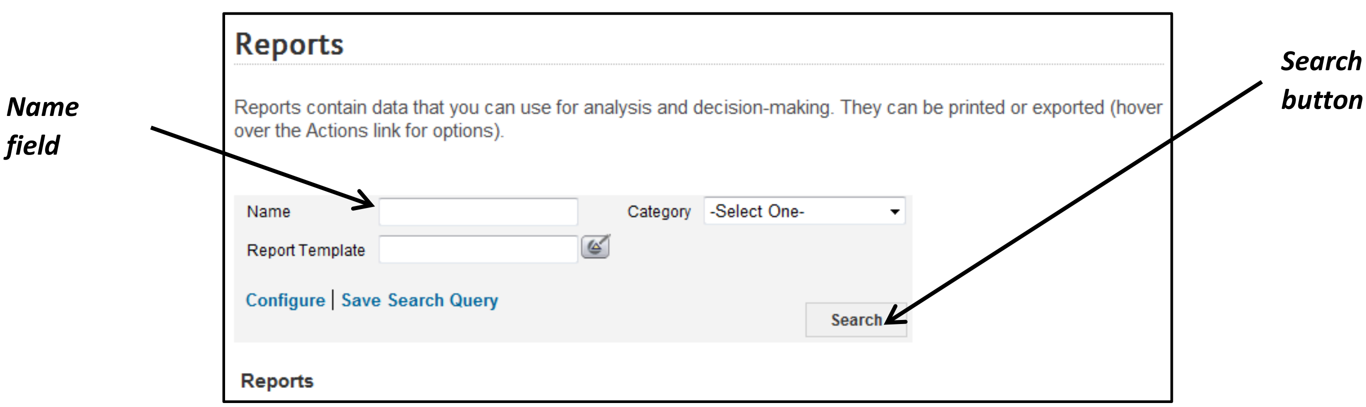


Figure 2 – Name field and Search button

Click the **Actions** link.

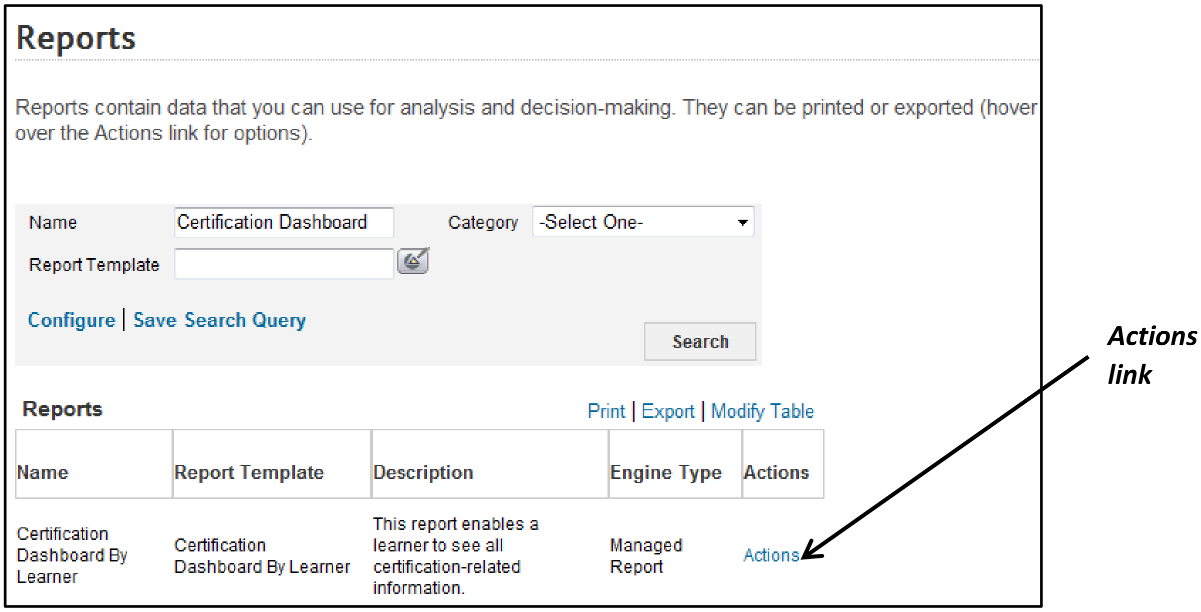


Figure 3 – Actions link

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

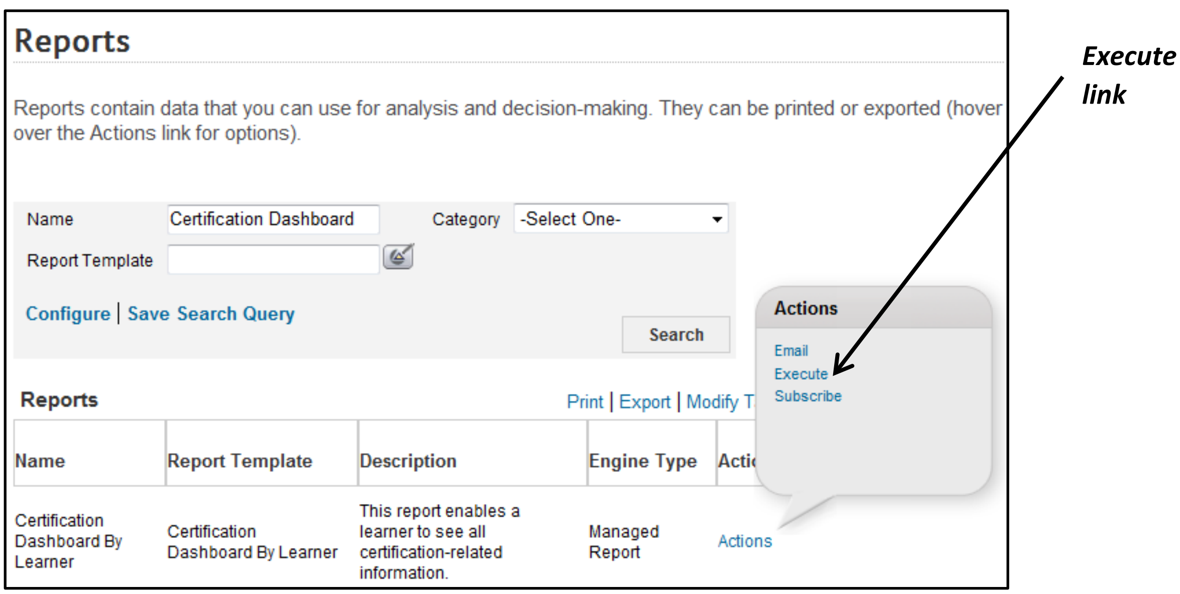


Figure 4 – Execute link on the Actions activity menu

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

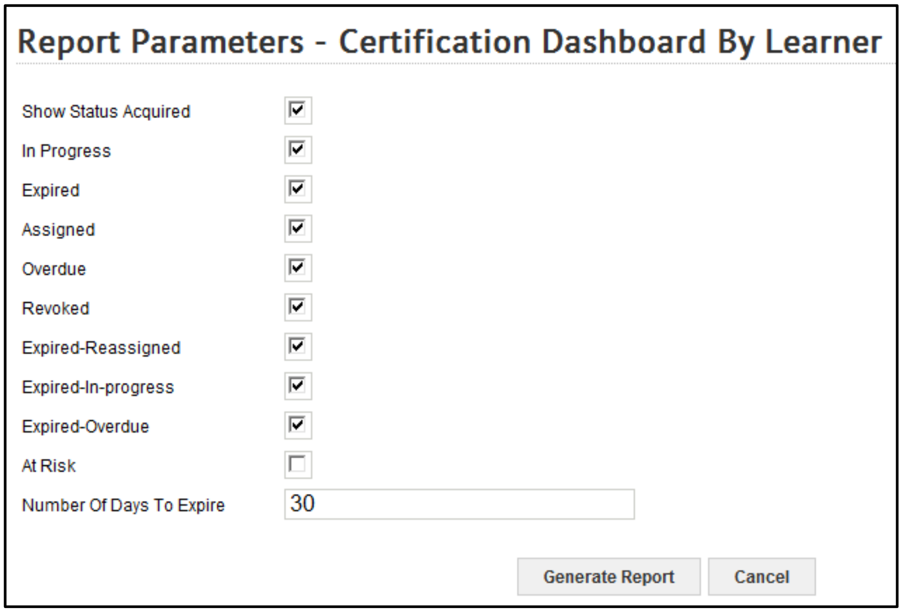


Figure 5 – Certification Dashboard by Learner report parameters page

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.

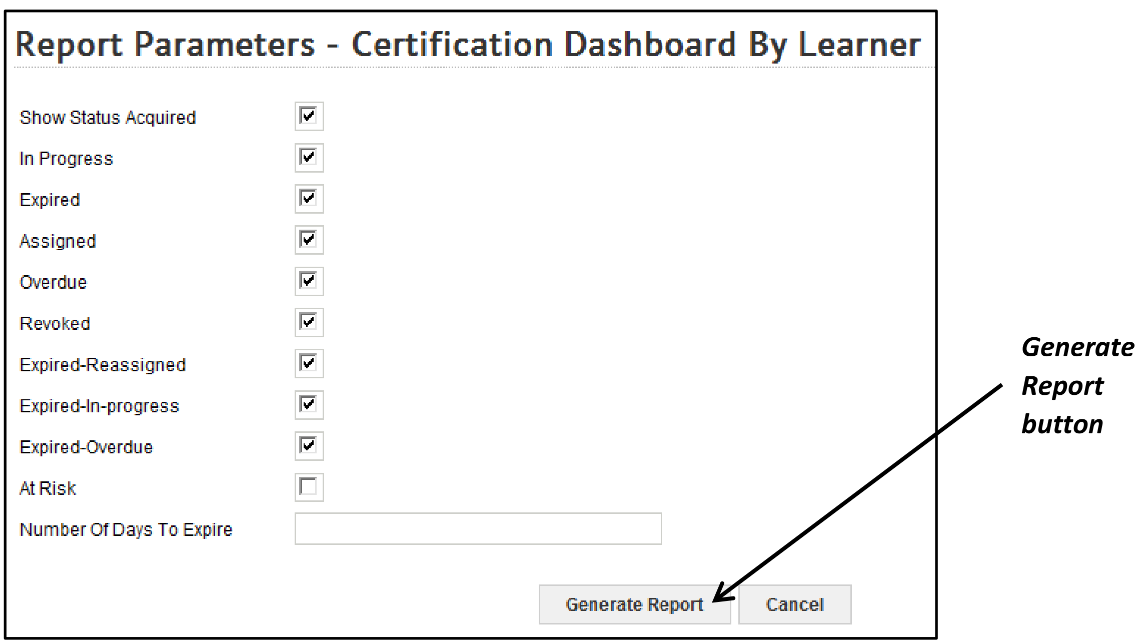


Figure 6 – Generate Report button

Click the **Print this report** icon.

Print this report icon

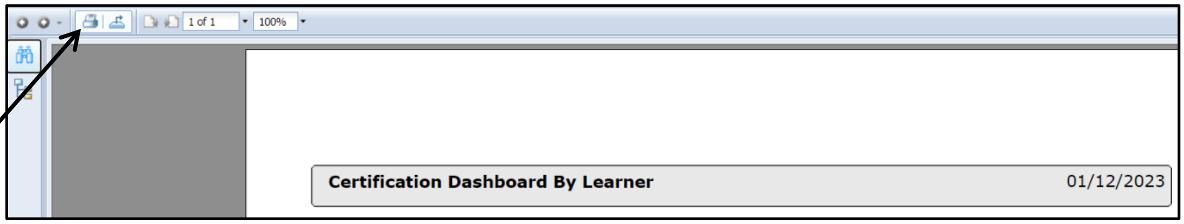
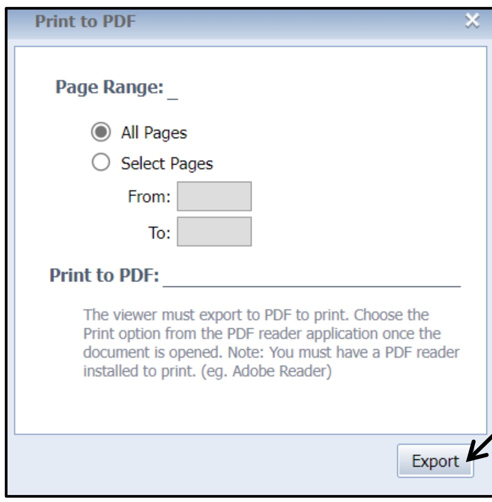


Figure 7 – Print this report button

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.

Open file link

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

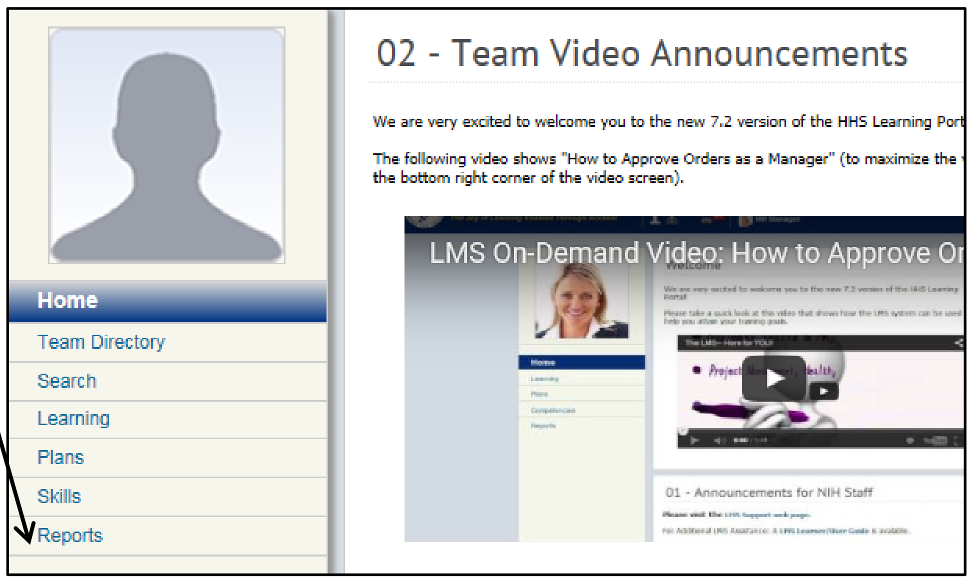


Figure 2 – Reports link in the left navigation menu

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

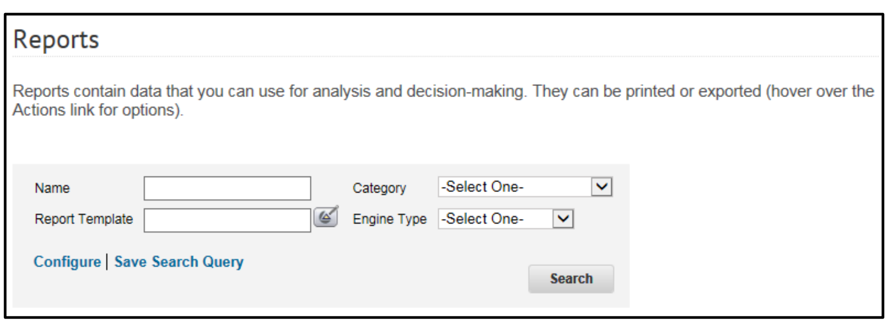


Figure 3 – Reports Search Screen

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

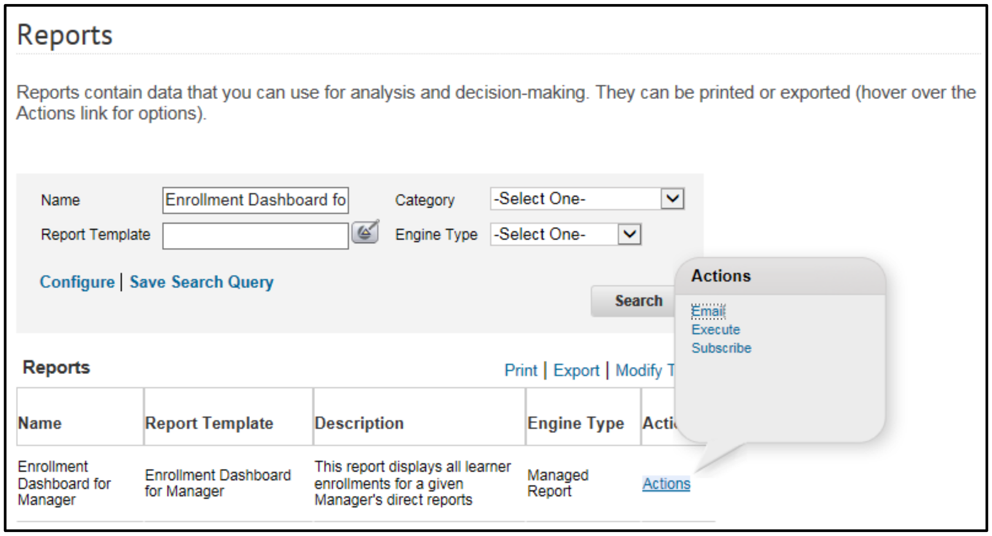


Figure 4 – Reports search screen with an arrow pointing to the Execute link

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

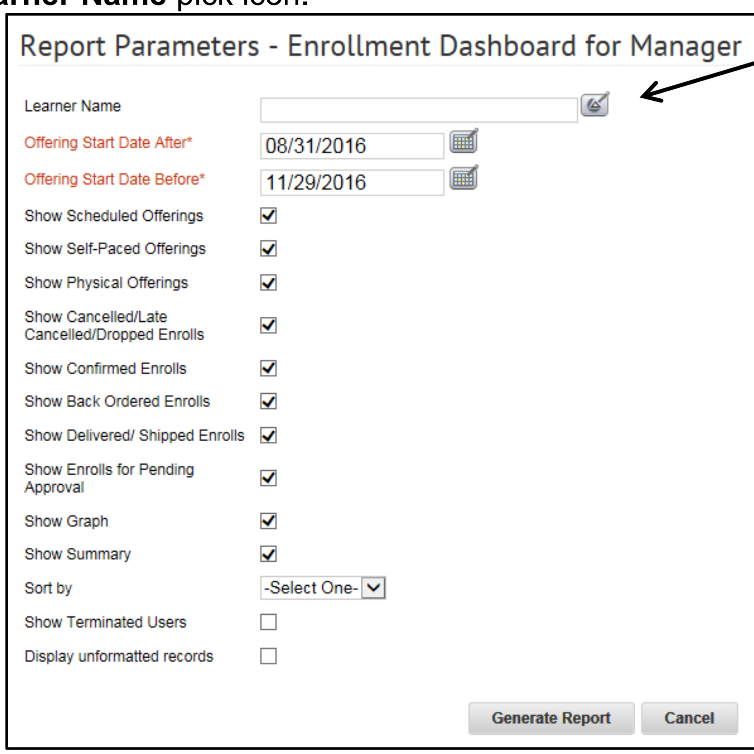


Figure 5 – The Enrollment Dashboard for Manager report parameters screen

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

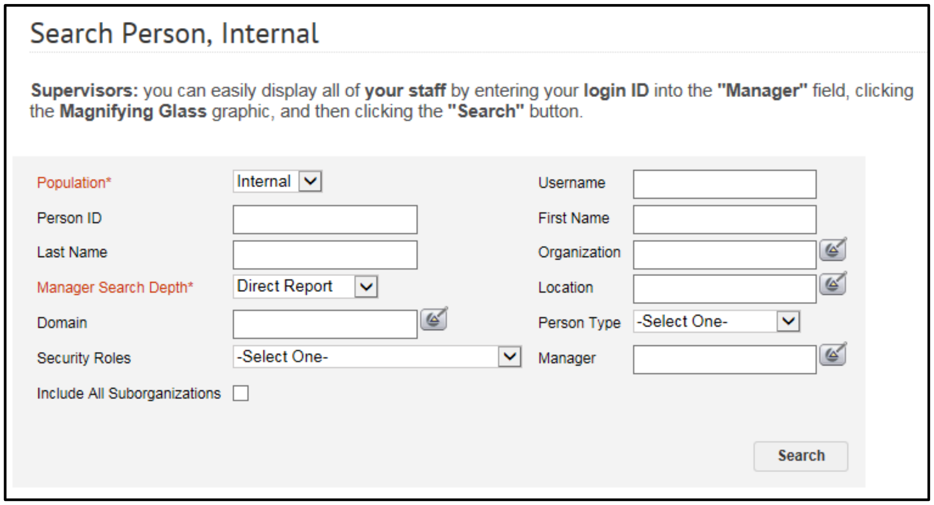


Figure 6 – The Search Person, Internal screen

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

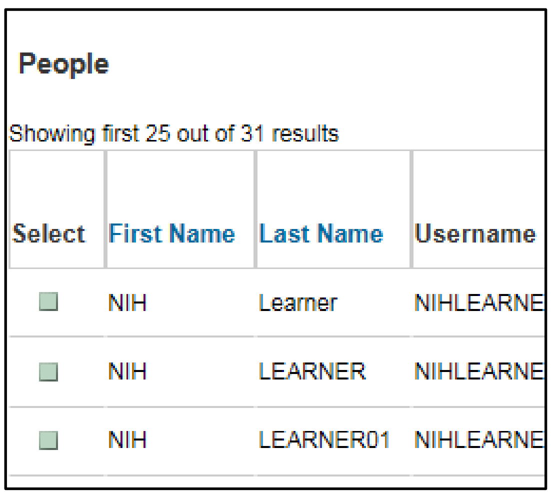


Figure 7 – The search results for the Search Person, Internal screen

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

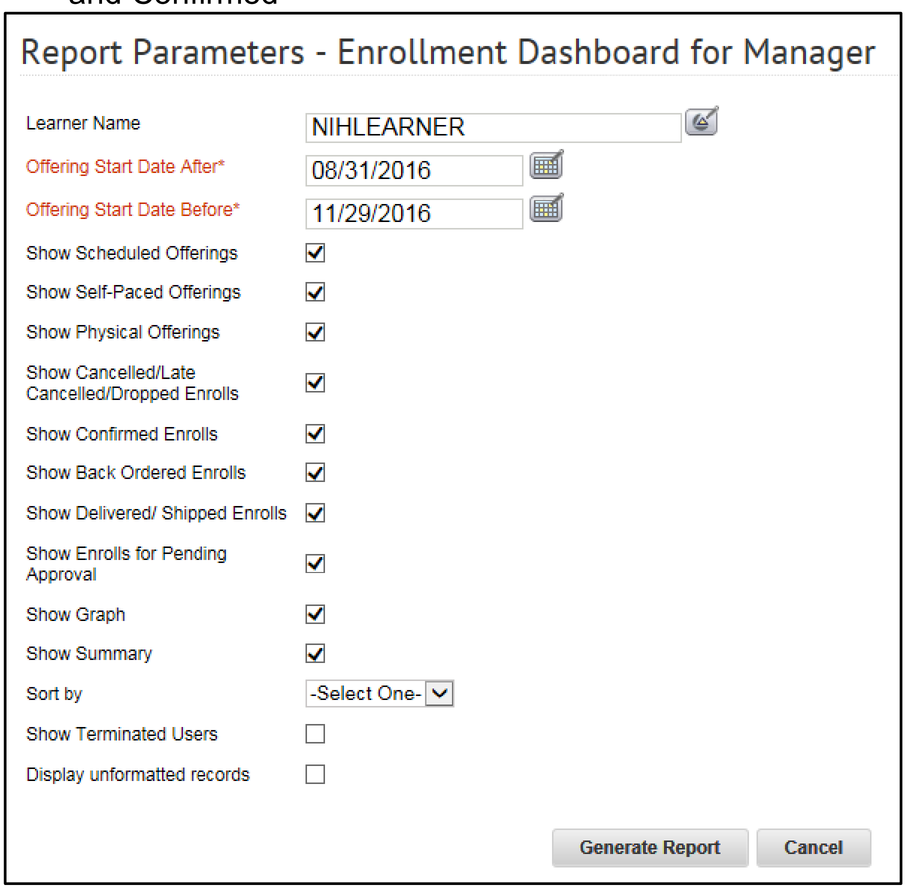


Figure 8 – The Enrollment Dashboard for Manager report parameters screen

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

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

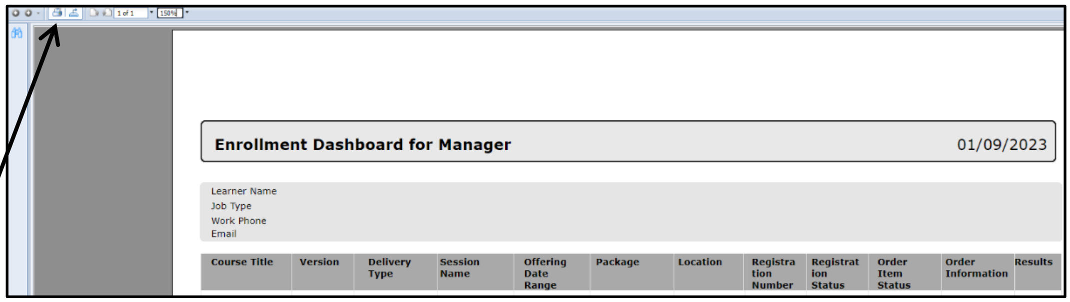


Figure 9 – The report output screen for the Enrollment Dashboard for Manager Report

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

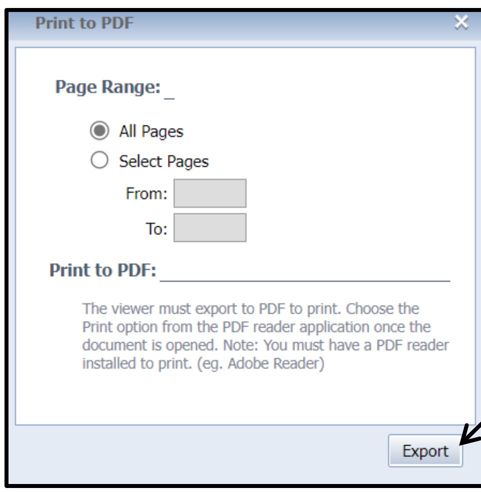


Figure 10 – Export button

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.

Reports link

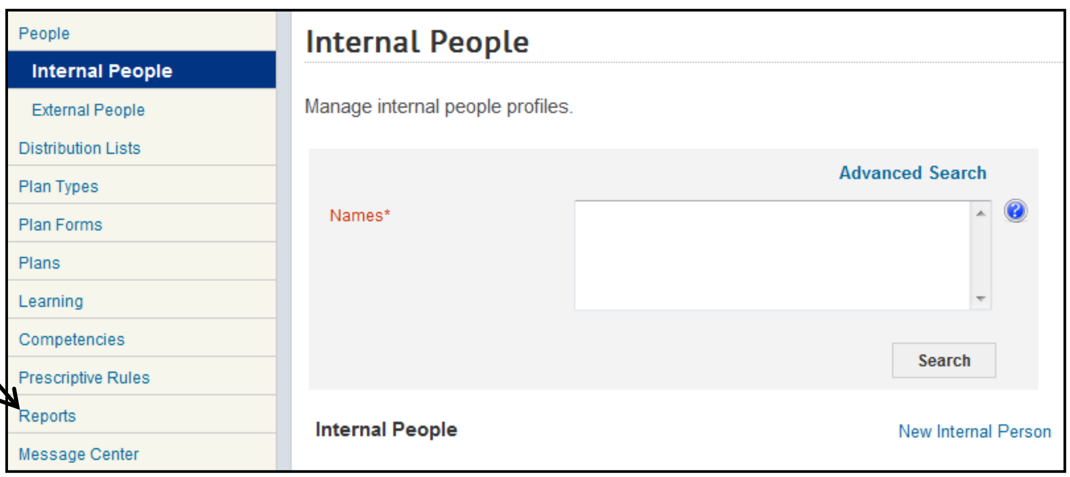


Figure 2 – Reports link

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

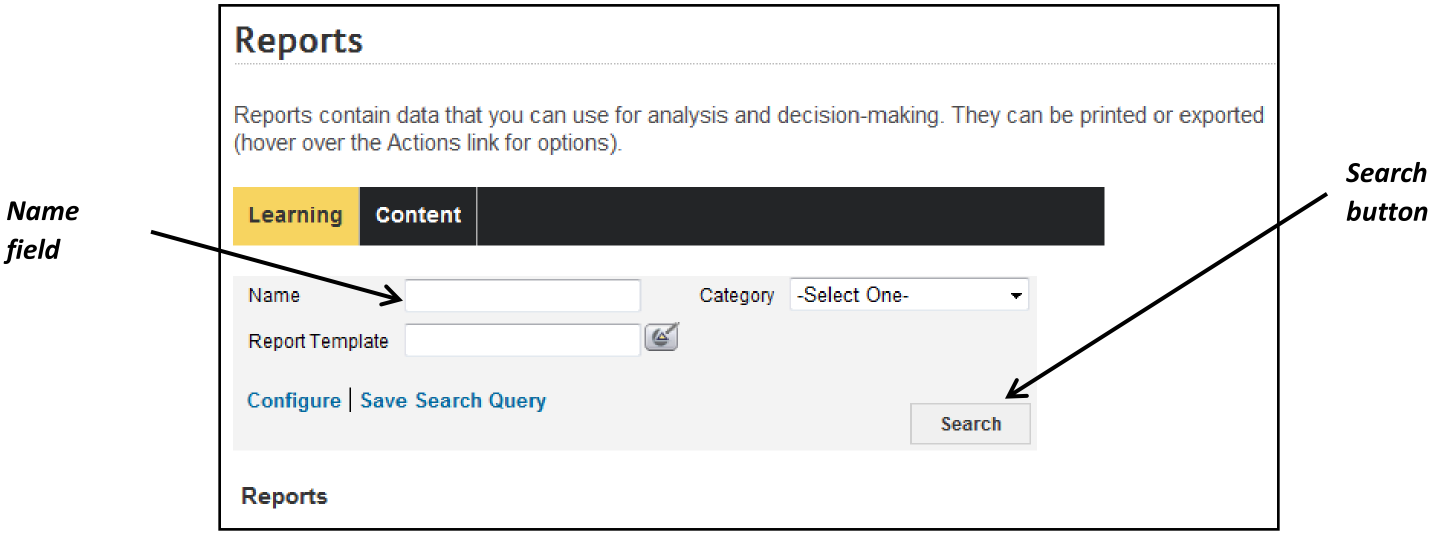


Figure 3 – Name field and Search button

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

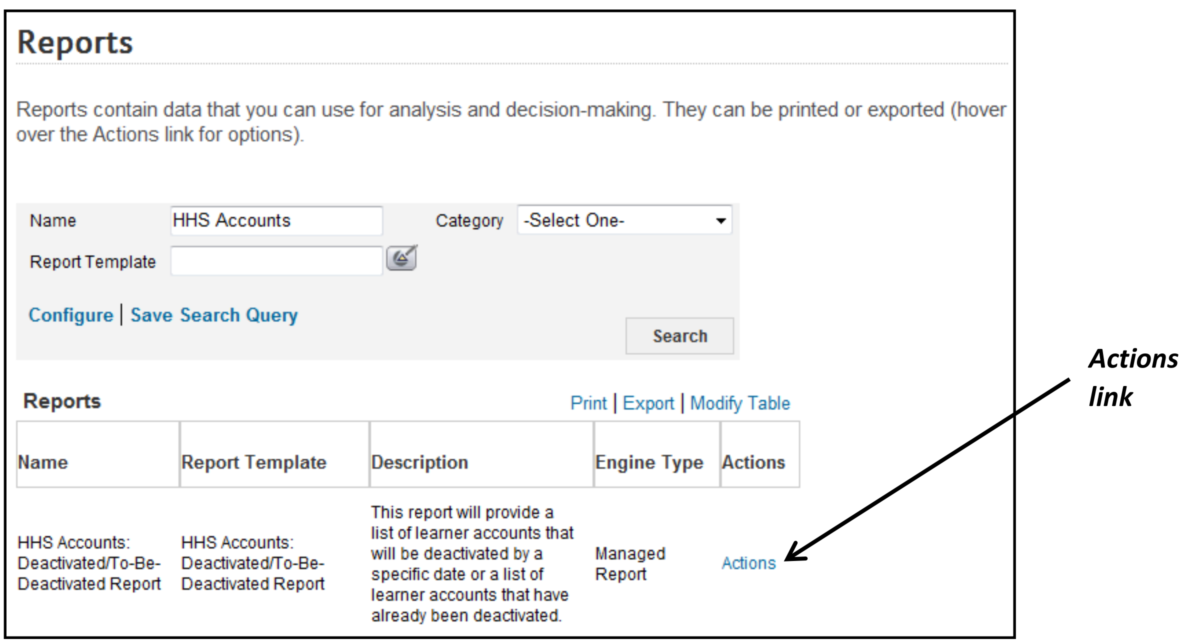


Figure 4 – Actions link

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

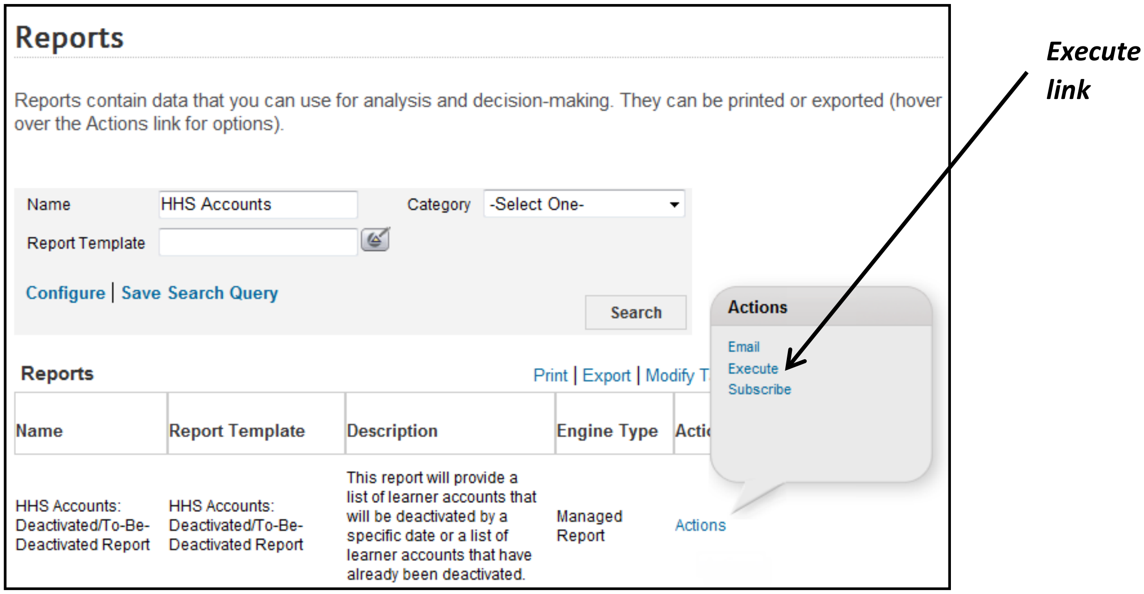


Figure 5 – Execute link on the Actions activity menu

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

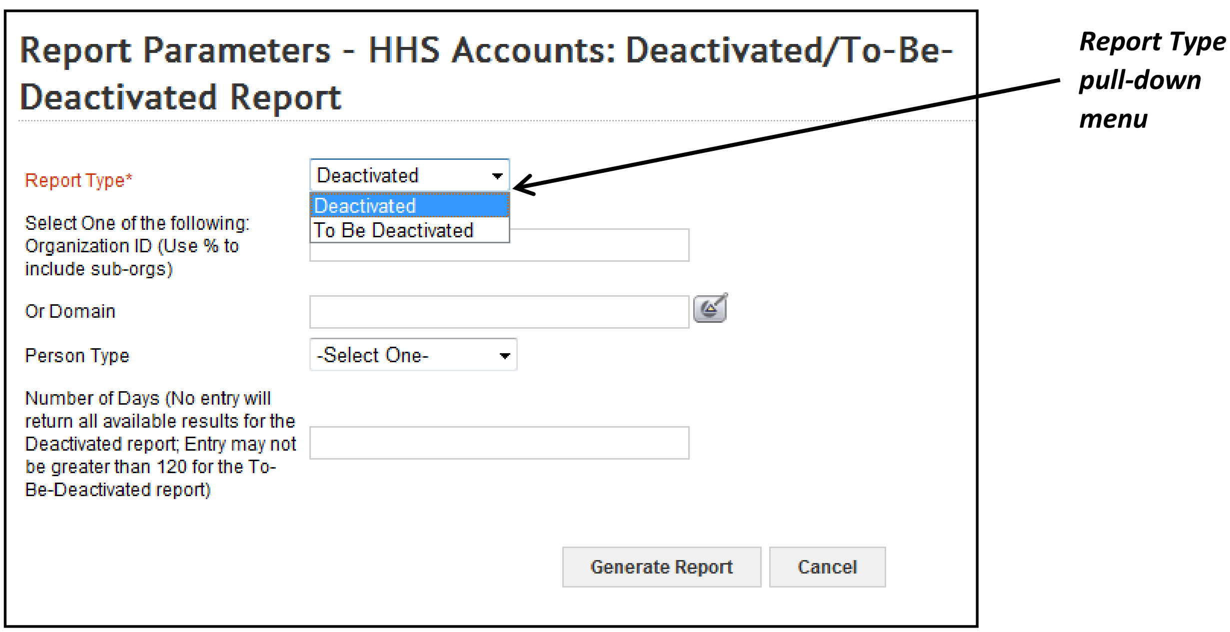


Figure 6 – Report Type pull-down menu

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.

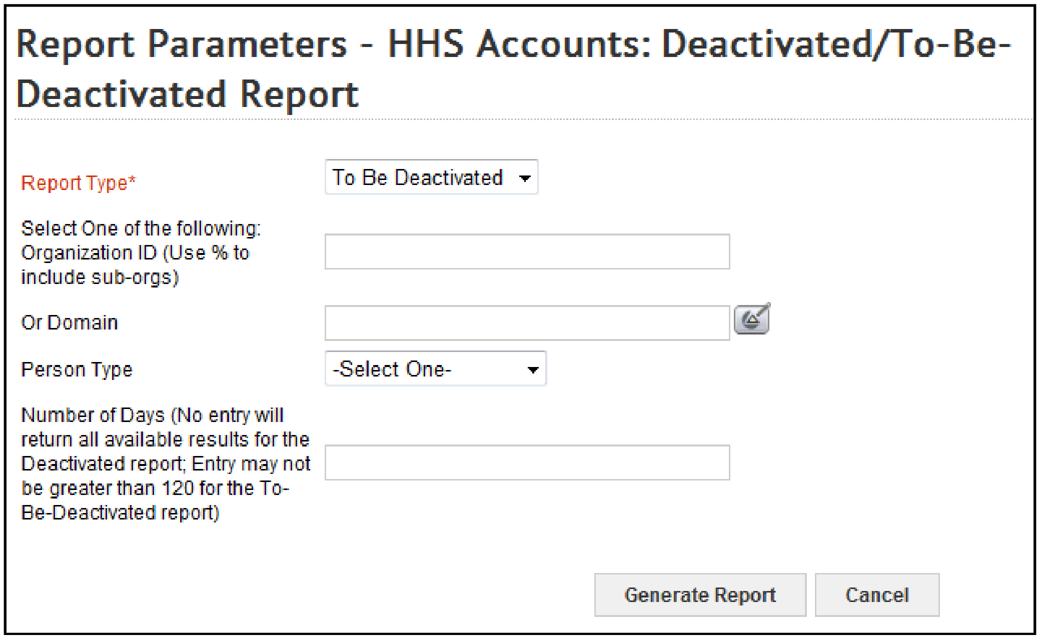


Figure 7 – Organization ID field

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.

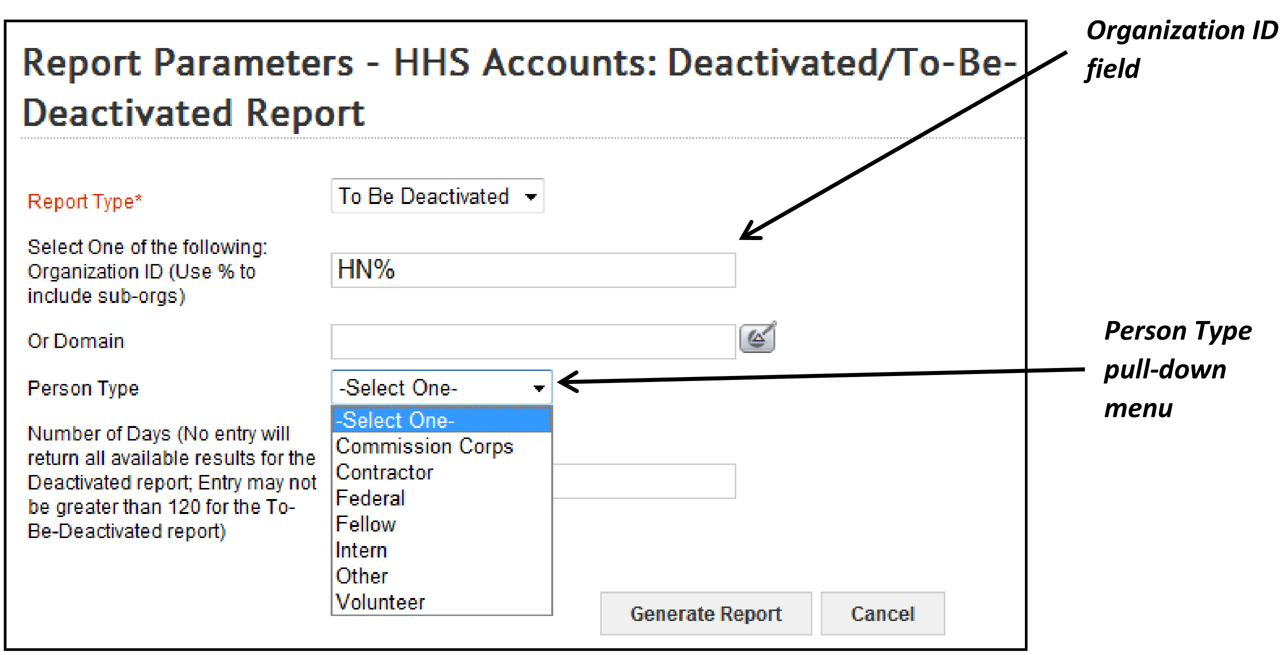


Figure 8 – Person Type pull-down menu

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.

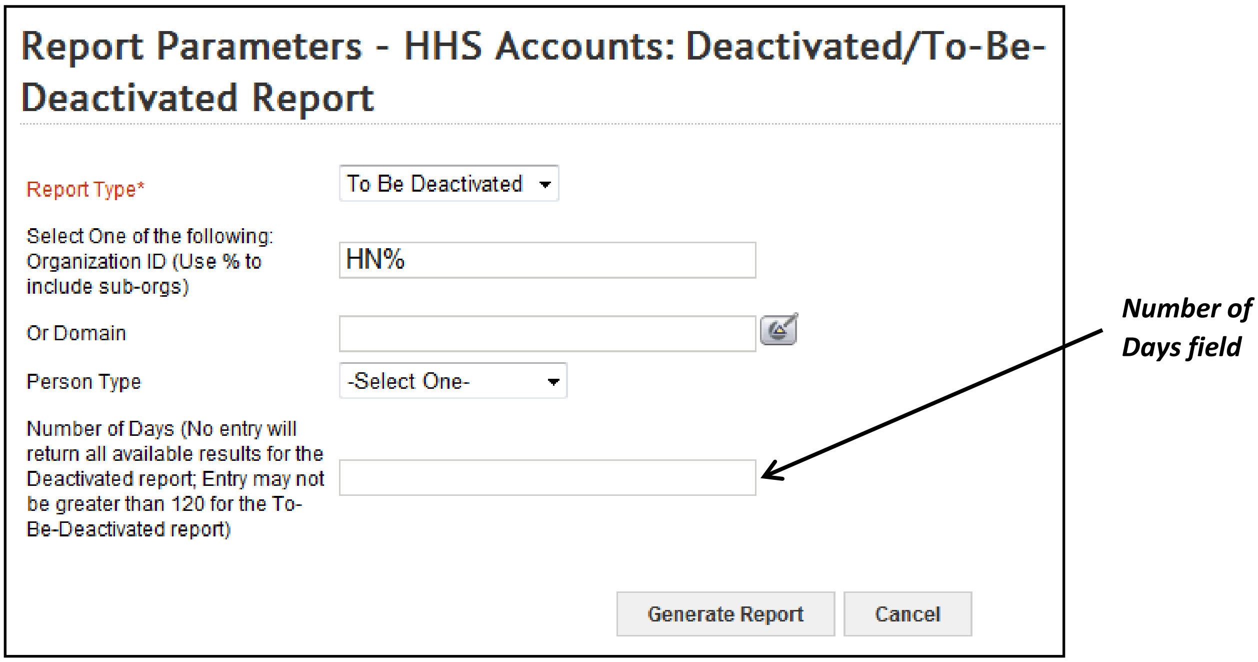


Figure 9 – Number of Days field

Click the **Generate Report button**.

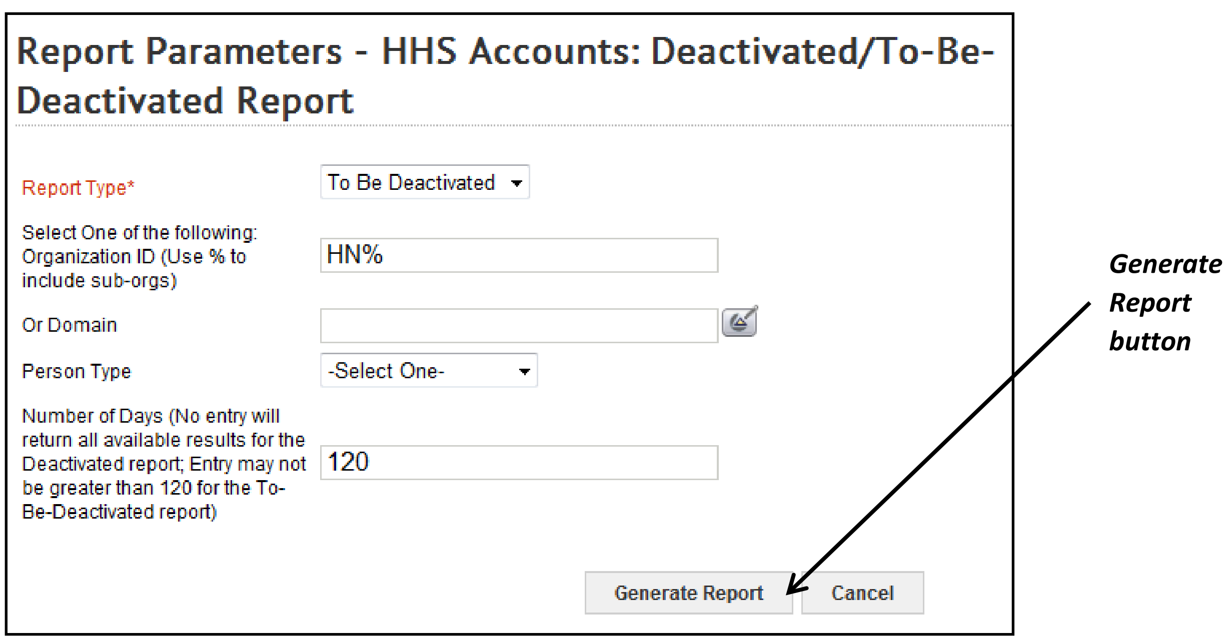


Figure 10 – Generate Report button

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

Print this report icon

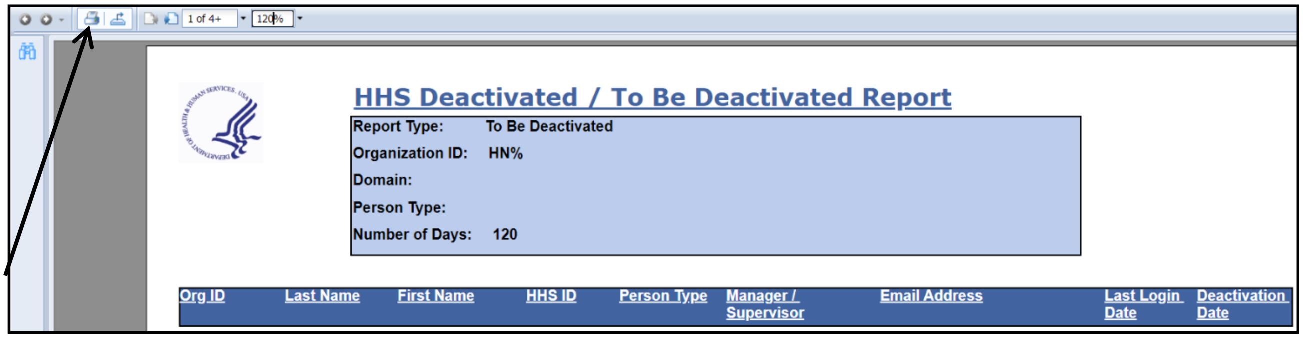
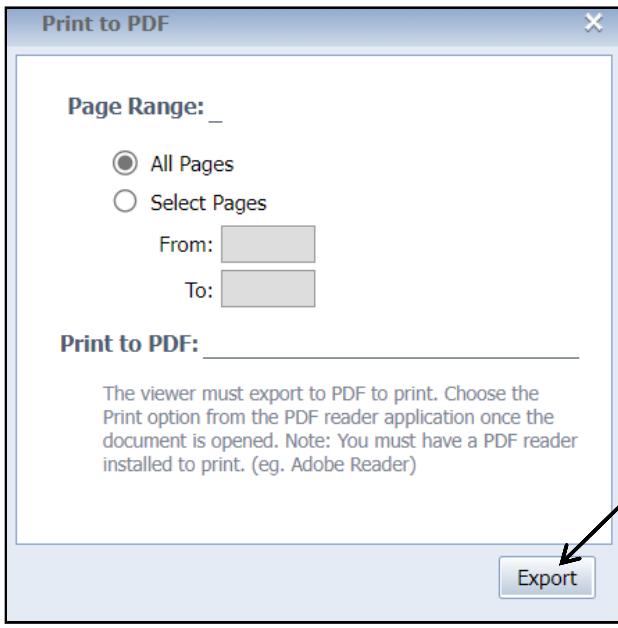


Figure 11 – Print this report button

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



Export button

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.

Admin icon

Figure 1 – Admin icon

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

Reports link

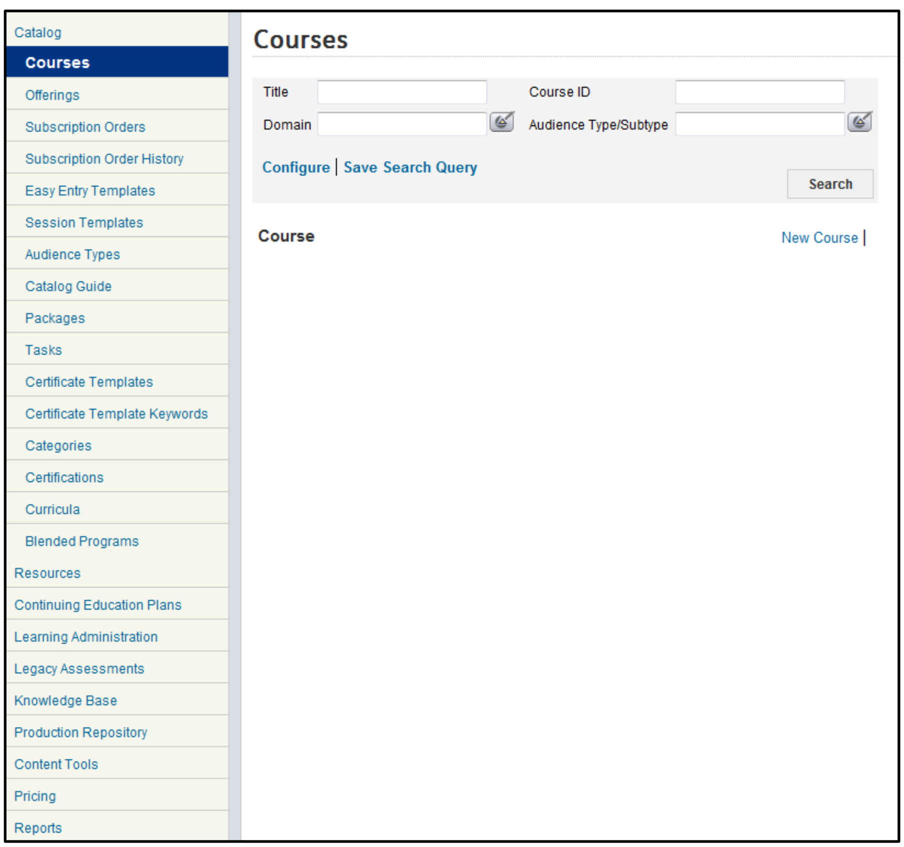


Figure 2 – Reports link

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

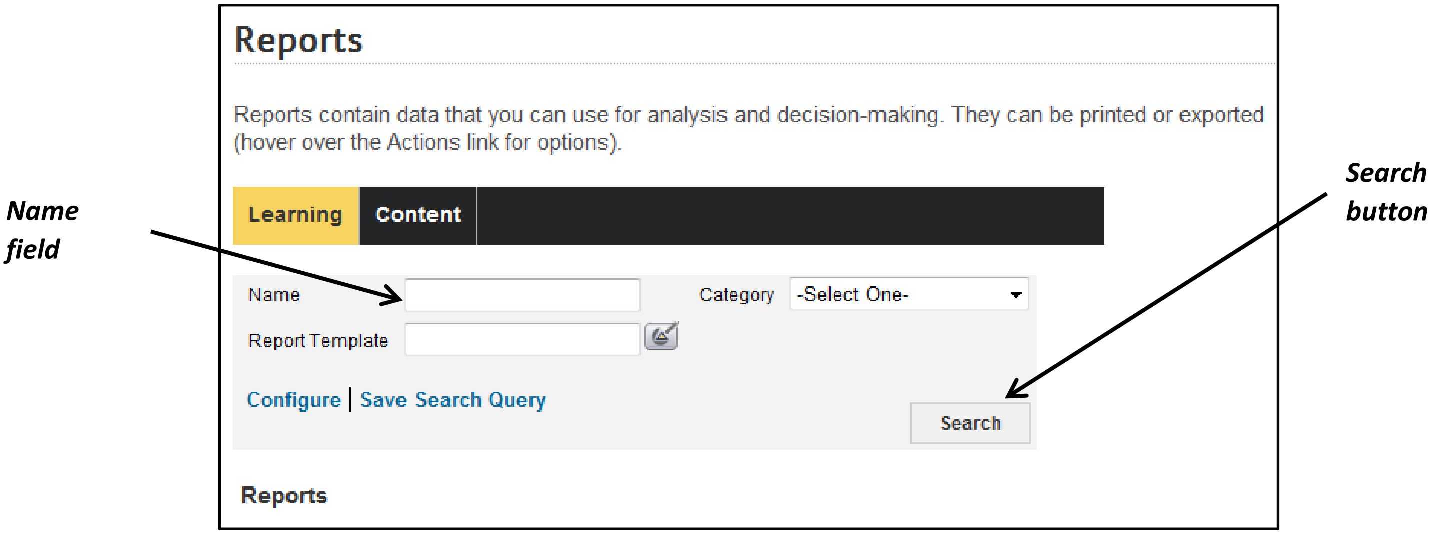


Figure 3 – Name field and Search button

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

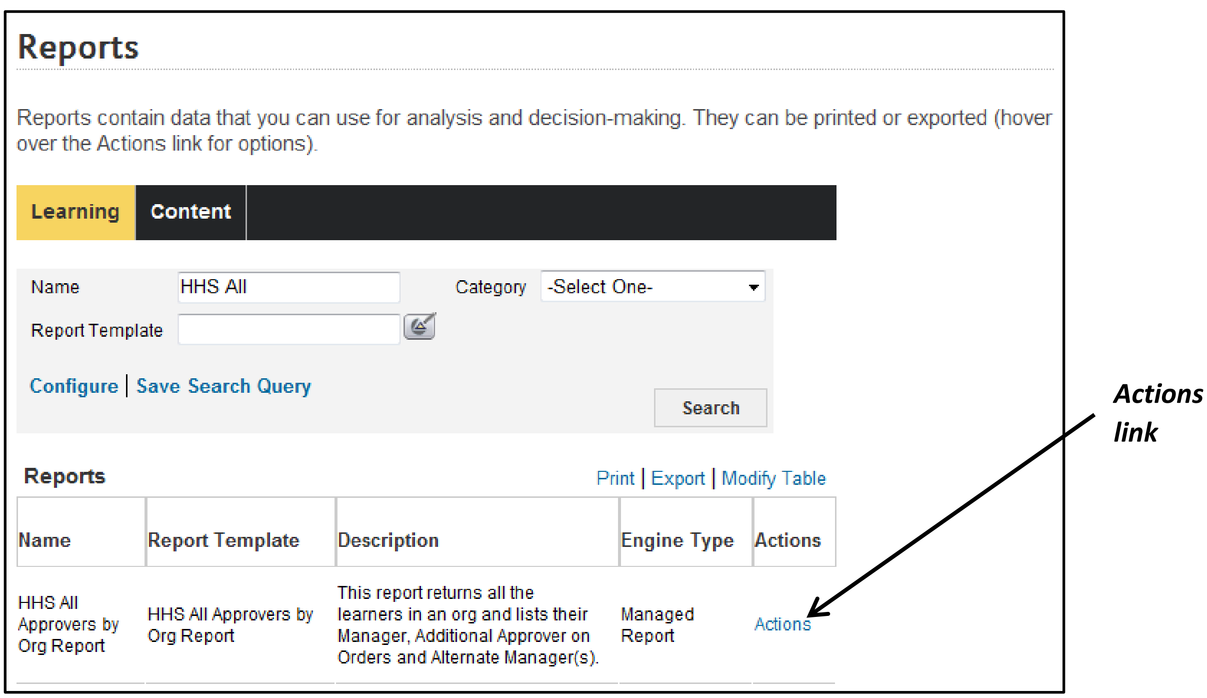


Figure 4 – Actions link

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

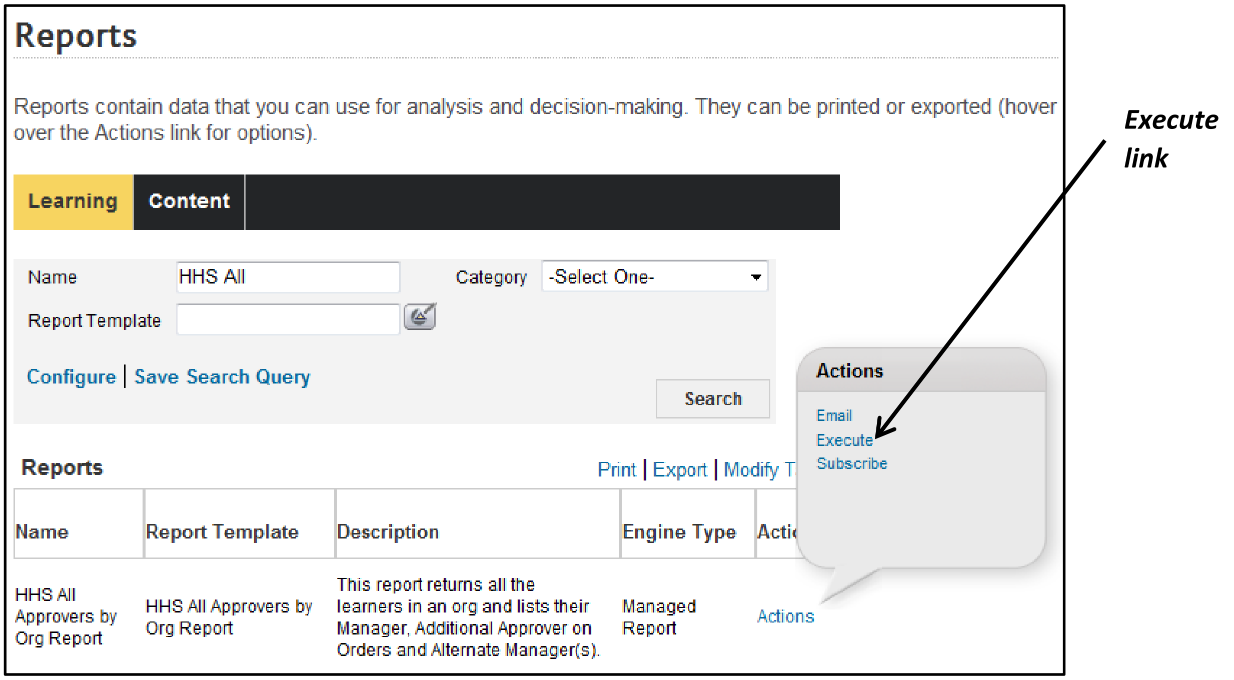


Figure 5 – Execute link on the Actions activity menu

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.

Figure 6 – Org Name field

Click the **Generate Report** link.

Generate Report button

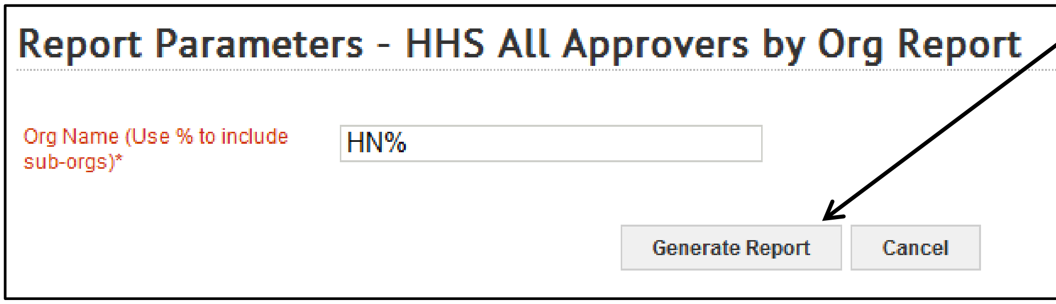


Figure 7 – Generate Report button

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

Print this report icon

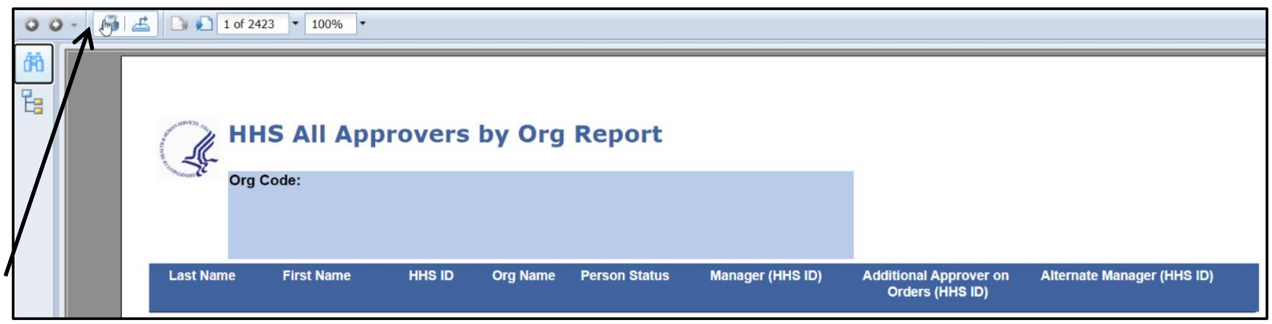


Figure 8 – Print this report button

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

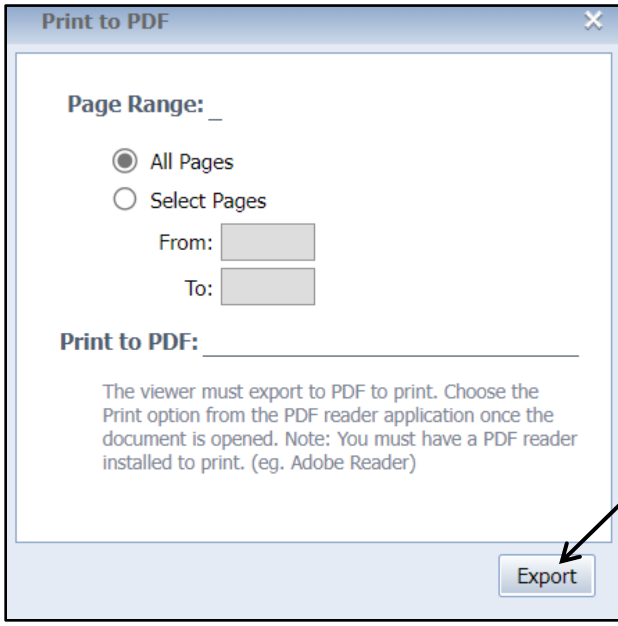


Figure 9 – Export button

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.

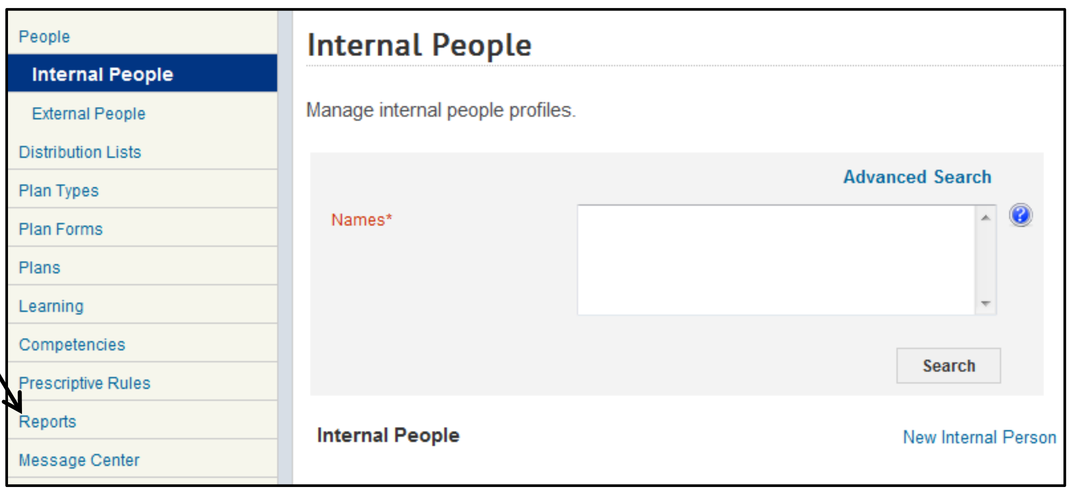


Figure 2 – Reports link

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

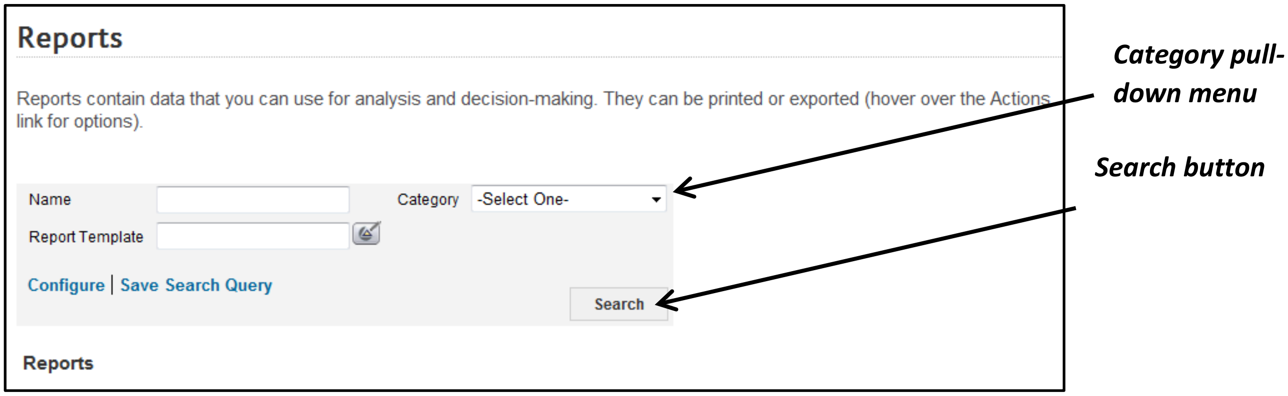


Figure 3 – Category pull-down menu and Search button

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

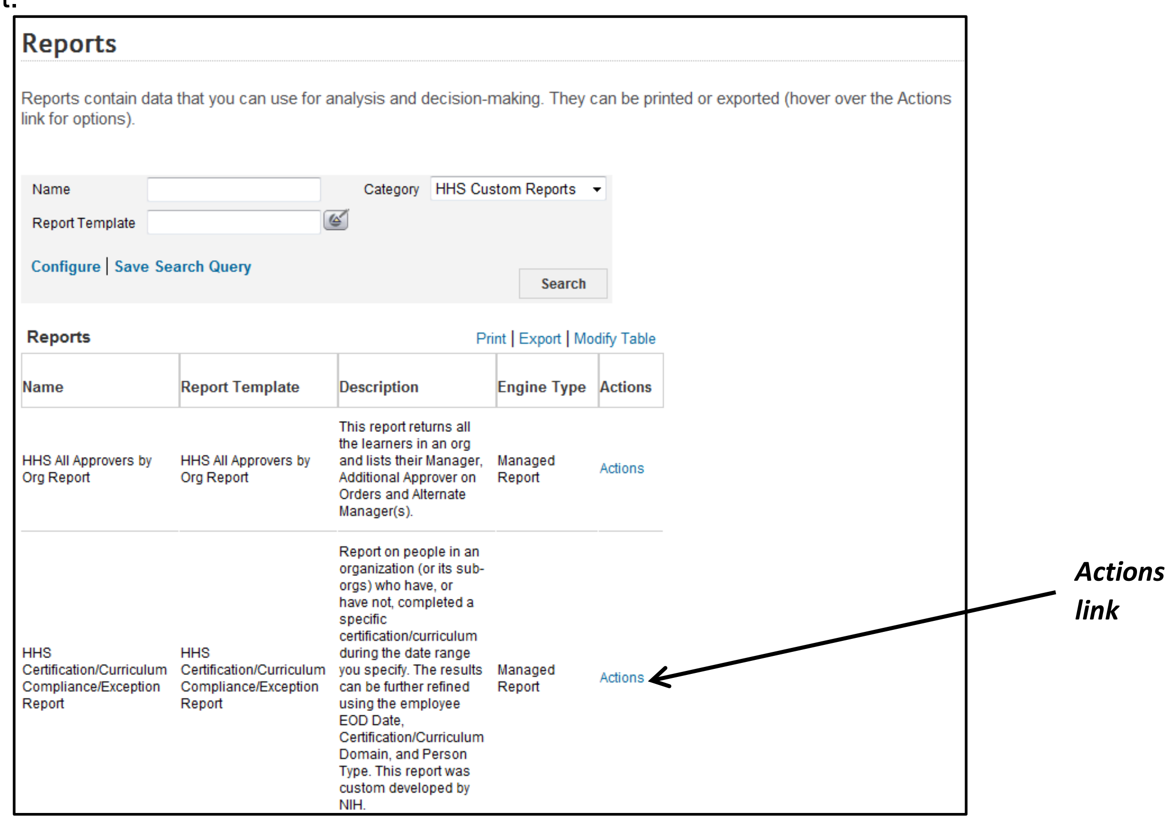


Figure 4 – Actions link

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

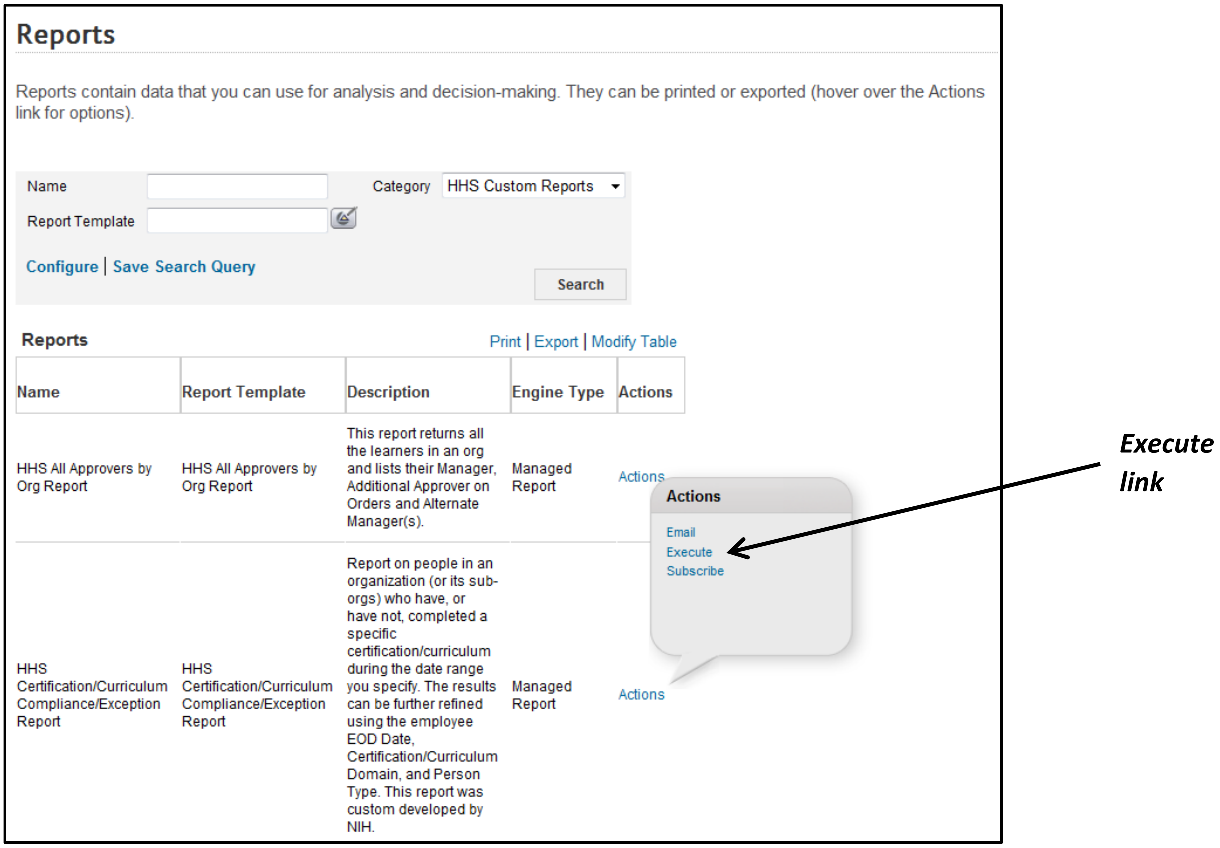


Figure 5 – Execute link on the Actions activity menu

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

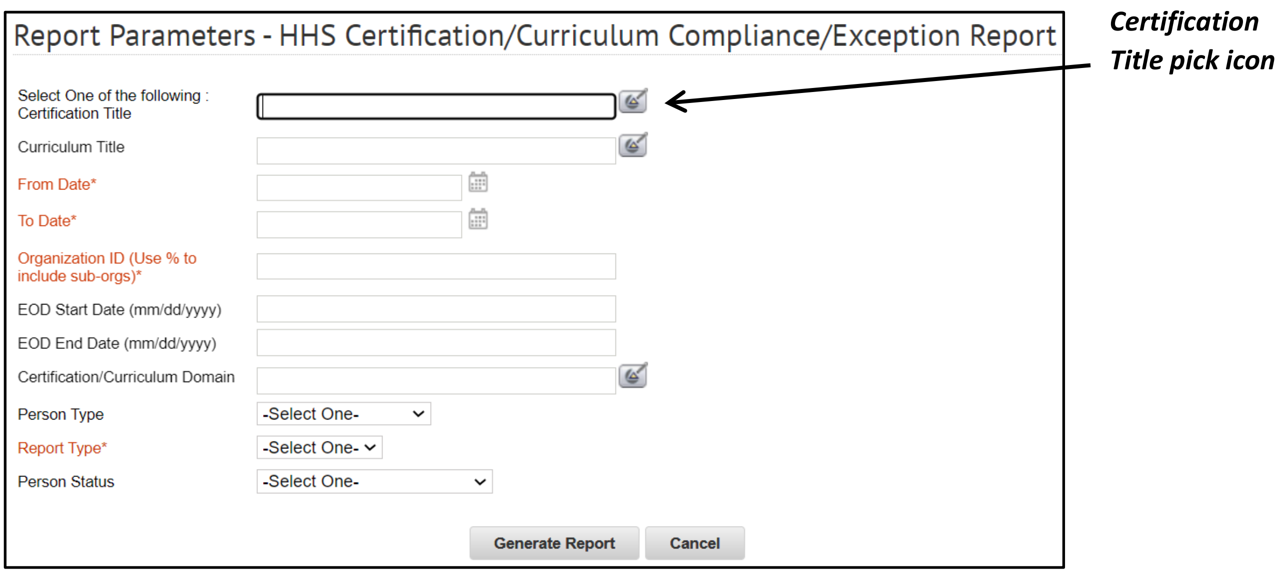


Figure 6 – Certification Title pick icon

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

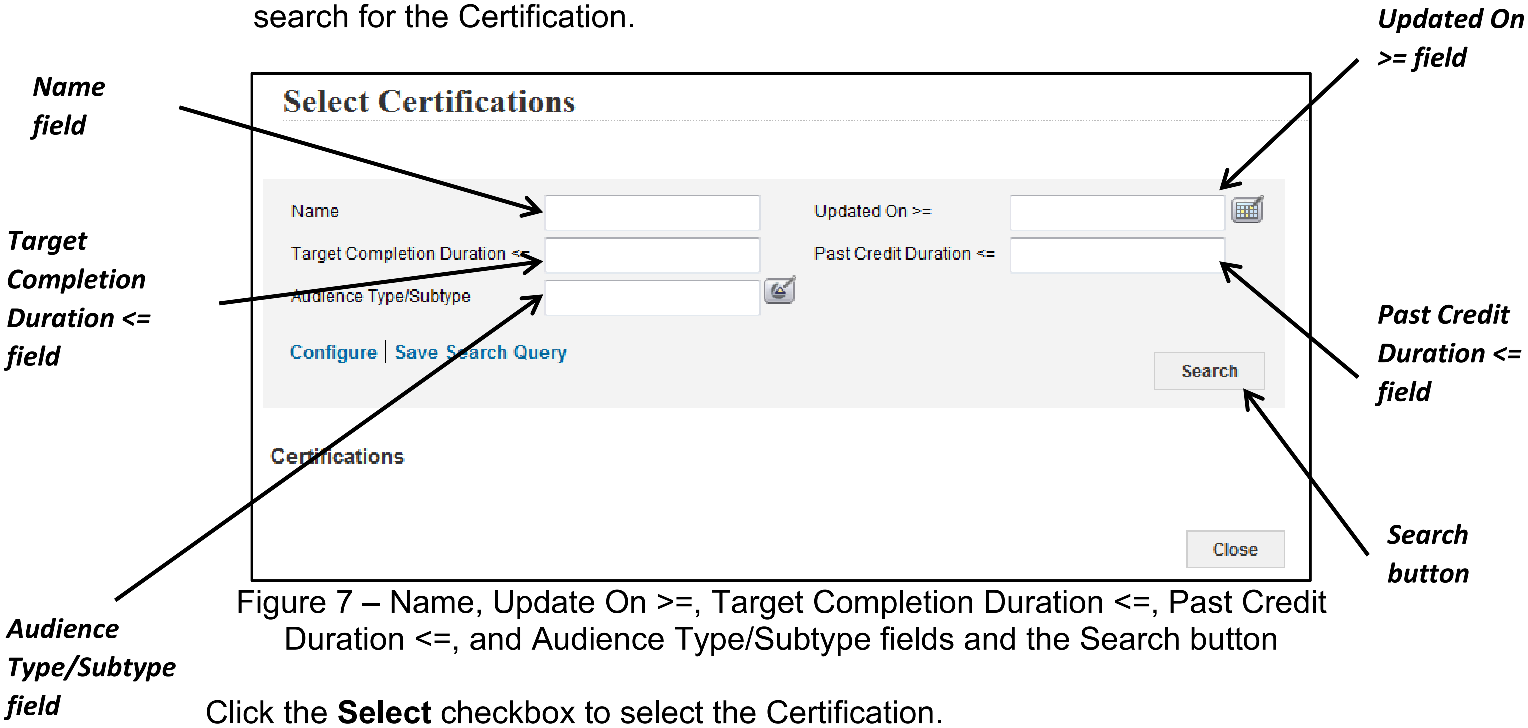


Figure 7 – Name, Update On >=, Target Completion Duration <=, Past Credit Duration <=, and Audience Type/Subtype fields and the Search button

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

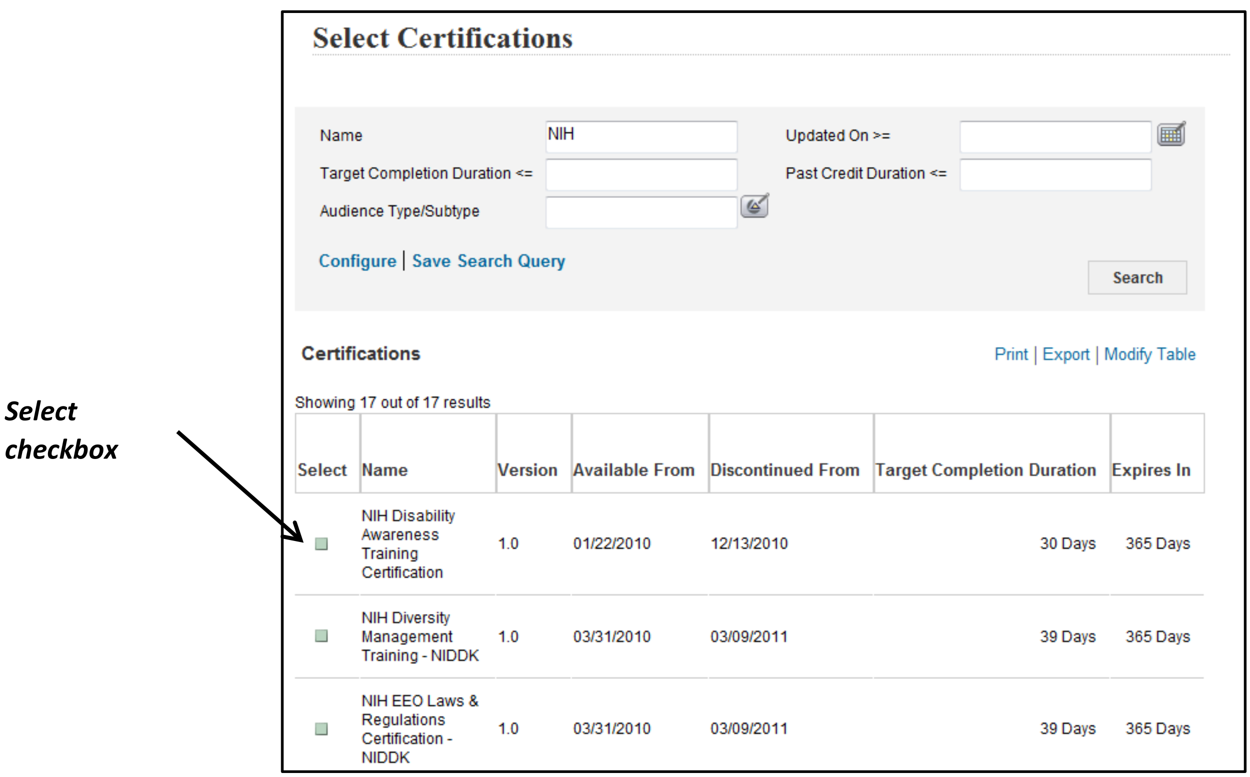


Figure 8 – Select checkmark

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

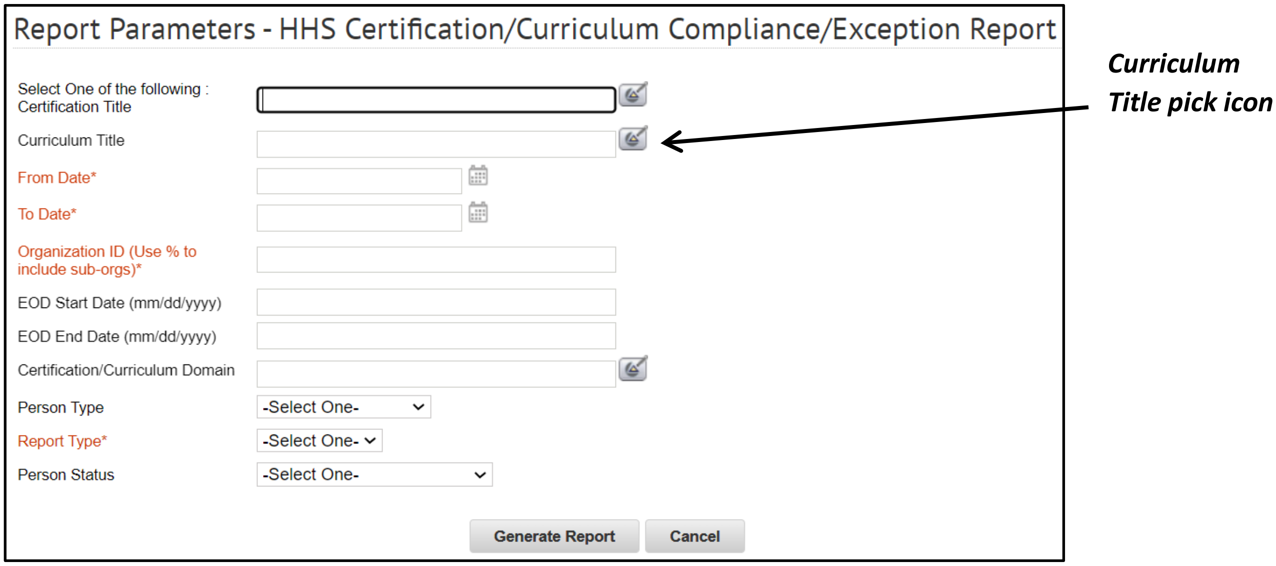


Figure 9 – Curriculum Title pick icon

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.

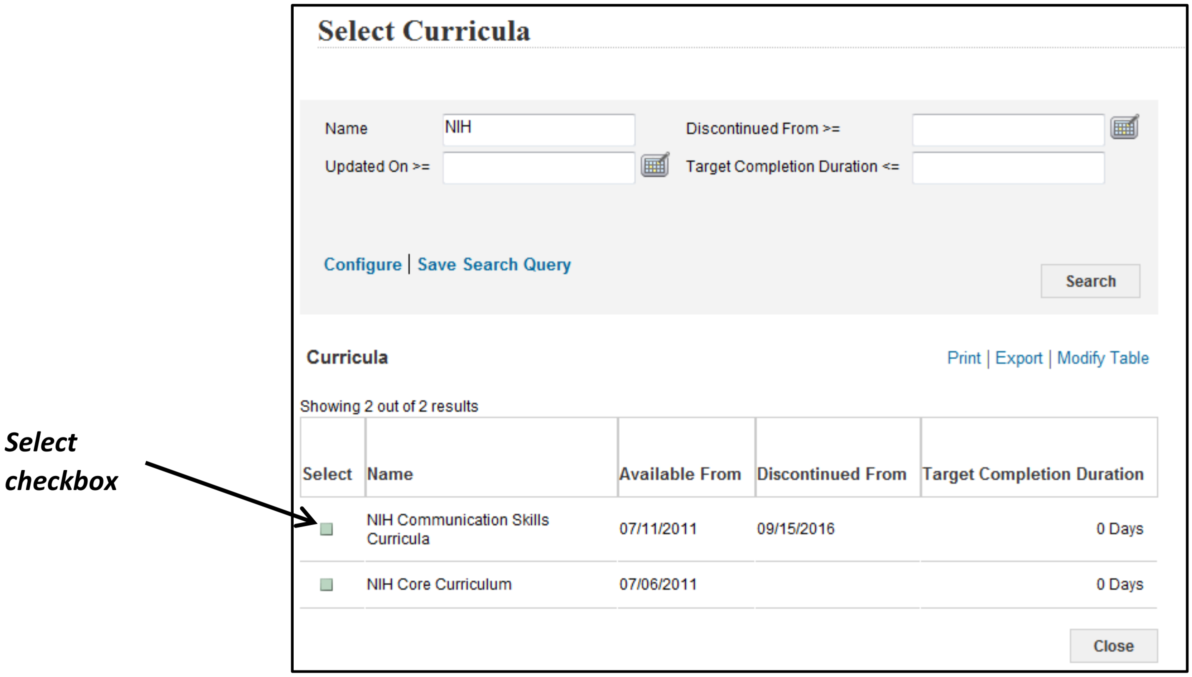


Figure 11 – Select checkbox

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.

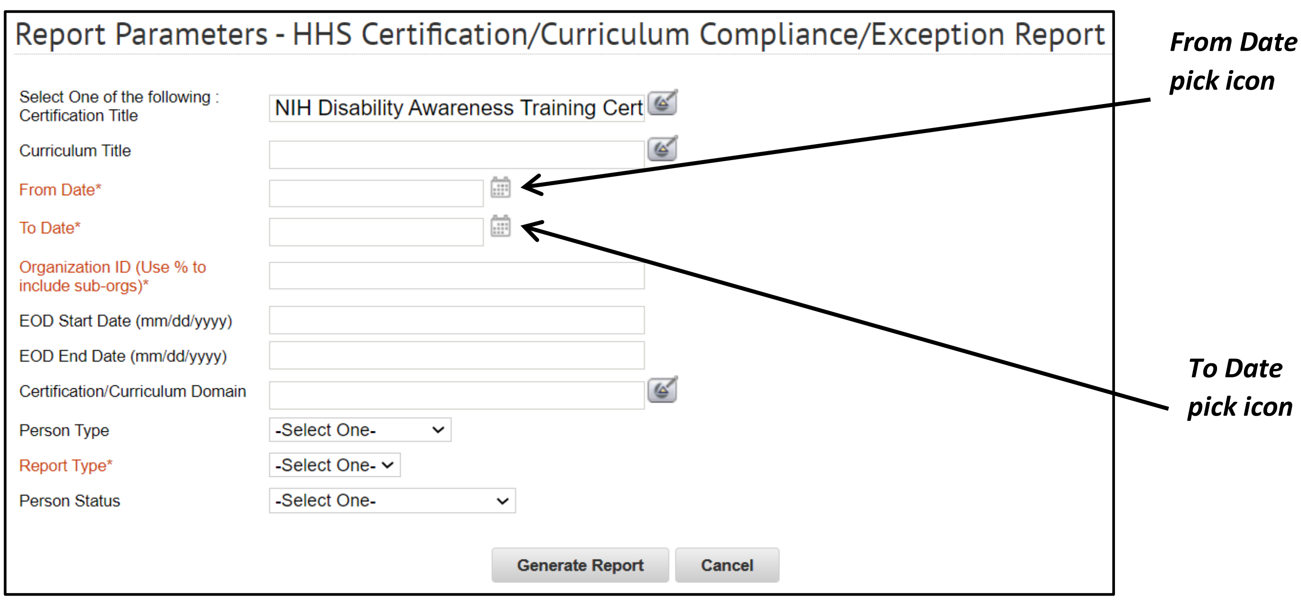


Figure 12 – From Date and To Date pick icons

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.

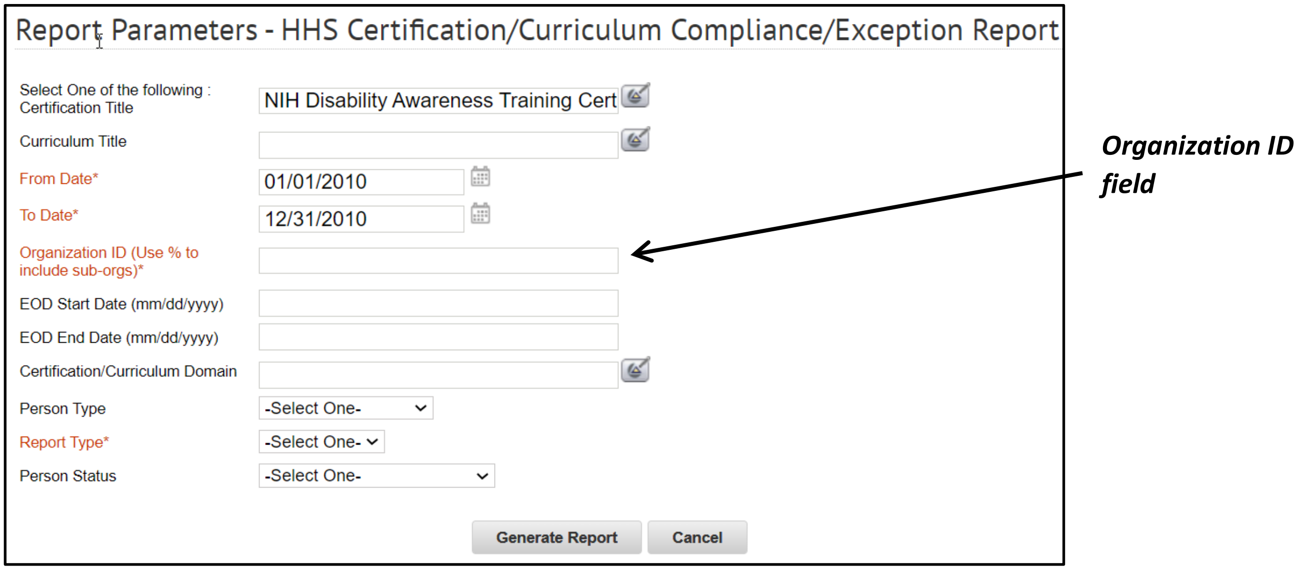


Figure 13 – Organization ID field

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.

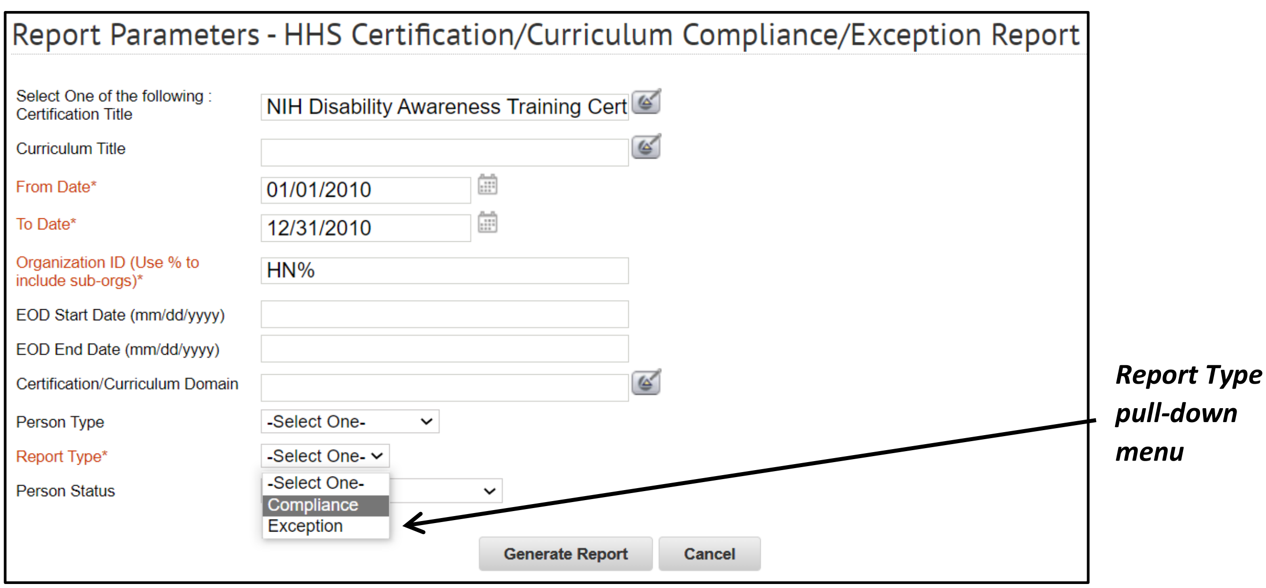
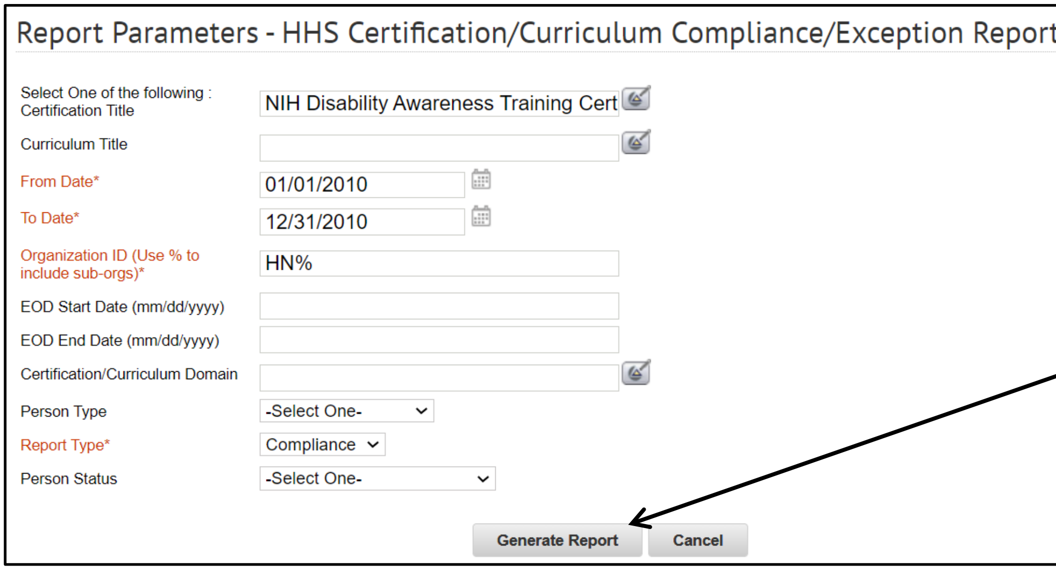


Figure 14 – Report Type pull-down menu

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.



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

Figure 16 – Print this report button

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

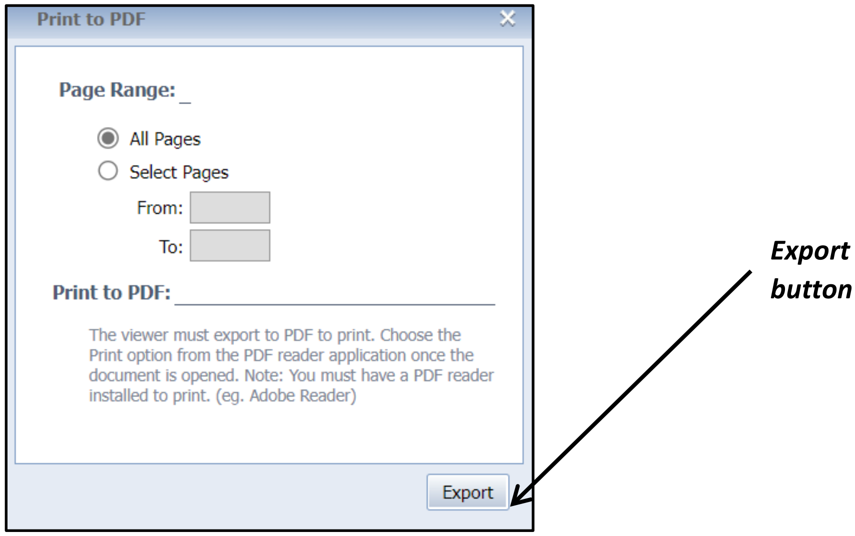


Figure 17 – Export button

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.

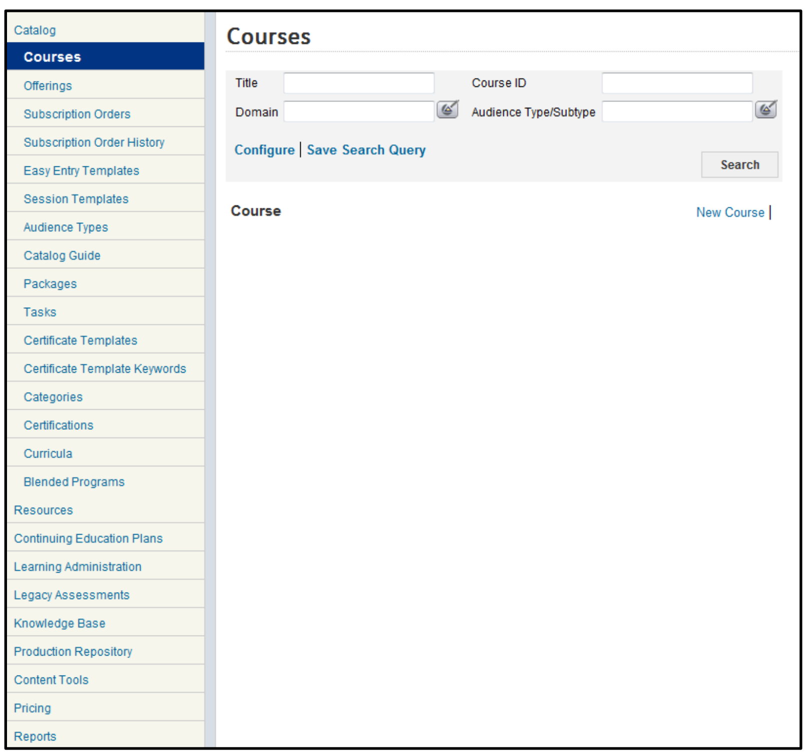
Log on to the LMS.

Click on **Admin** icon.

Admin icon

Figure 1 – Admin icon

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



Reports link

Figure 2 – Reports link

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

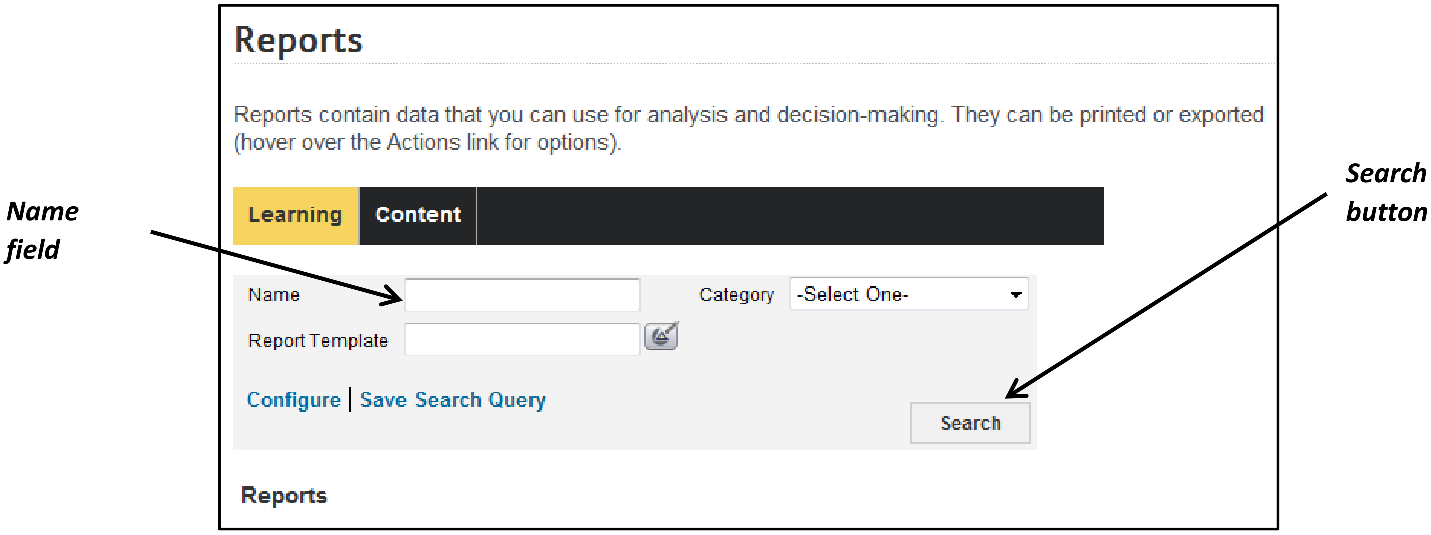


Figure 3 – Name field and Search button

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

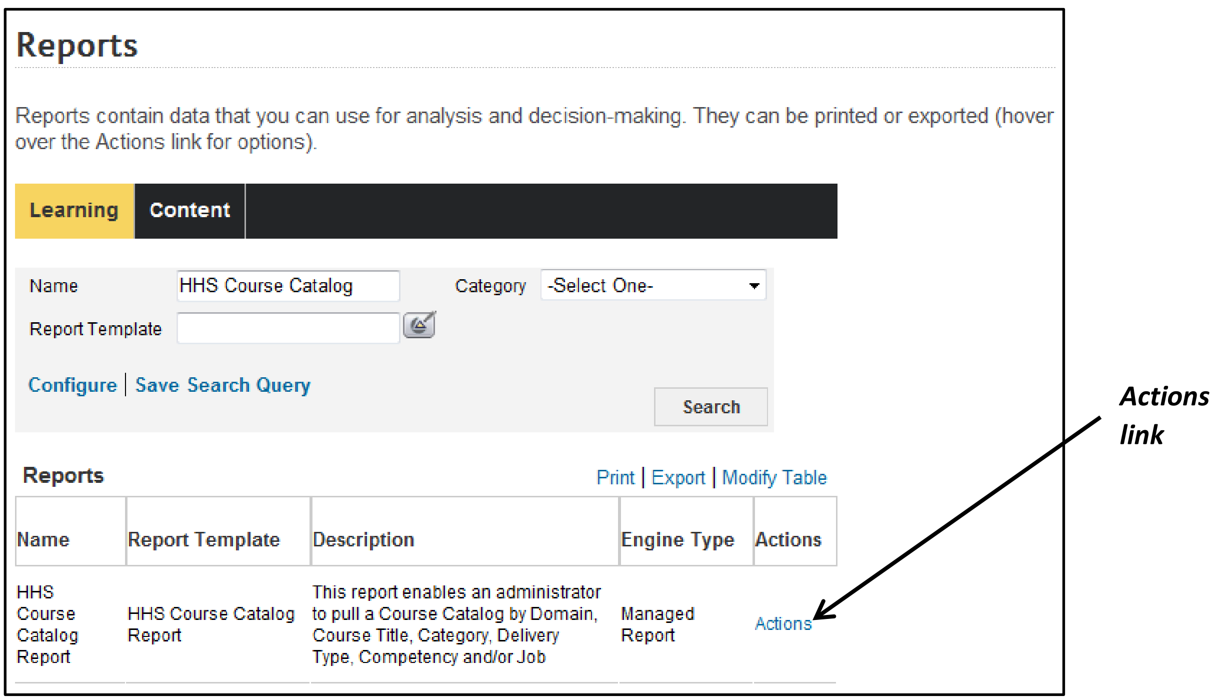


Figure 4 – Actions link

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

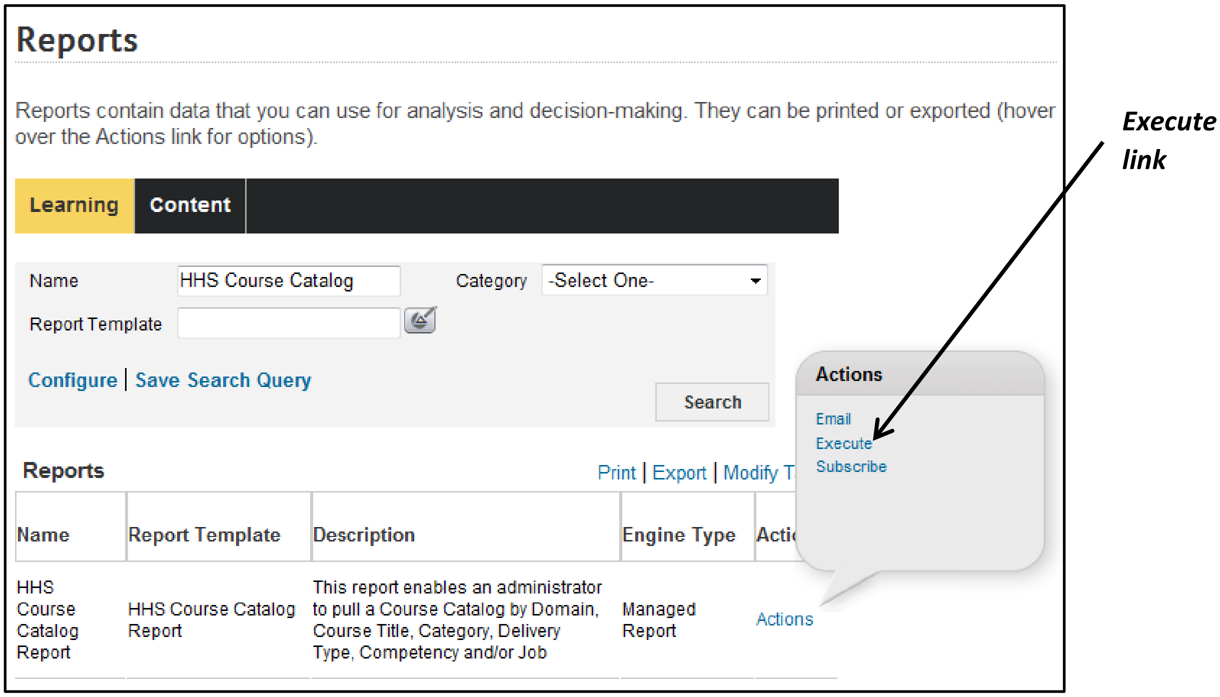


Figure 5 – Execute link on the Actions activity menu

Click the **Domain** pick icon.

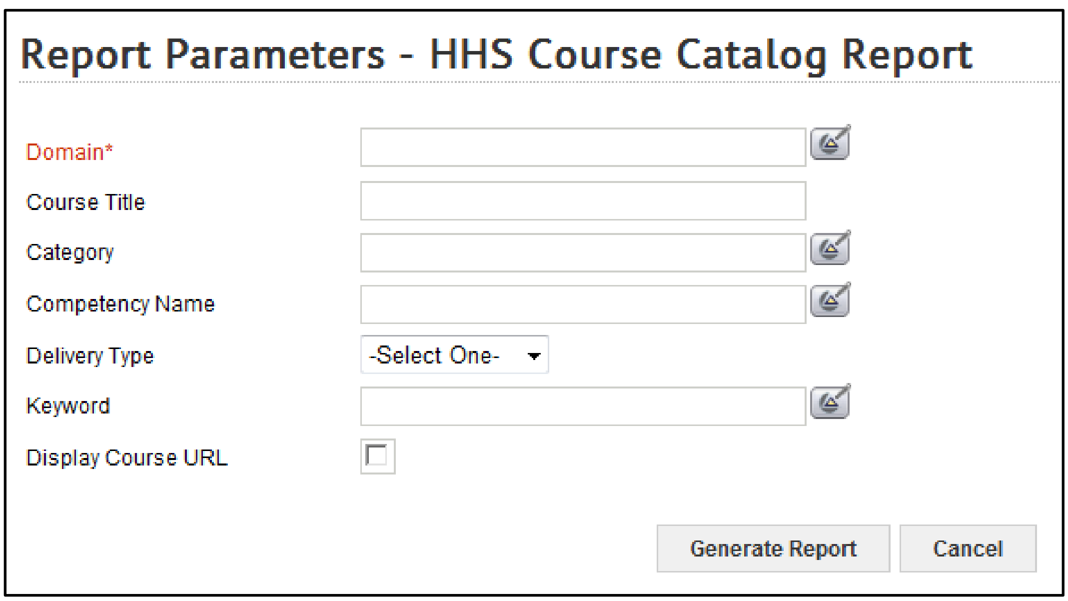


Figure 6 – Domain pick icon

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.

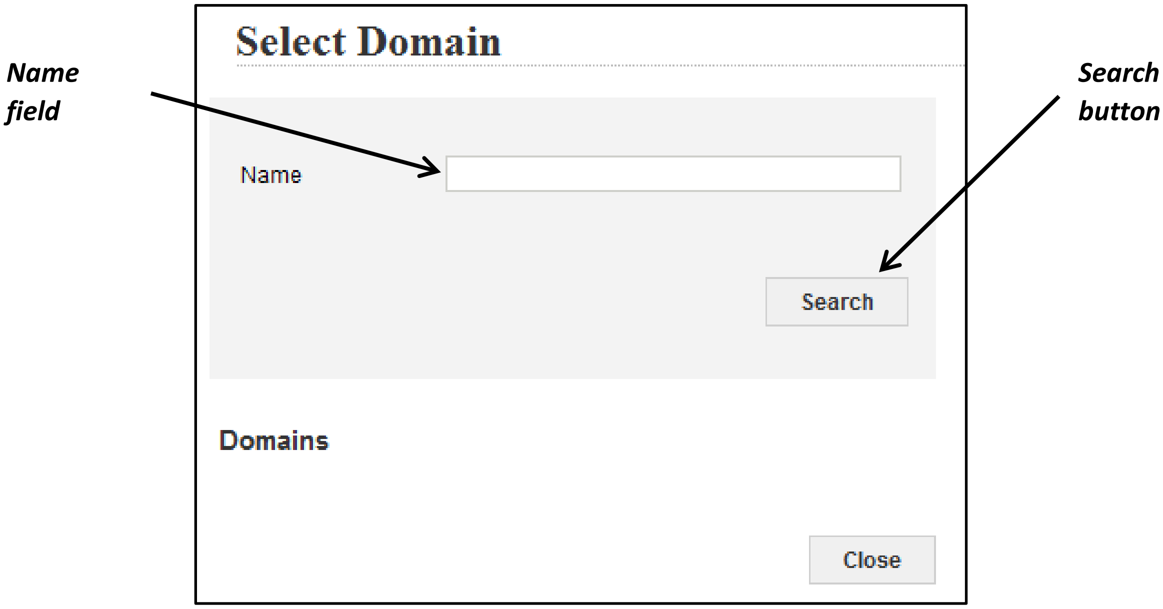


Figure 7 – Name field and Search button

Click the **Select** checkbox.

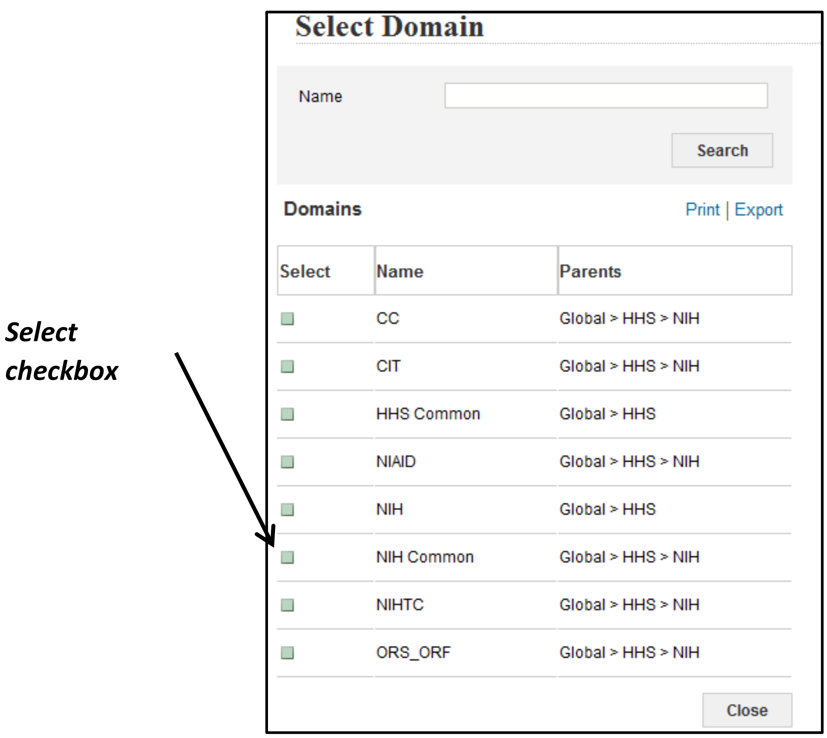


Figure 8 – Select checkbox

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

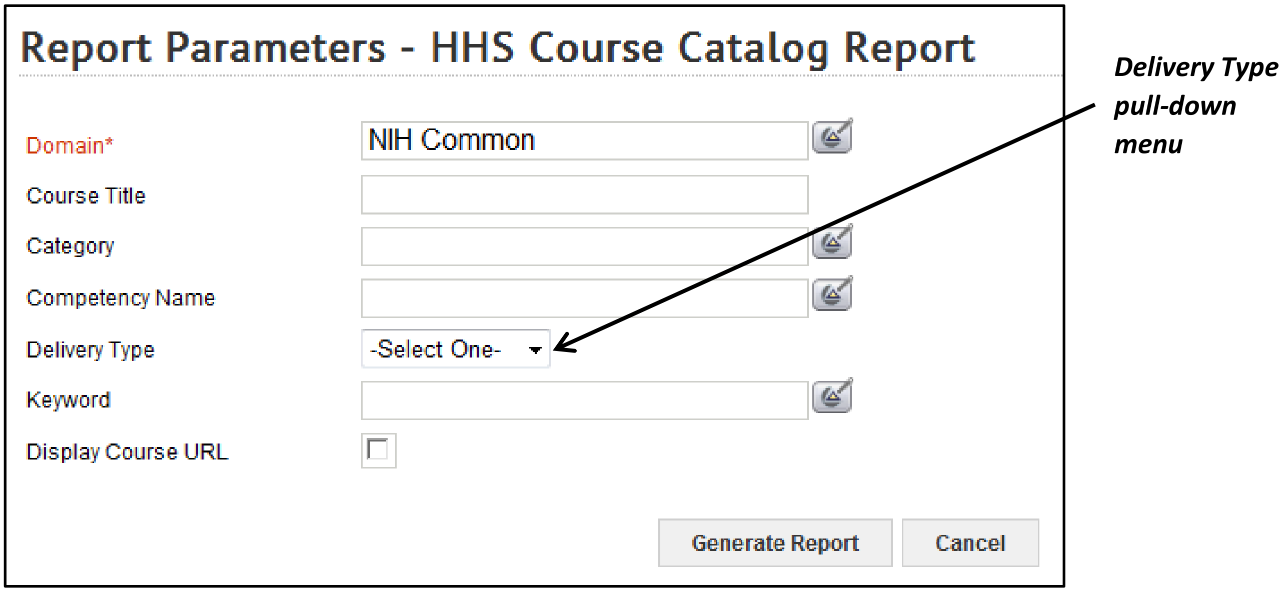


Figure 9 – Delivery Type pull-down menu

Click the **Generate Report** button.

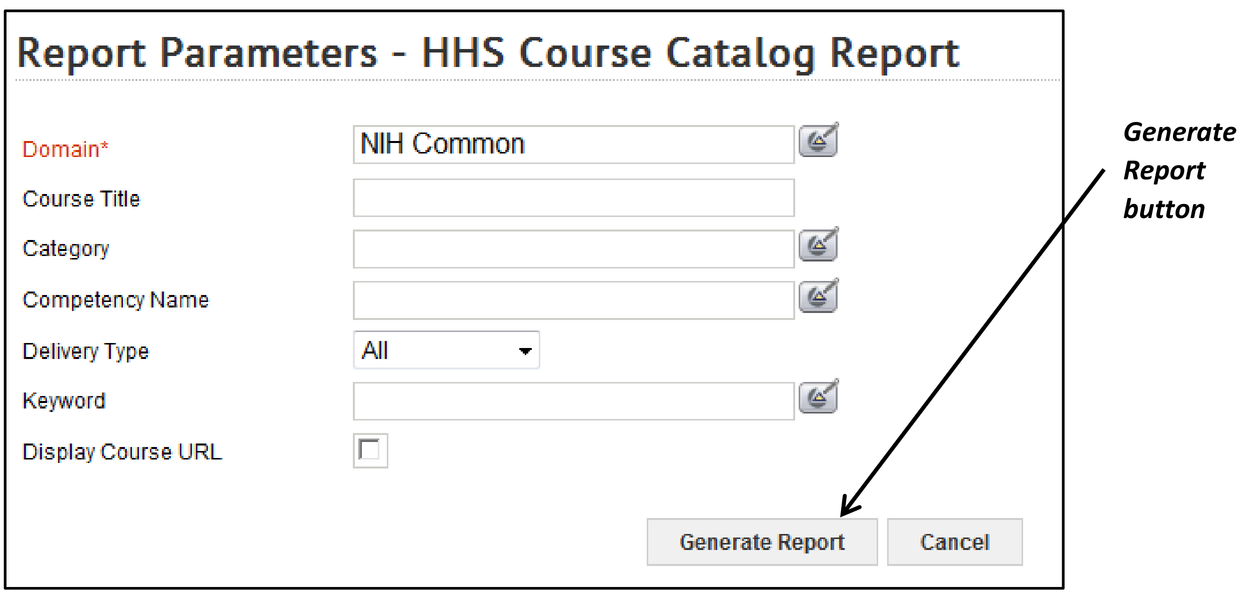


Figure 10 – Generate Report button

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

Print this report icon

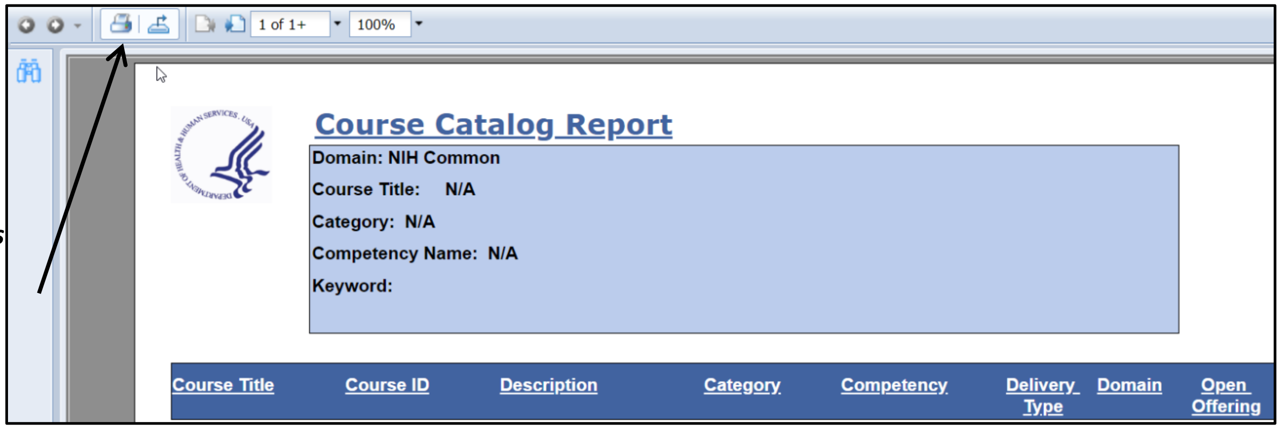
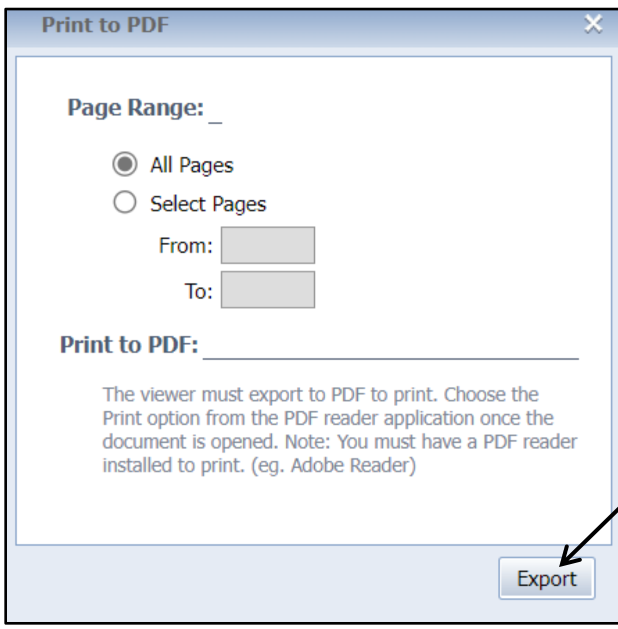


Figure 11 – Print this report button

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



Export button

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 Leaner 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.

Admin icon

Figure 1 – Admin icon

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

Reports link

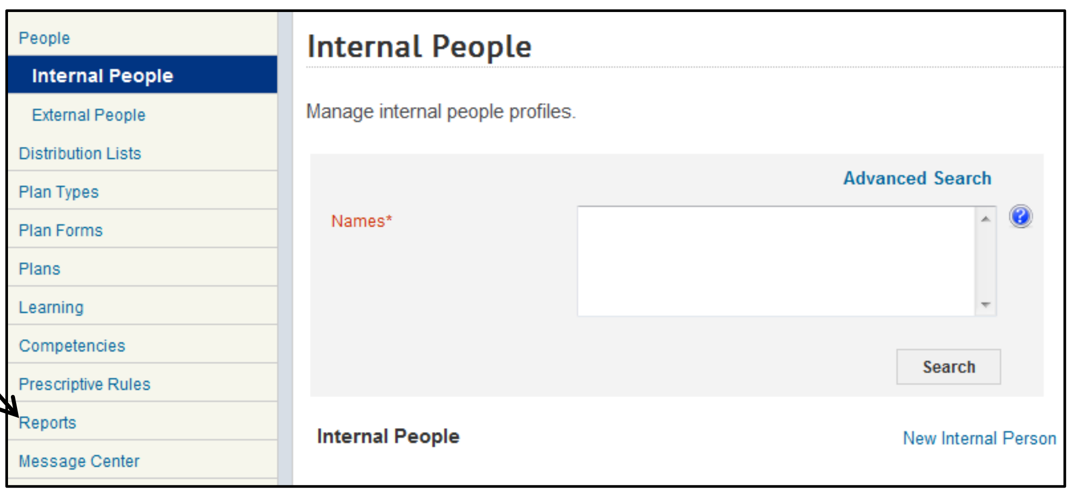
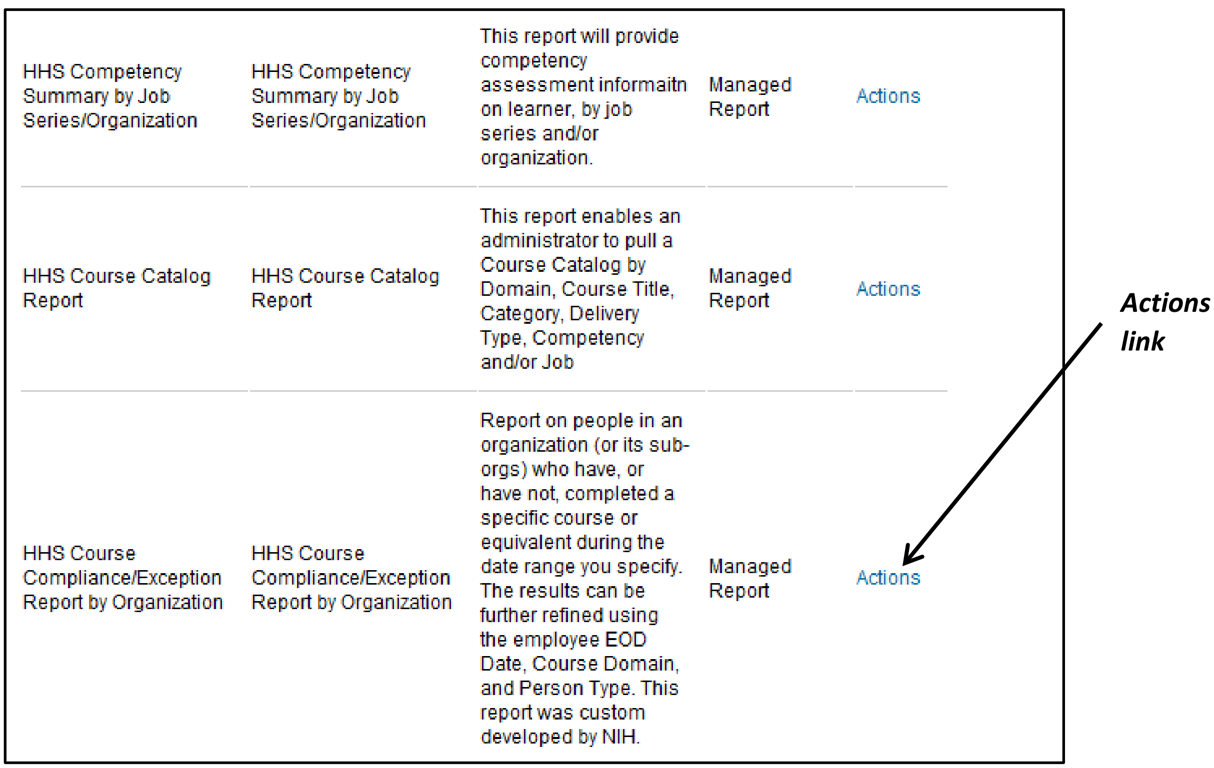


Figure 2 – Reports link

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

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 informaitn 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

Figure 4 – Actions link

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

Execute link

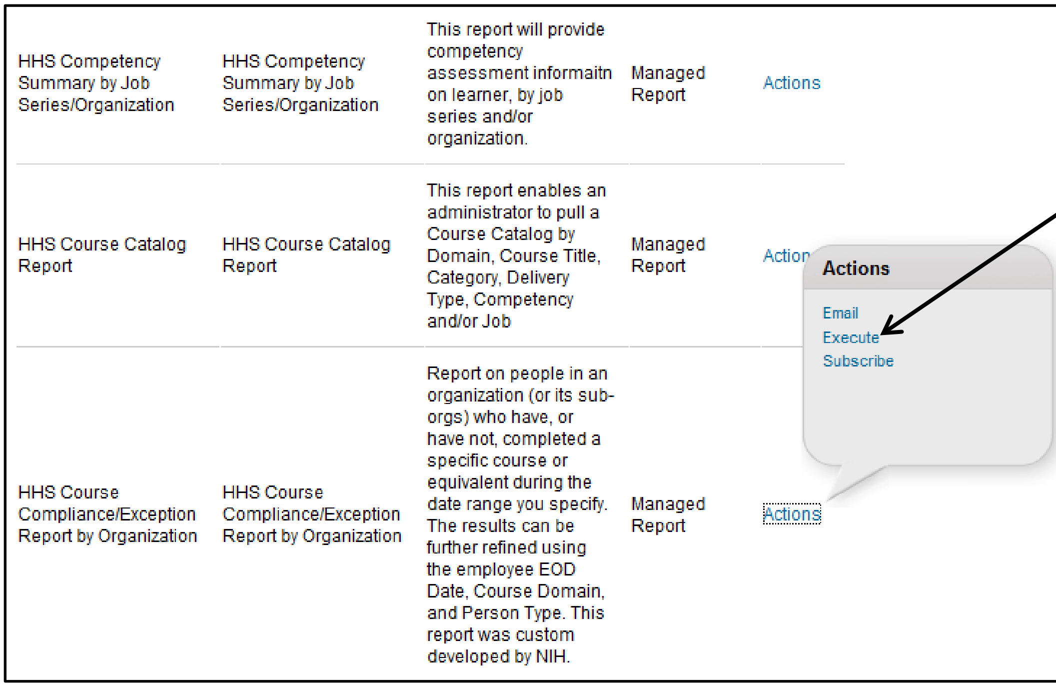


Figure 5 – Execute link on the Actions activity menu

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

Course Title pick icon

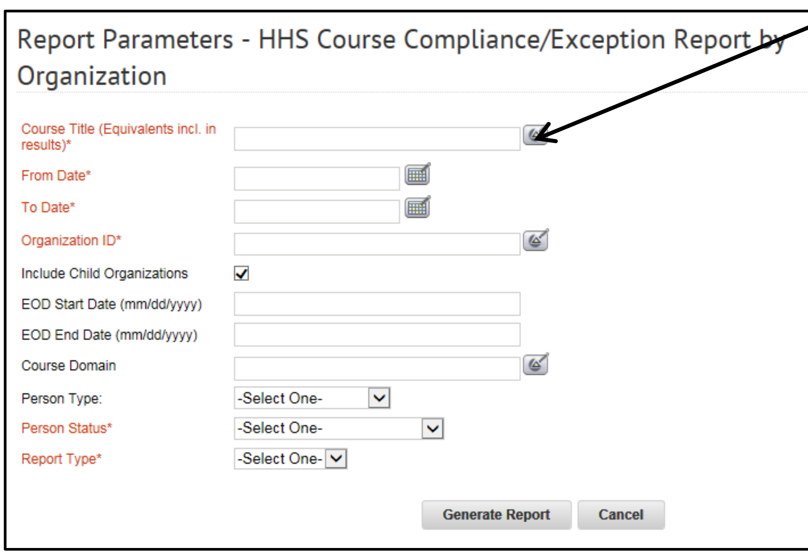


Figure 6 – Course Title pick icon

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

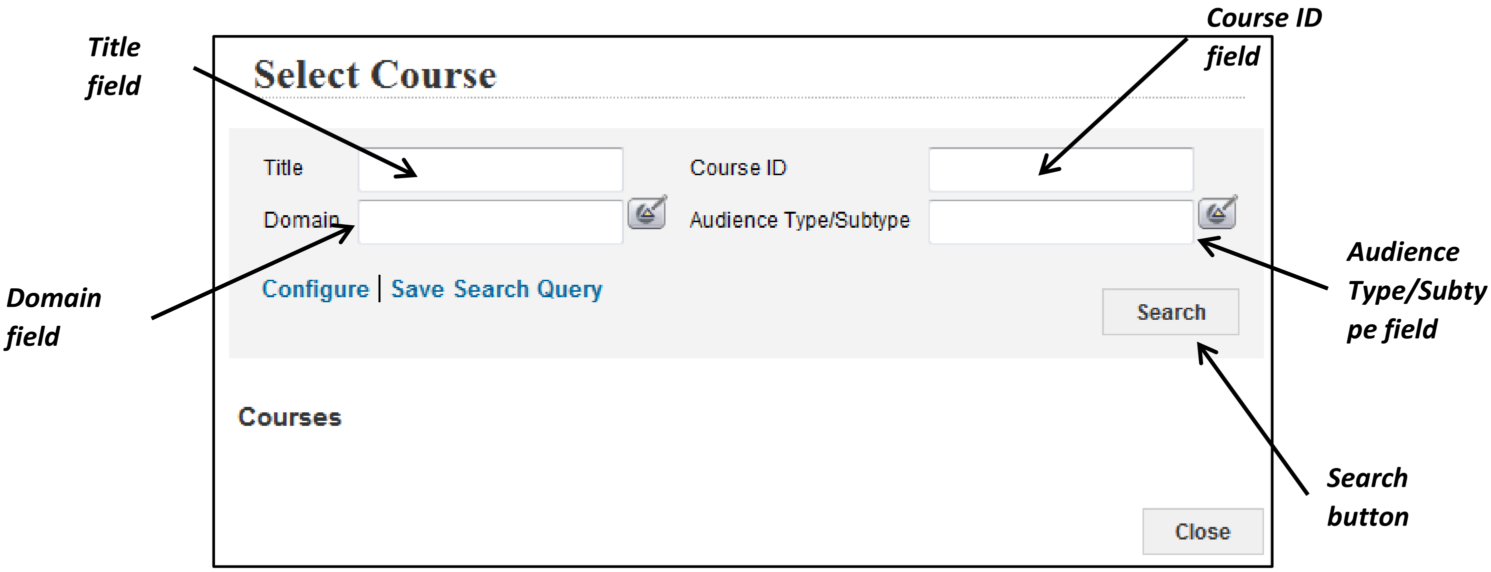


Figure 7 – Title, Course ID, Domain, and Audience Type/Subtype fields and the Search button

Click the Select checkbox to select the course.

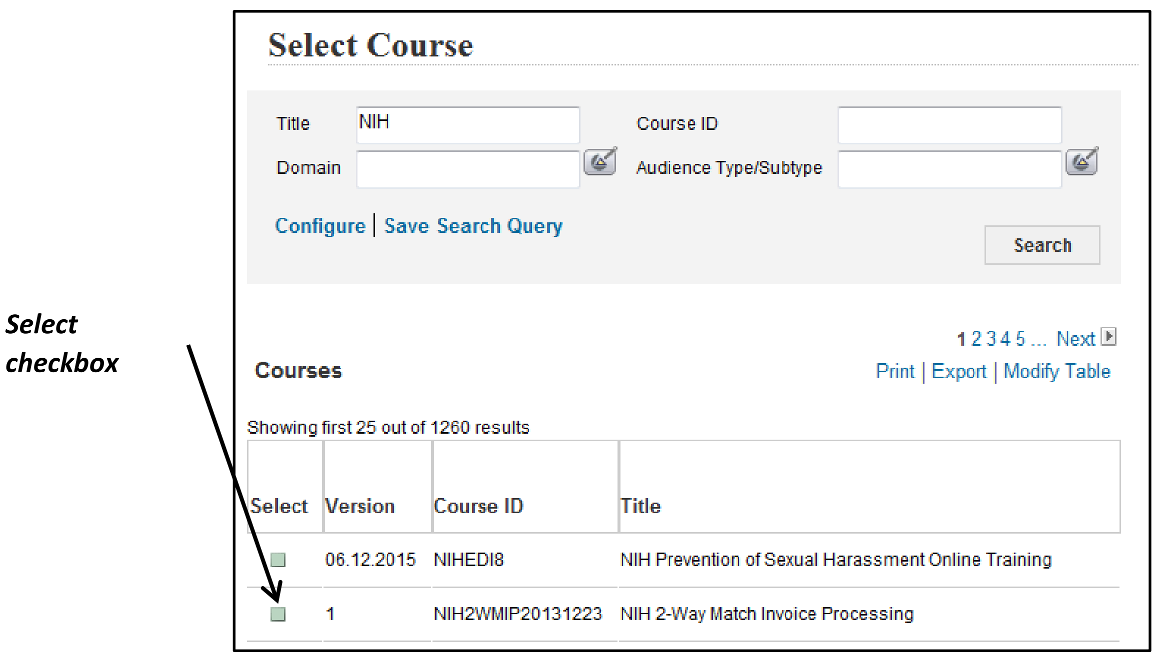


Figure 8 – Select checkbox

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.

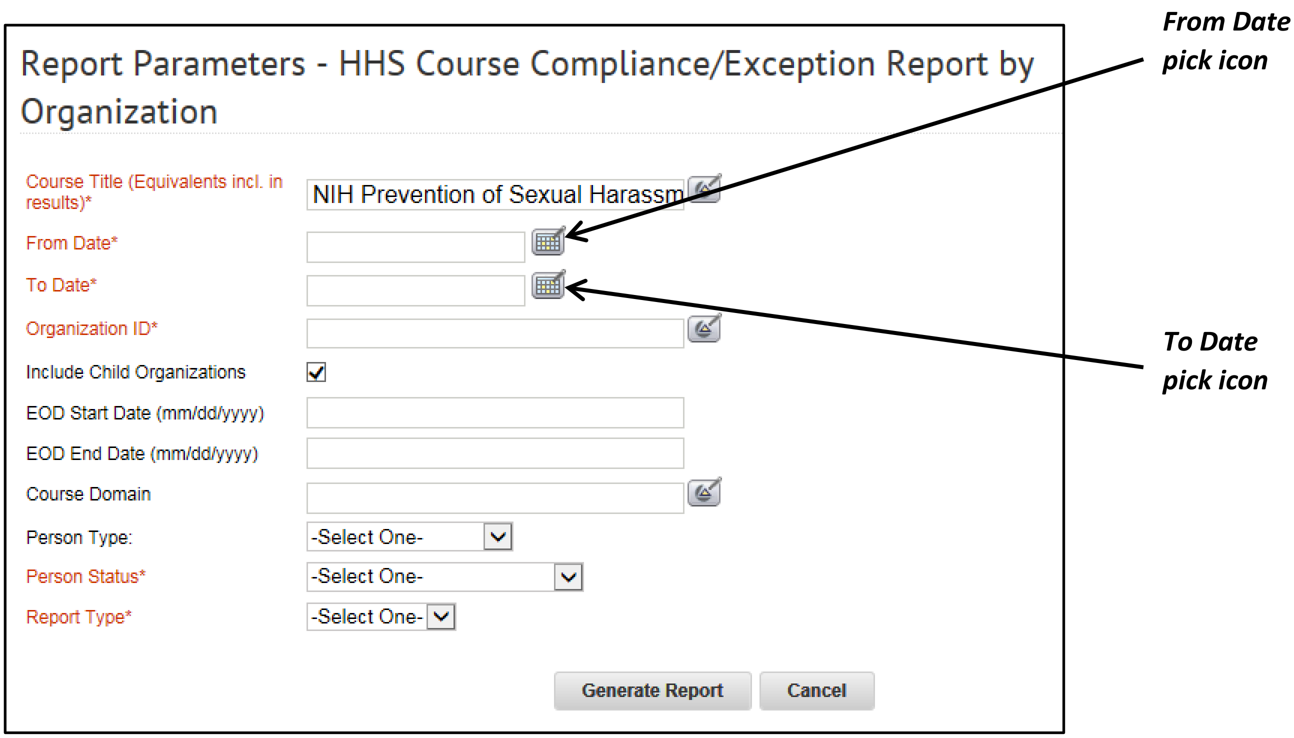


Figure 9 – From Date and To Date pick icons

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

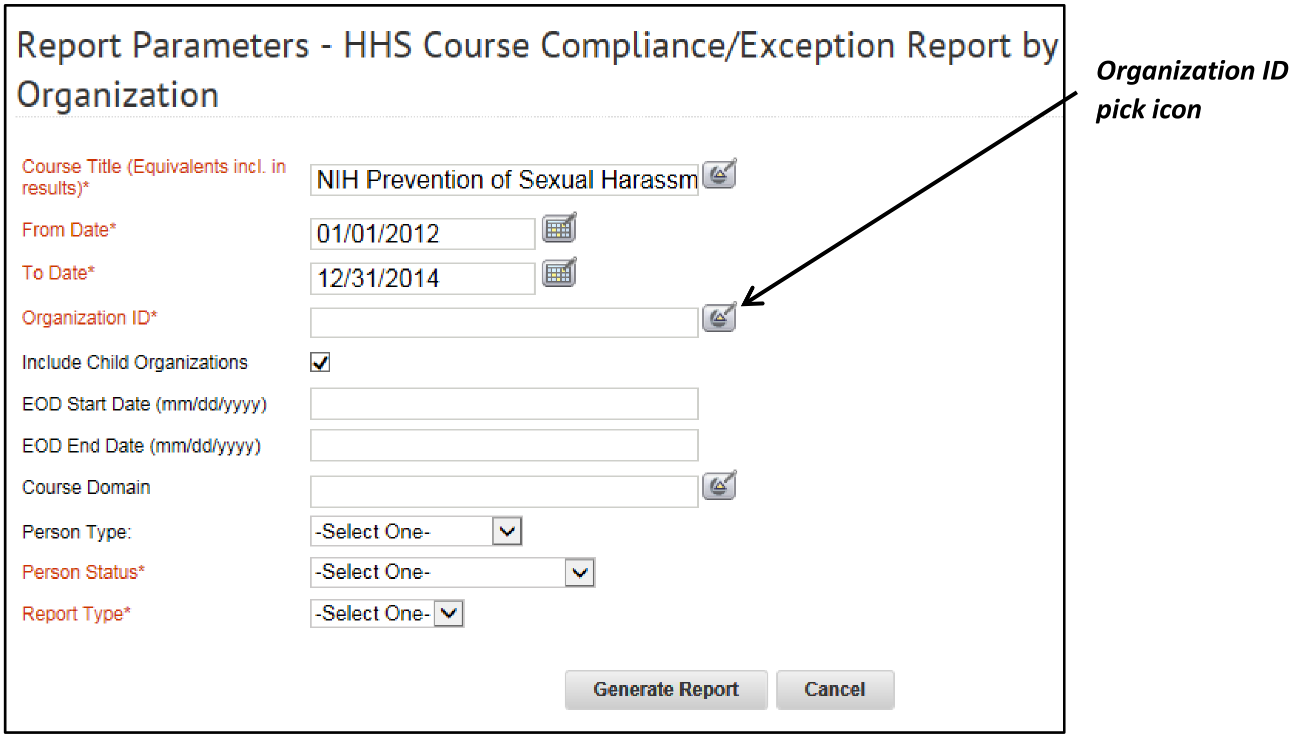


Figure 10 – Organization ID field

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

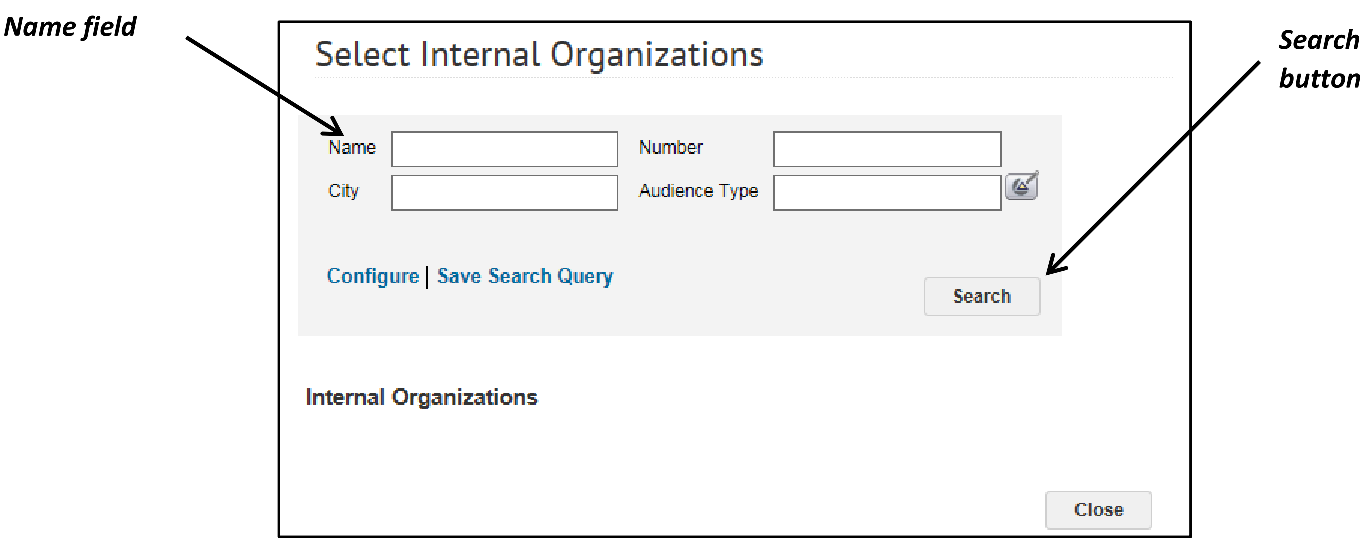


Figure 11 – Name field and Search button

Click the Select checkbox to select the Organization.

Select checkbox

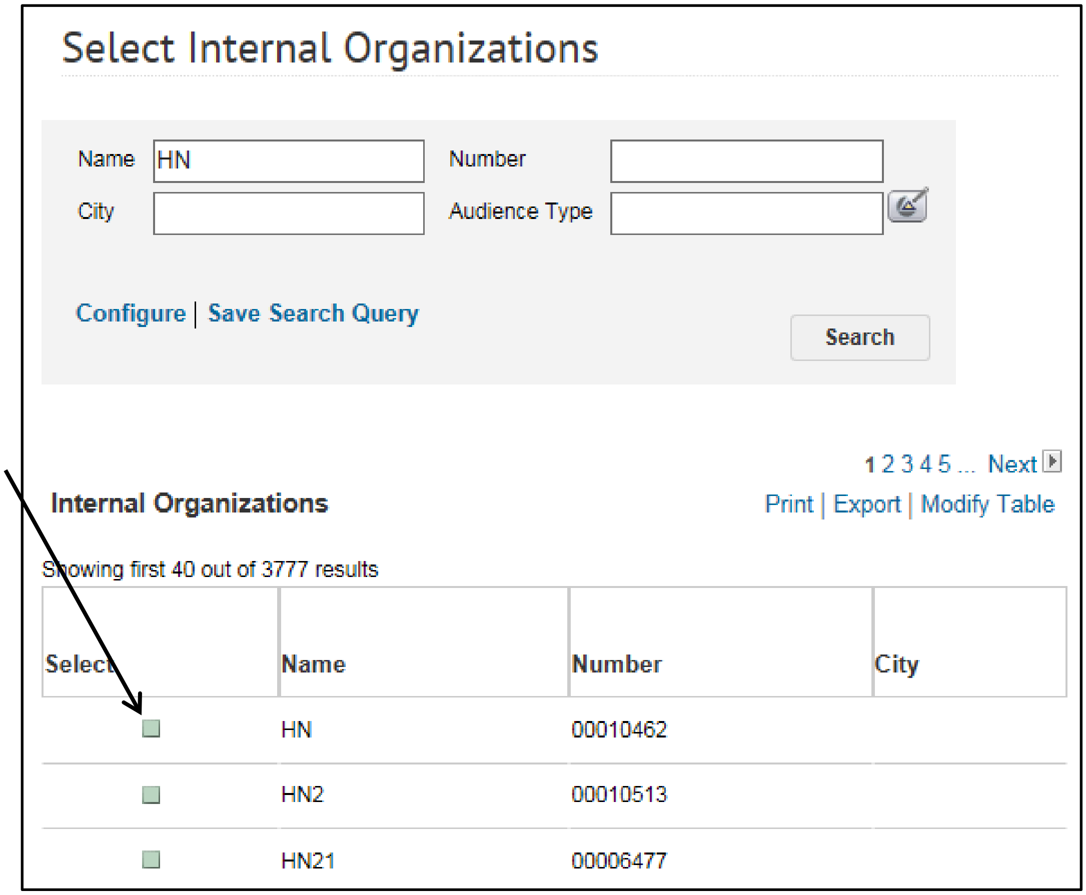


Figure 12 – Select checkbox

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

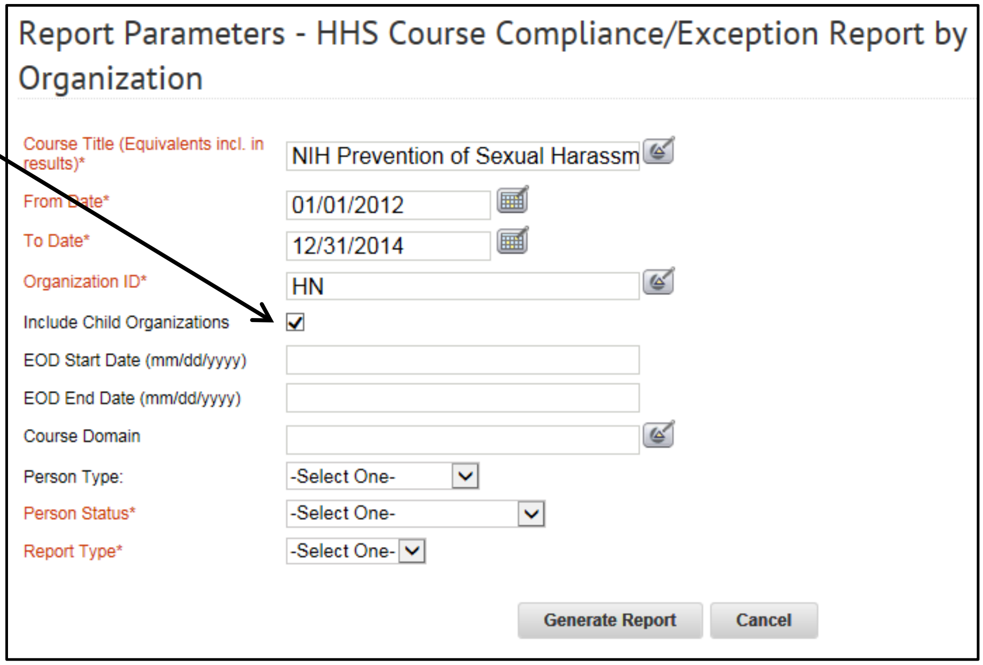
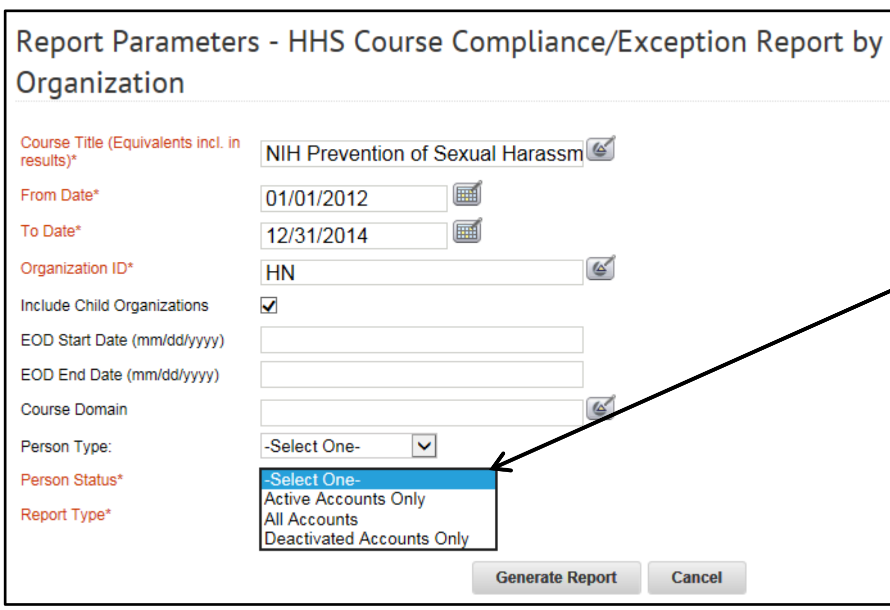


Figure 13 – Include Child Organizations checkbox

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



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.

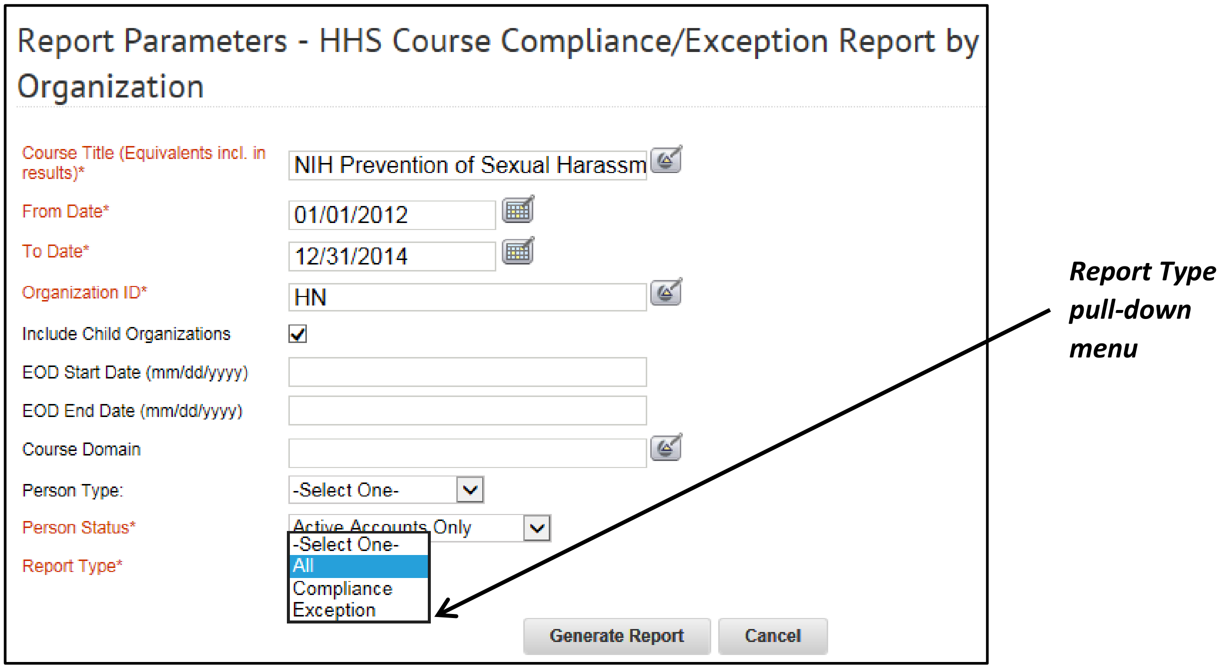


Figure 15 – Report Type pull-down menu

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.

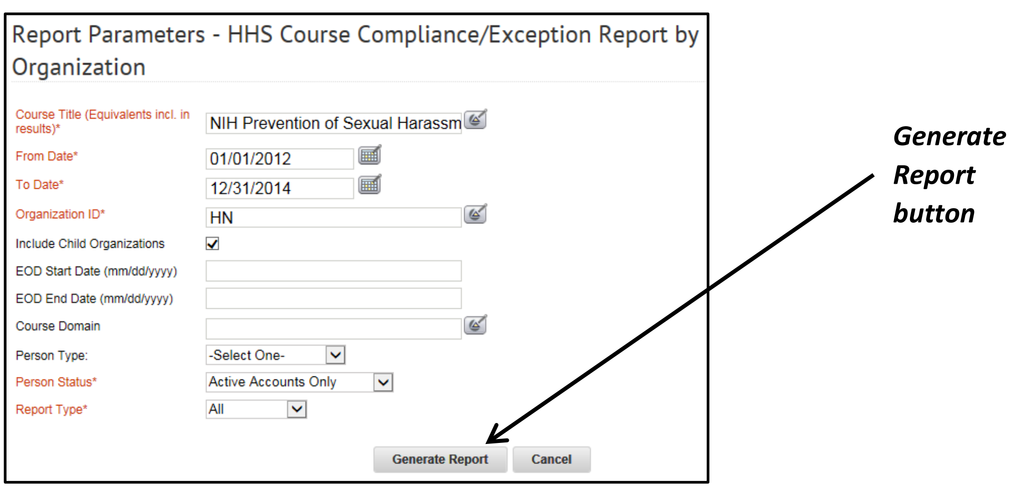


Figure 16 – Generate Report button

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

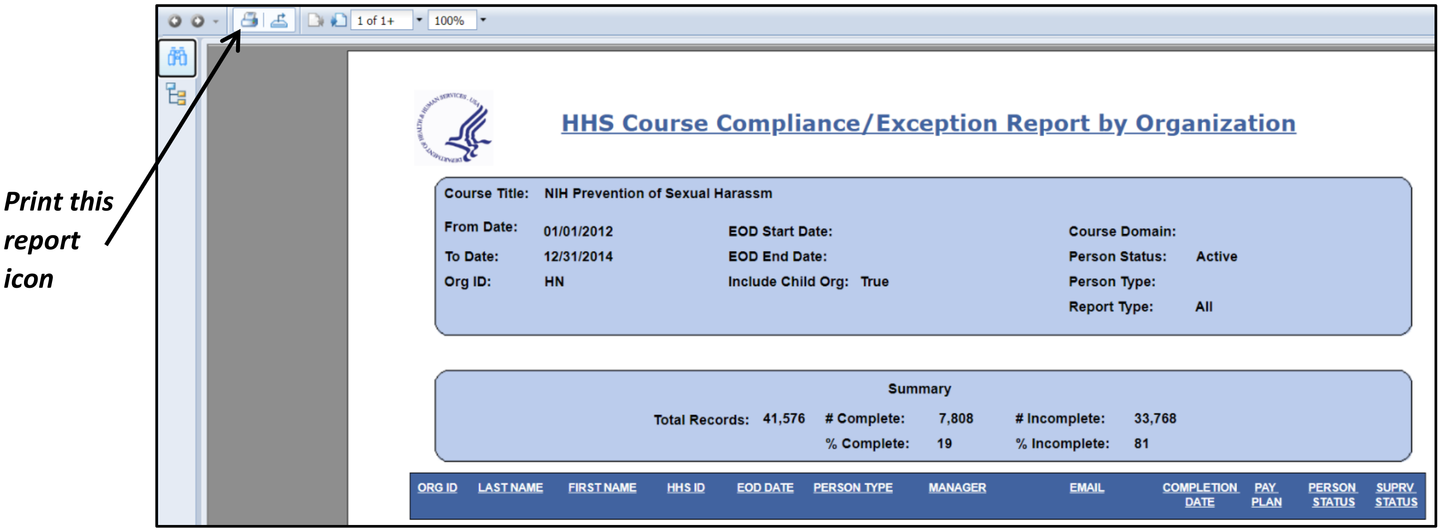


Figure 17 – Print this report icon

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

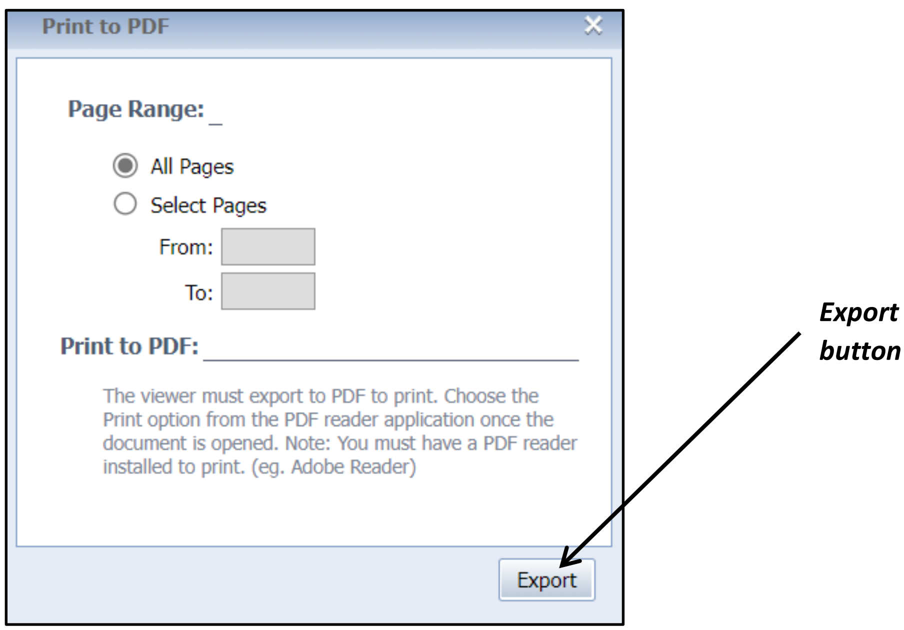


Figure 18 – Export button

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

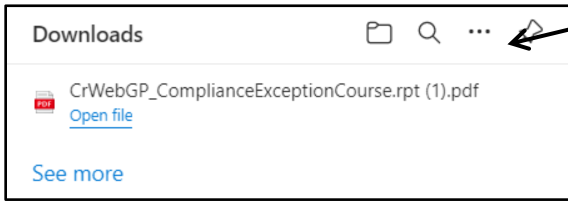


Figure 19 – Open file link

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 i**con.

Figure 1 – Admin icon

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

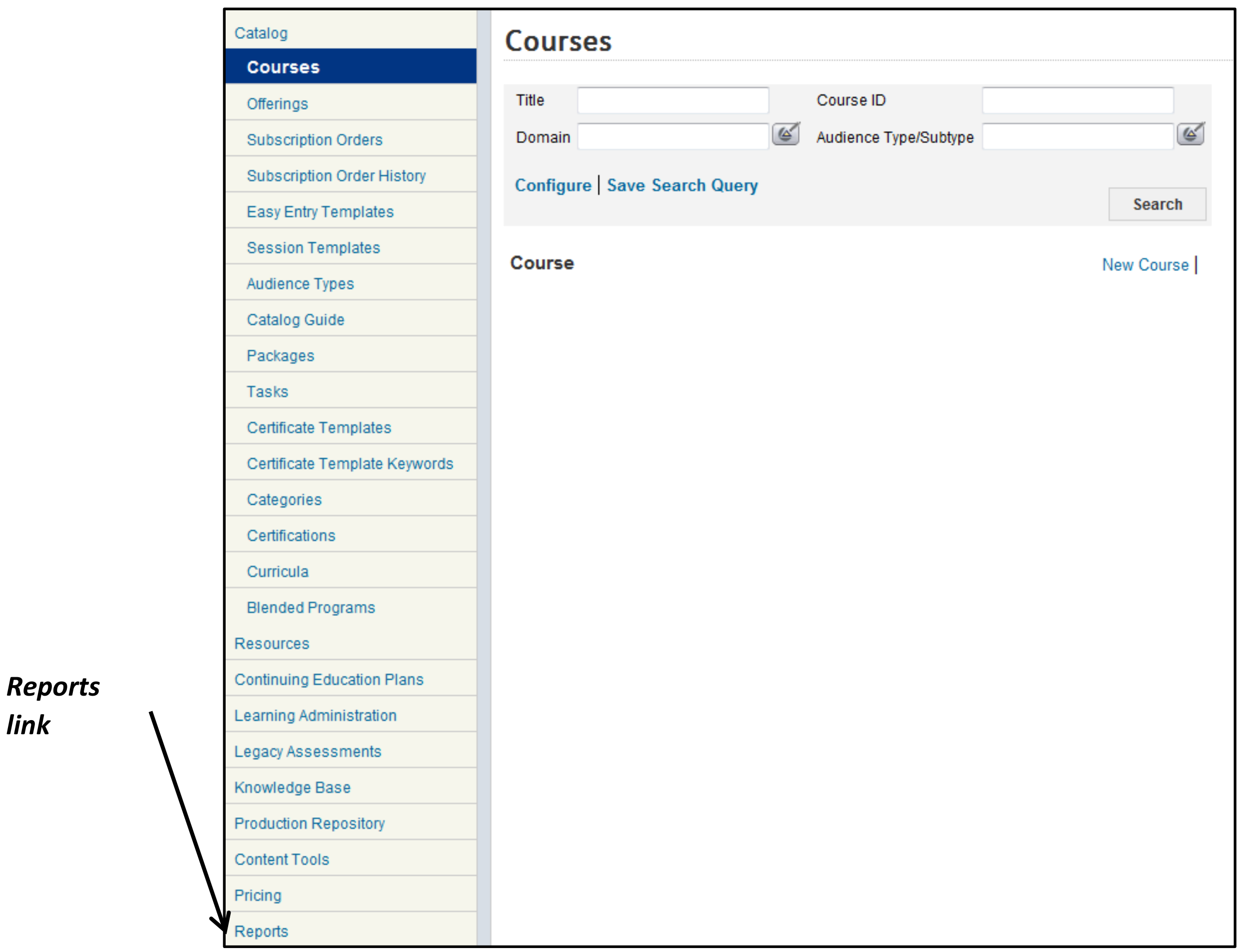


Figure 2 – Reports link

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

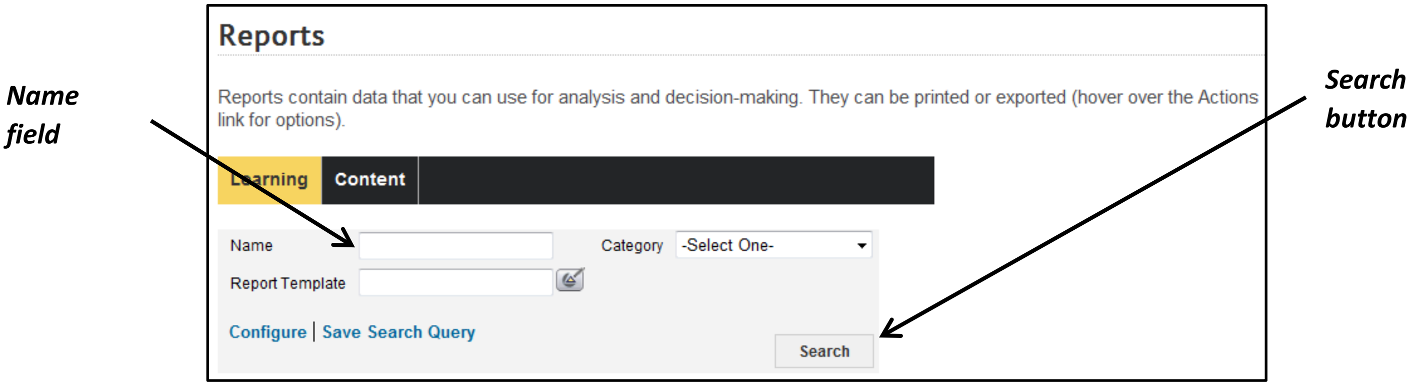


Figure 3 – Name field and Search button

Click the **Actions** link.

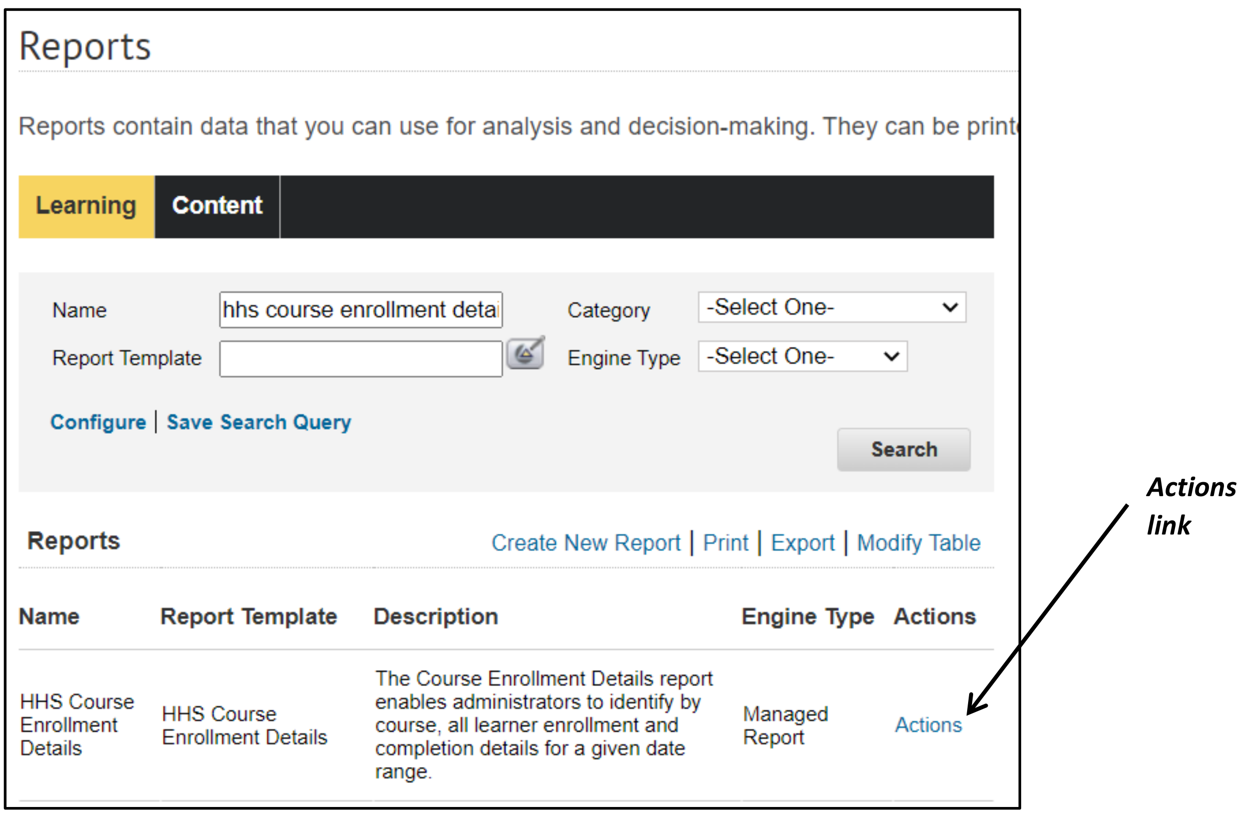


Figure 4 – Actions link

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

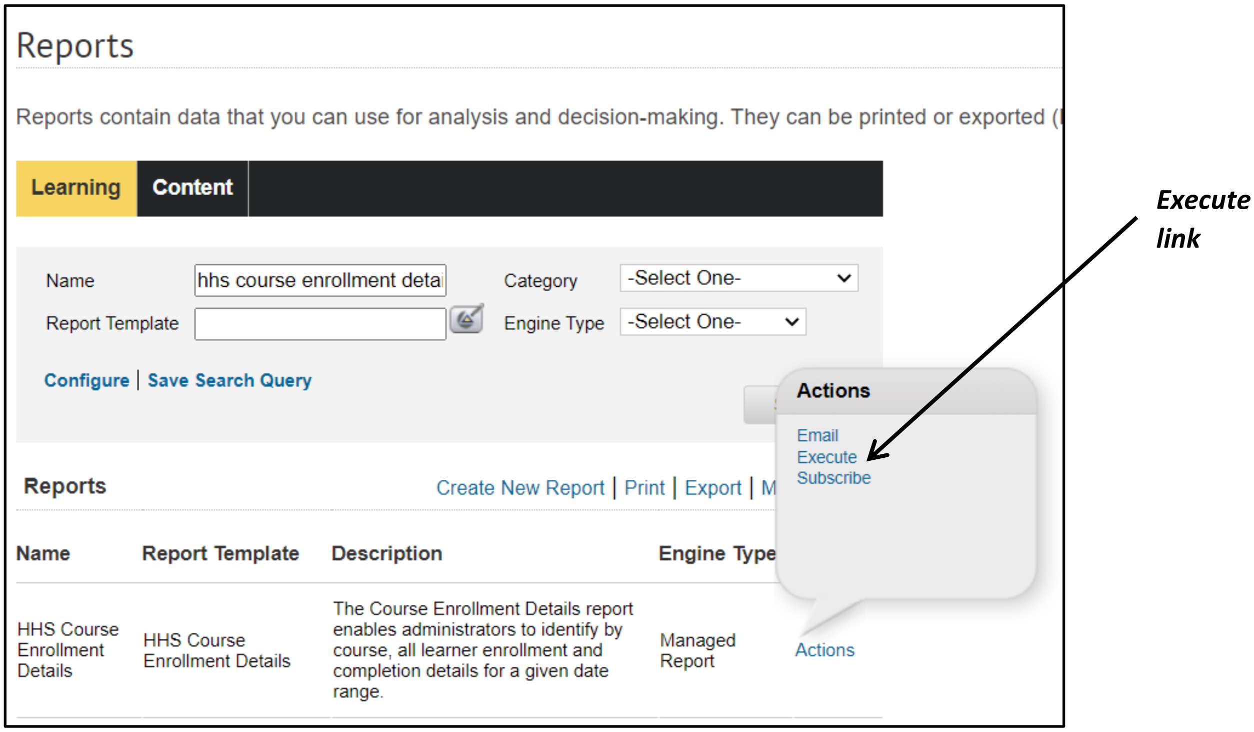


Figure 5 – Execute link on the Actions activity menu

Click the **Course Title** pick icon.

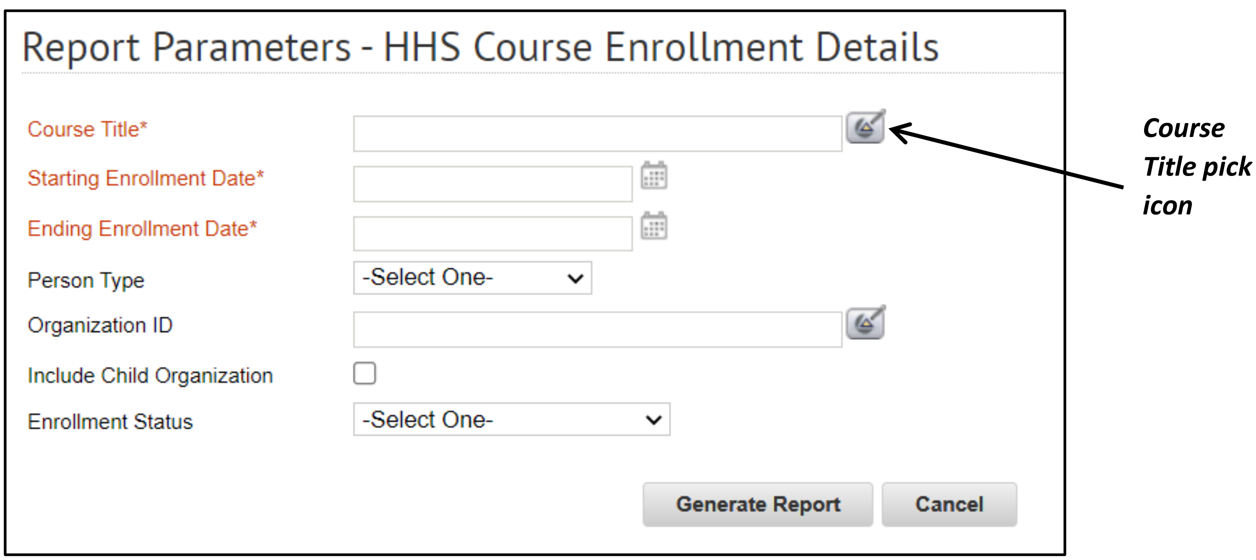


Figure 6 – Course Title pick icon

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

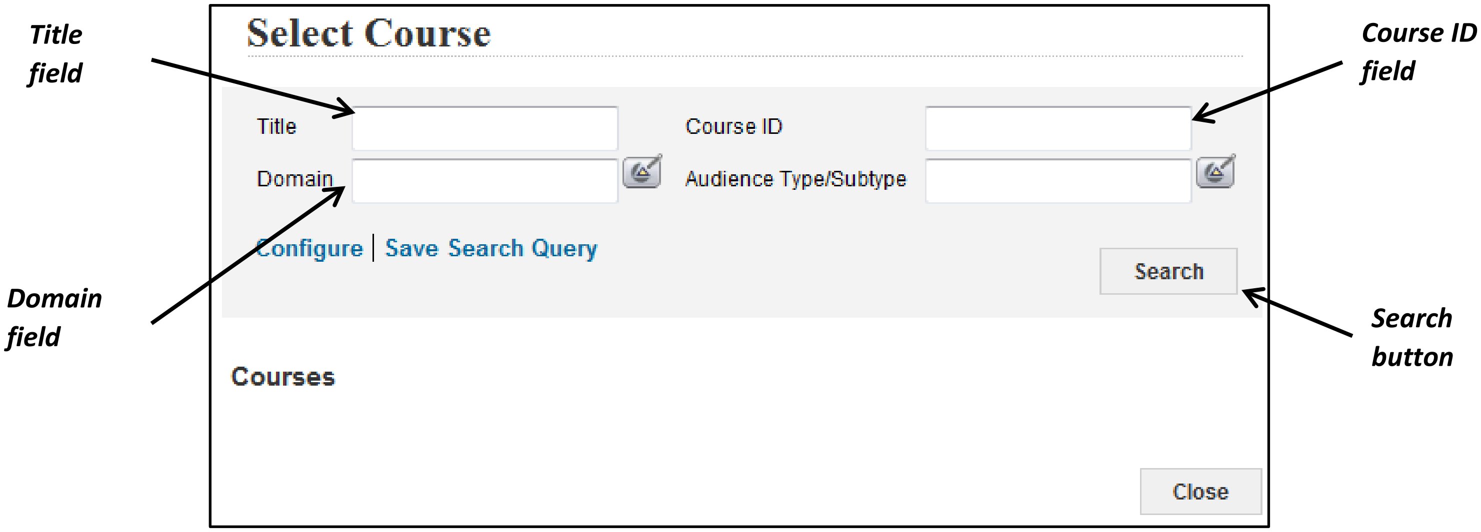


Figure 7 – Title, Course ID, and Domain fields and Search button

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

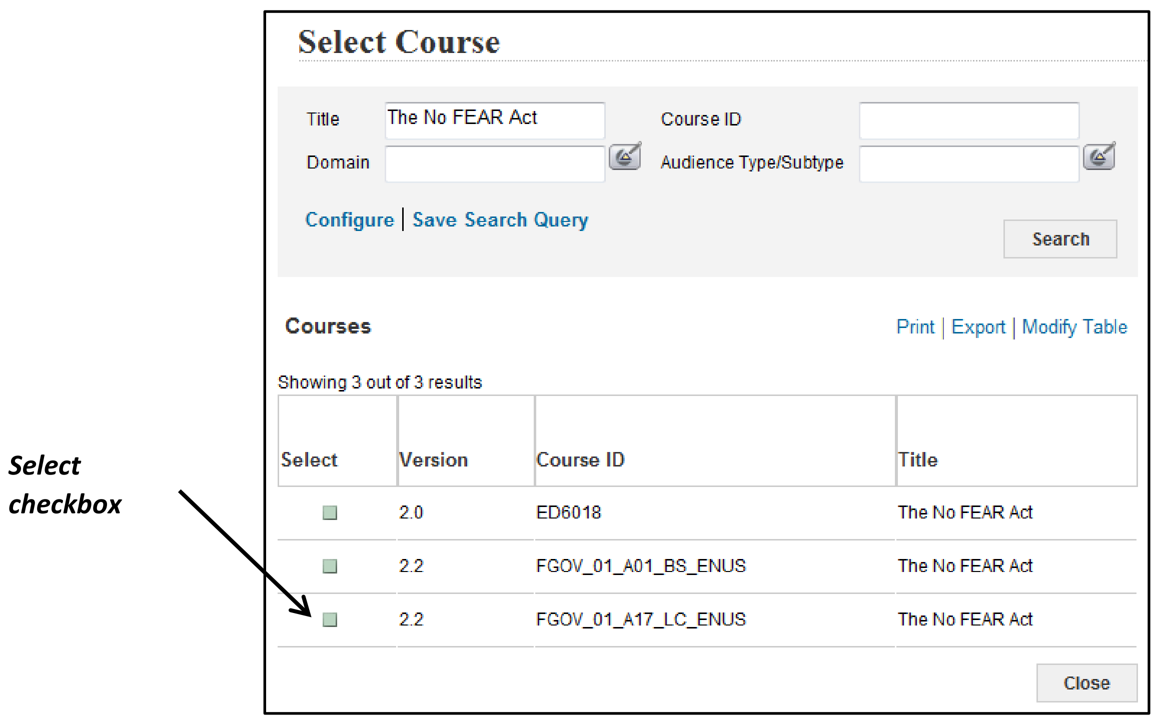


Figure 8 – Select checkbox

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.

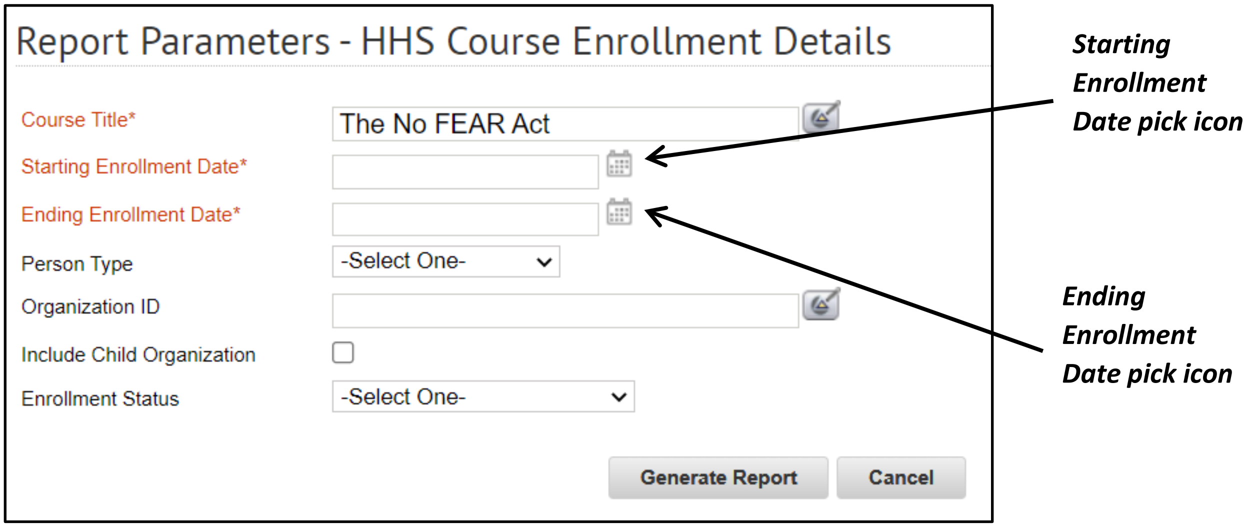


Figure 9 – Starting Enrollment Date and Ending Enrollment Date fields and pick icons

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.

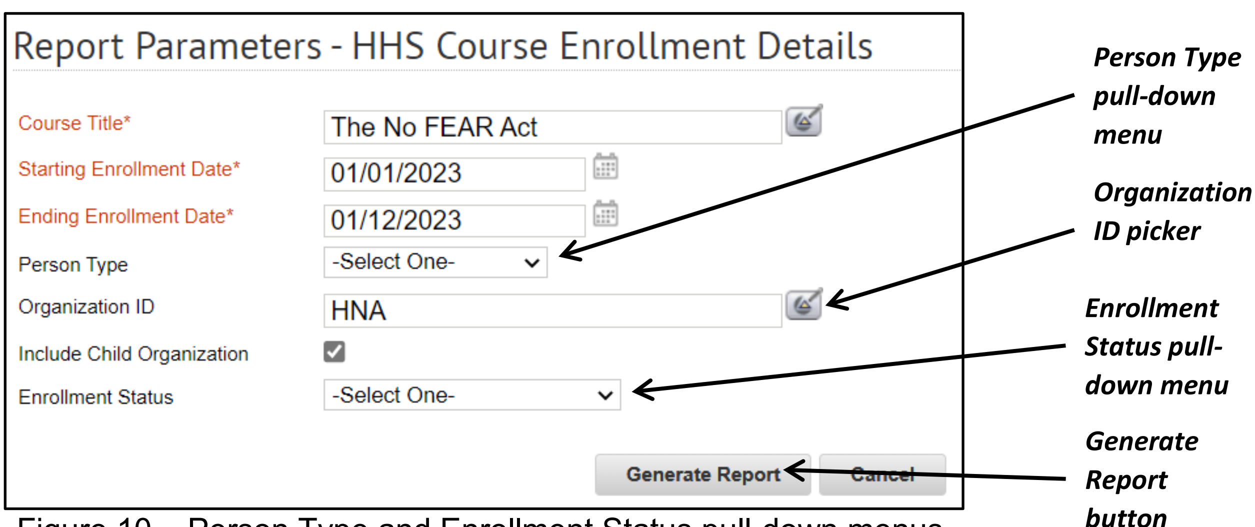


Figure 10 – Person Type and Enrollment Status pull-down menus, Organization ID text field, and Generate Report button

Click the **Print this report** icon.

Print this report icon

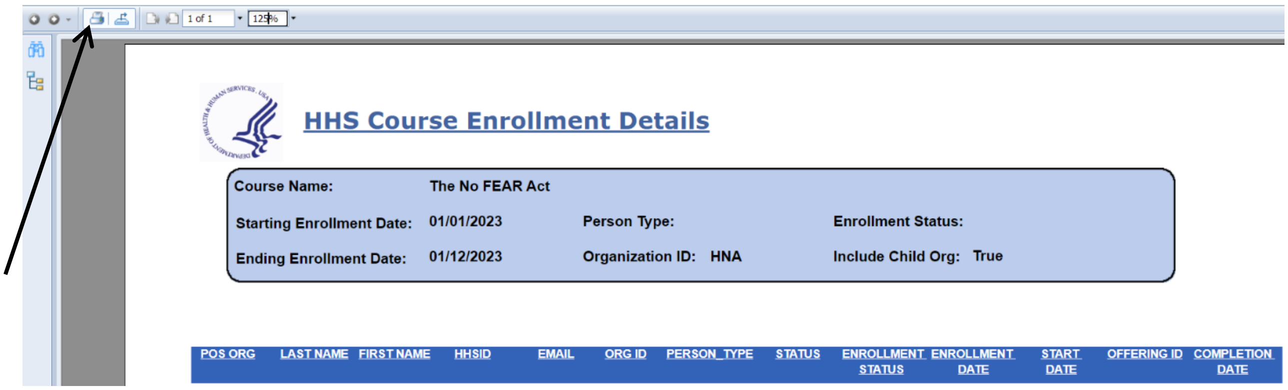
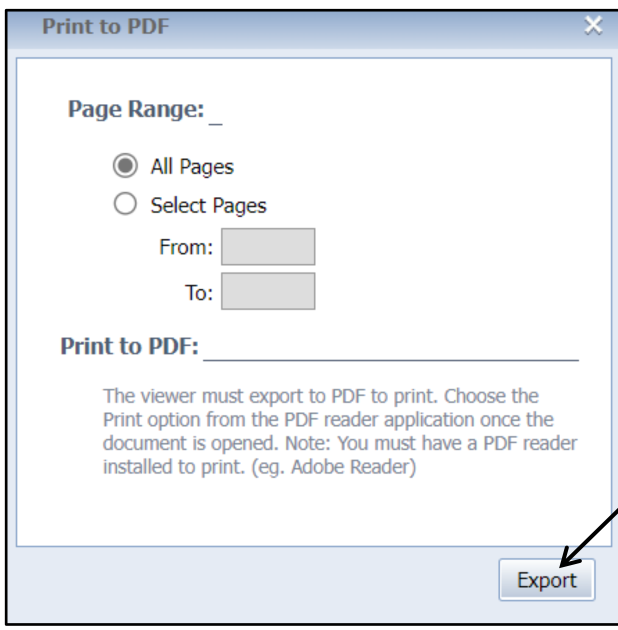


Figure 11 – Print this report button

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



Export button

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 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 i**con.

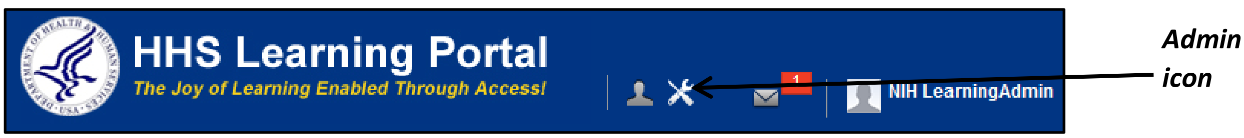


Figure 1 – Admin icon

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

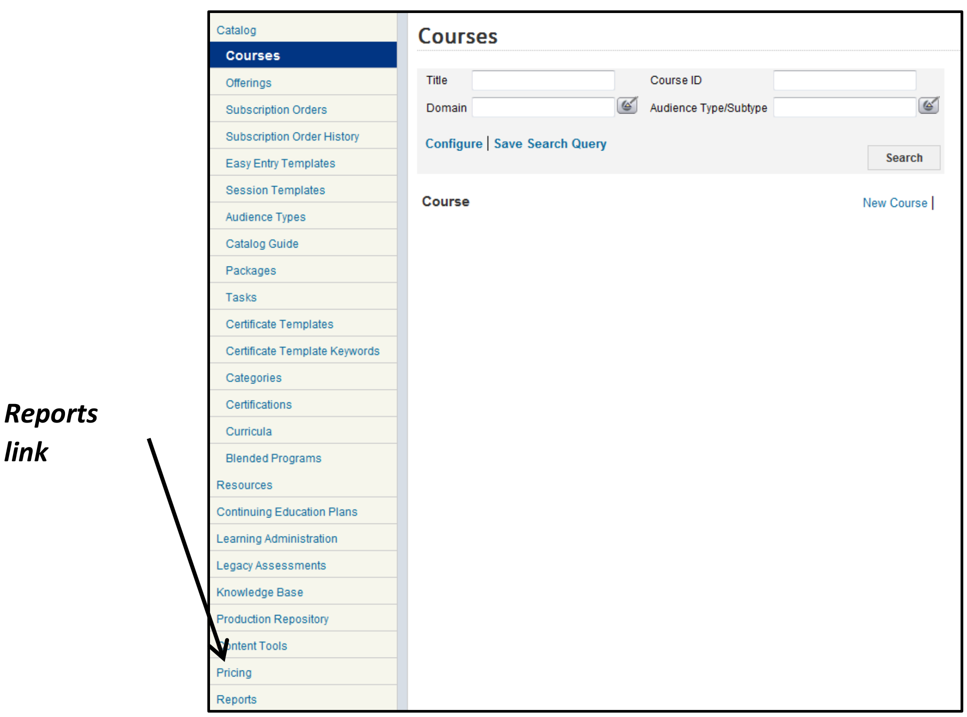


Figure 2 – Reports link

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

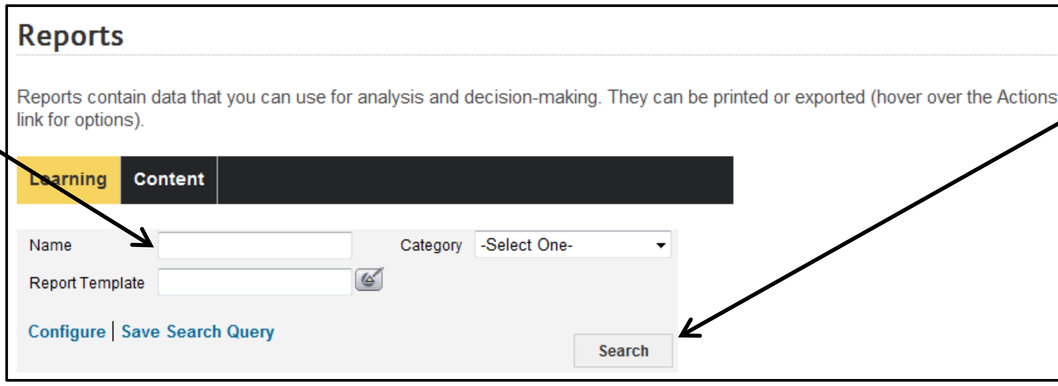


Figure 3 – Name field and Search button

Click the **Actions** link.

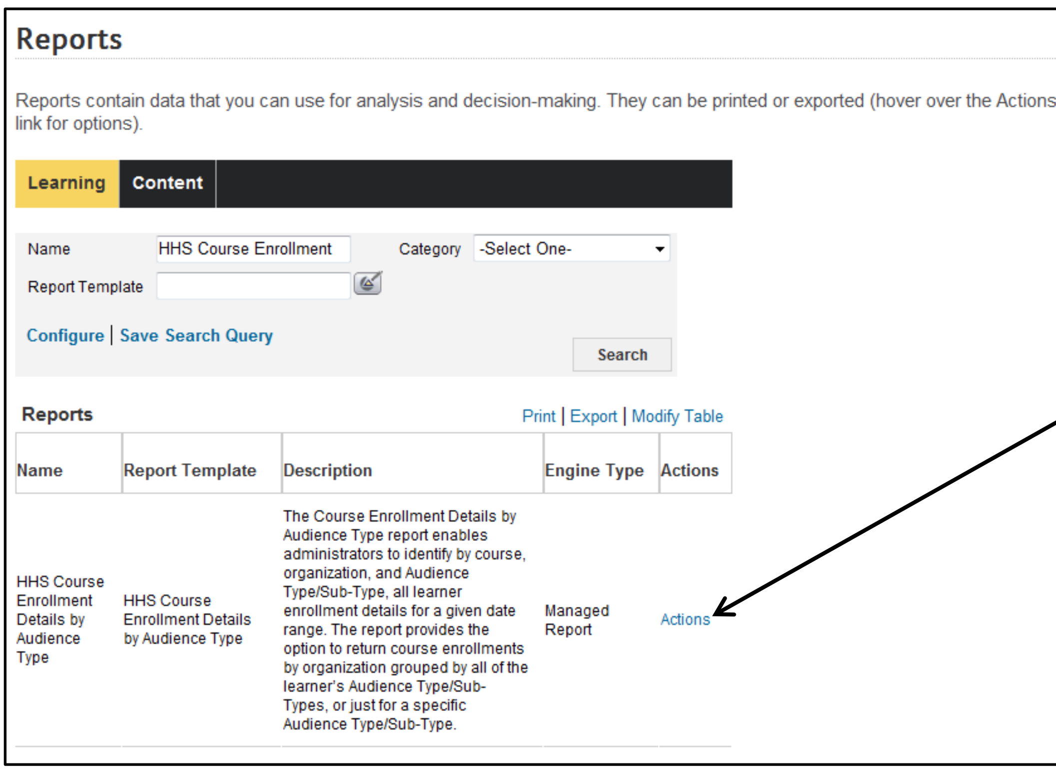


Figure 4 – Actions link

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

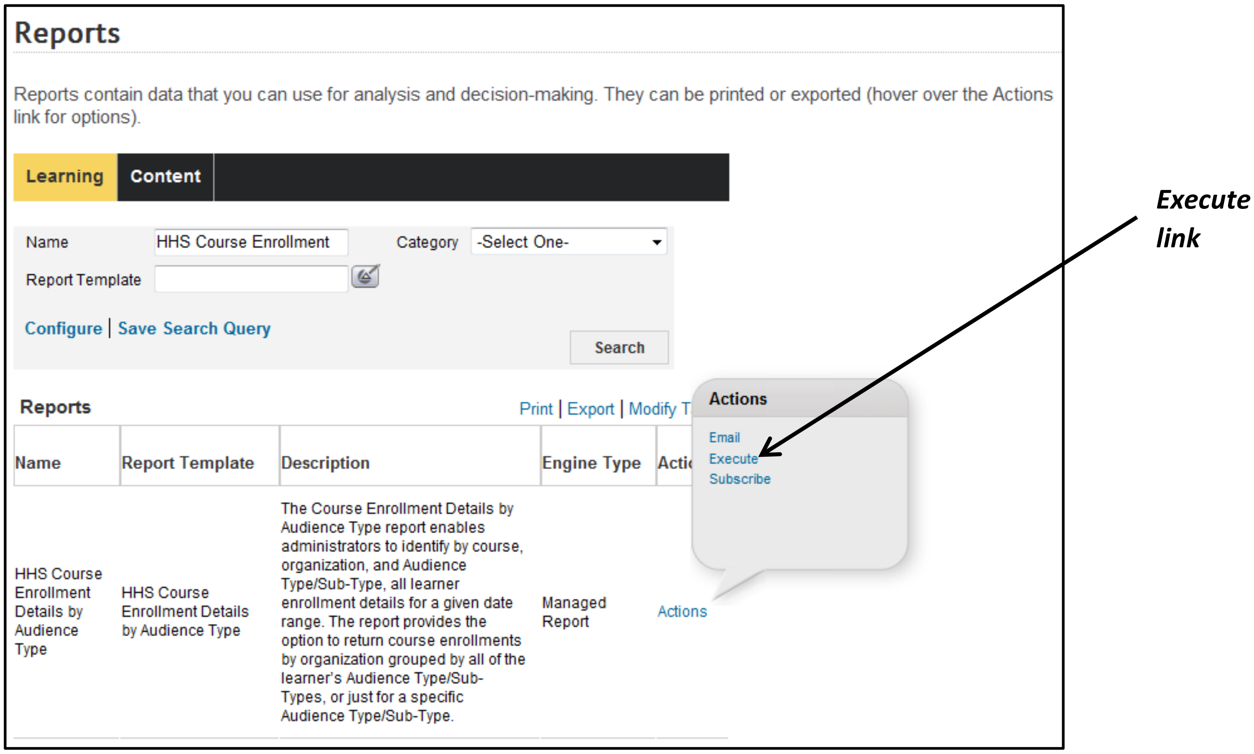


Figure 5 – Execute link on the Actions activity menu

Click the **Course Title** pick icon.

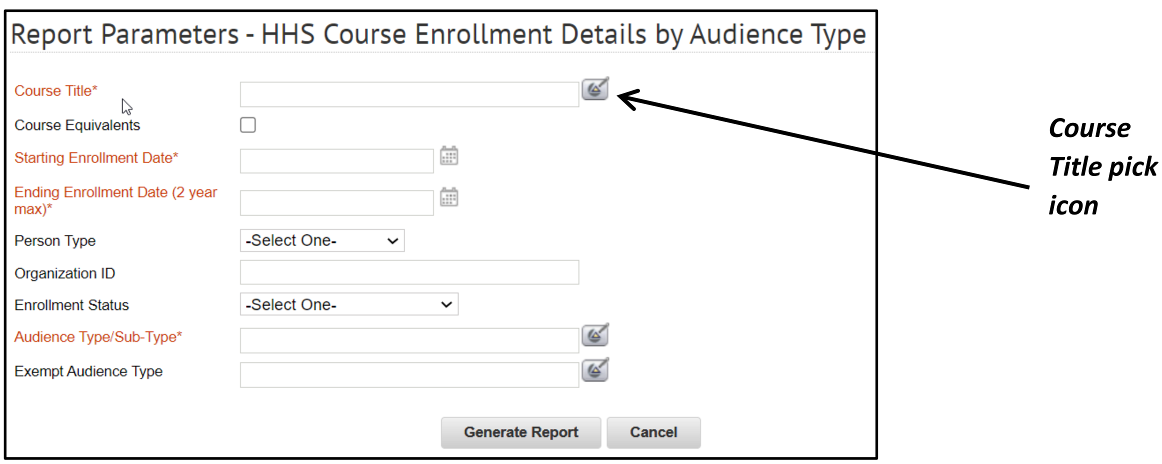


Figure 6 – Course Title pick icon

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

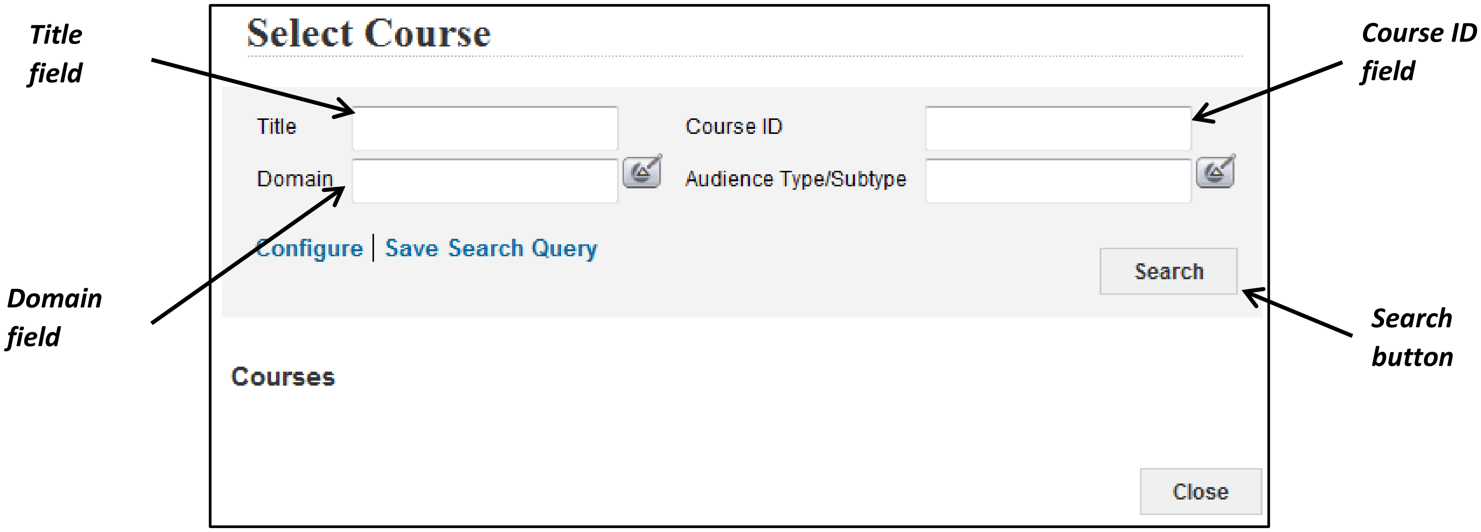


Figure 7 – Title, Course ID, and Domain fields and Search button

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

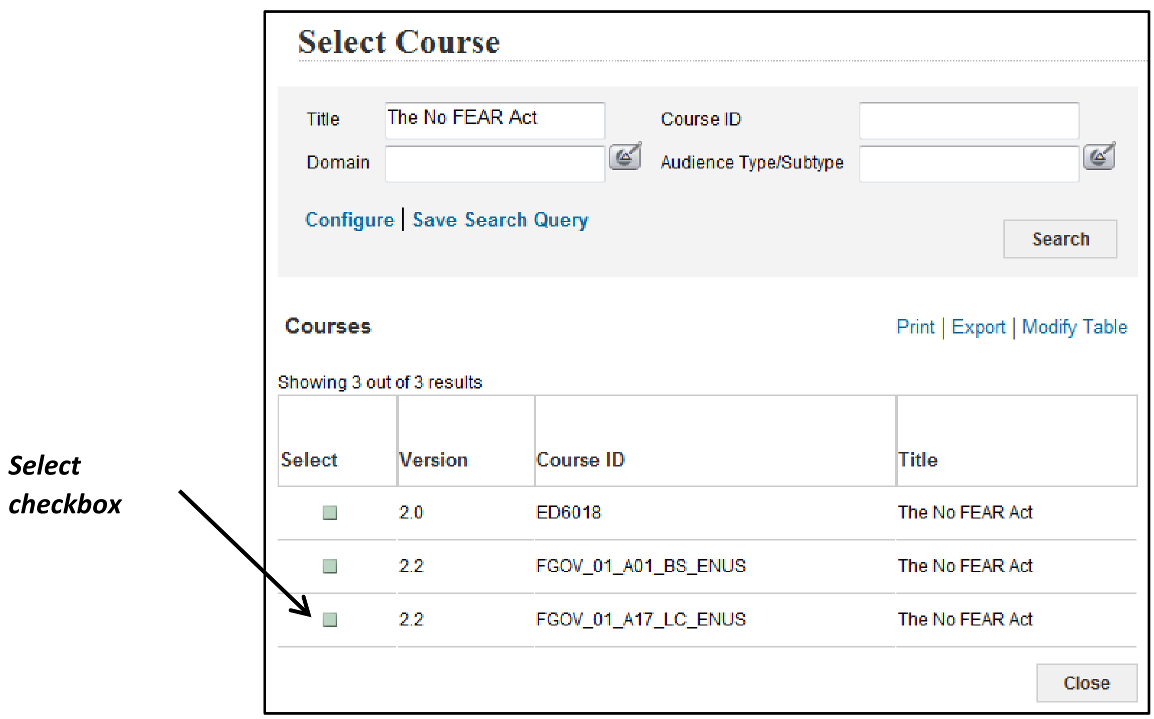


Figure 8 – Select checkbox

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

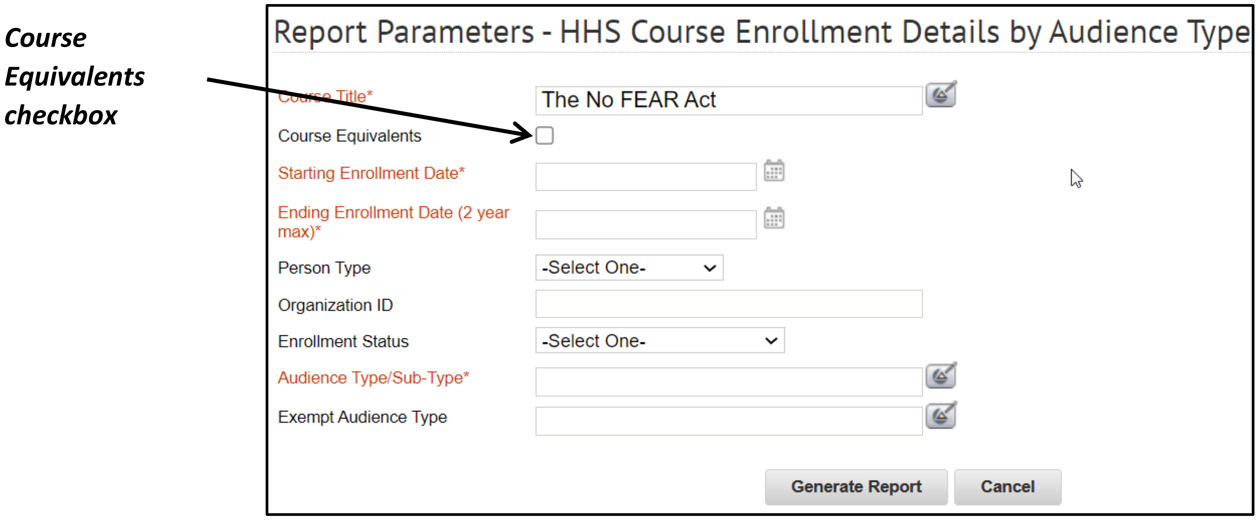


Figure 9 – Course Equivalents checkbox

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.

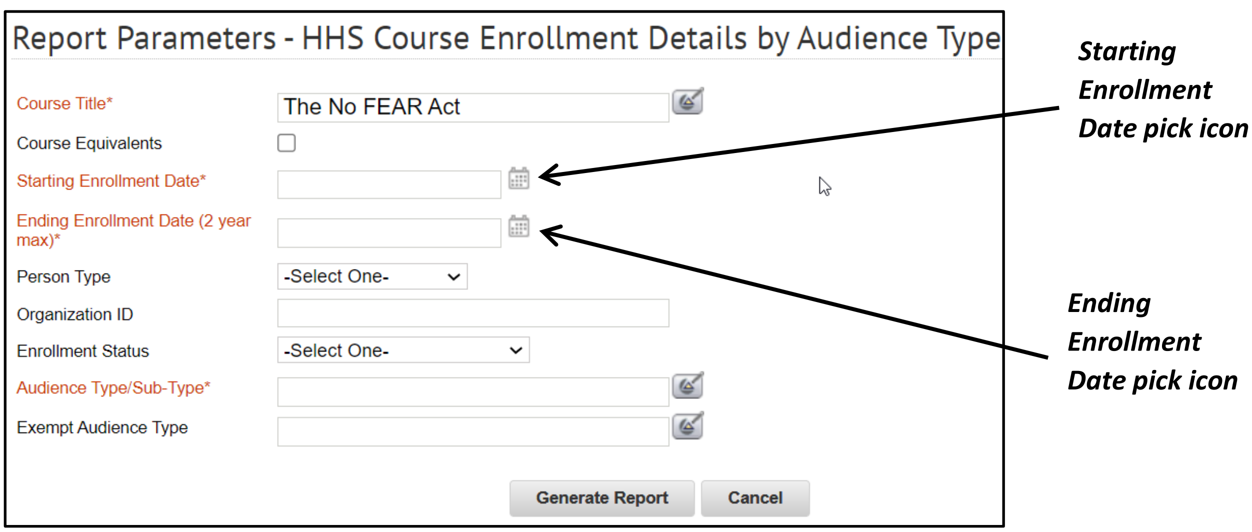


Figure 10 – Starting Enrollment Date and Ending Enrollment Date fields and pick icons

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

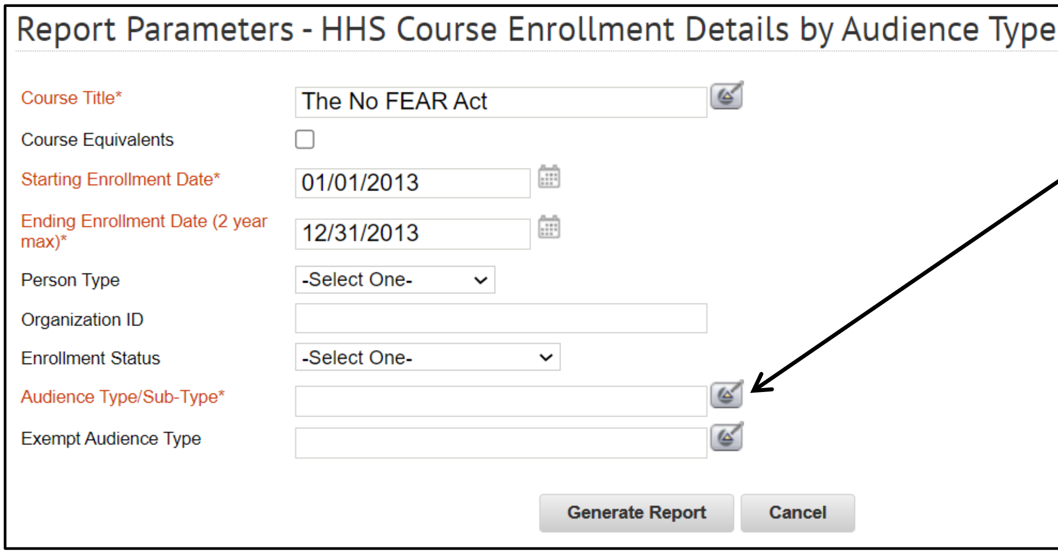


Figure 11 – Audience Type/Sub-Type pick icon

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

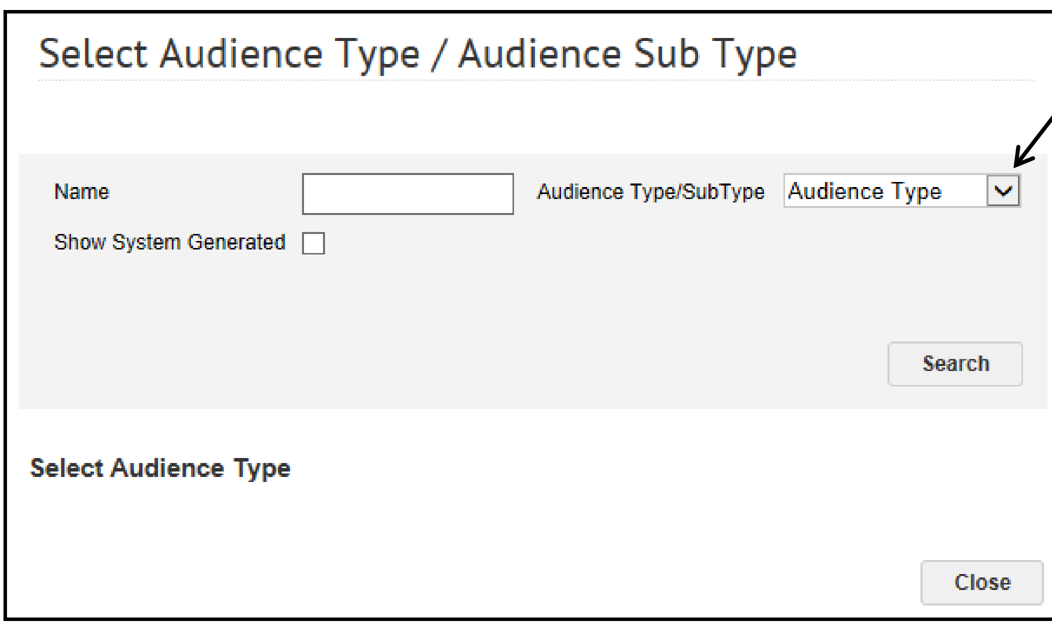


Figure 12 – Audience Type/SubType pull-down menu

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.

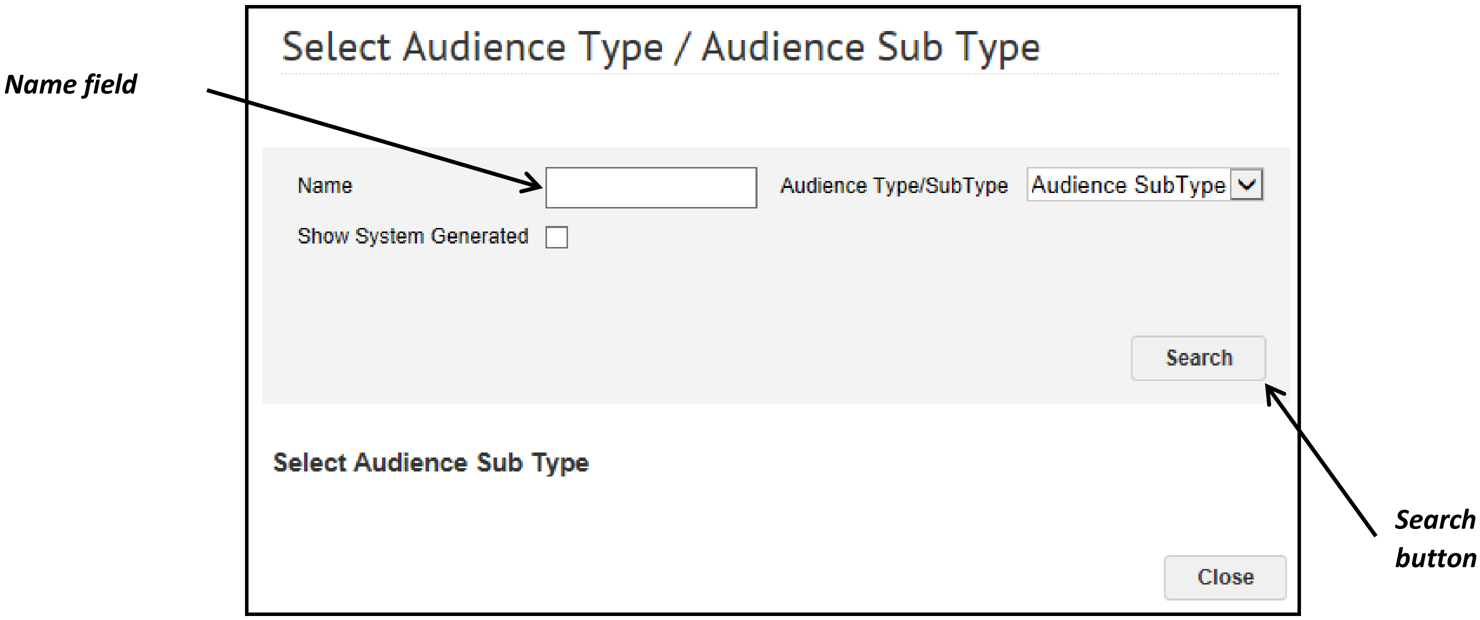


Figure 13 – Name field and Search button

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

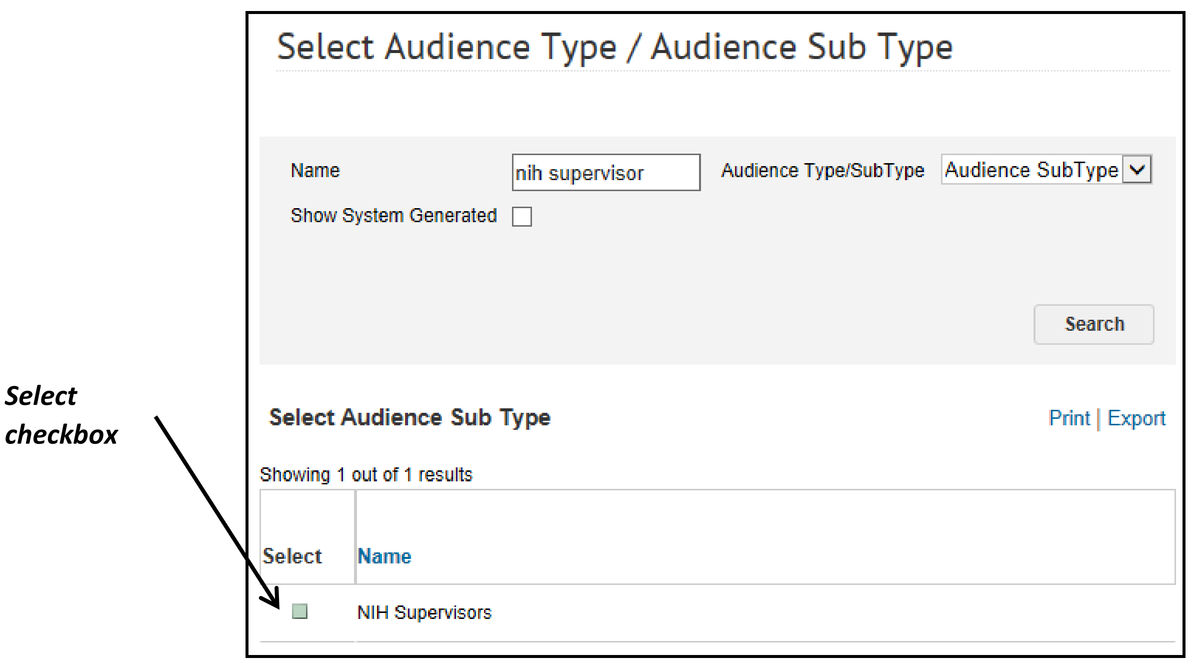


Figure 14 – Select checkbox

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

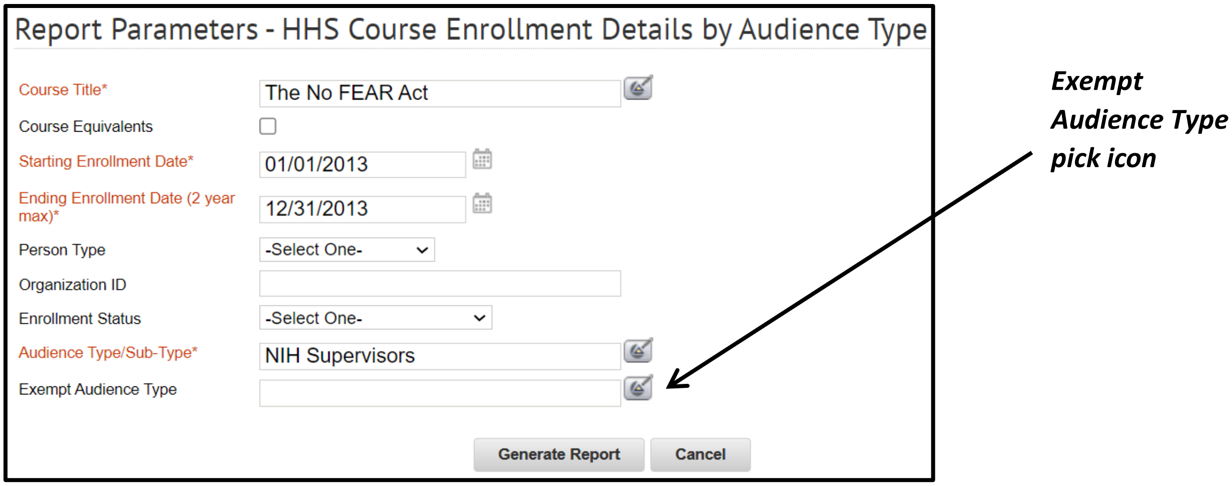


Figure 15 – Exempt Audience Type/Sub-Type pick icon

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

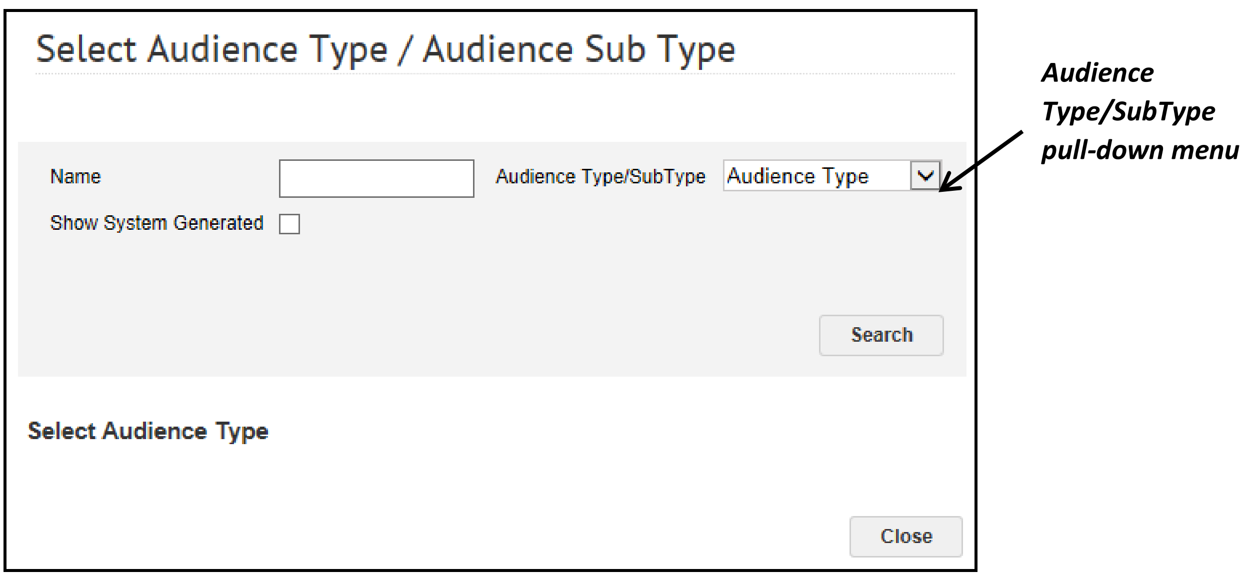


Figure 16 – Audience Type/SubType pull-down menu

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.

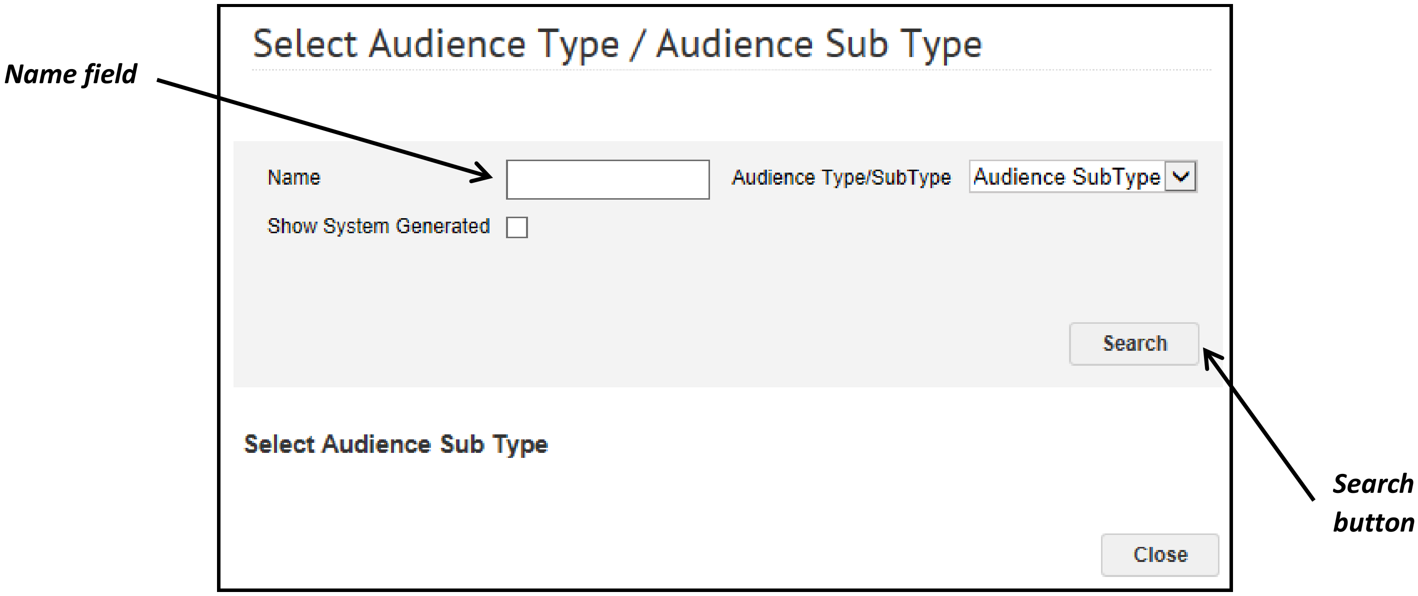


Figure 17 – Name field and Search button

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

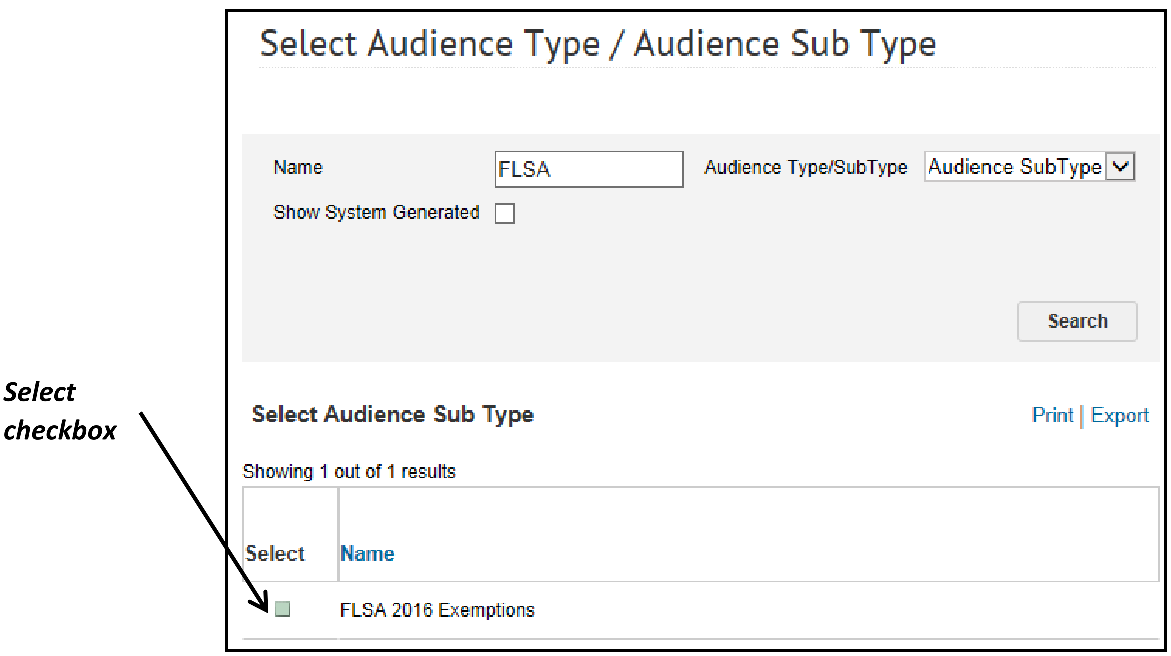


Figure 18 – Select checkbox

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.

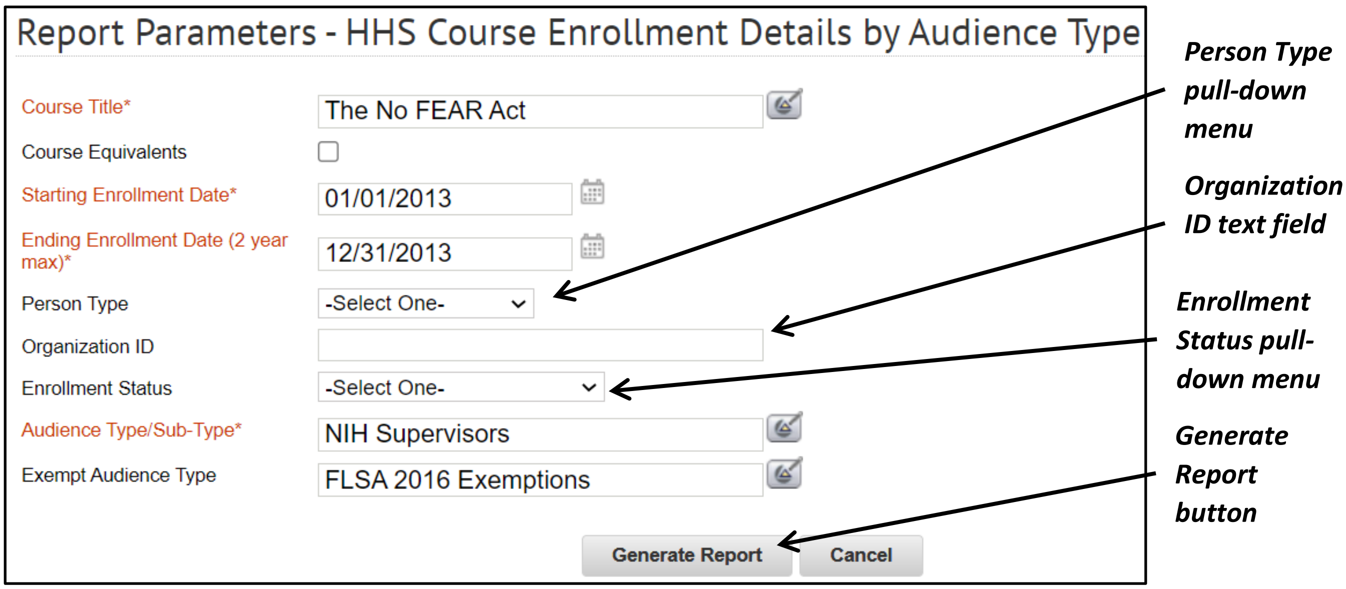


Figure 19 – Person Type and Enrollment Status pull-down menus, Organization ID text field, and Generate Report button

Click the **Print this report** icon.

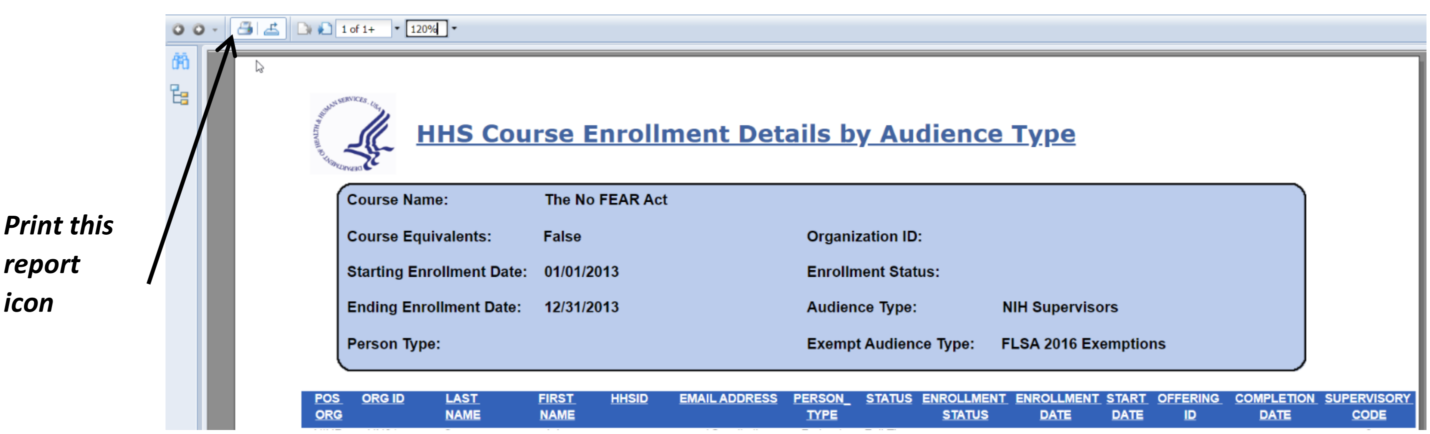


Figure 20 – Print this report button

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

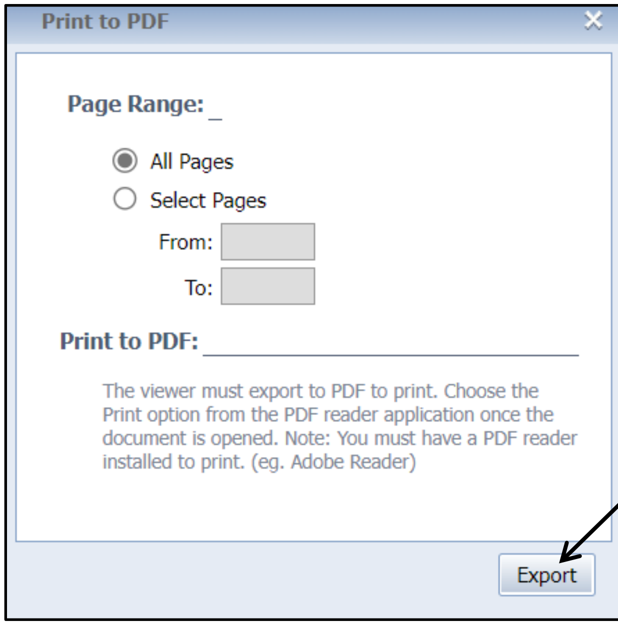


Figure 21 – Export button

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.

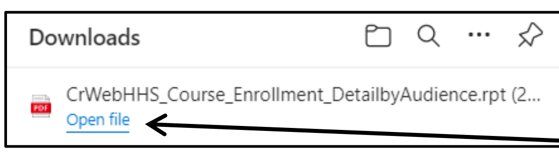


Figure 22 – Open file link

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

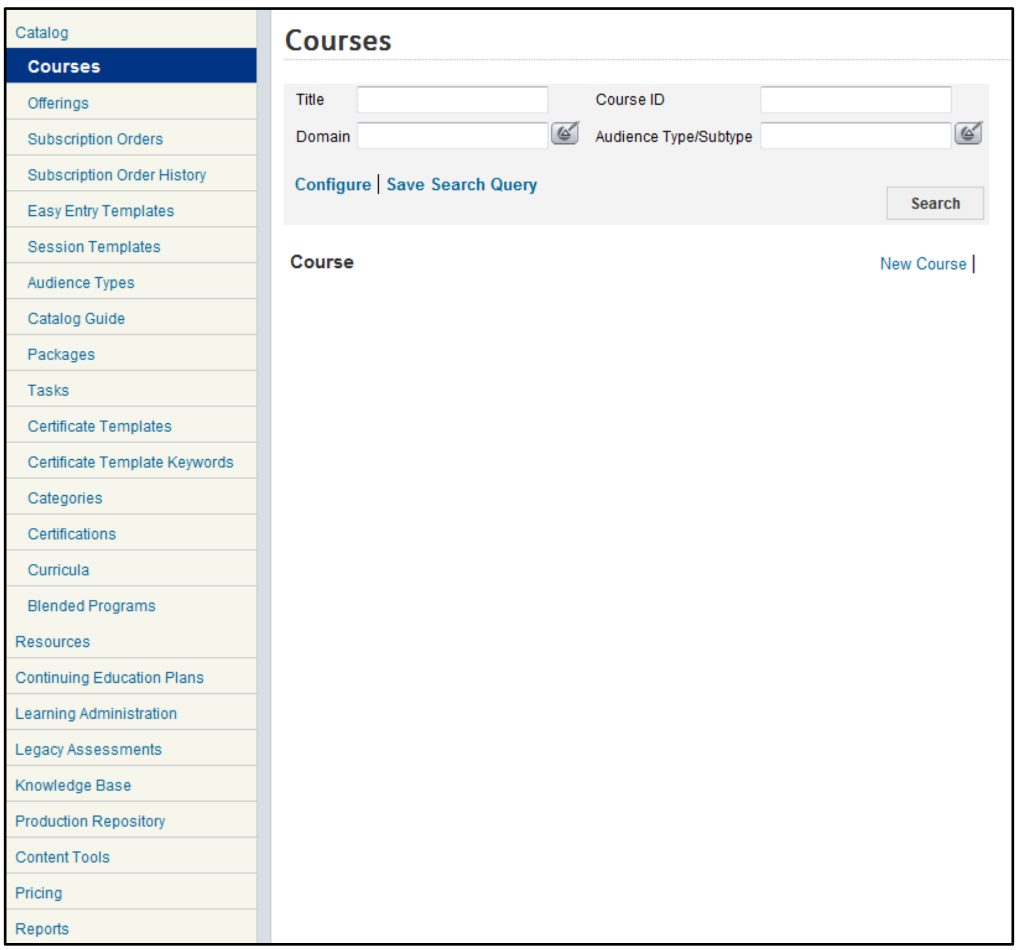


Figure 2 – Reports link

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

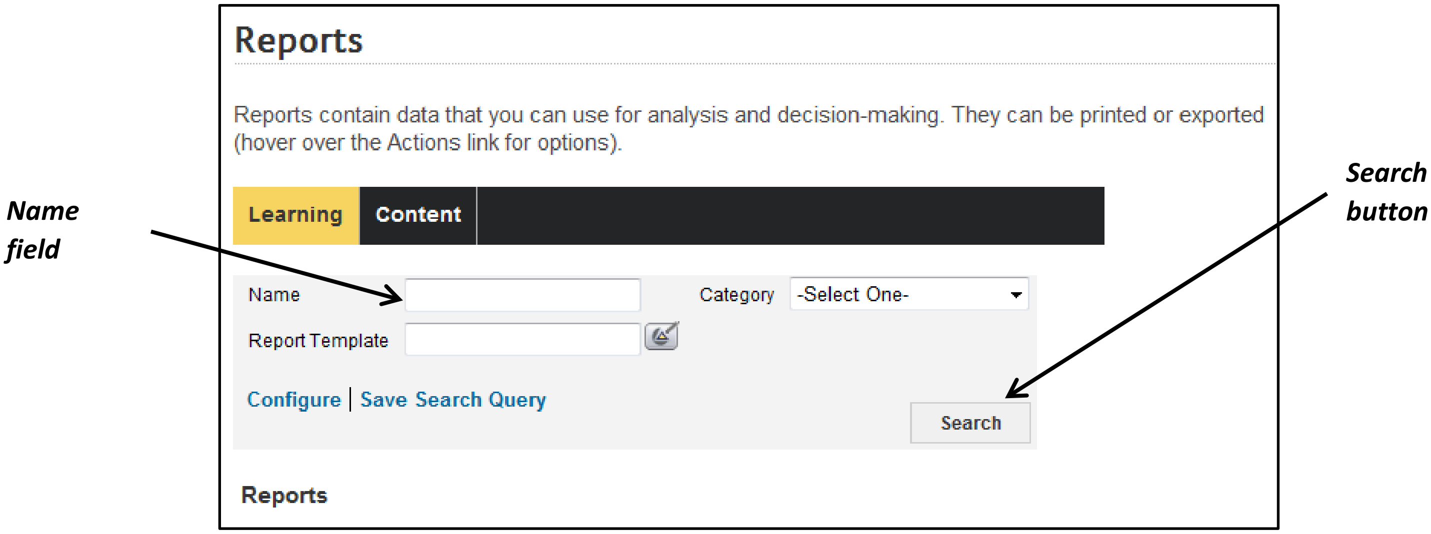


Figure 3 – Name field and Search button

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

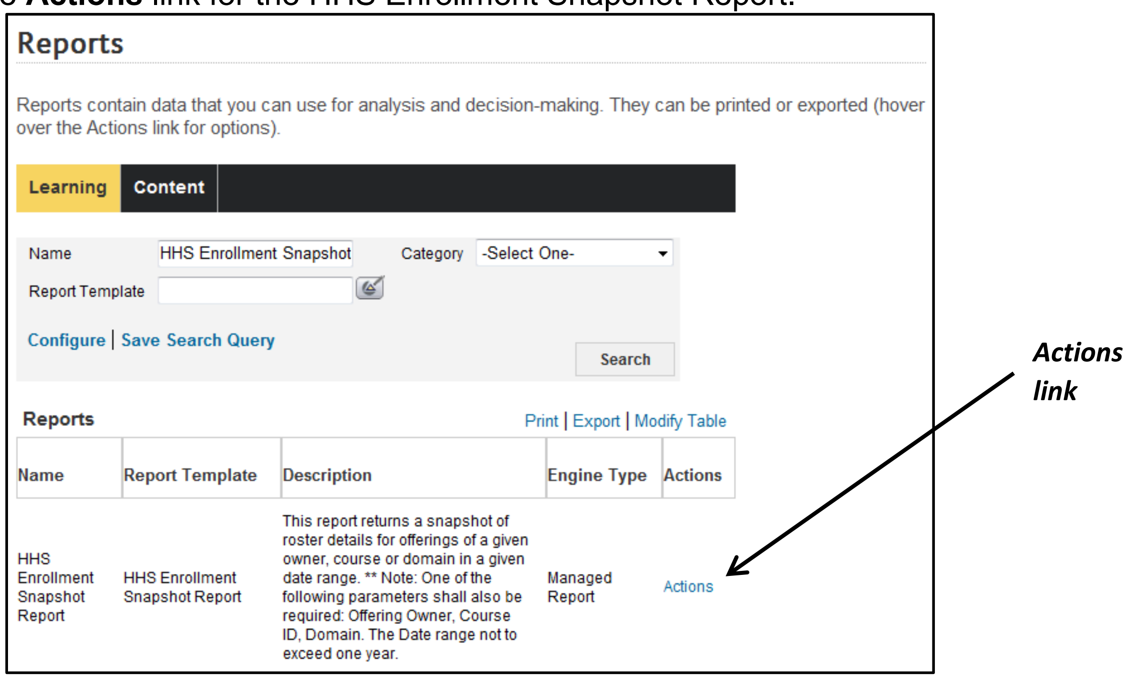


Figure 4 – Actions link

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

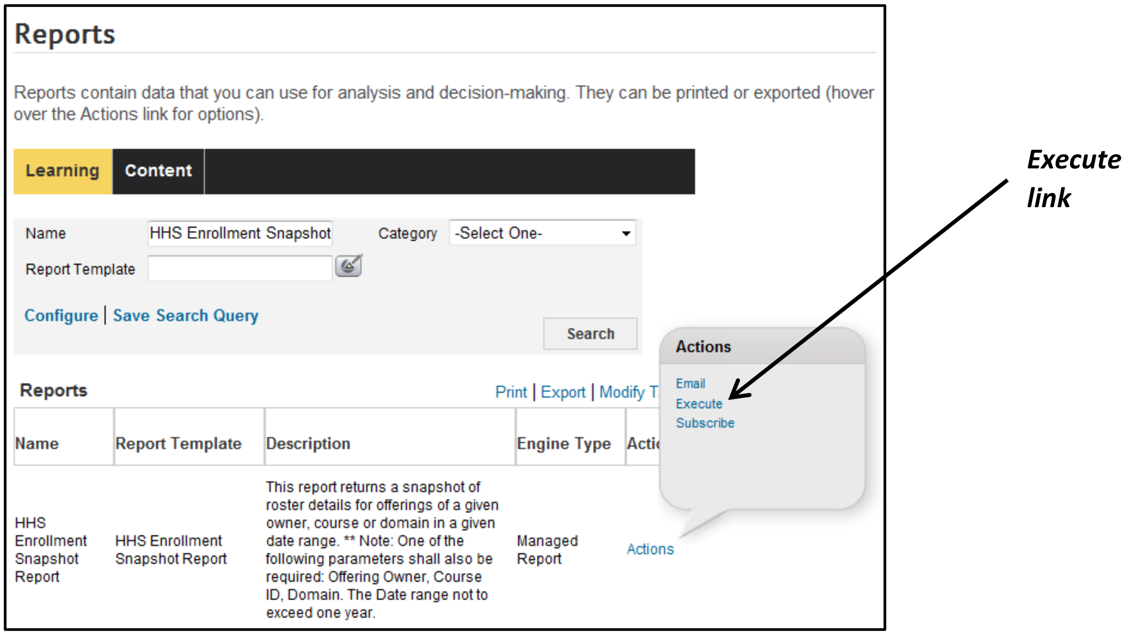


Figure 5 – Execute link on the Actions activity menu

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.

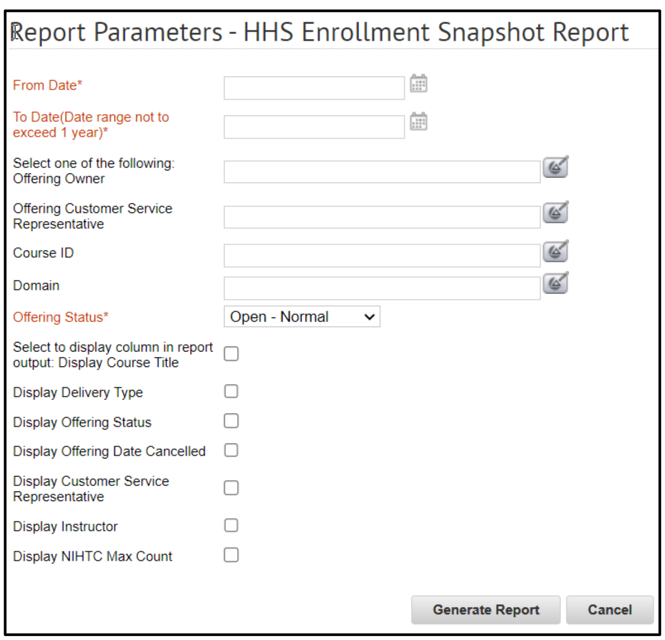


Figure 6 – Offering Owner, Customer Service Representative, Course ID, and Domain pick icons

Click the **Search** button.

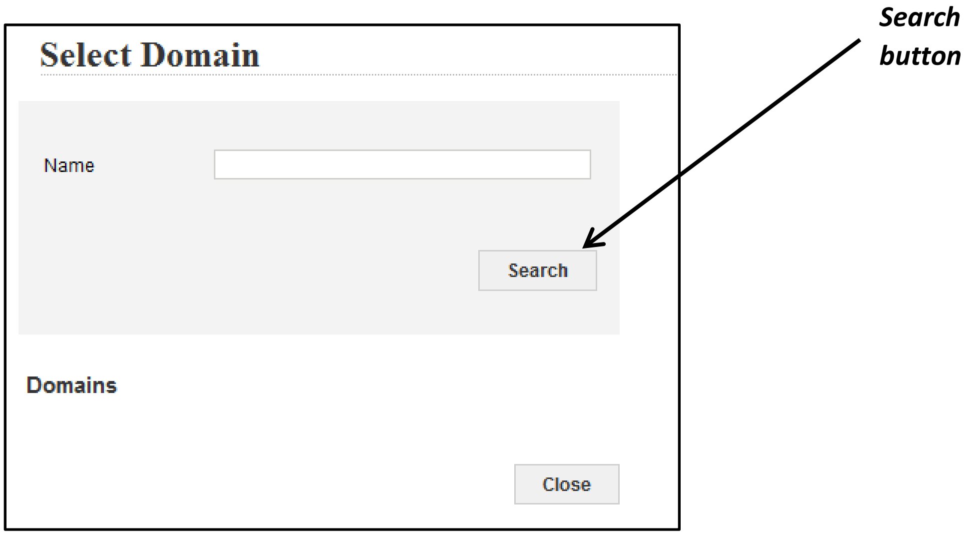


Figure 7 – Search button

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

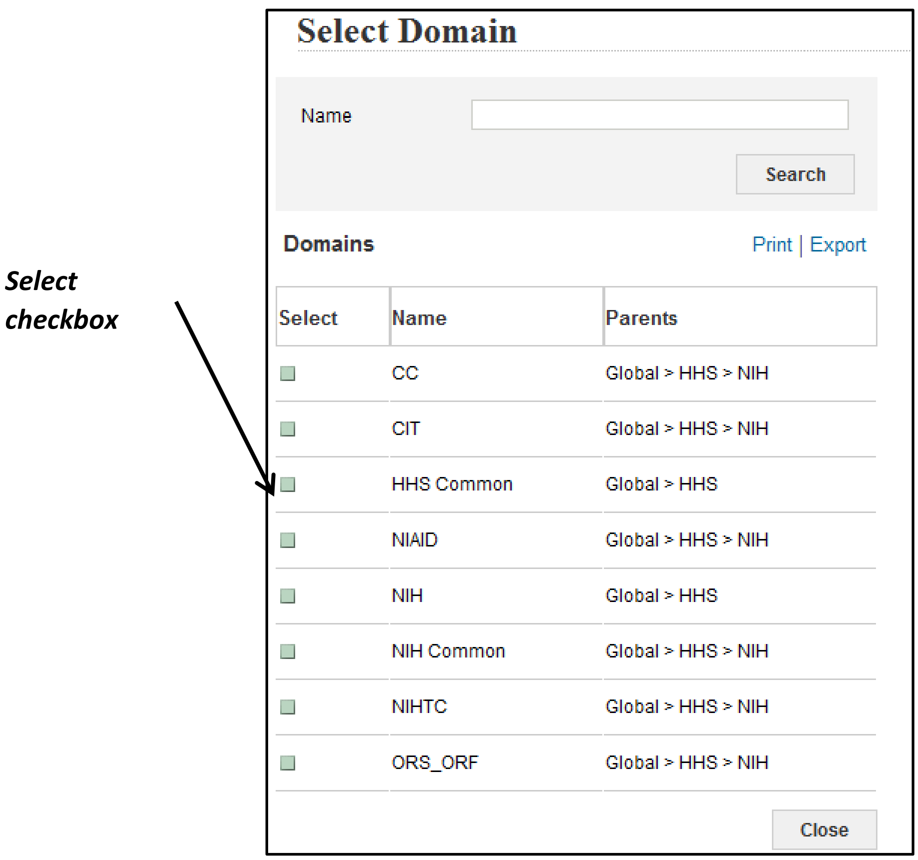


Figure 8 – Select checkbox

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

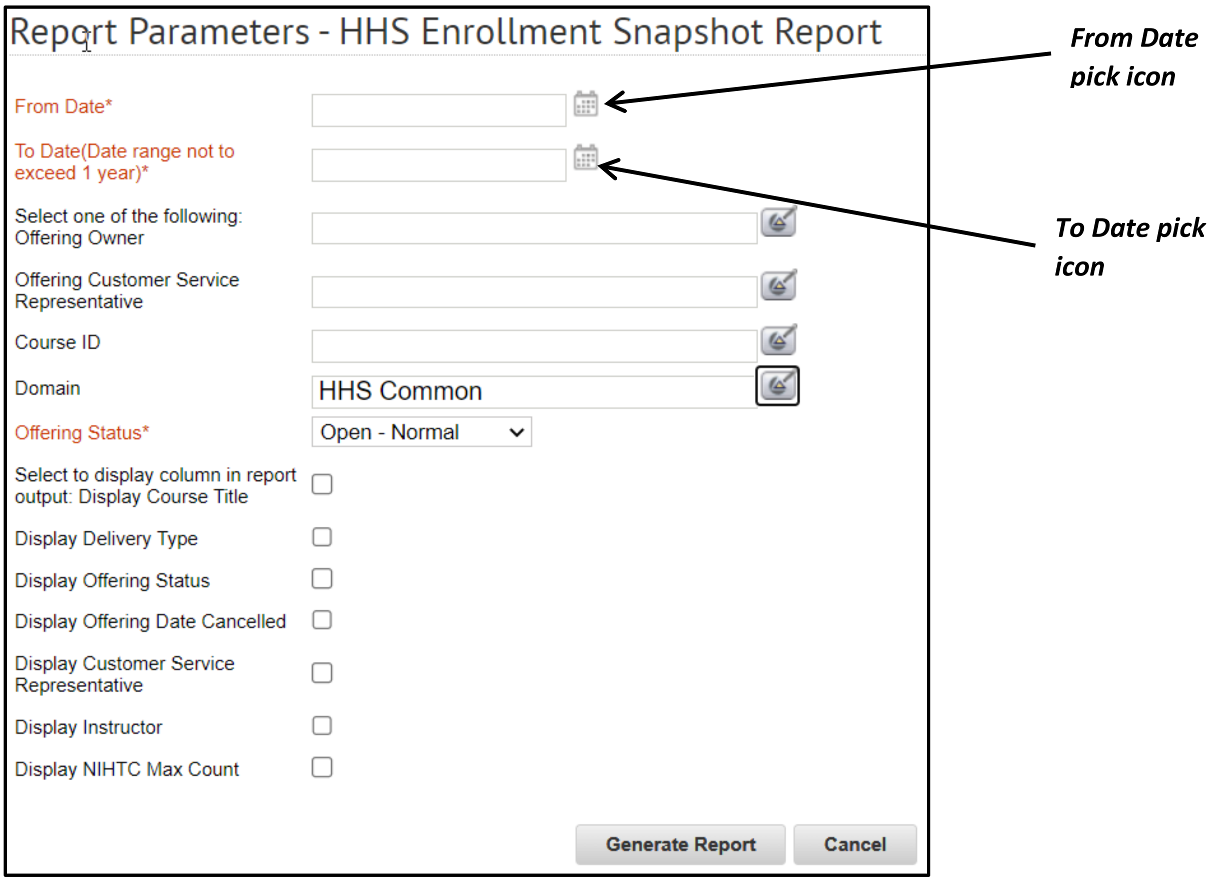


Figure 9 – From Date and To Date pick icons

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.

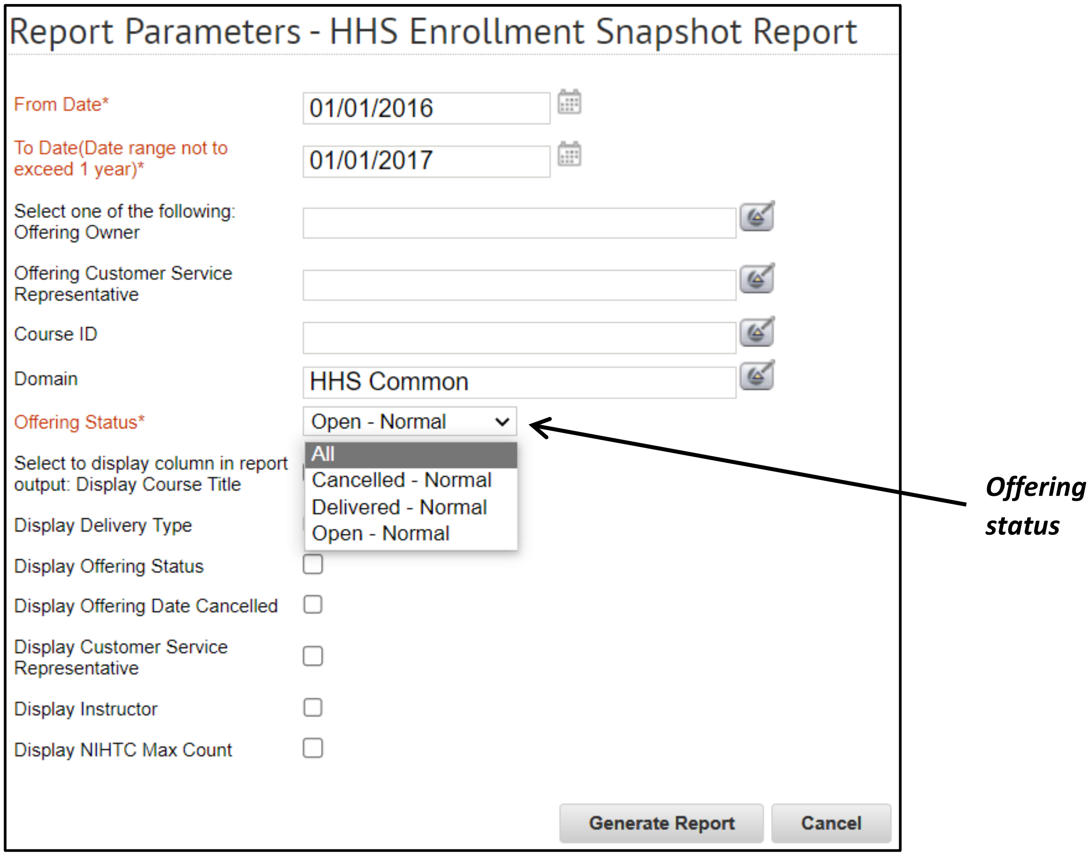


Figure 10 – Offering Status Pull-Down Menu

Click the **Generate Report** icon.

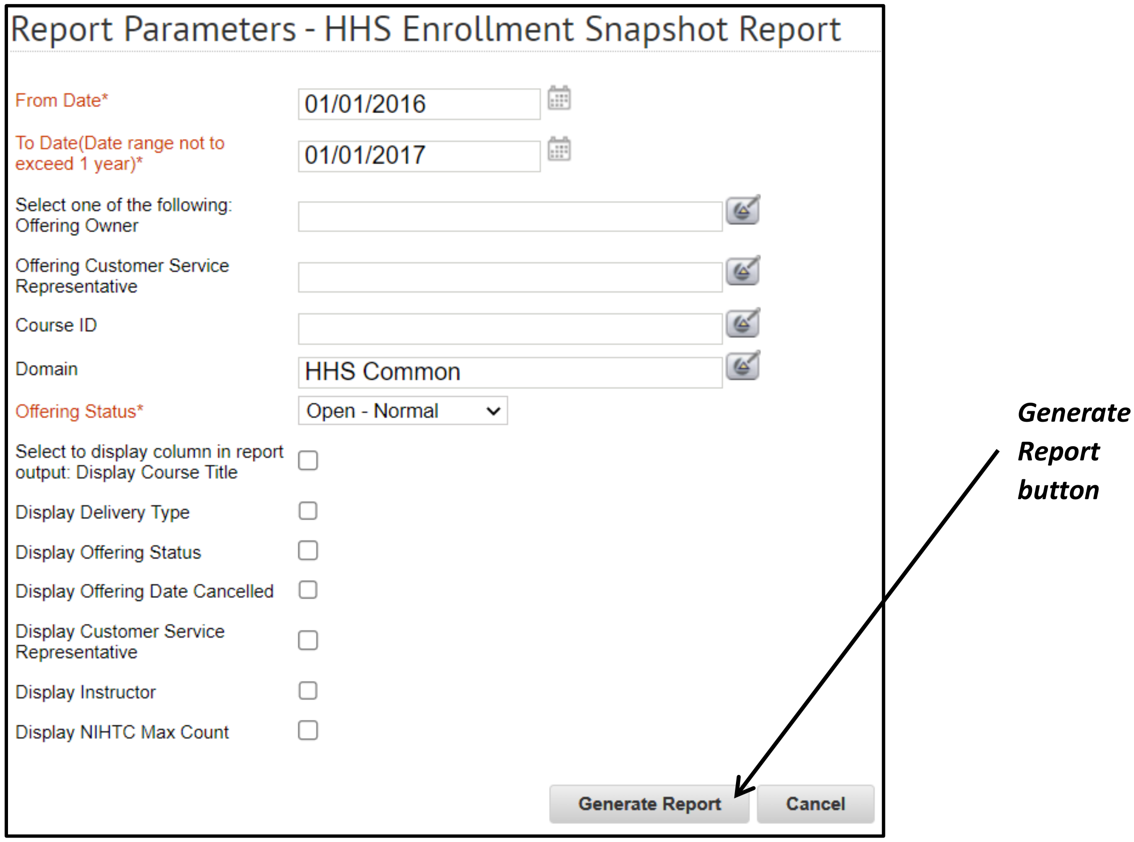


Figure 11 – Generate Report button

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

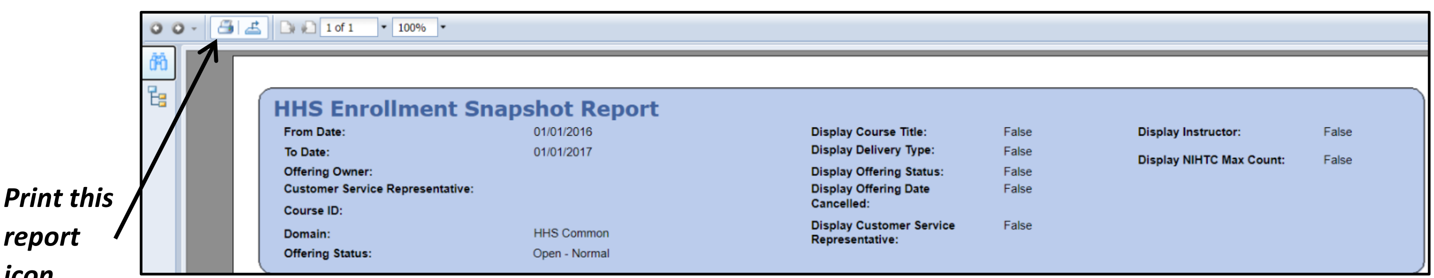
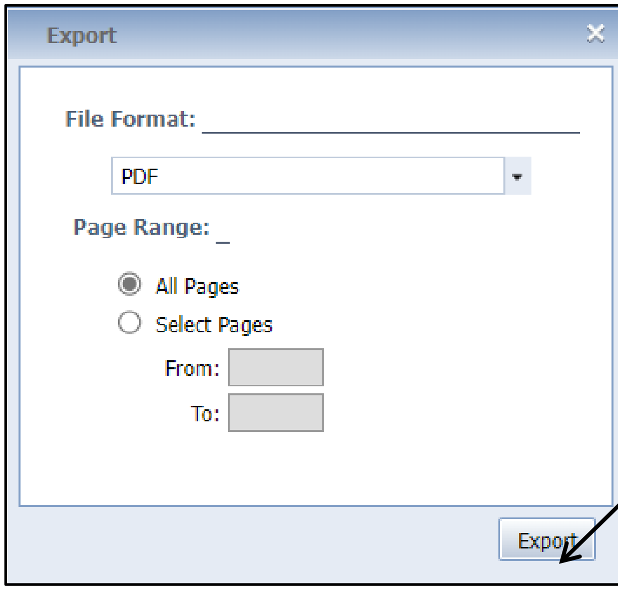


Figure 12 – Print this report icon

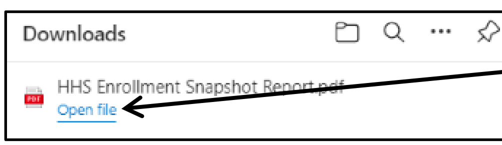
Click the **Export** button on the Print to PDF message box.



Export button

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.



Open file link

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.

Admin icon

Figure 1 – Admin icon

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

Reports link

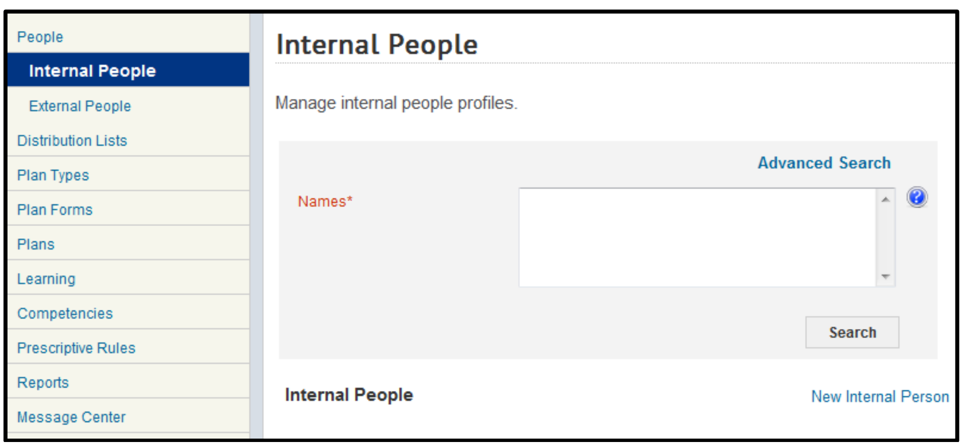


Figure 2 – Reports link

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

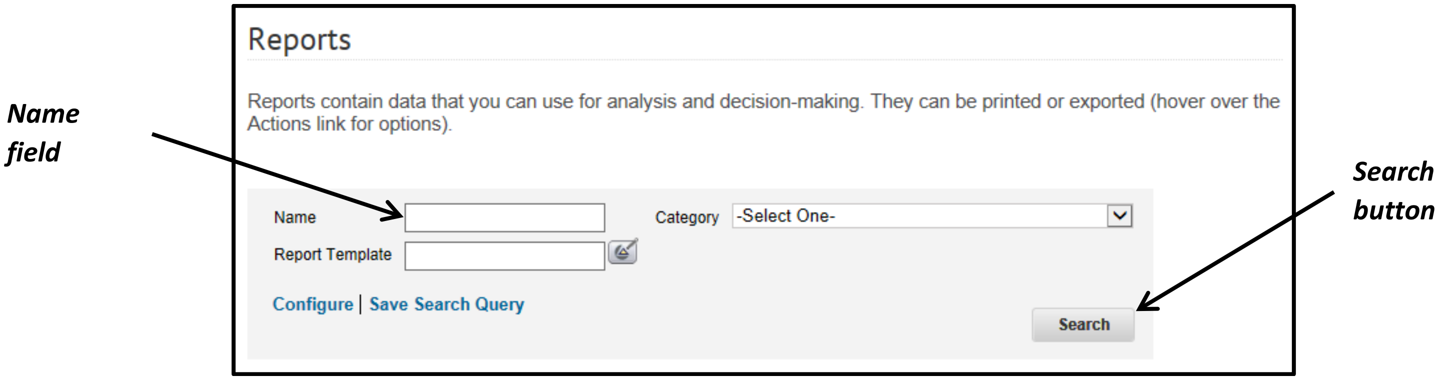


Figure 3 – Name field and Search button

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

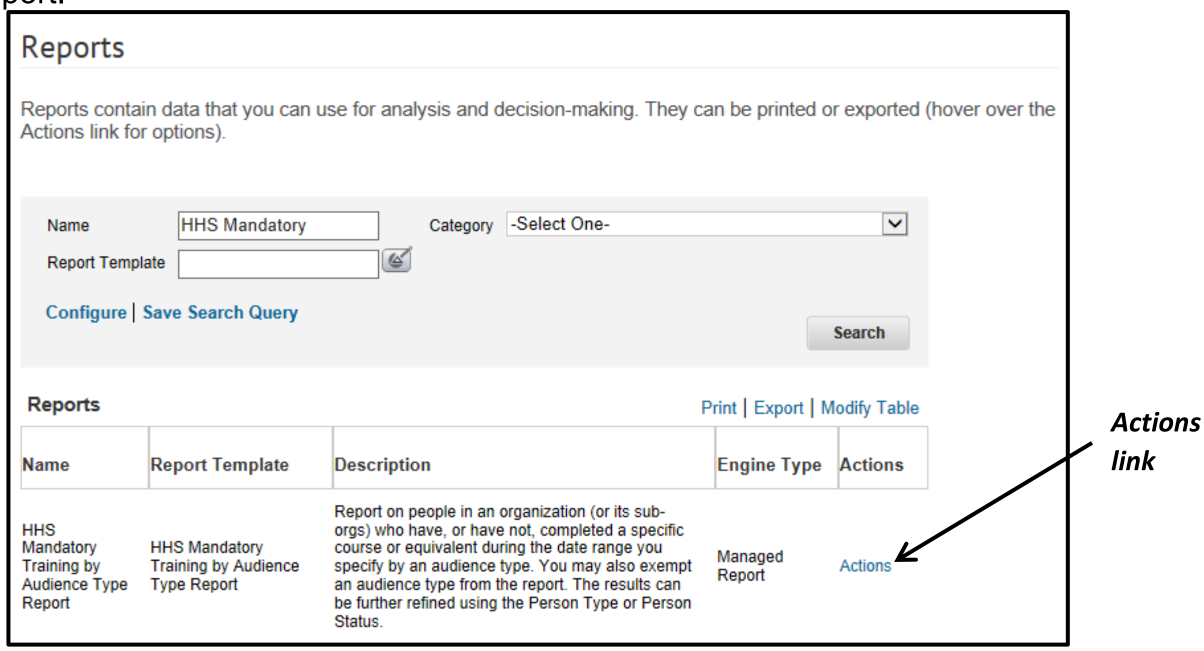


Figure 4 – Actions link

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

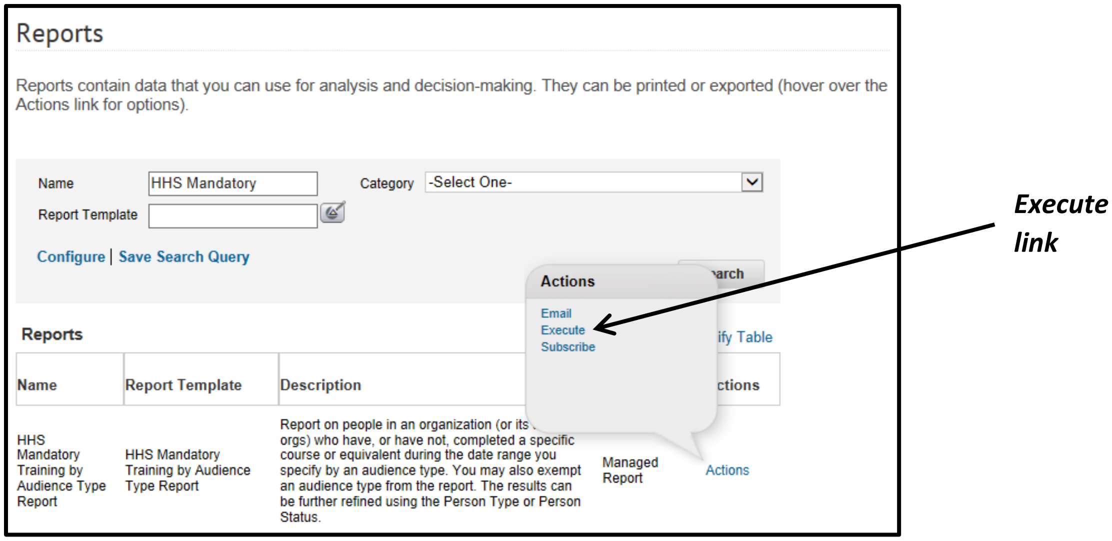


Figure 5 – Execute link on the Actions activity menu

Select the **Course Title** pick icon.

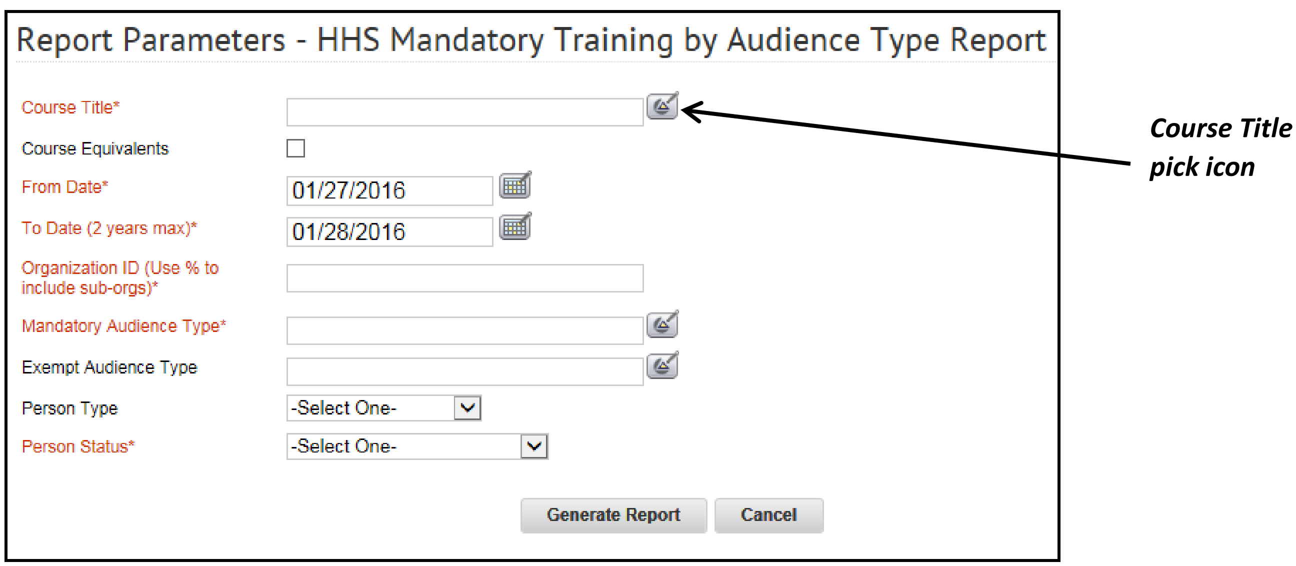


Figure 6 – Course Title pick icon

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

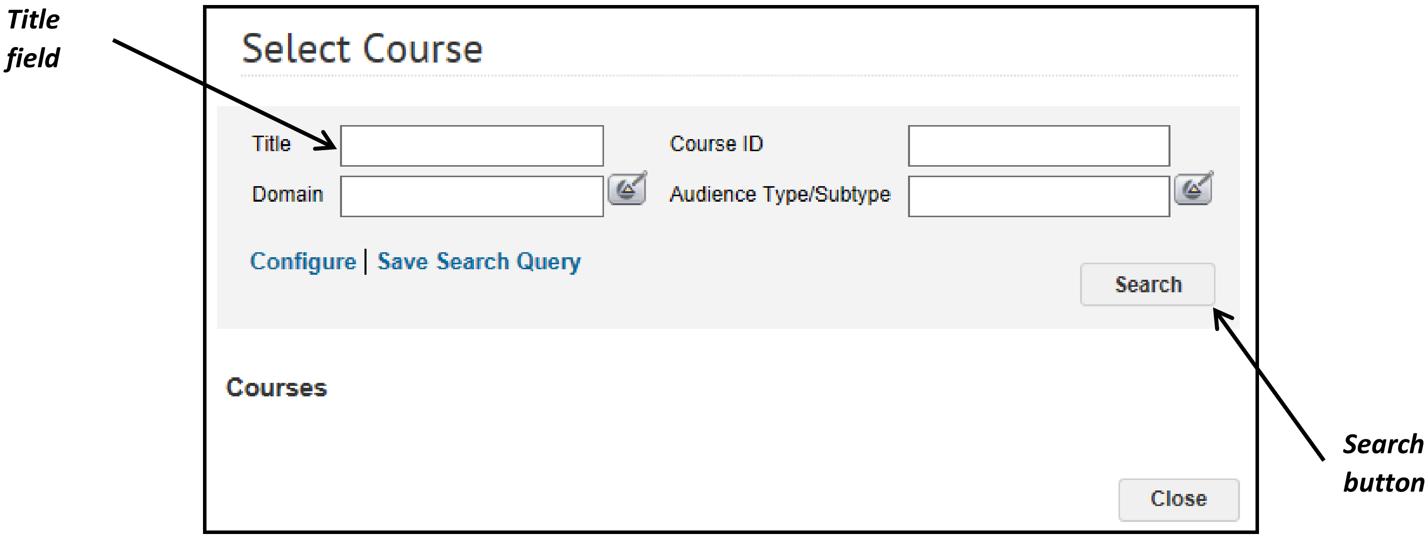


Figure 7 – Title, Course ID, Domain, and Audience Type/Subtype fields and the Search button

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

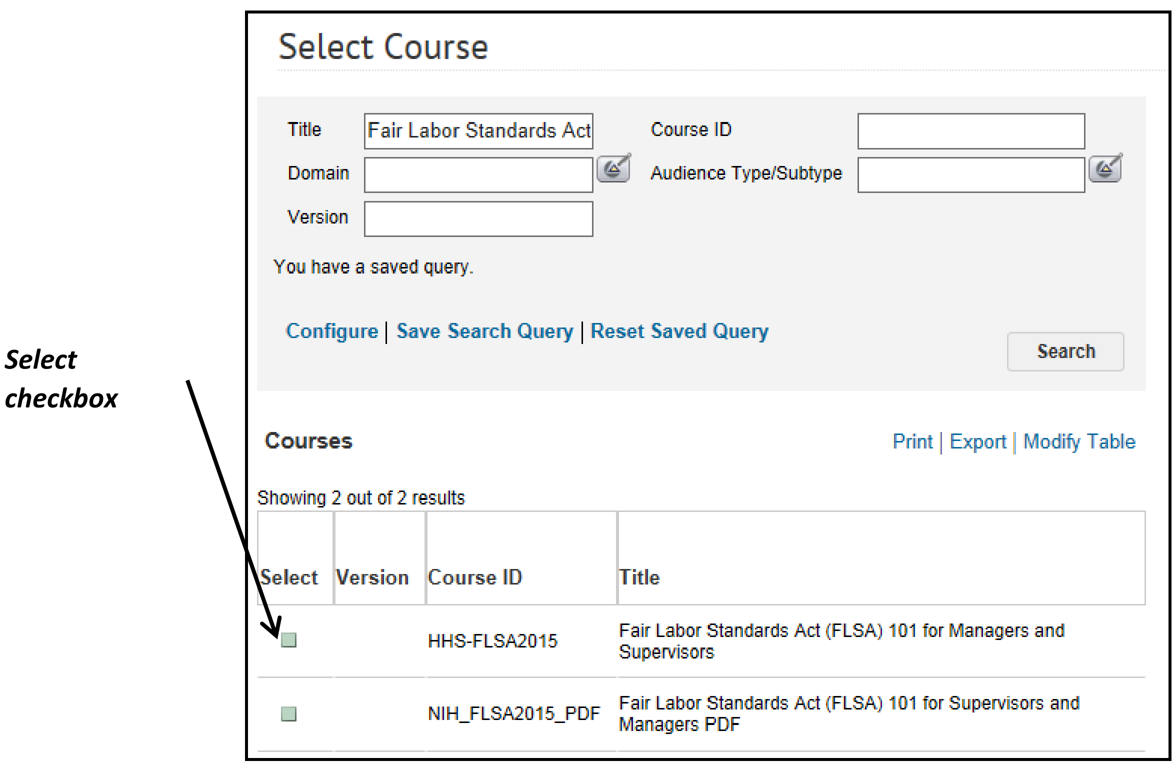


Figure 8 – Select checkbox

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

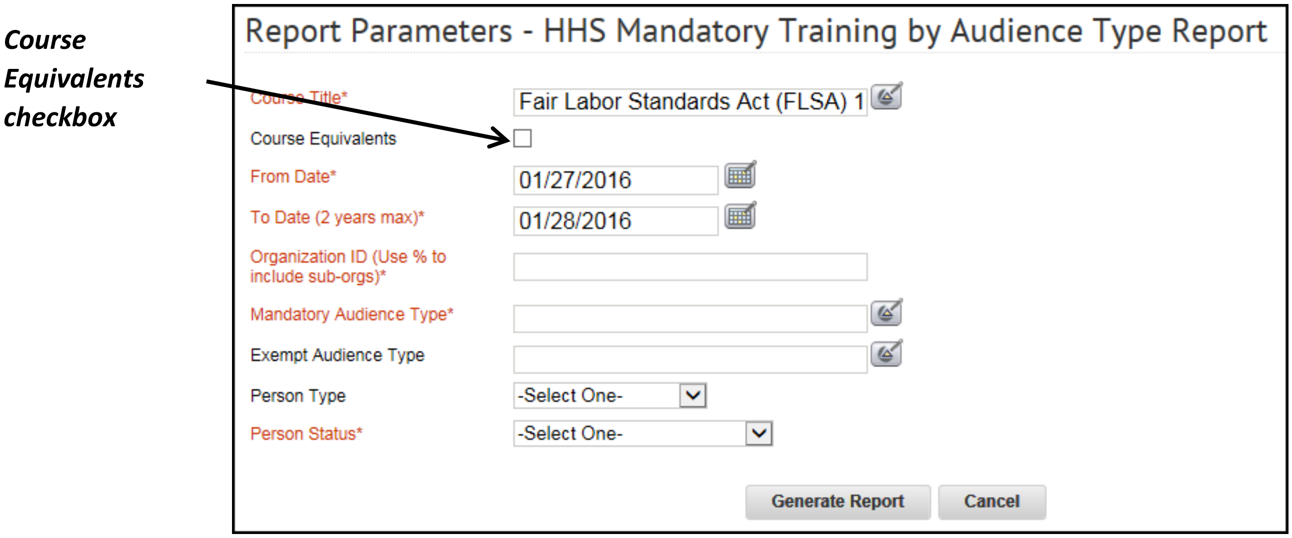


Figure 9 – Course Equivalents checkbox

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.

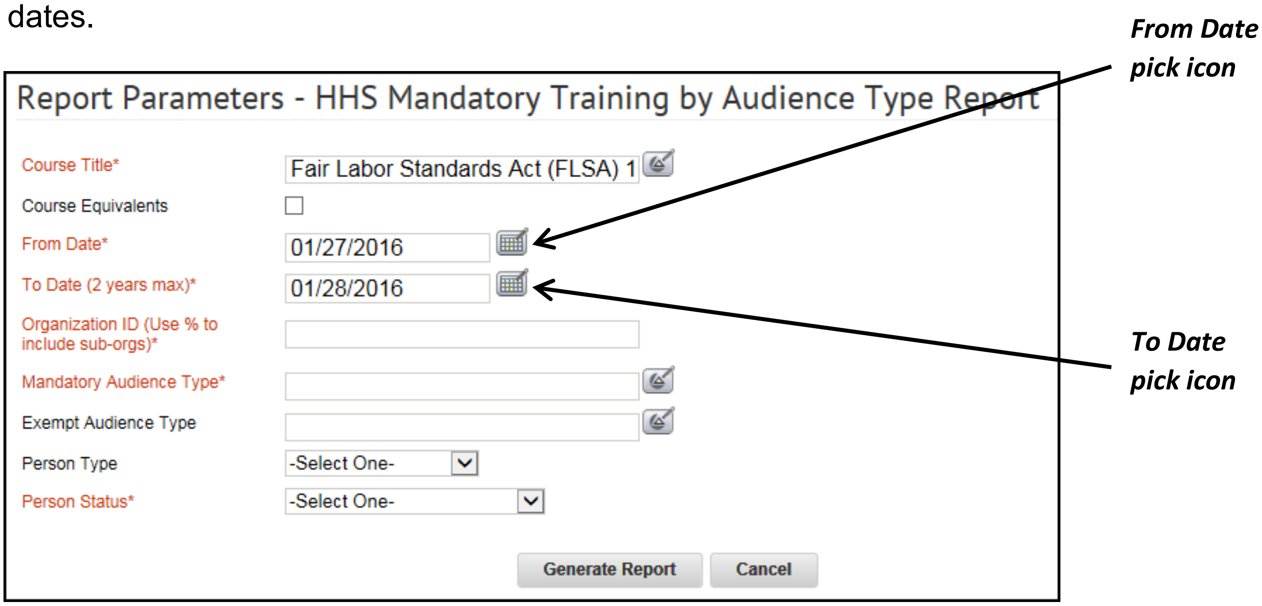


Figure 10 – From Date and To Date pick icons

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

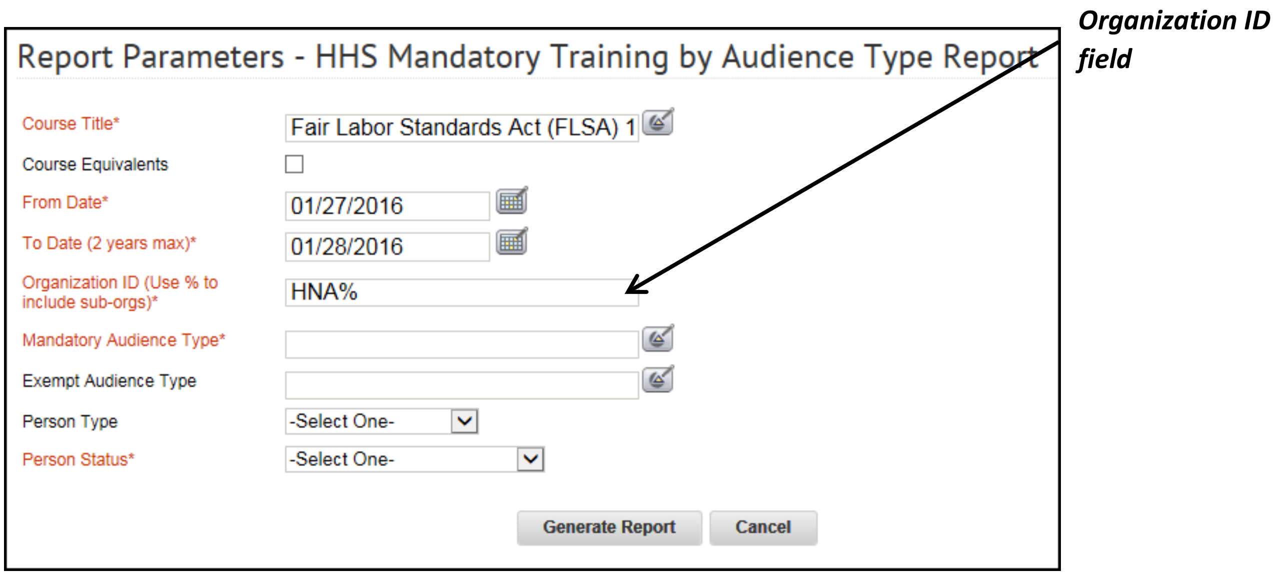


Figure 11 – Organization ID field

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

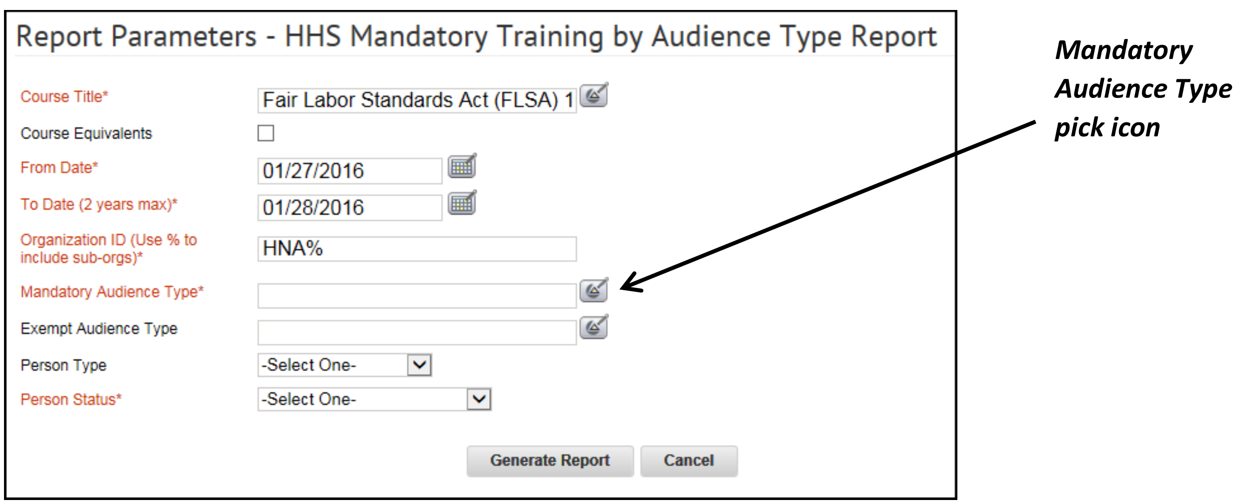


Figure 12 – Mandatory Audience Type pick icon

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

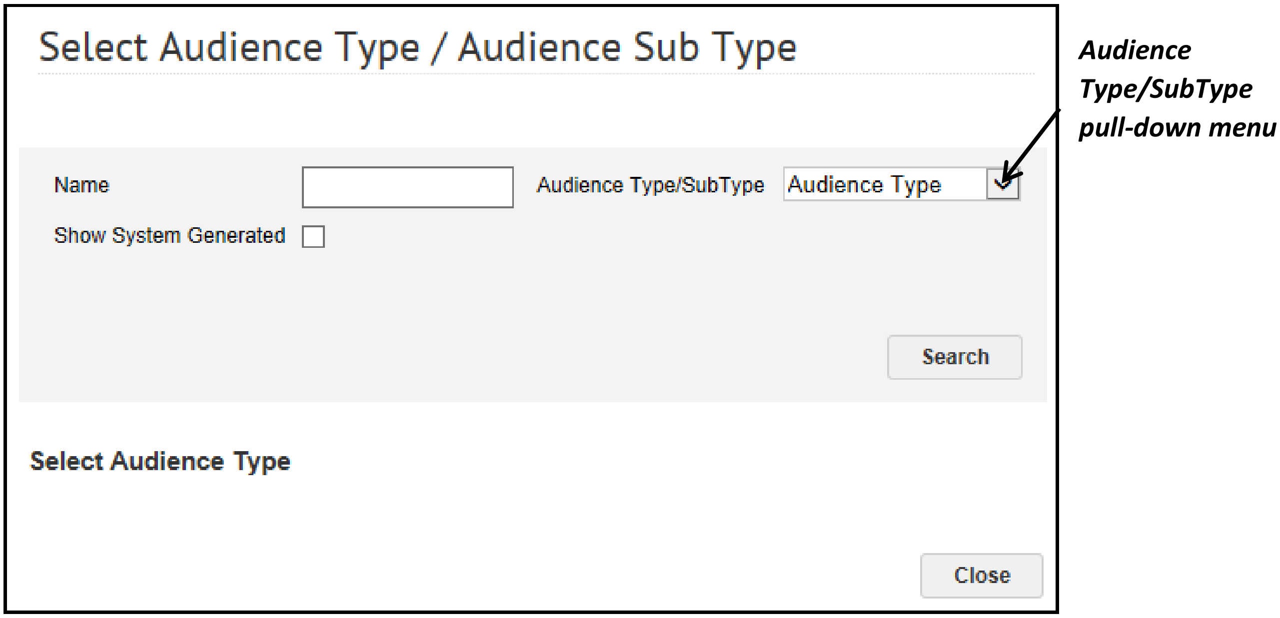


Figure 13 – Audience Type/SubType pull-down menu

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.

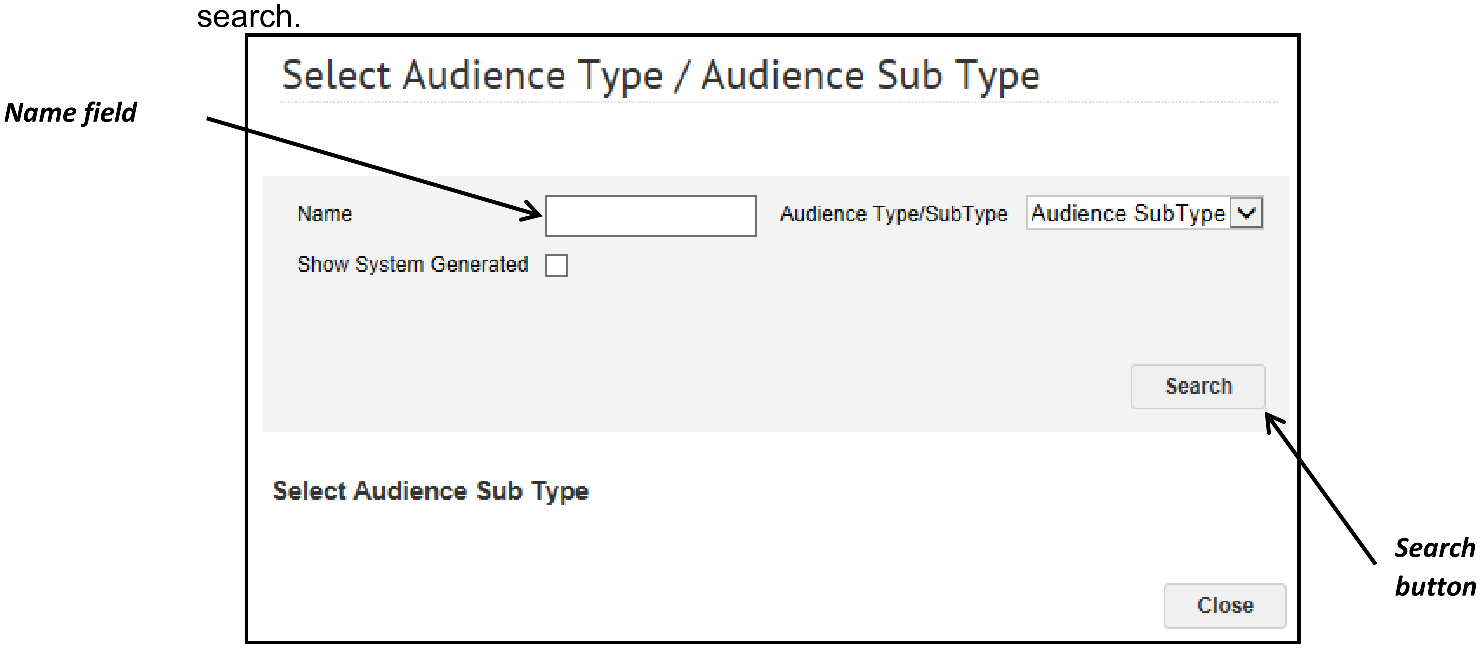


Figure 14 – Name field and Search button

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

Select checkbox

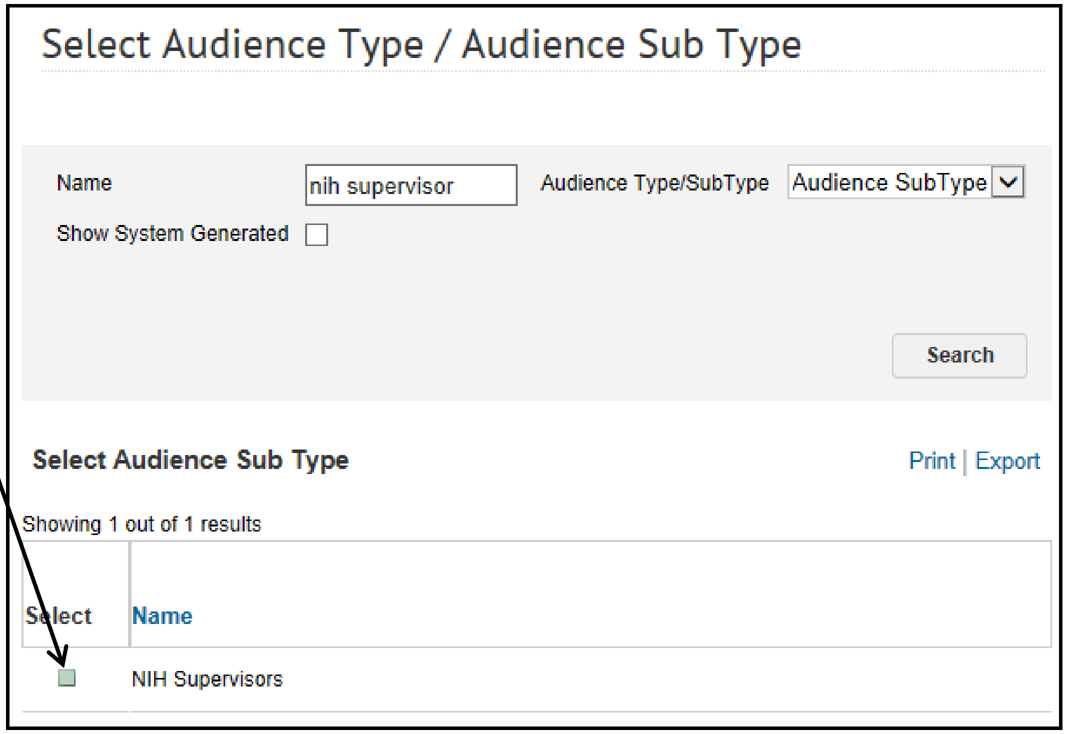
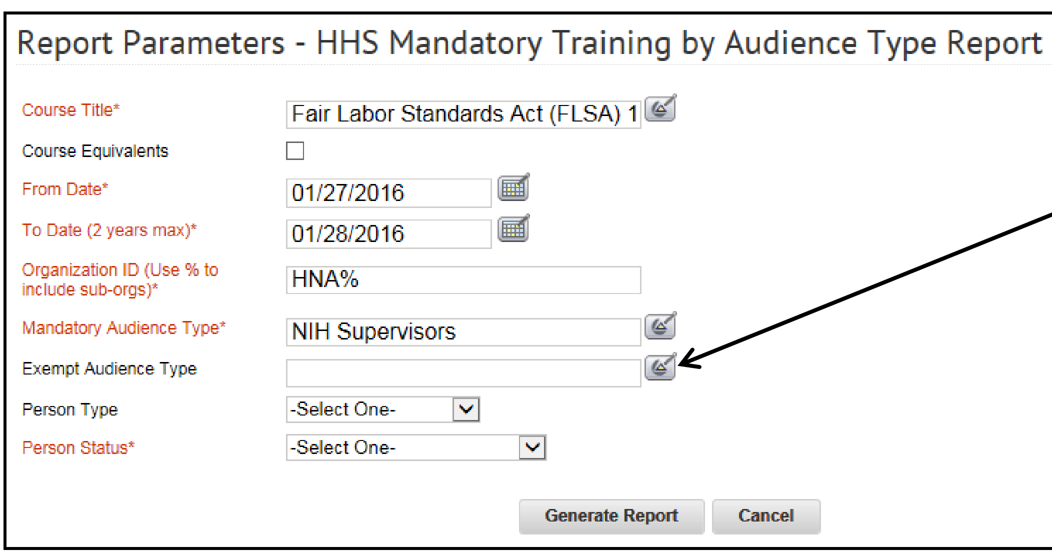


Figure 15 – Select checkbox

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.

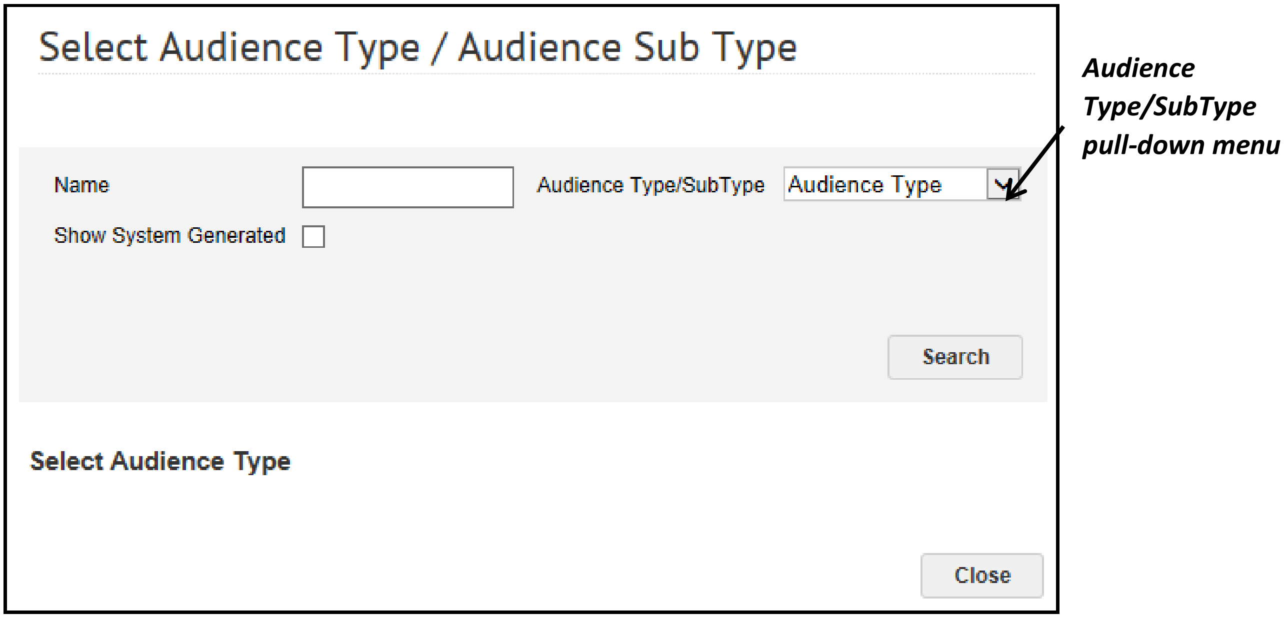


Figure 17 – Audience Type/SubType pull-down menu

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.

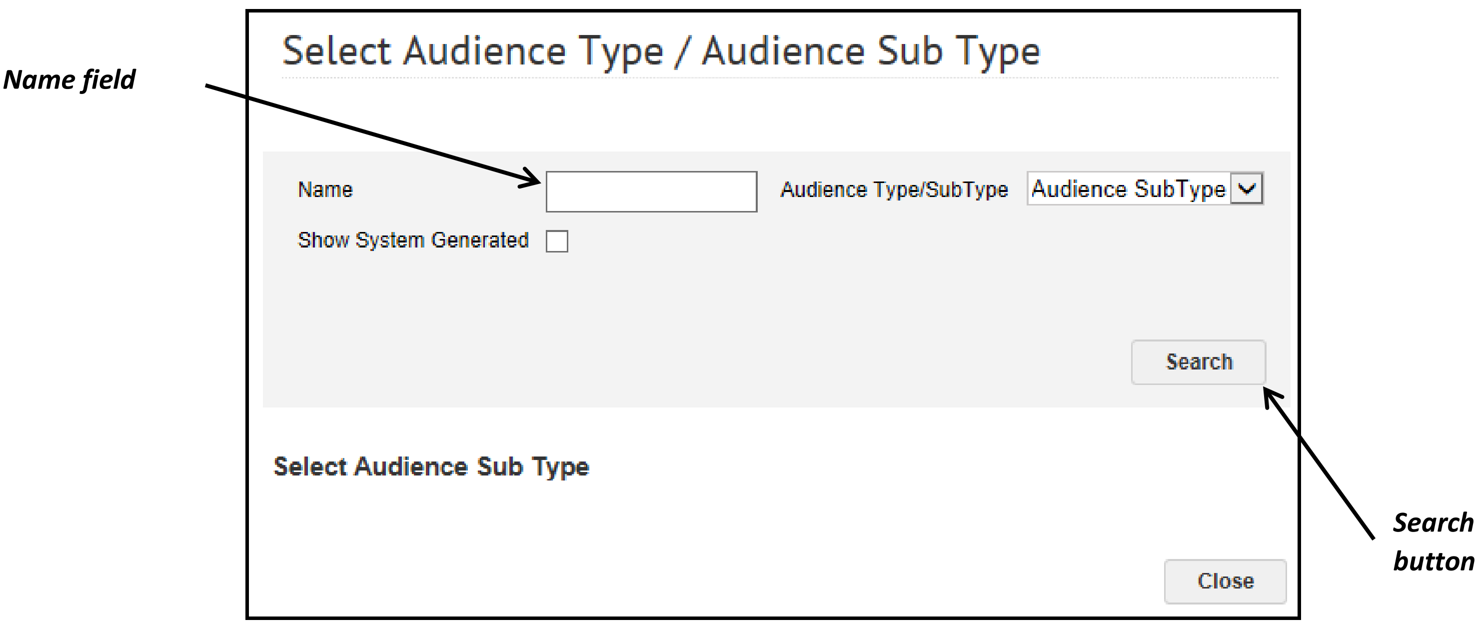


Figure 18 – Name field and Search button

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

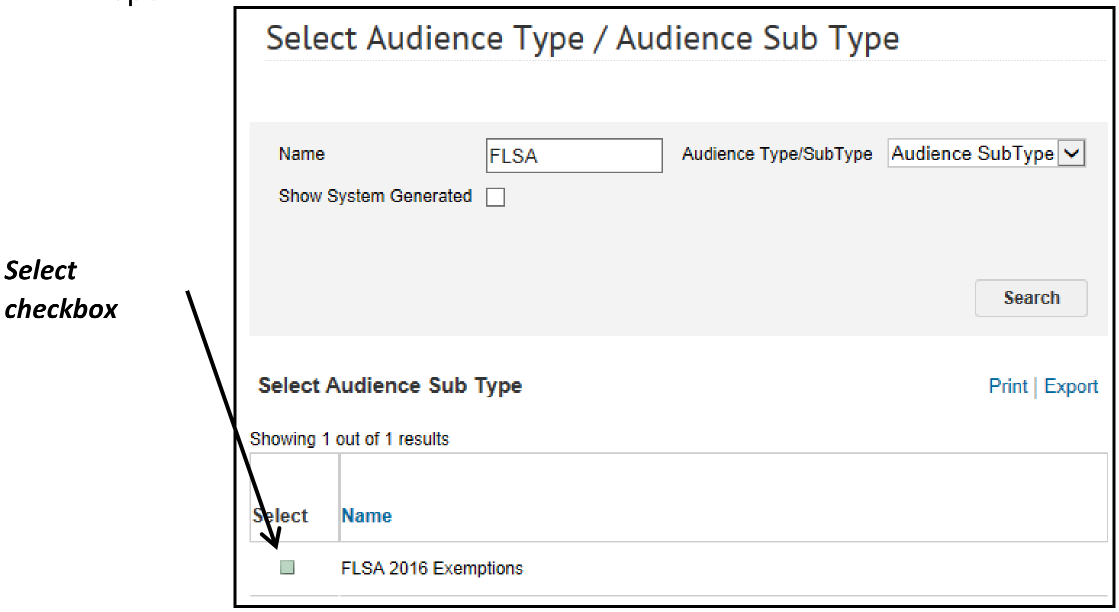


Figure 19 – Select checkbox

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

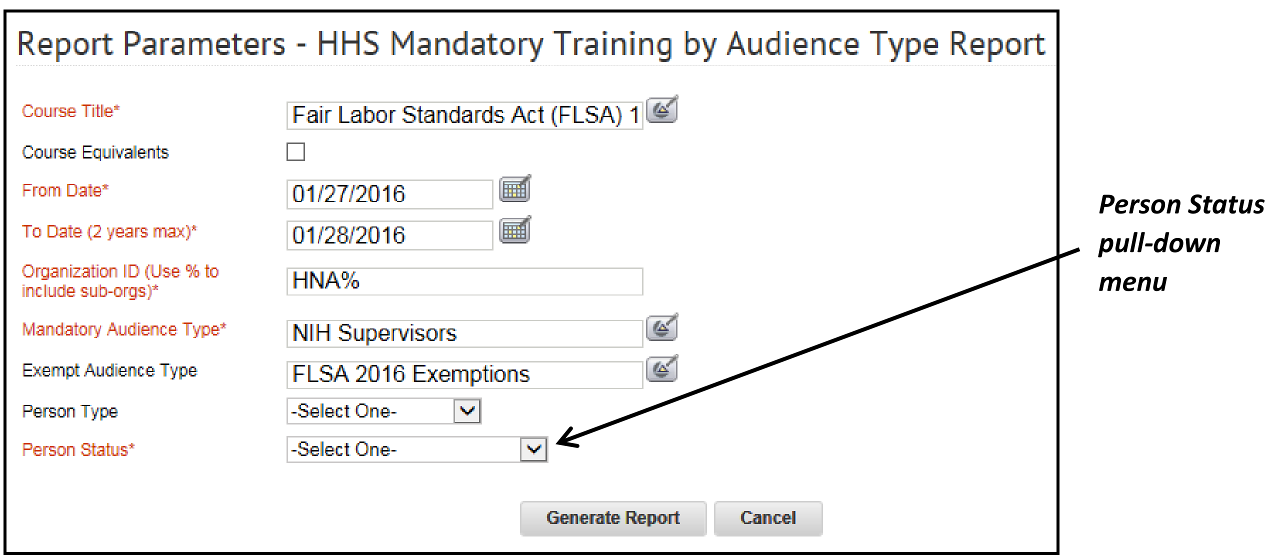


Figure 20 – Person Status pull-down menu

Select the **Generate Report** button.

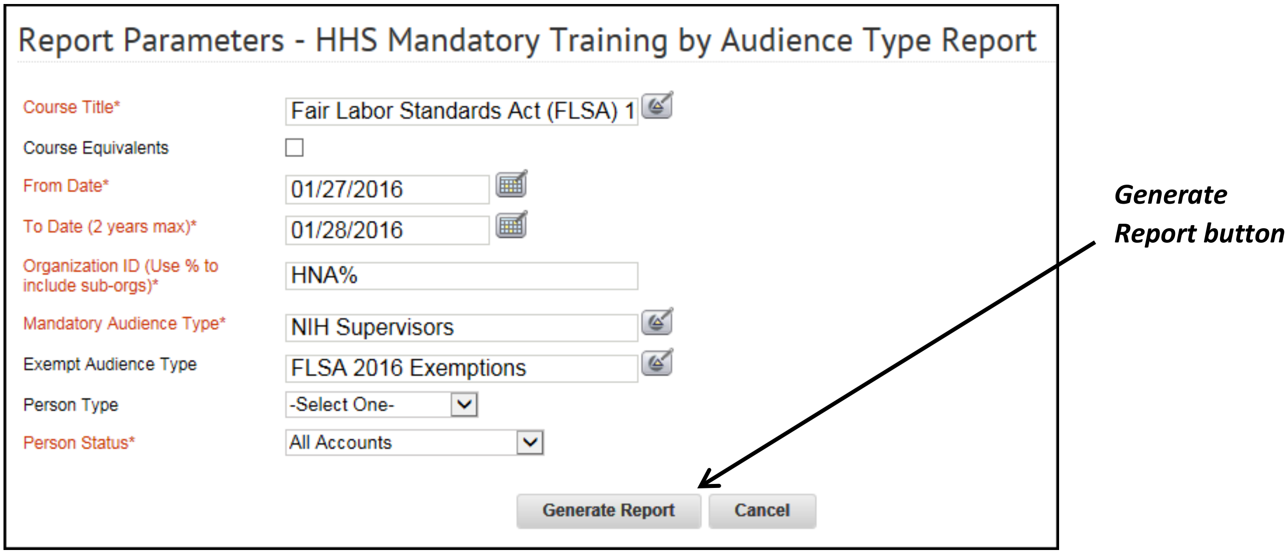


Figure 21 – Generate Report button

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

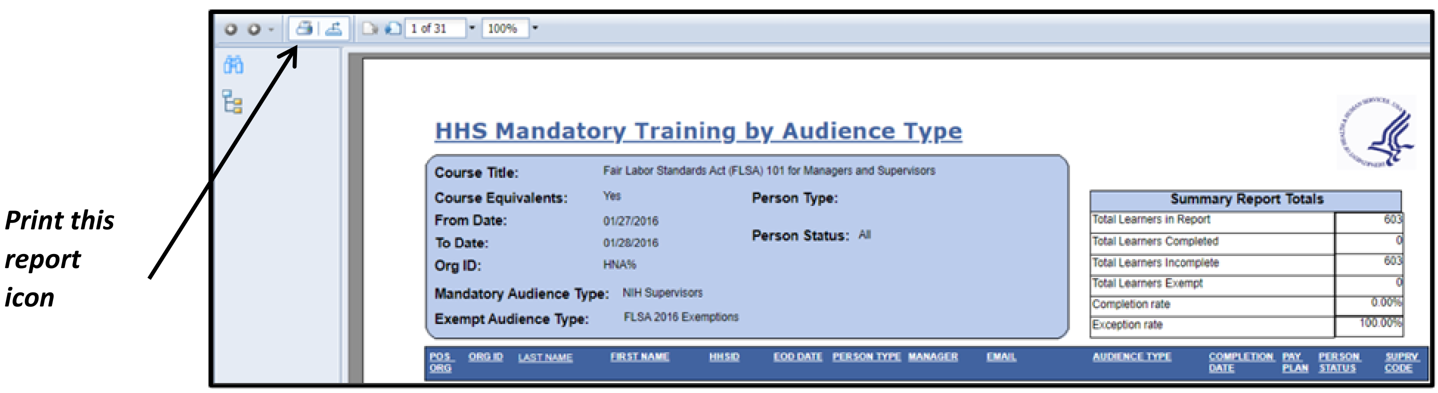


Figure 22 – Print this report button

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

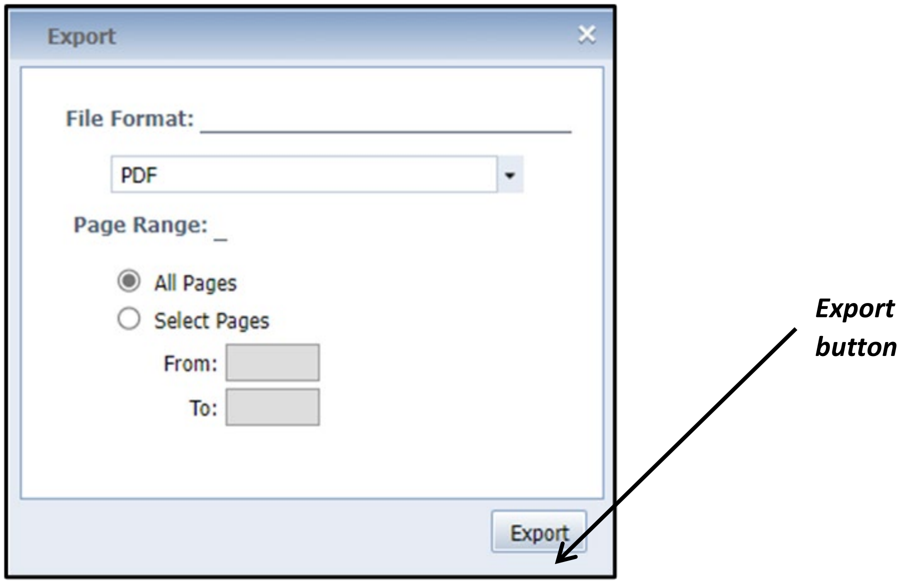


Figure 23 – Export button

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

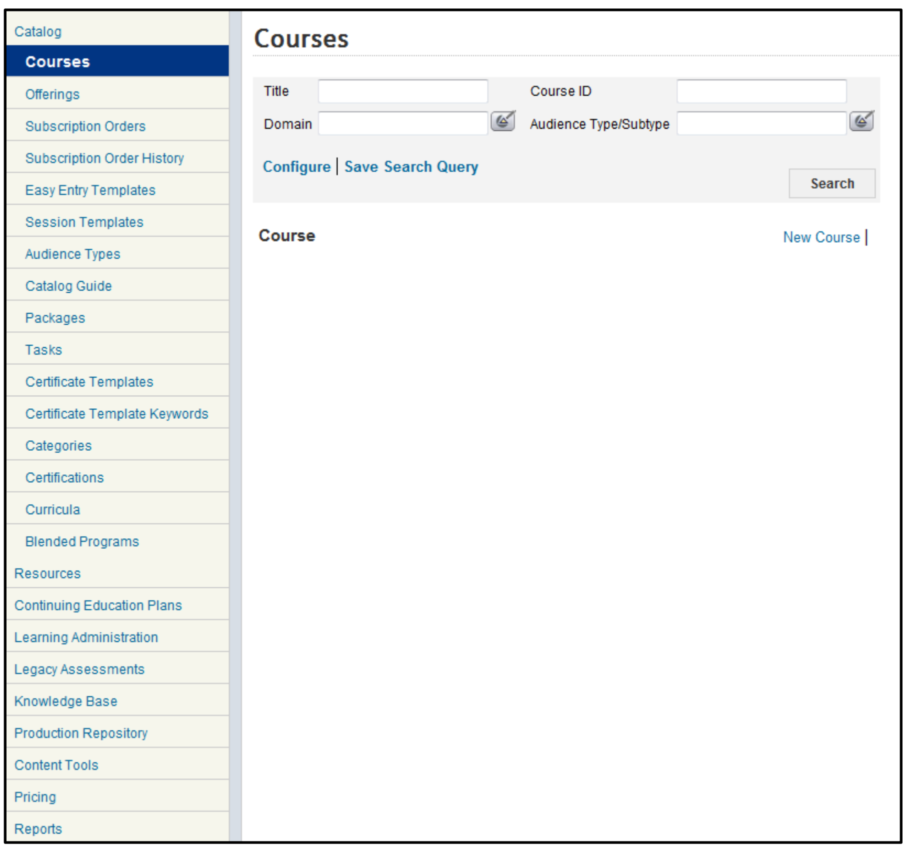


Figure 2 – Reports link

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

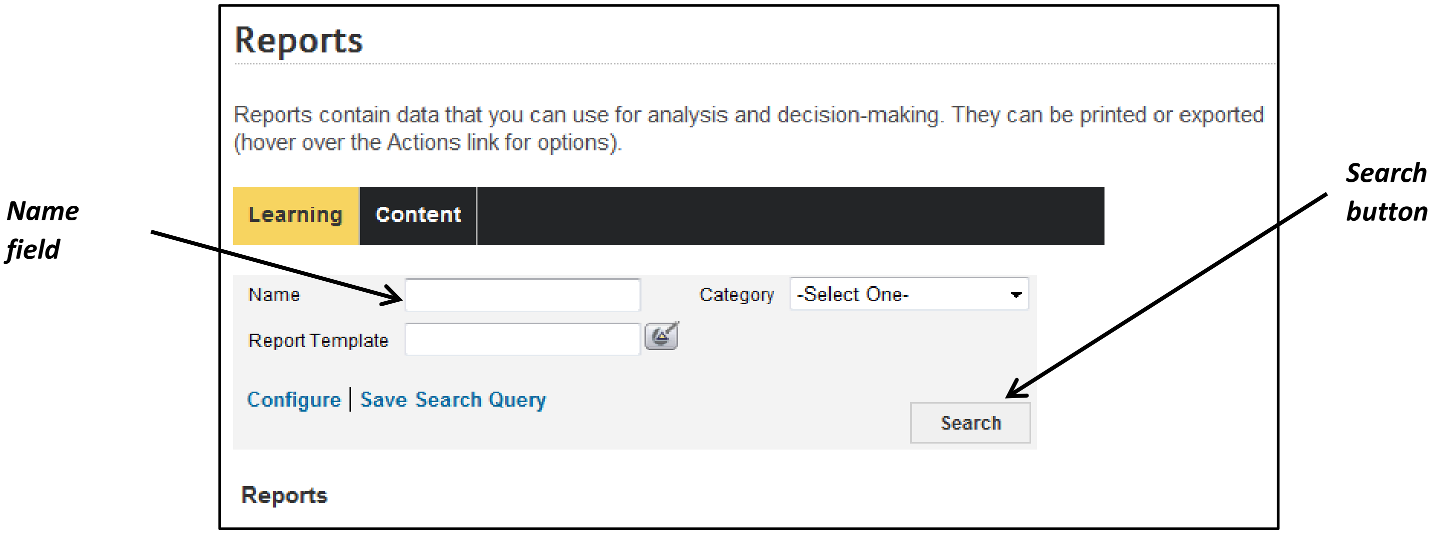


Figure 3 – Name field and Search button

Click the **Actions** link.

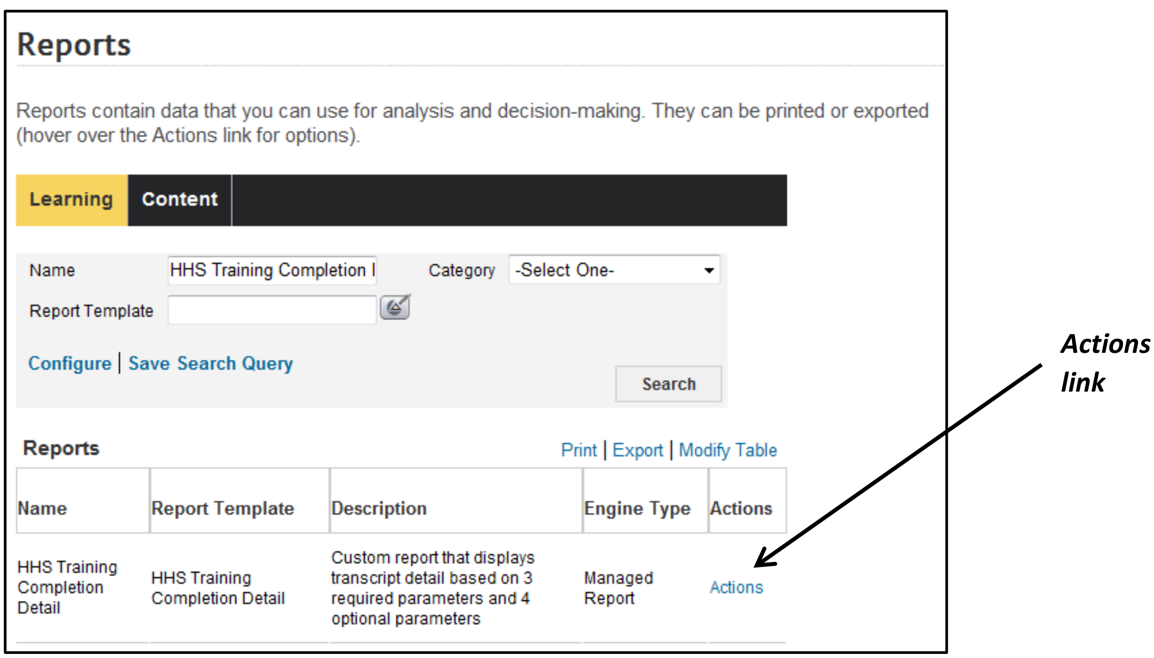


Figure 4 – Actions link

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

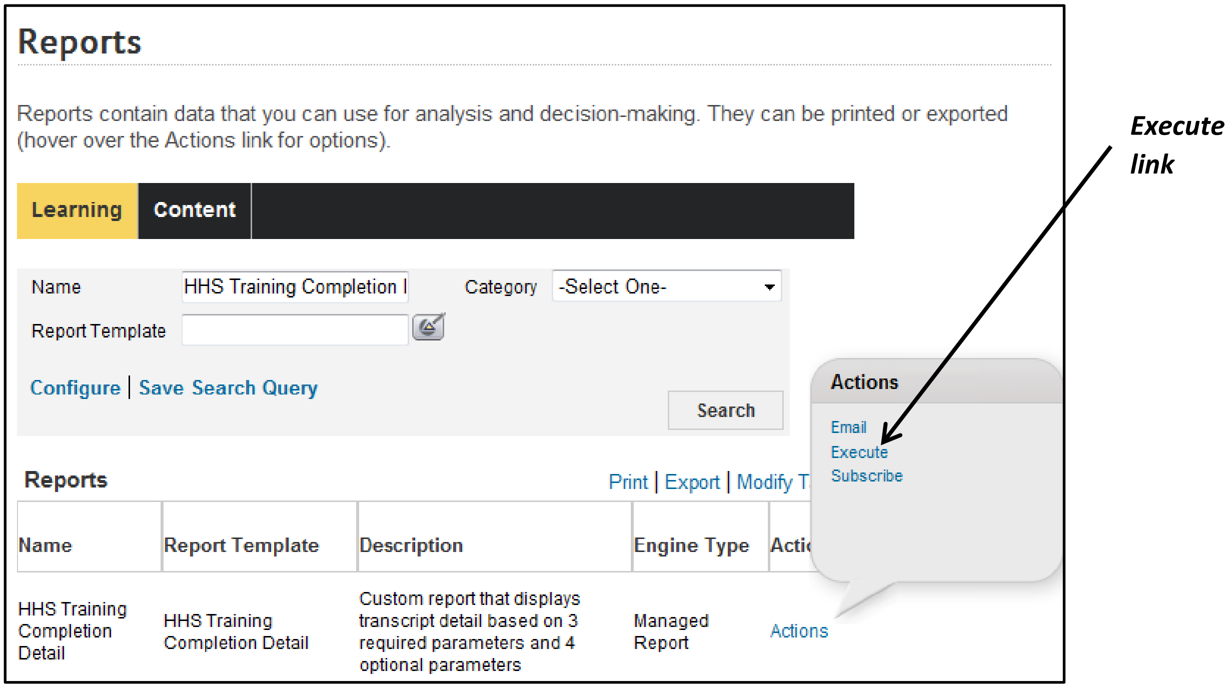


Figure 5 – Execute link on the Actions activity menu

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

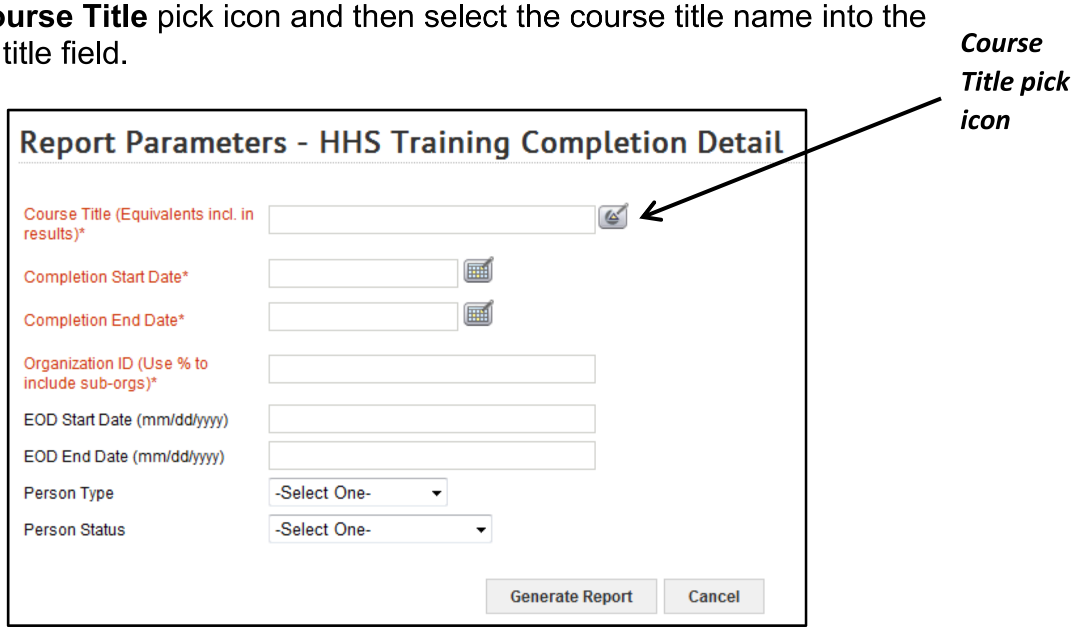


Figure 6 – Course Title pick icon

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

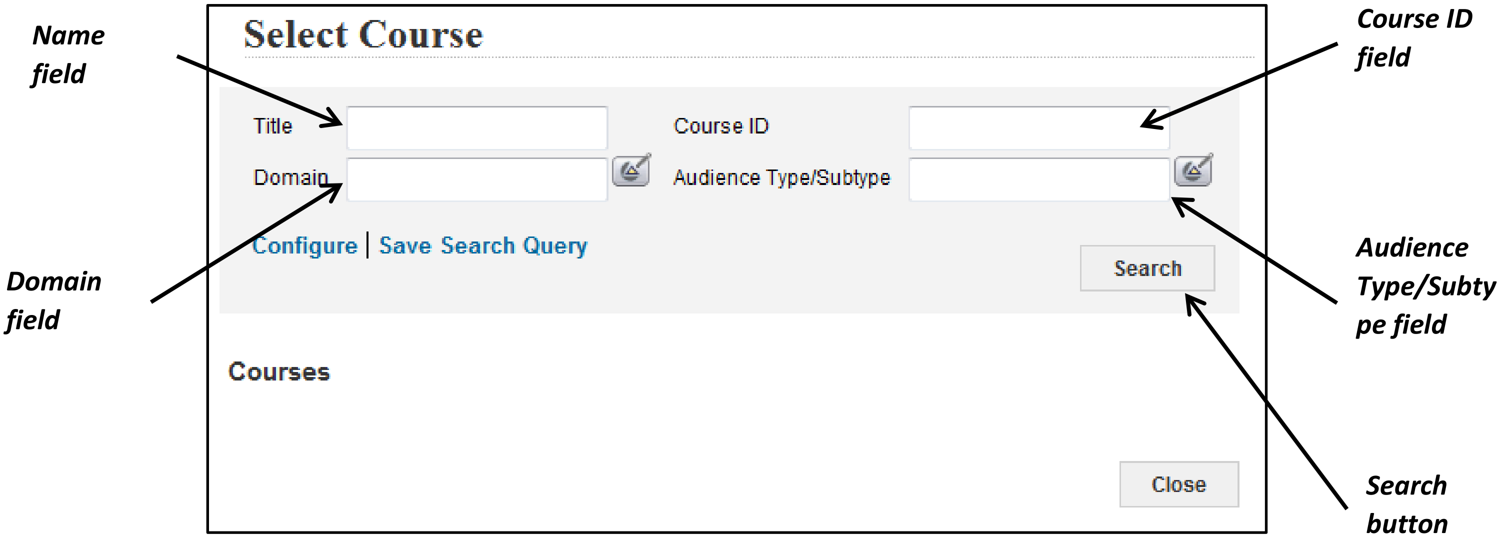


Figure 7 – Name, Course ID, Domain, and Audience Type/Sub type fields and Search button

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

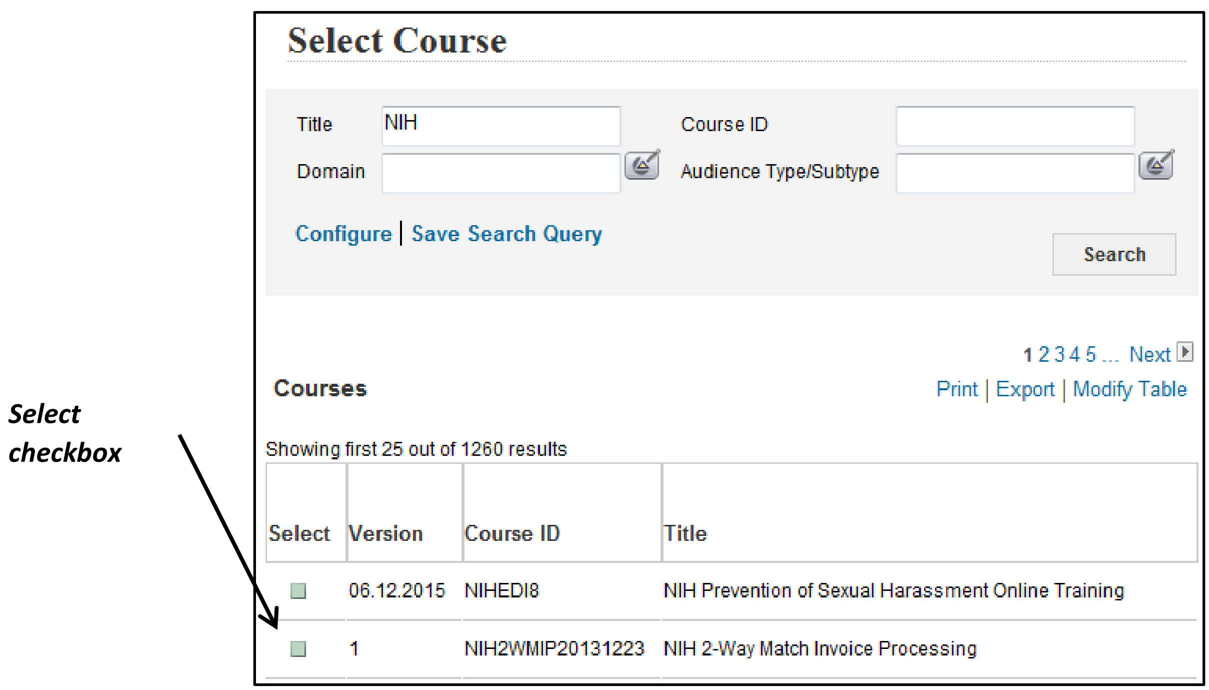


Figure 8 – Select checkbox

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.

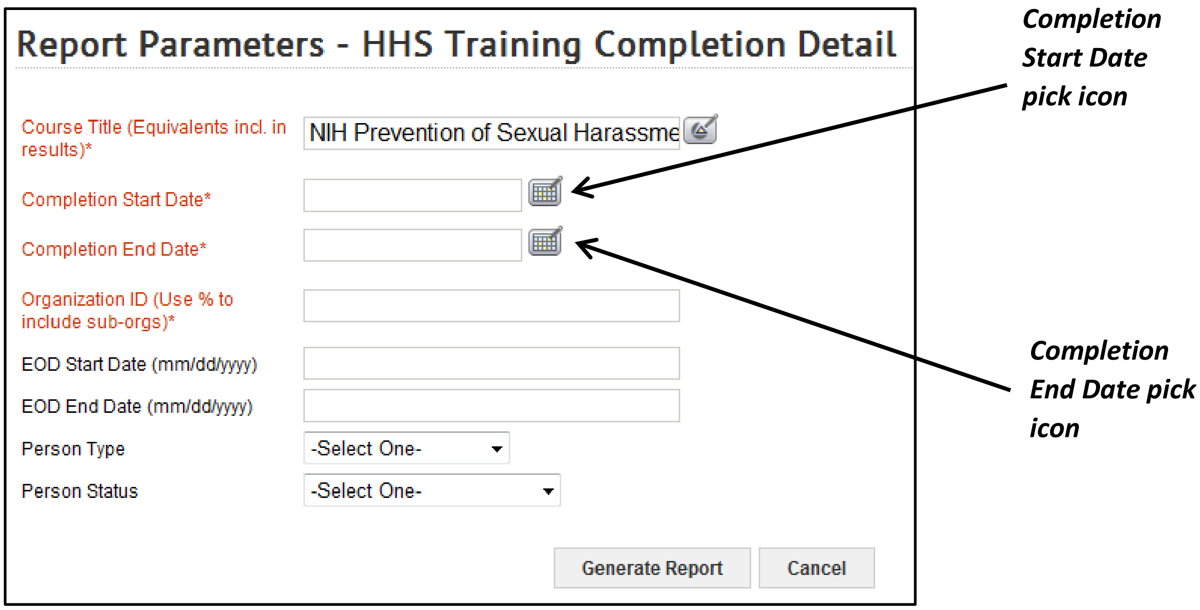


Figure 9 – Completion Start Date and Completion End Date pick icons

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.

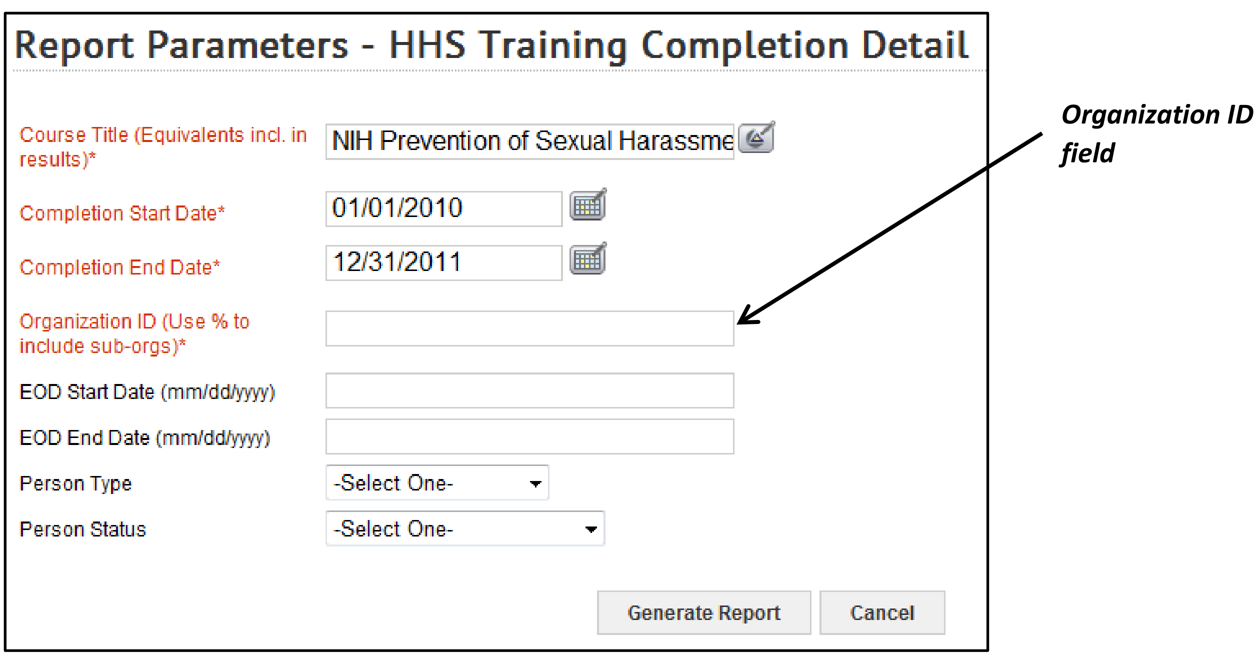


Figure 10 – Organization ID field

Click the **Generate Report** button.

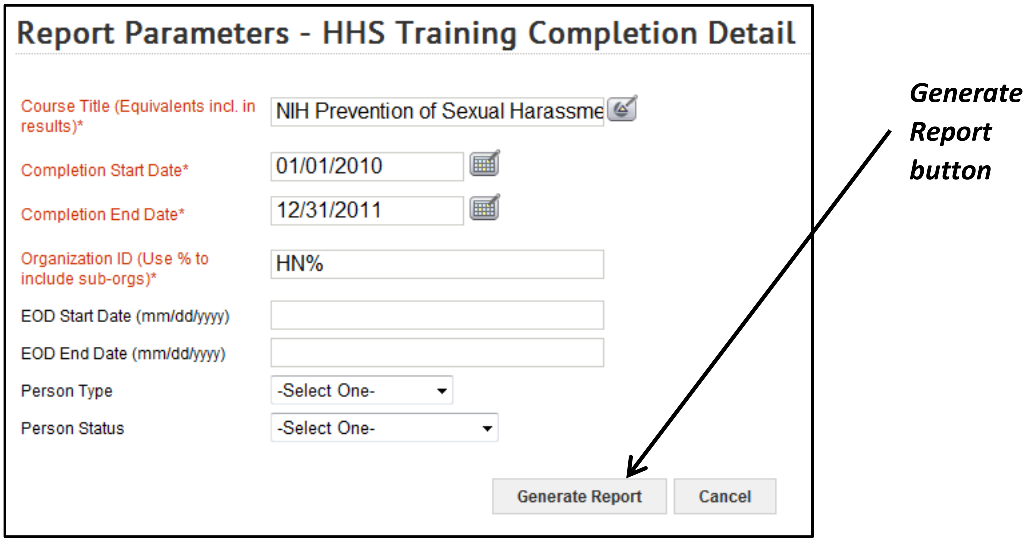


Figure 11 – Generate Report button

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

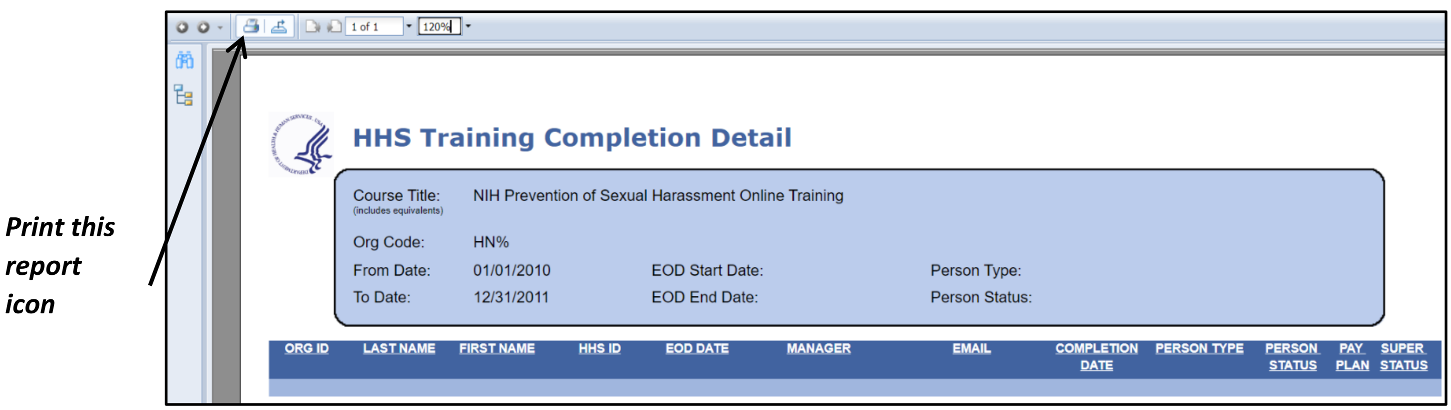


Figure 12 – Print this report icon

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

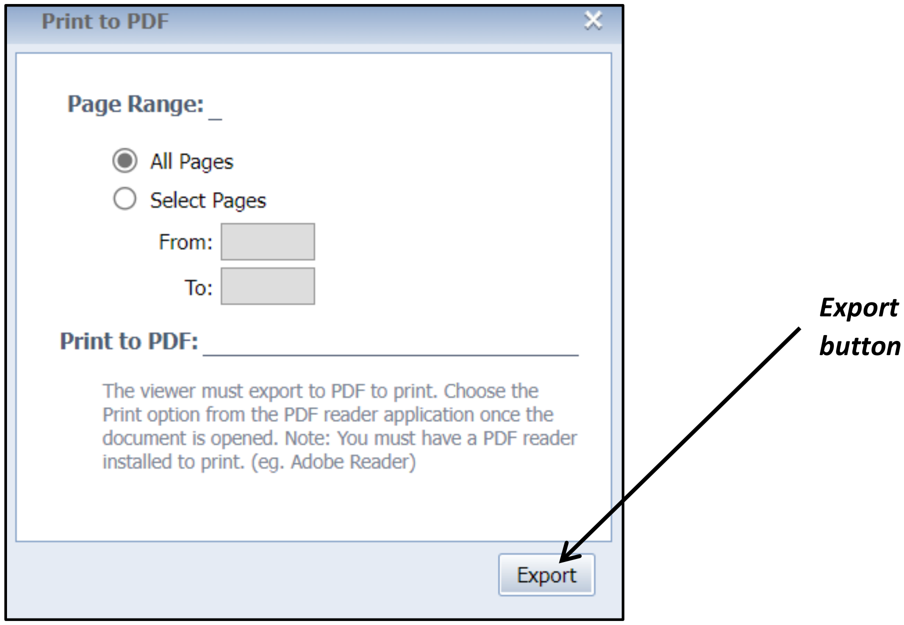


Figure 13 – Export button

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 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.

Admin icon

Figure 1 – Admin icon

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

Reports link

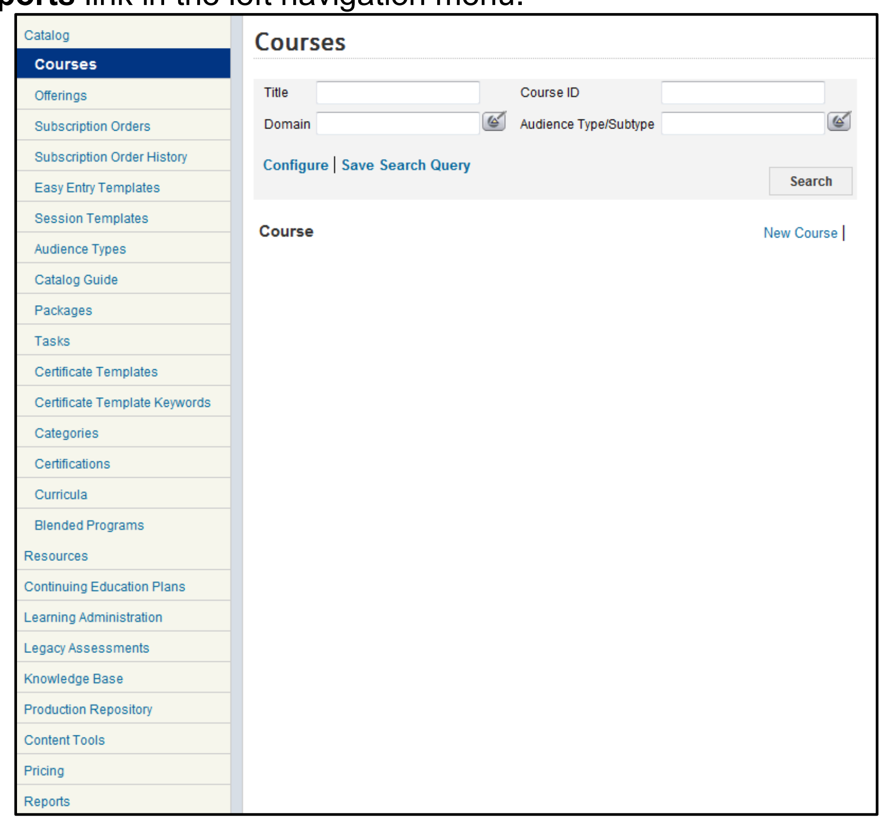


Figure 2 – Reports link

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

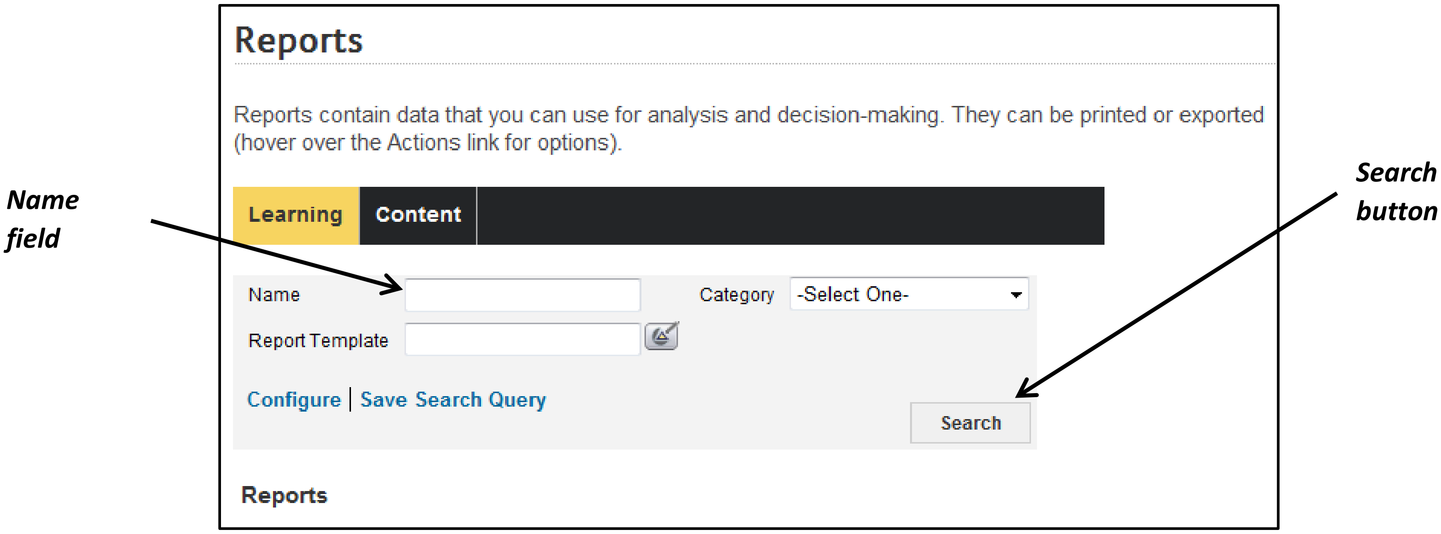


Figure 3 – Name field and Search button

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

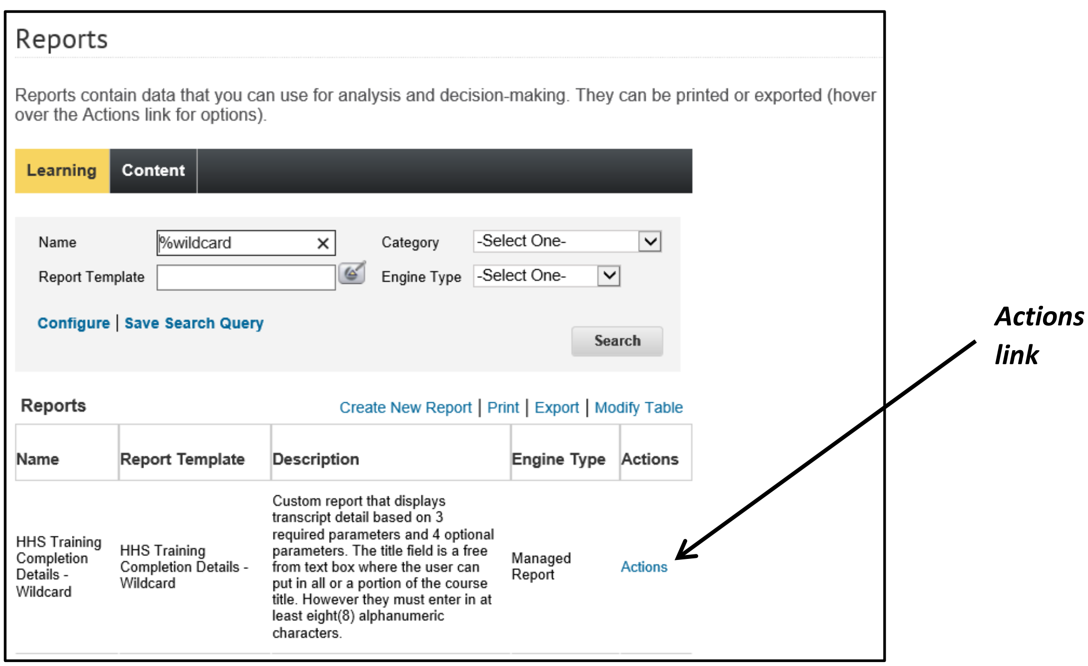


Figure 4 – Actions link

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

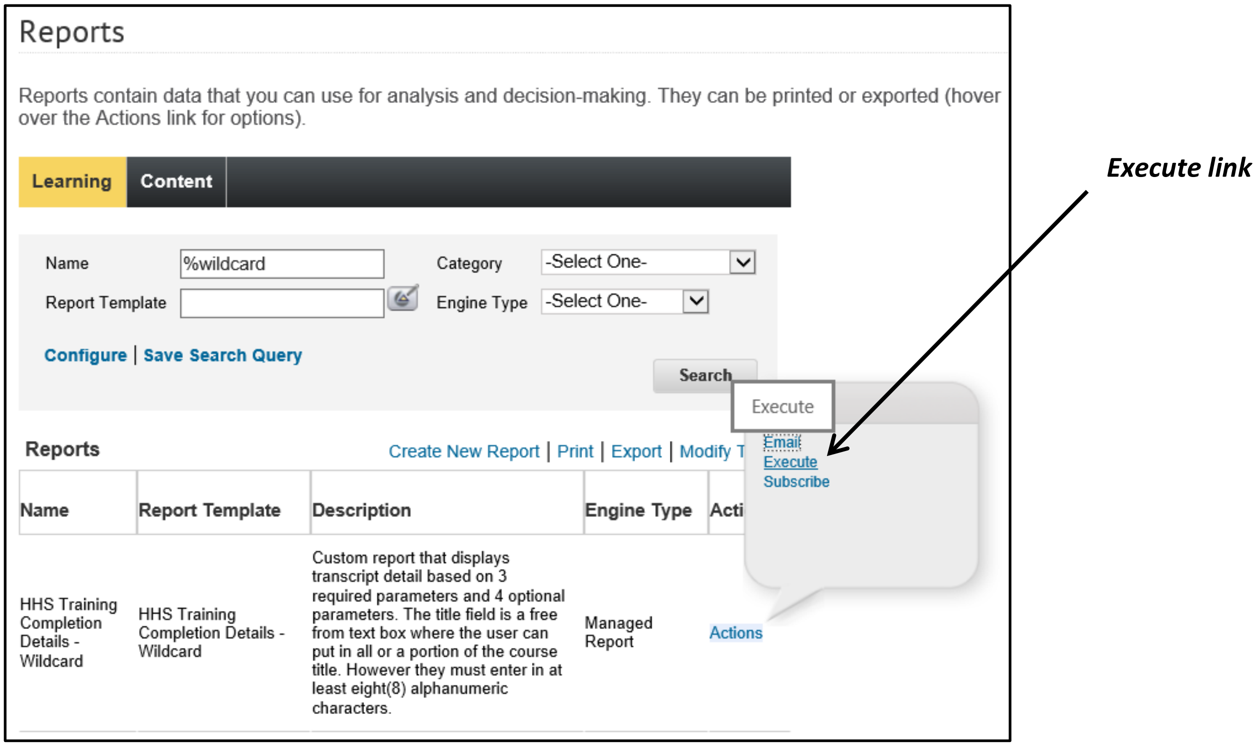


Figure 5 – Execute link on the Actions activity menu

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.

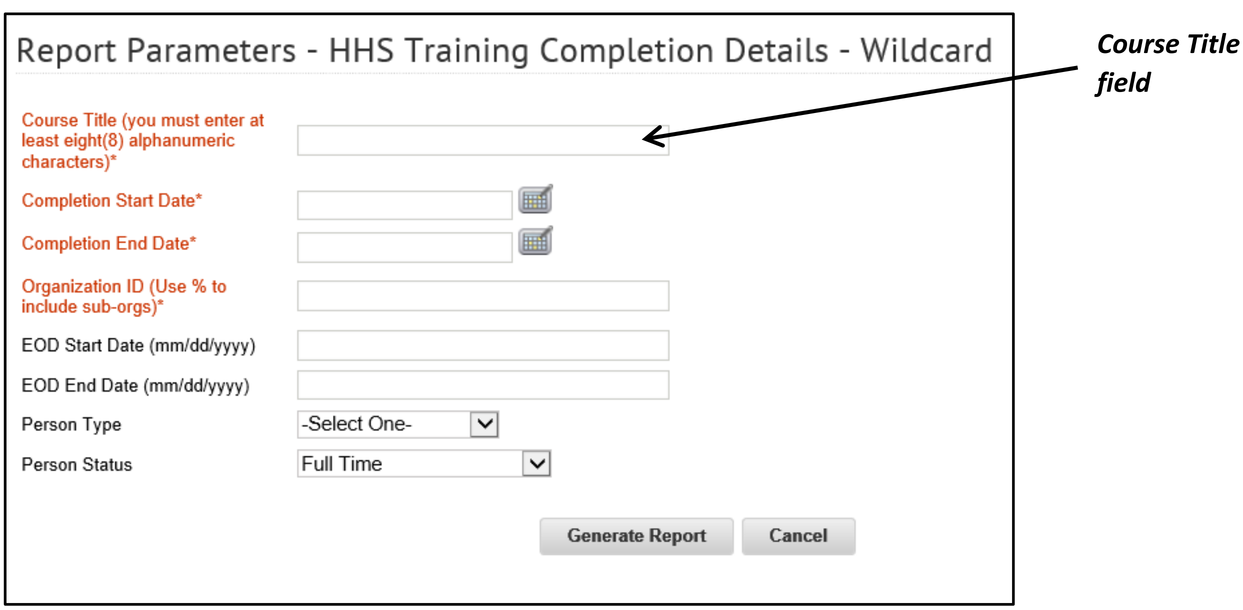


Figure 6 – Course Title field

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.

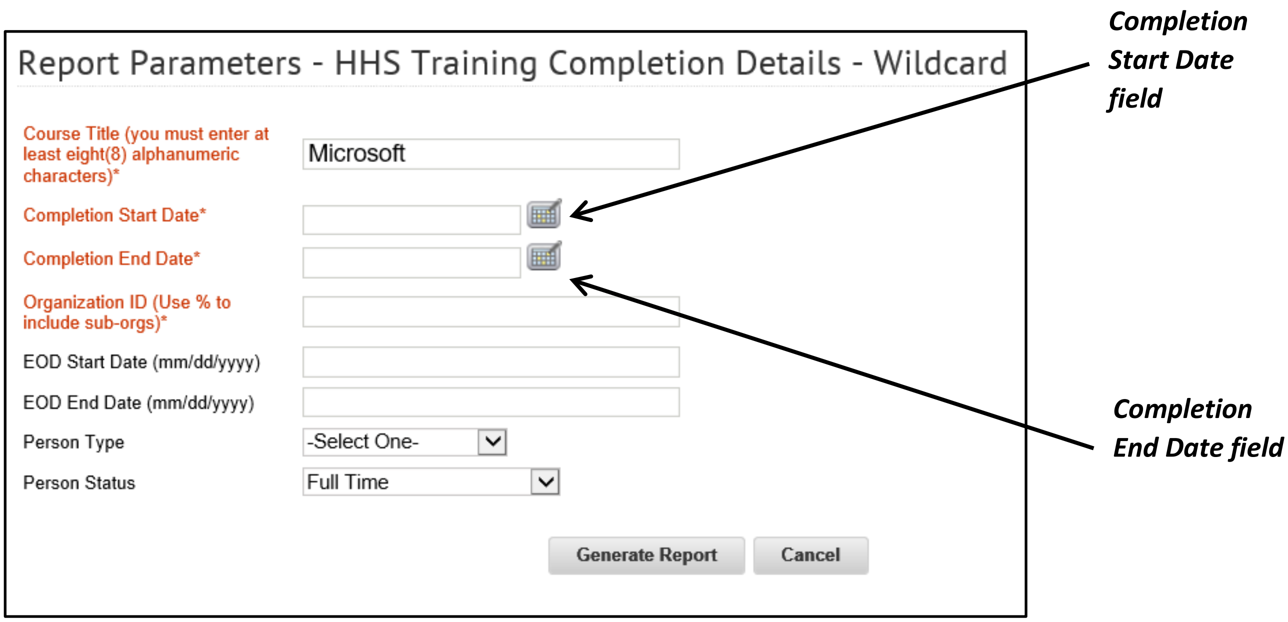


Figure 6 – Completion Start Date and Completion End Date pick icons

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.

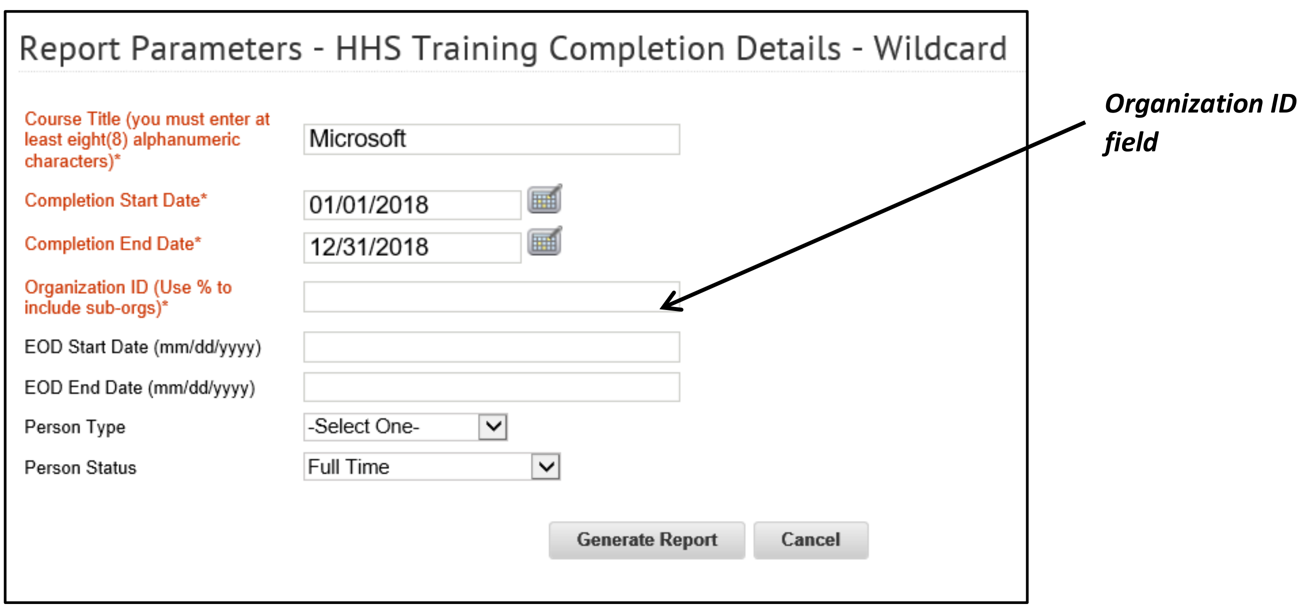


Figure 8 – Organization ID field

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

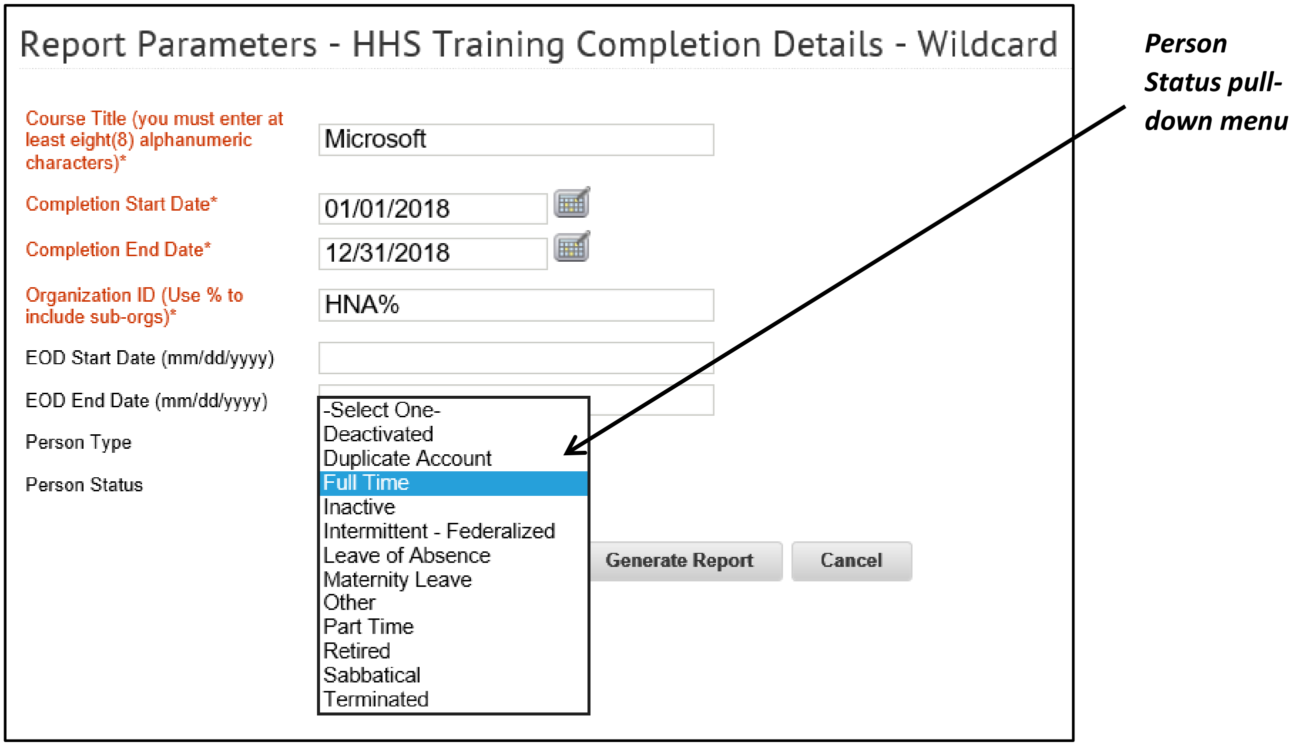


Figure 9 – Person Status pull-down menu

Click the **Generate Report** button.

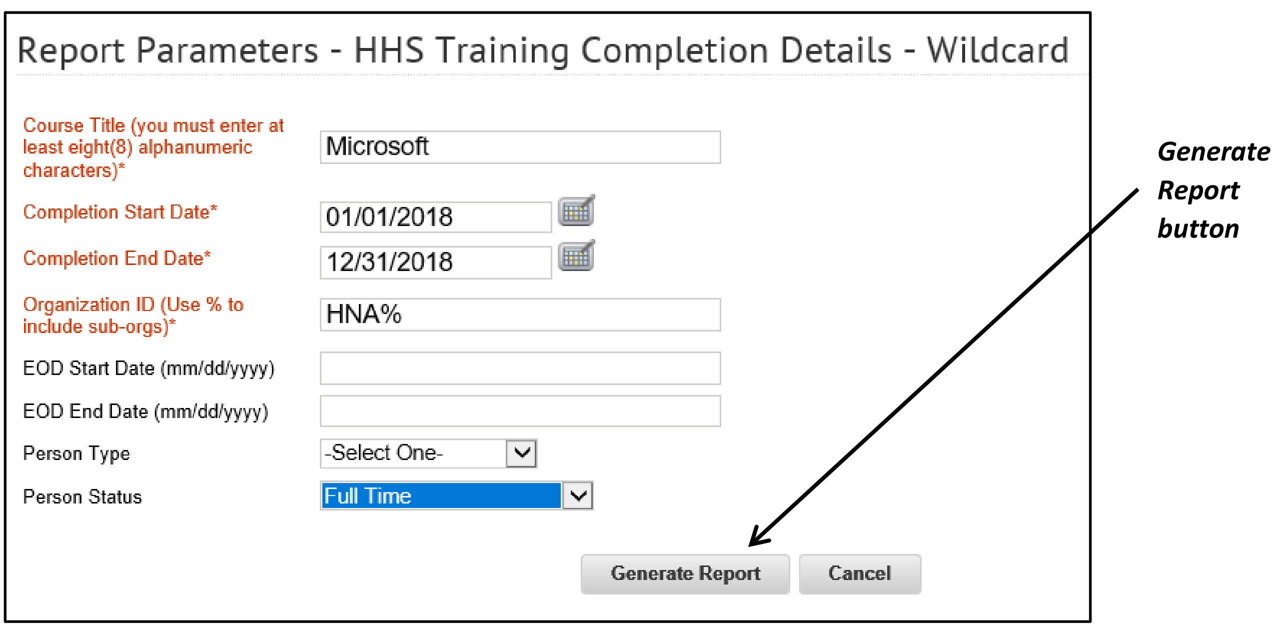


Figure 10 – Generate Report button

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

Print this report icon

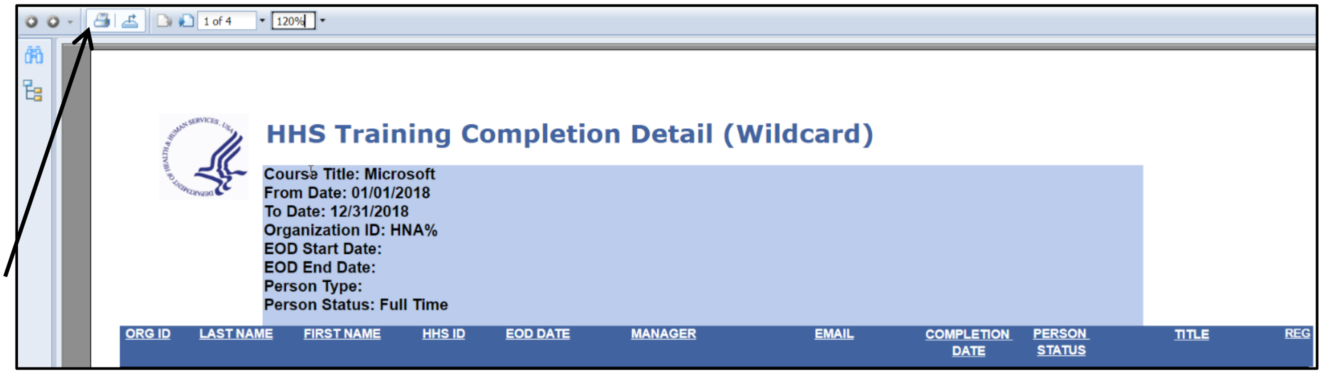
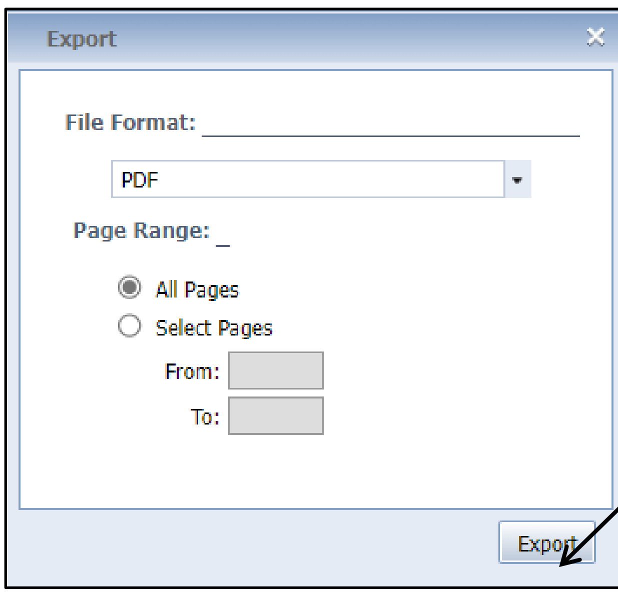


Figure 11 – Print this report button

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



Export button

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.

Admin icon

Figure 1 – Admin icon

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

Reports link

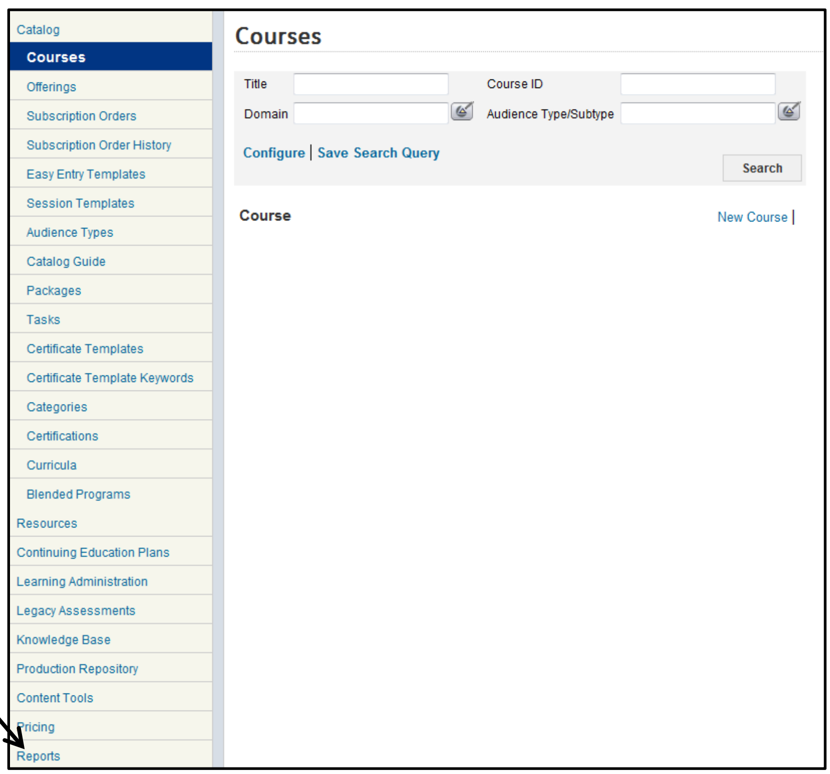


Figure 2 – Reports link

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

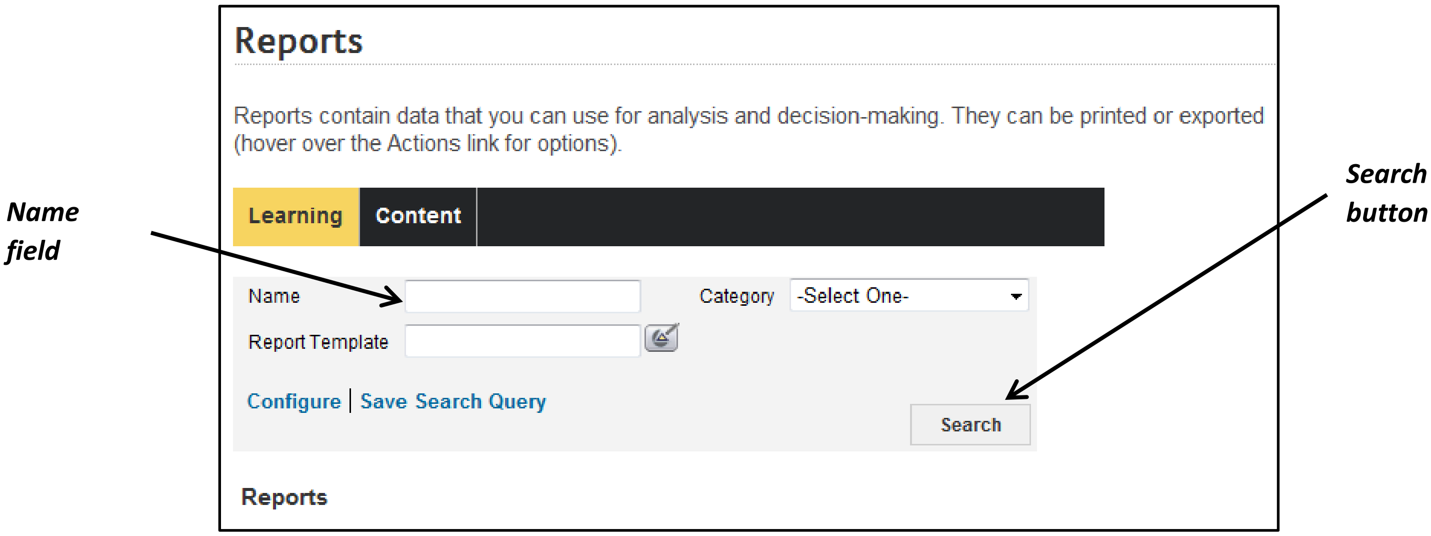


Figure 3 – Name field and Search button

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

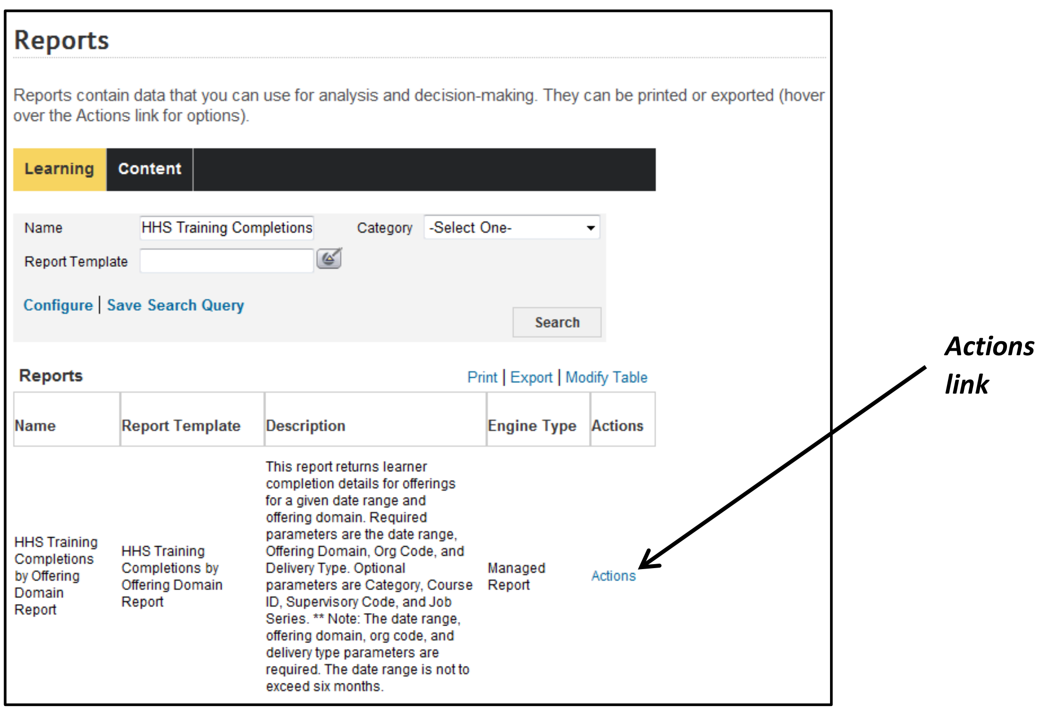


Figure 4 – Actions link

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

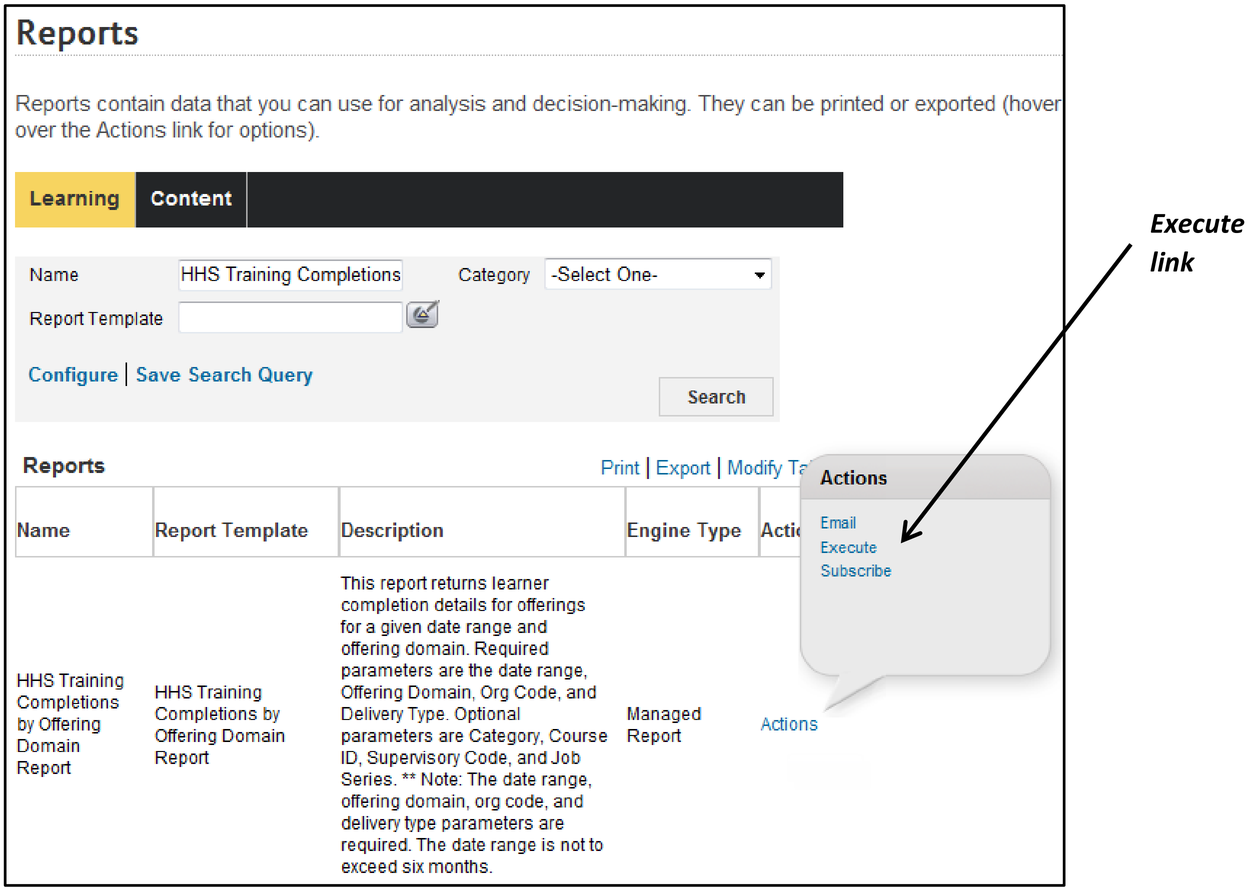


Figure 5 – Execute link on the Actions activity menu

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

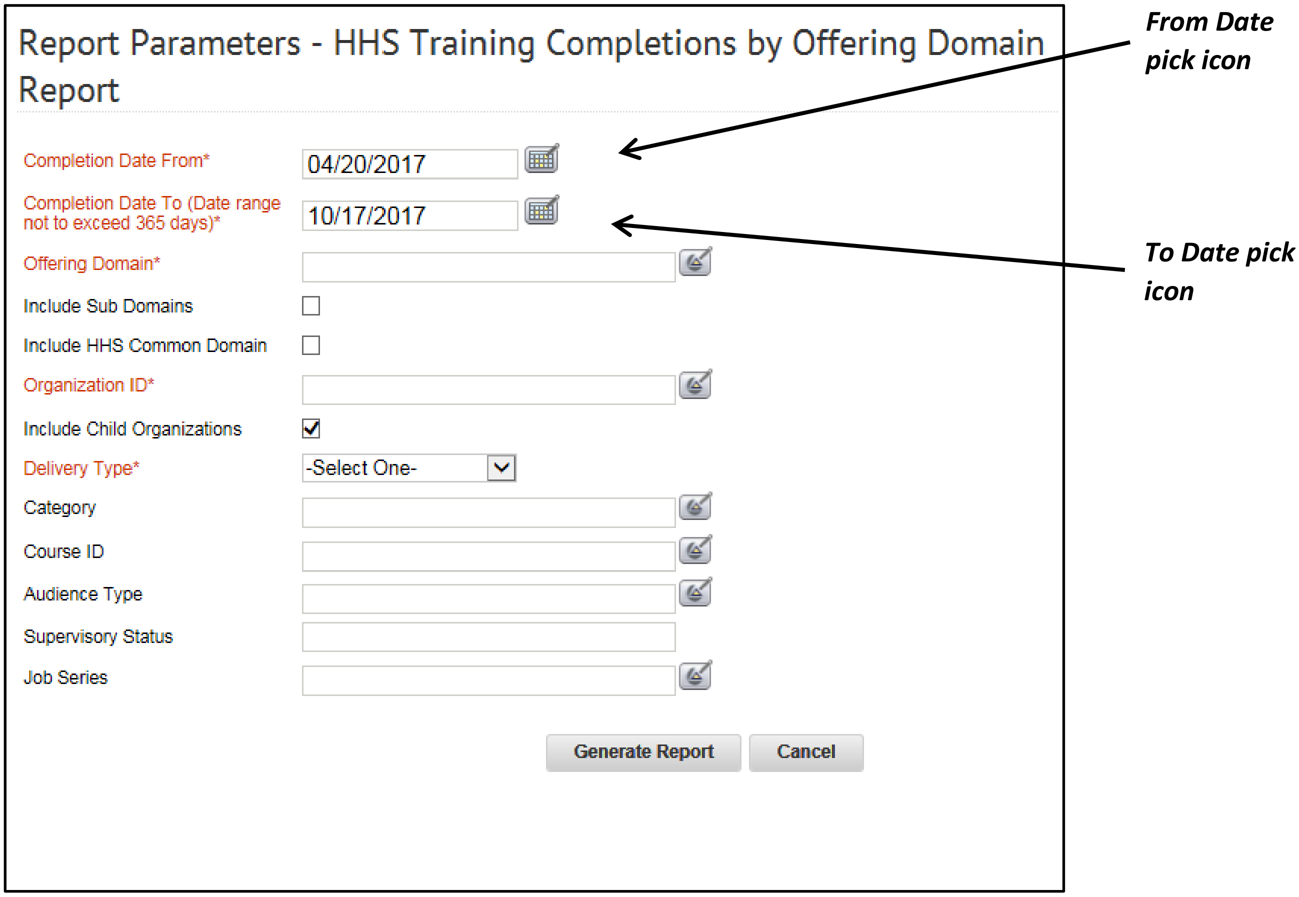


Figure 6 – From Date and To Date pick icons

NOTE: The date range cannot exceed 365 days.

Click the **Offering Domain** pick icon.

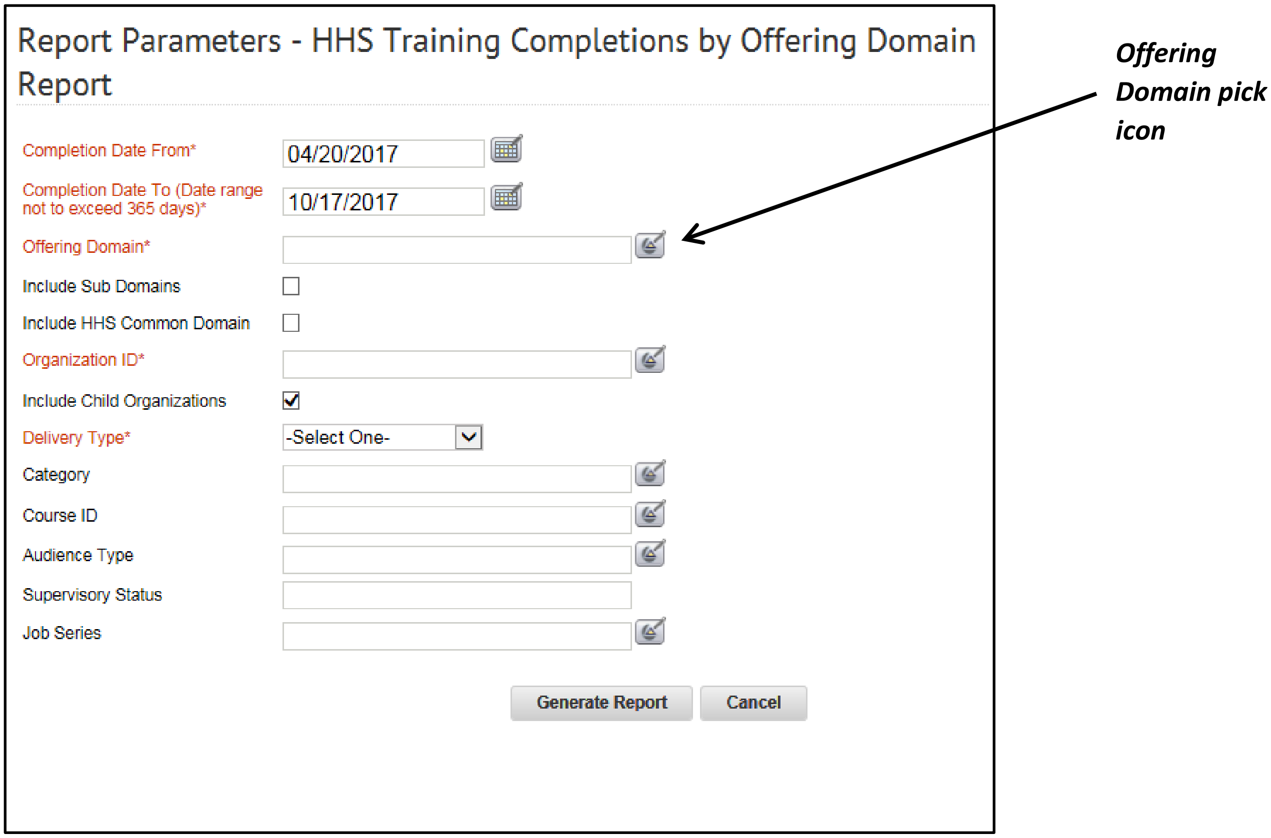


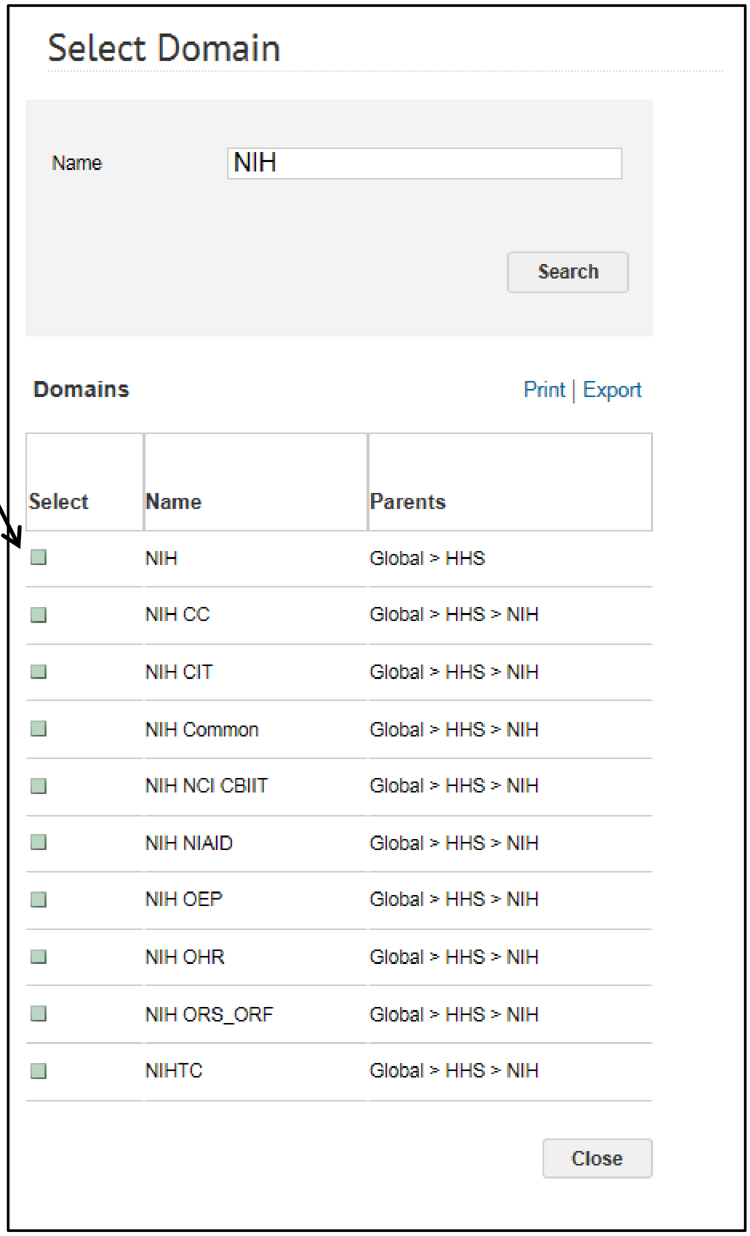
Figure 7 – Offering Domain pick icon

Click the **Search** button.

Figure 8 – Search button

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

Select checkbox


Select Domain

Name NIH

Search

Domains   Print | Export

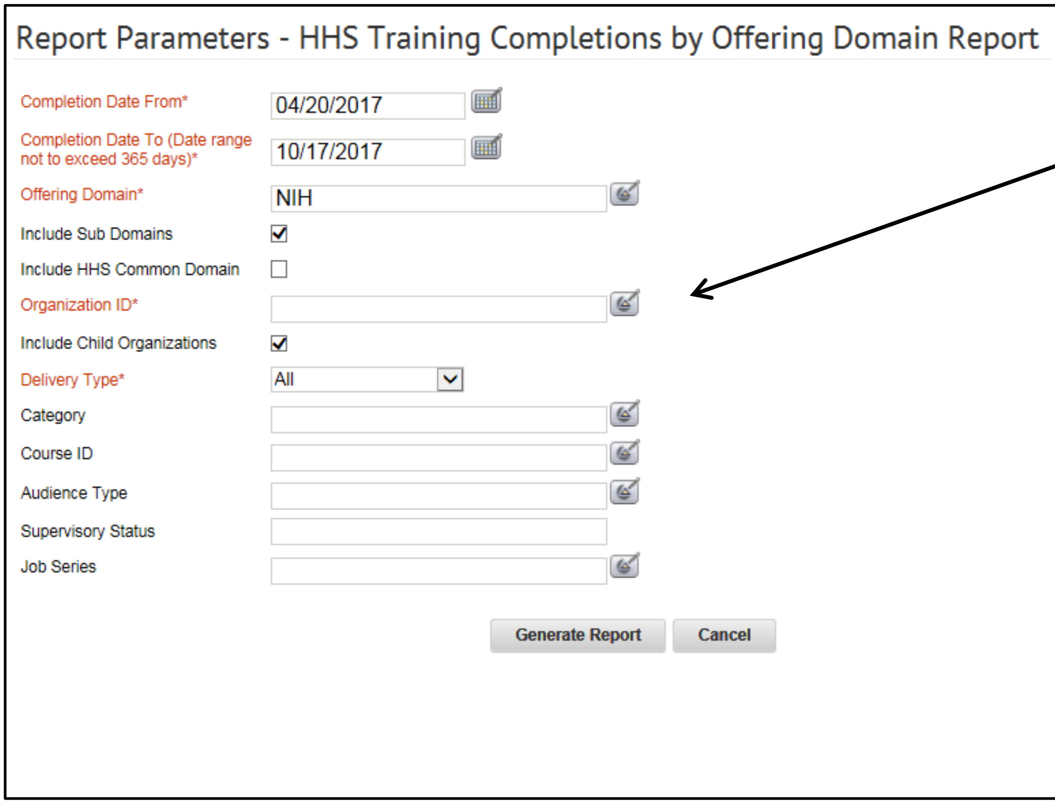
Select	Name	Parents
☐	NIH	Global > HHS
☐	NIH CC	Global > HHS > NIH
☐	NIH CIT	Global > HHS > NIH
☐	NIH Common	Global > HHS > NIH
☐	NIH NCI CBIIT	Global > HHS > NIH
☐	NIH NIAID	Global > HHS > NIH
☐	NIH OEP	Global > HHS > NIH
☐	NIH OHR	Global > HHS > NIH
☐	NIH ORS_ORF	Global > HHS > NIH
☐	NIHTC	Global > HHS > NIH

Close

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.



Organization ID pick icon

Figure 10 – Organization ID field

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

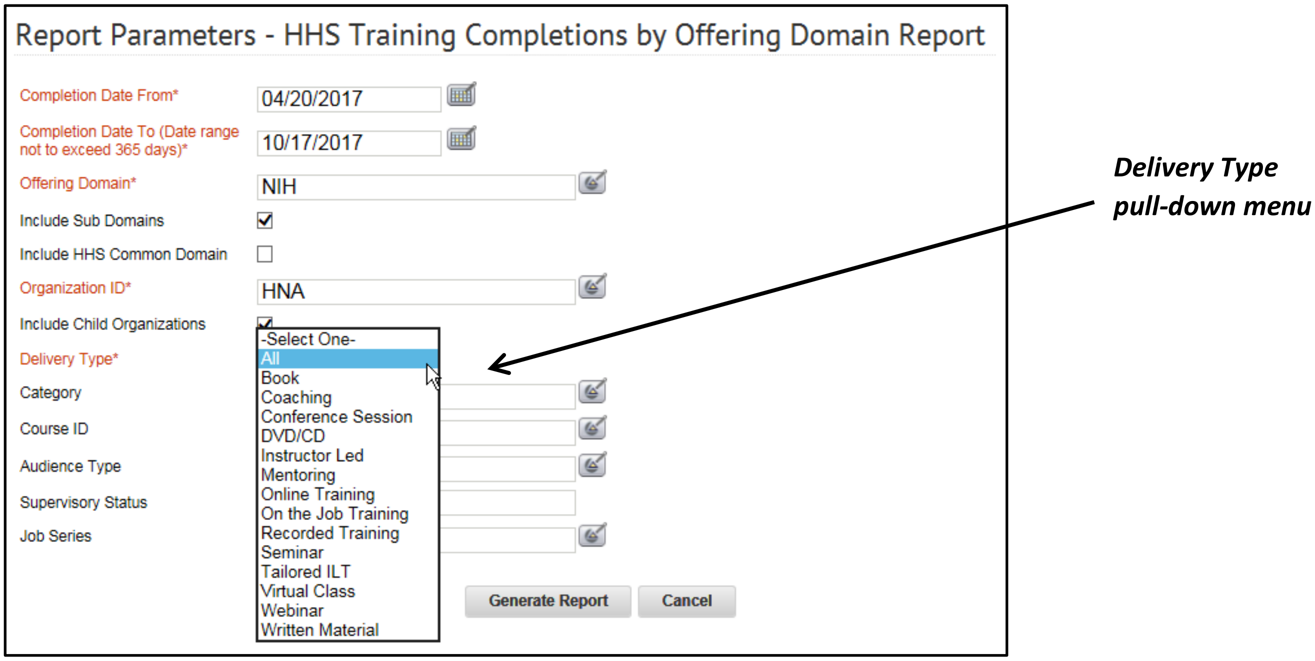


Figure 11 – Delivery Type pull-down menu

Click the **Generate Report** button.

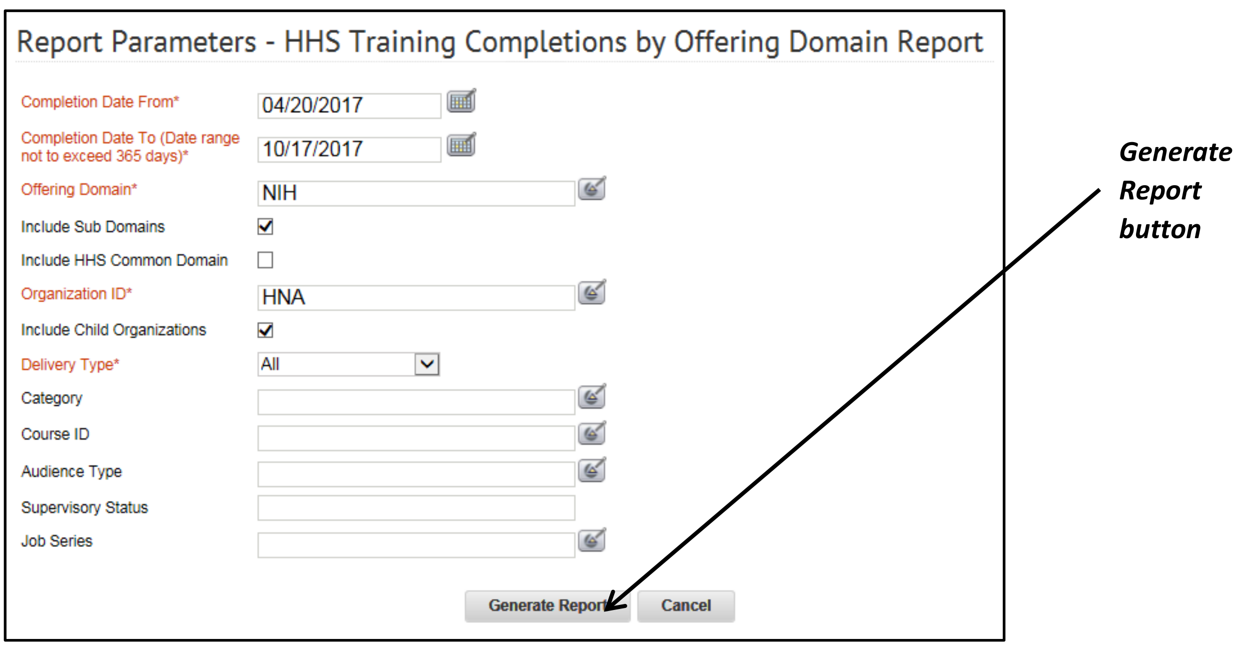


Figure 12 – Generate Report button

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

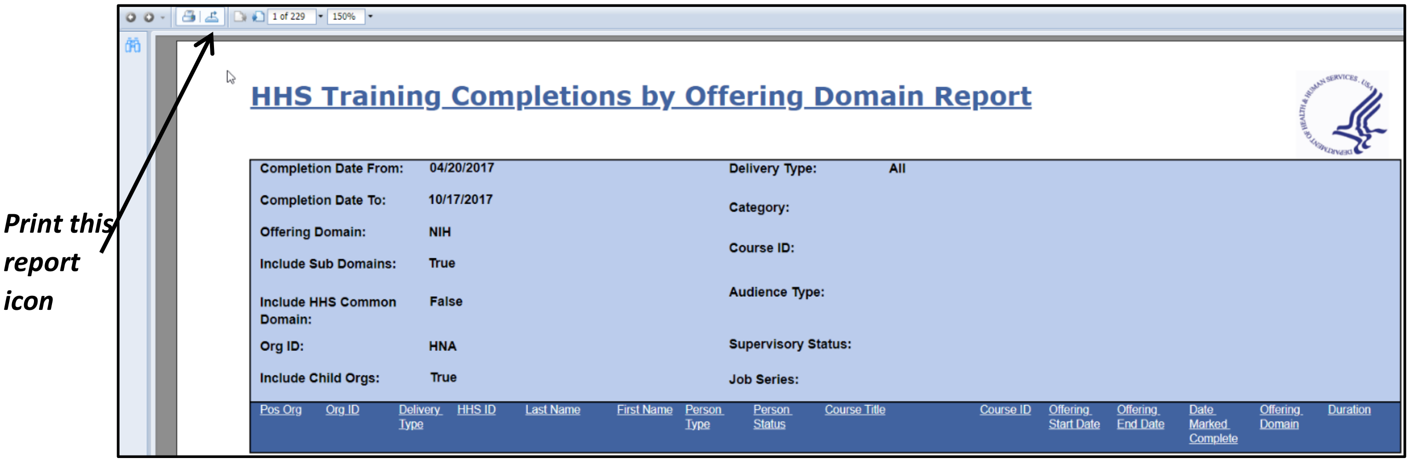


Figure 13 – Print this report icon

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

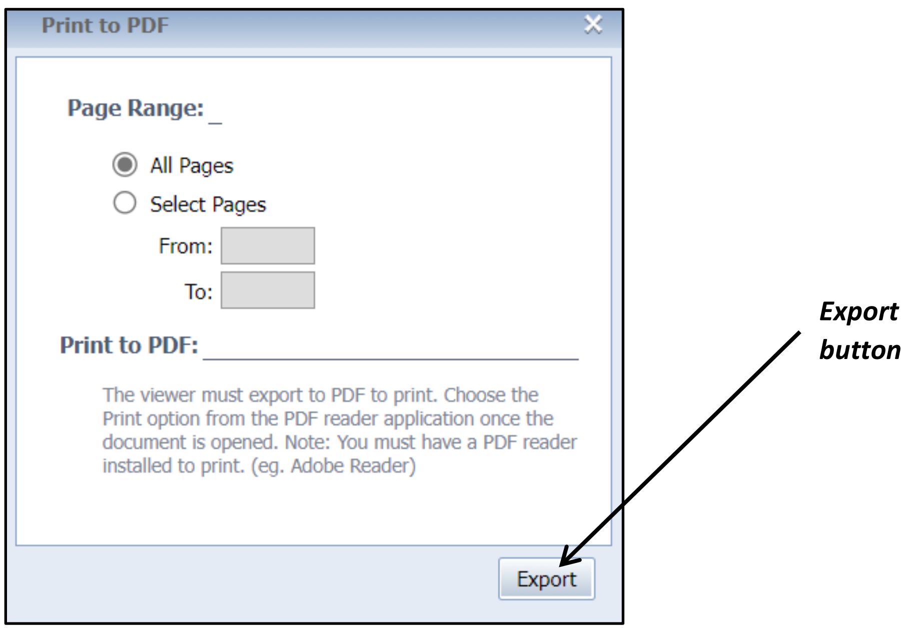
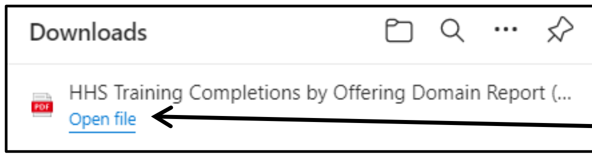


Figure 14 – Export button

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.



Open file link

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.](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

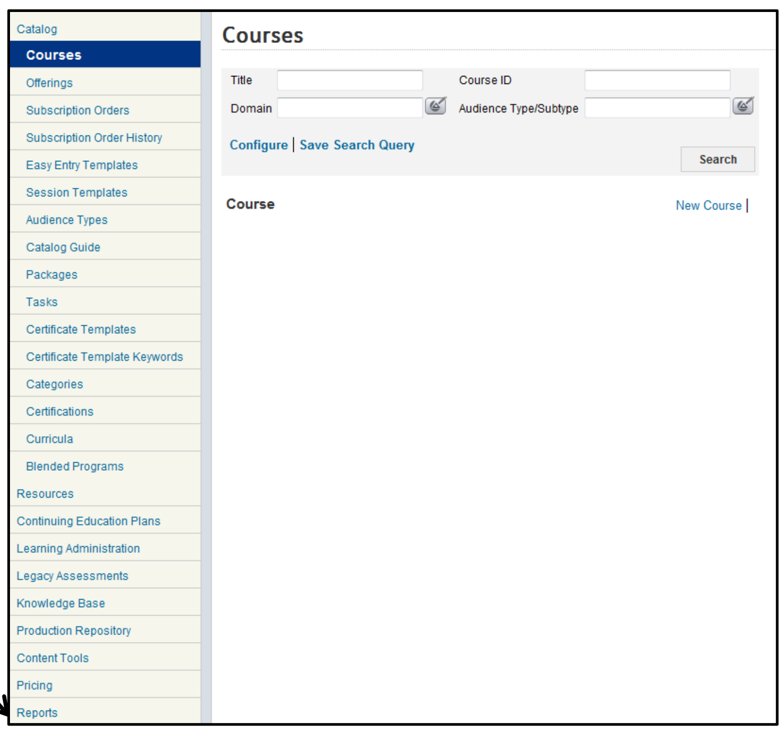


Figure 2 – Reports link

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

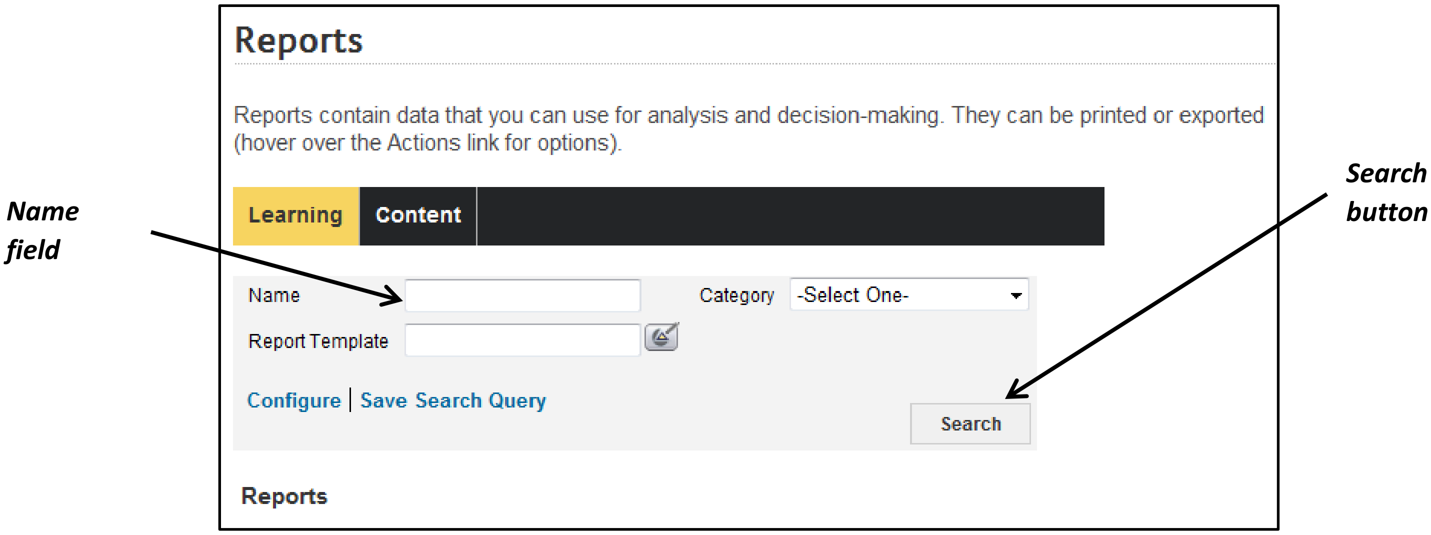


Figure 3 – Name field and Search button

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

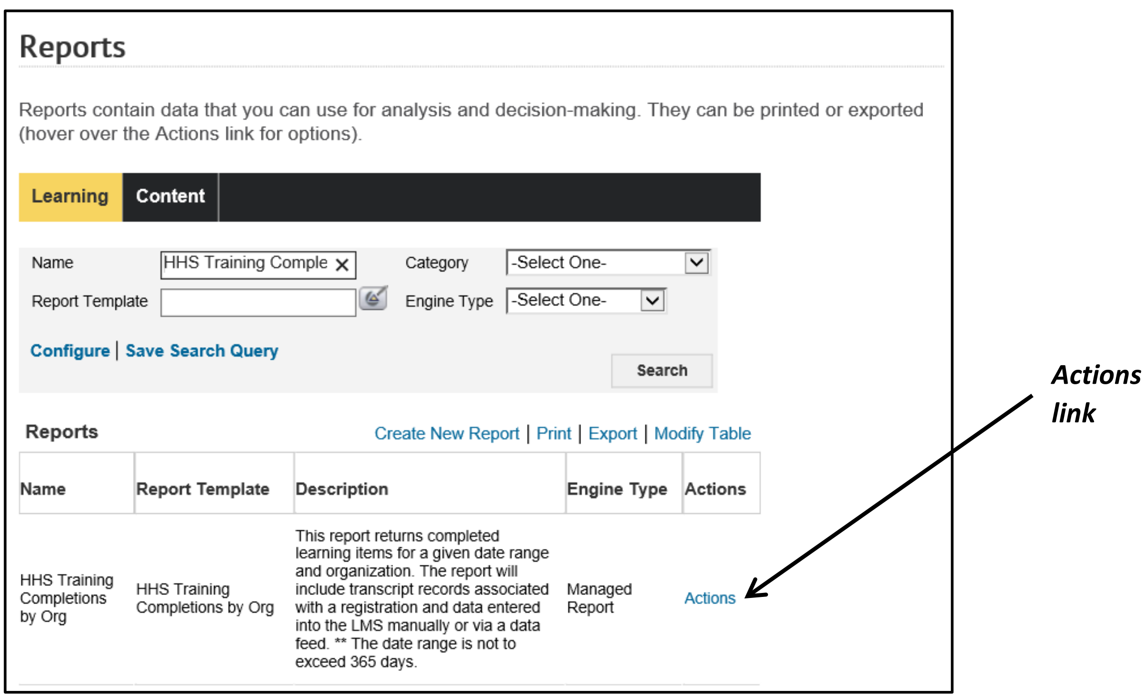


Figure 4 – Actions link

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

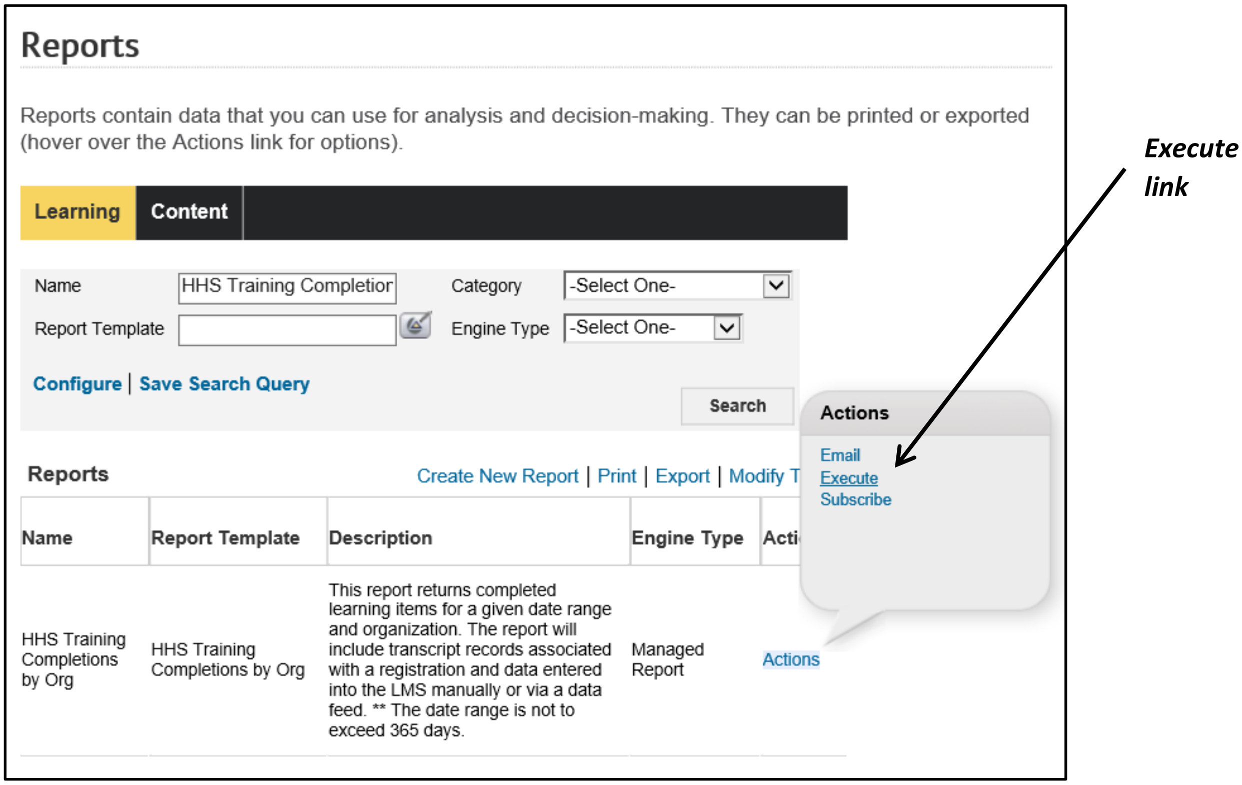


Figure 5 – Execute link on the Actions activity menu

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/DDD/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.

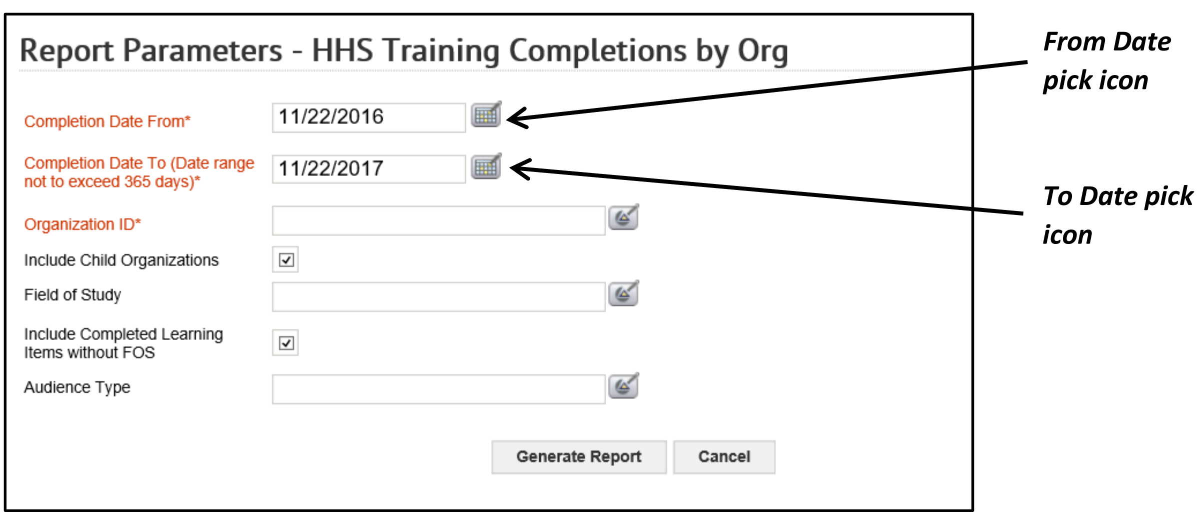


Figure 6 – From Date and To Date pick icons

Click the **Organizational ID** pick icon.

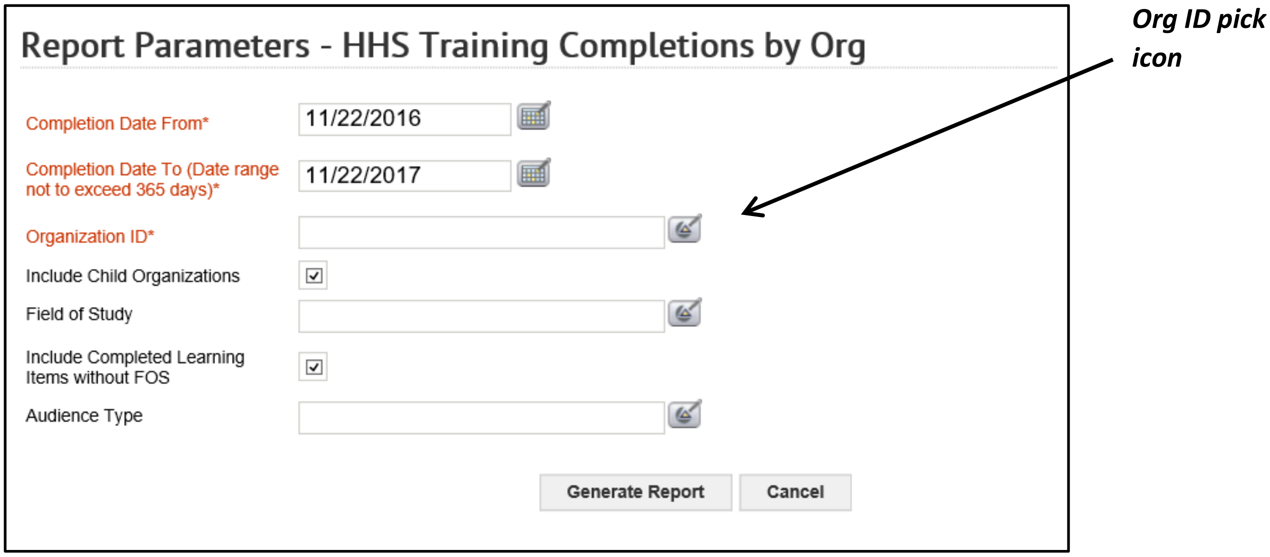


Figure 7 – Org ID pick icon

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

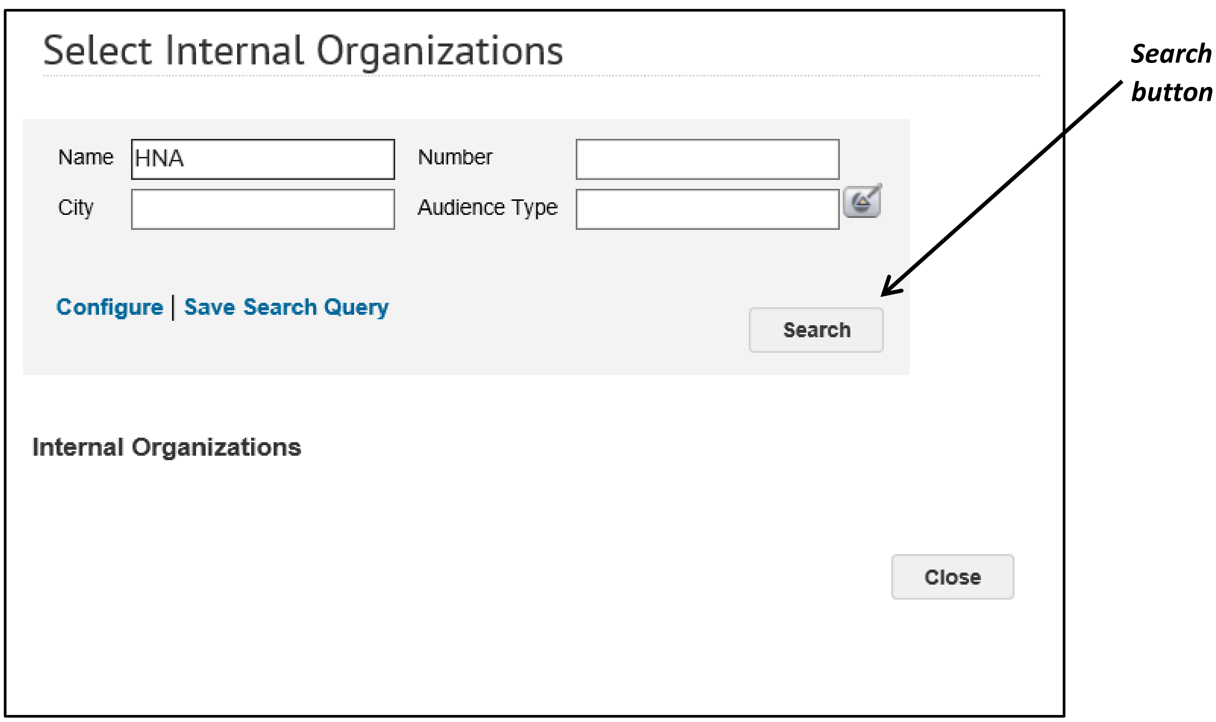


Figure 8 – Search button

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

Select checkbox

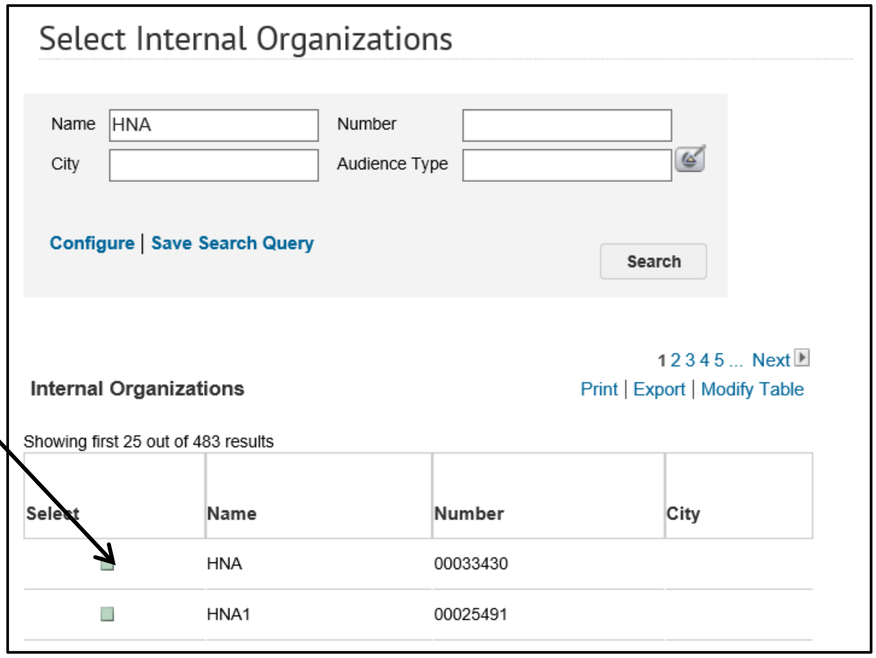
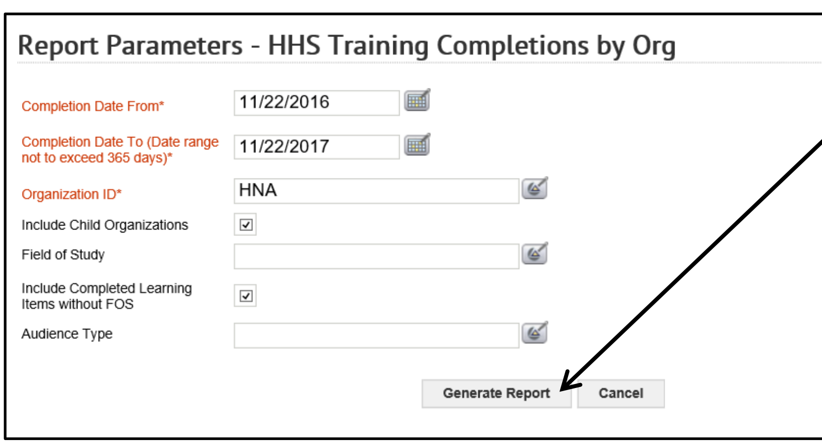


Figure 9 – Select checkbox

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.



Generate Report button

Figure 10 – Generate Report button

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

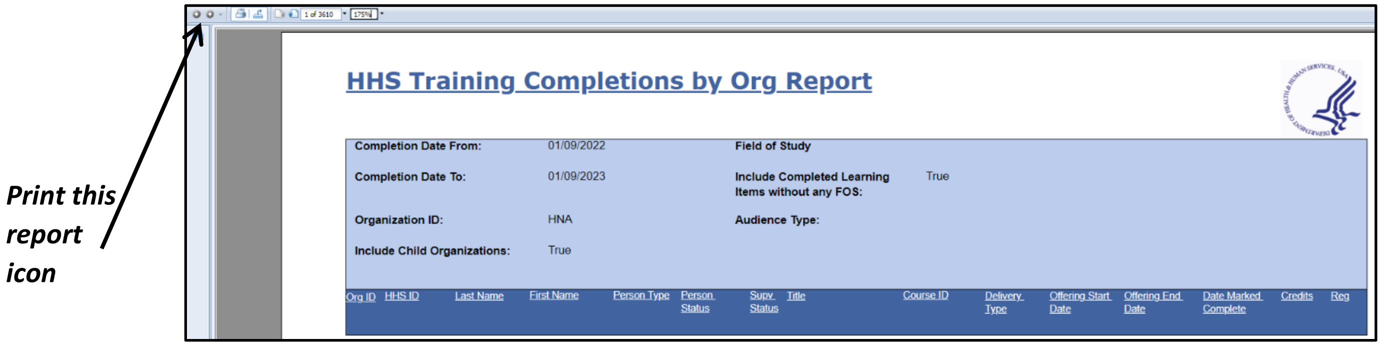


Figure 11 – Print this report icon

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

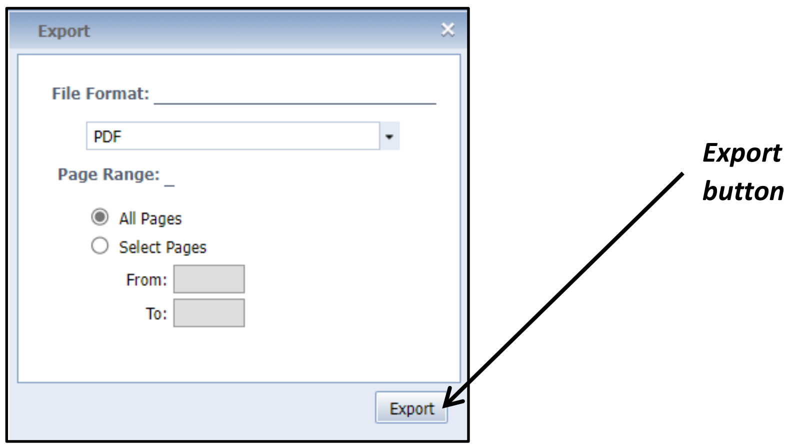


Figure 12 – Export button

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.

Admin icon

Figure 1 – Admin icon

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

Reports link

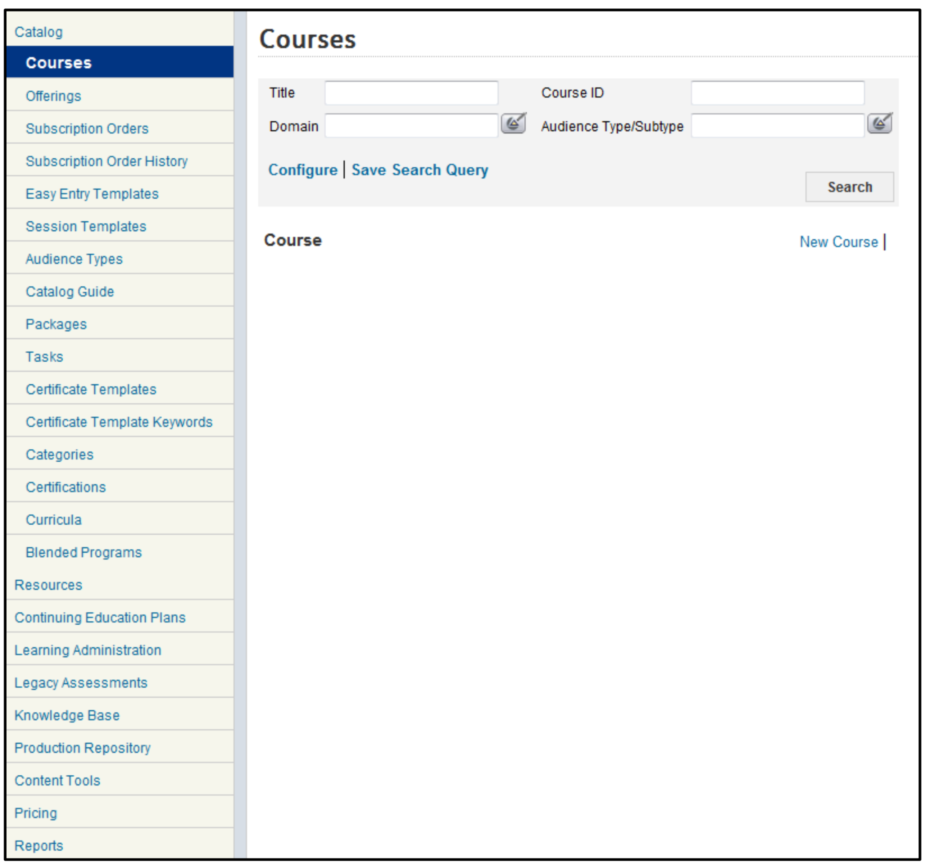


Figure 2 – Reports link

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

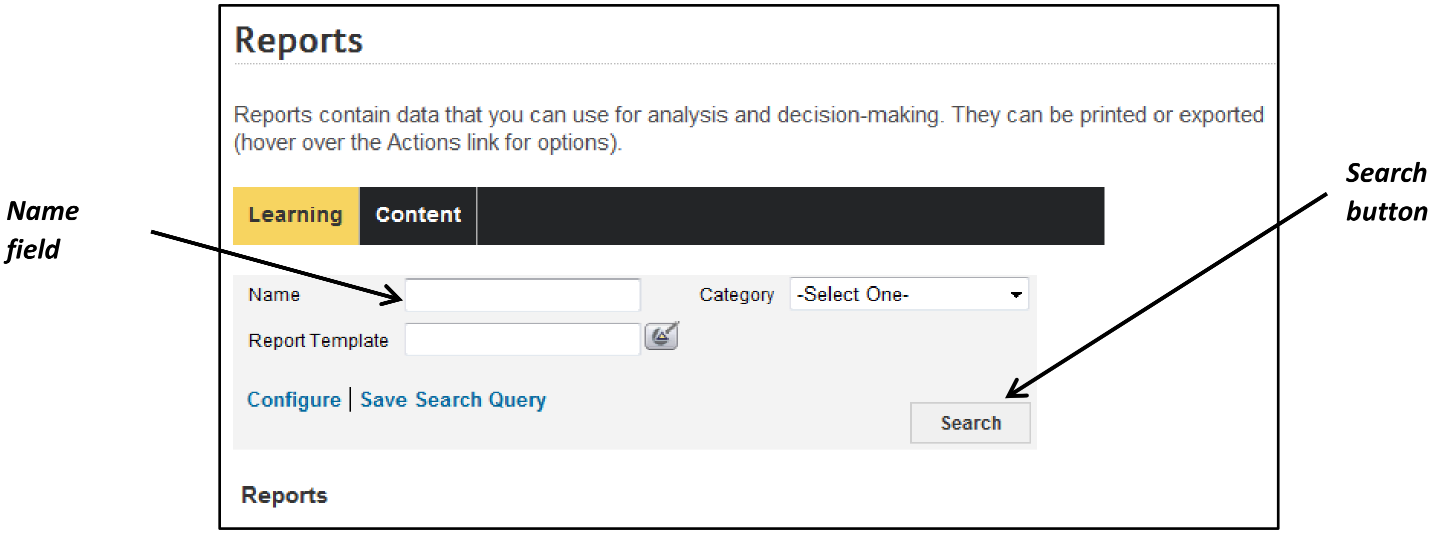


Figure 3 – Name field and Search button

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

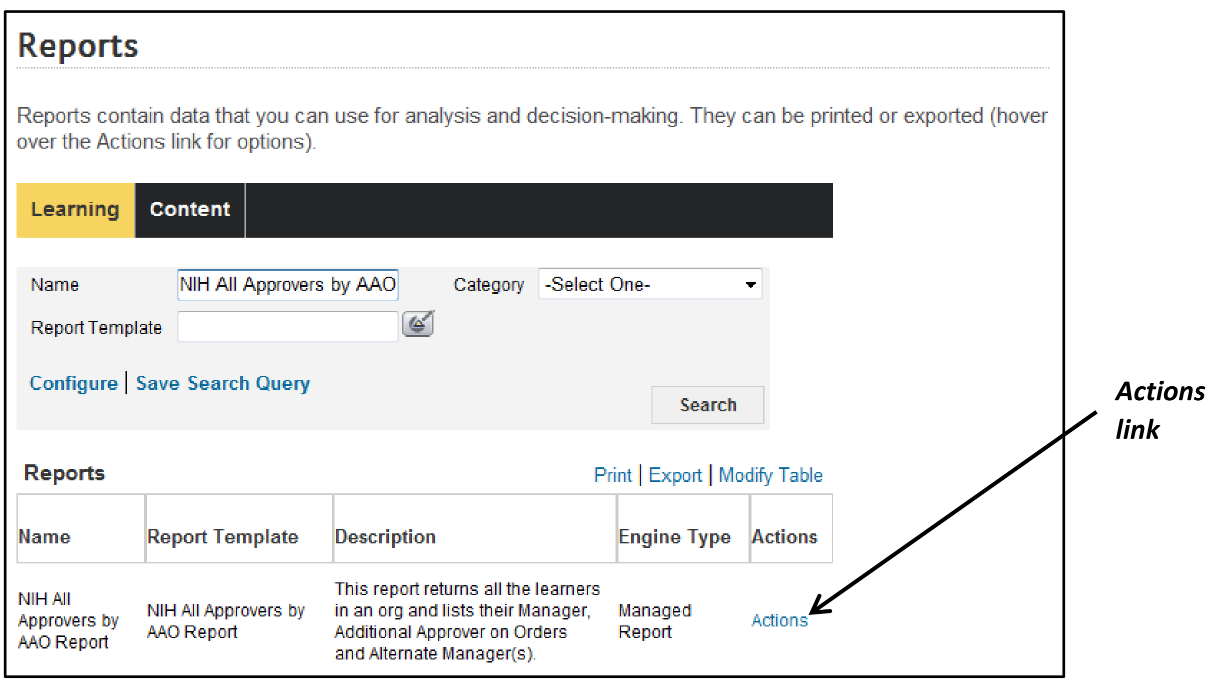


Figure 4 – Actions link

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

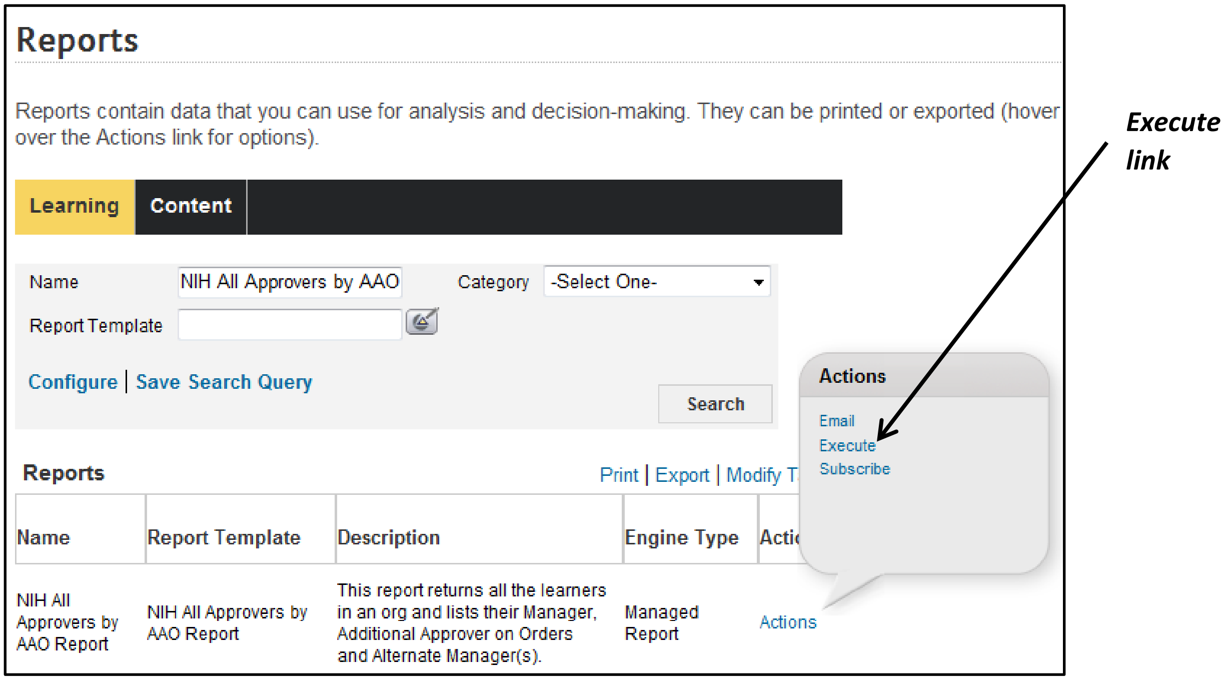


Figure 5 – Execute link on the Actions activity menu

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

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.

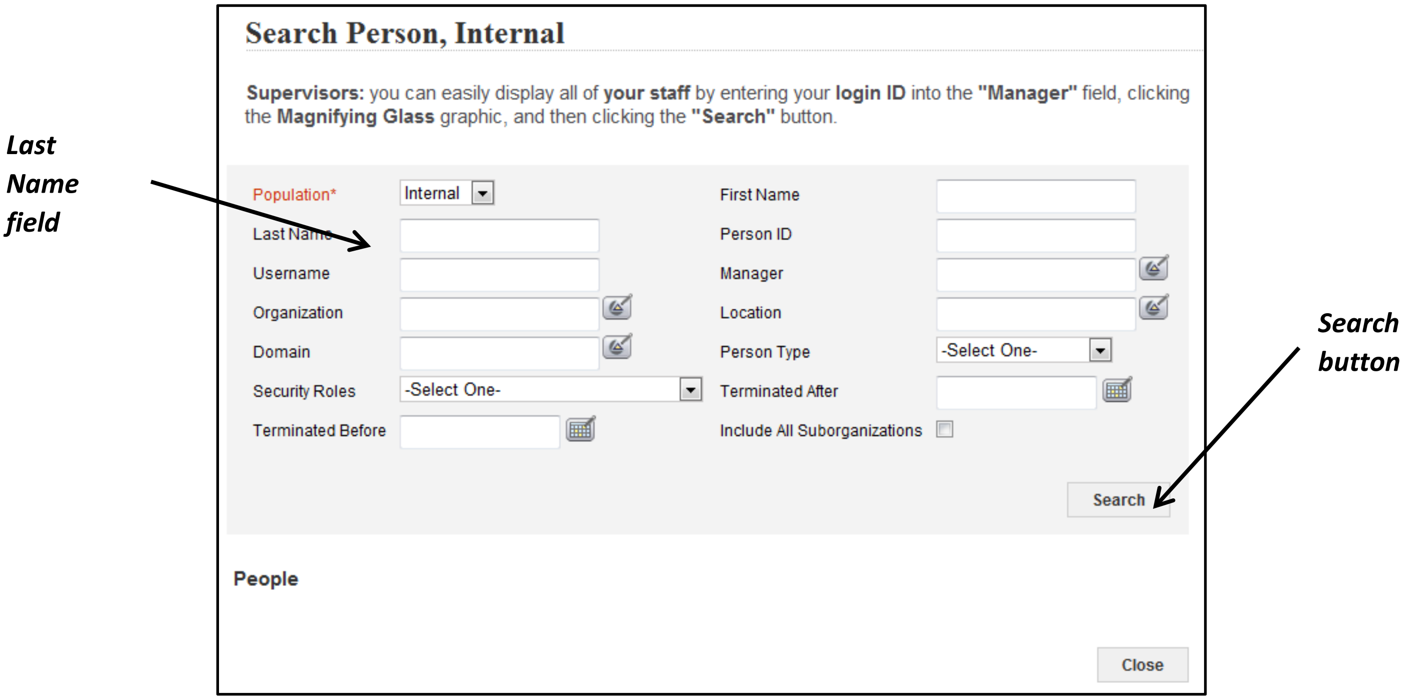


Figure 7 – Last Name field and Search button

Click the Select checkbox to select the AAO.

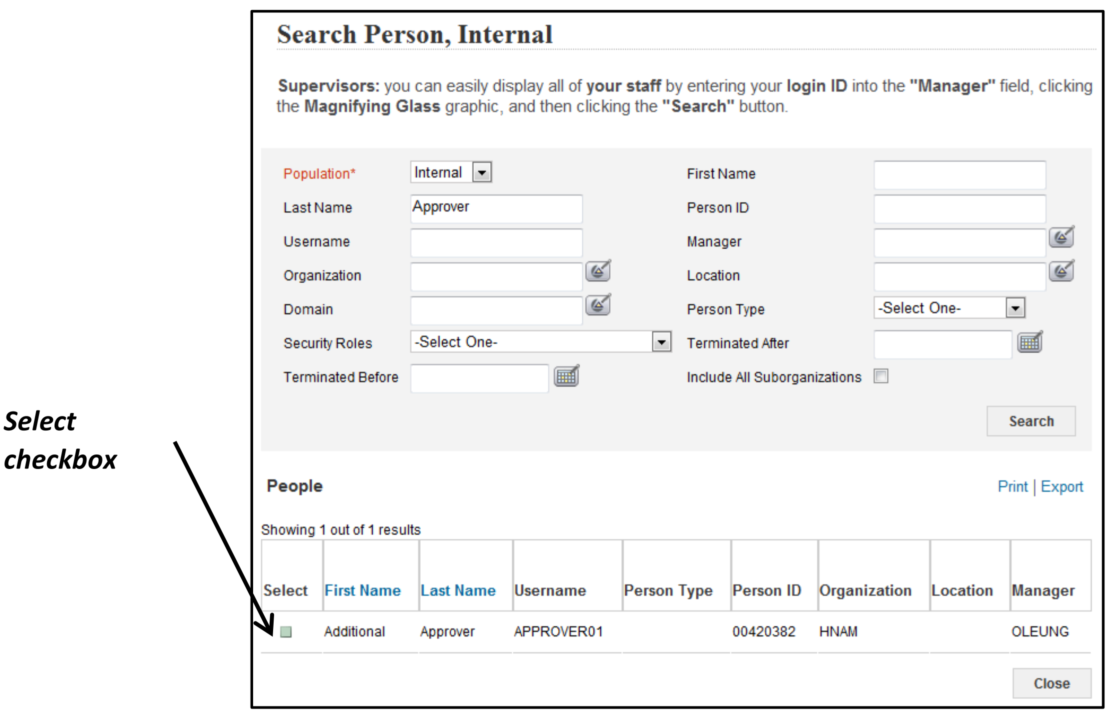


Figure 8 – Select checkbox

Click the **Generate Report** button.

Figure 9 – Generate Report button

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

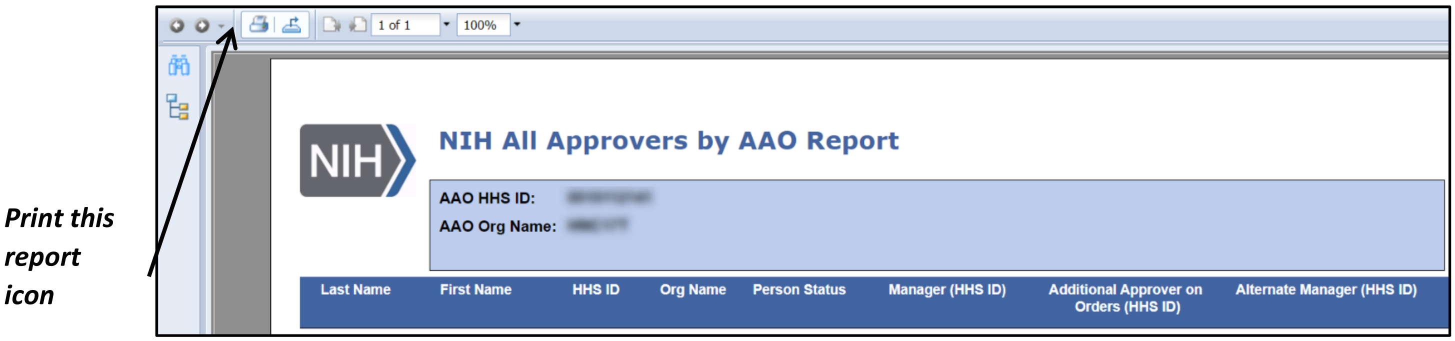


Figure 10 – Print this report icon

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

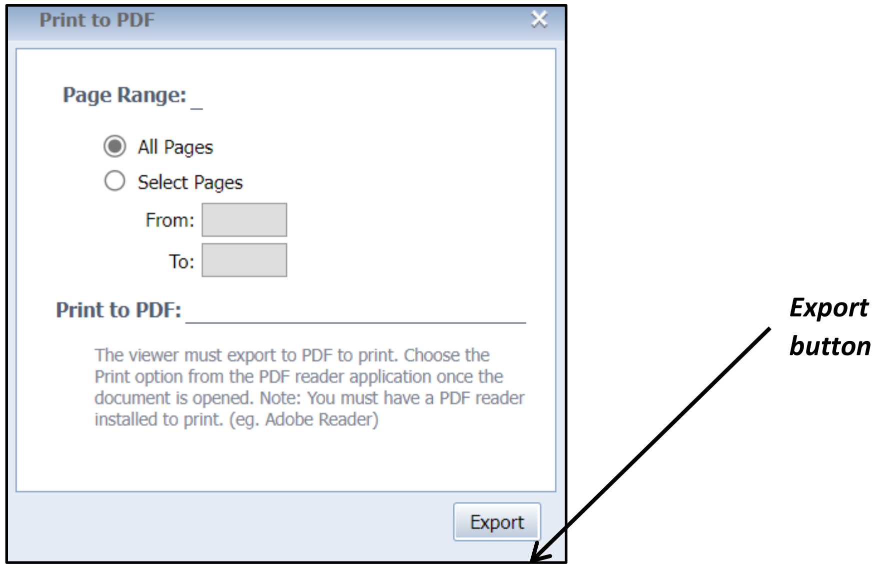


Figure 11 – Export button

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.

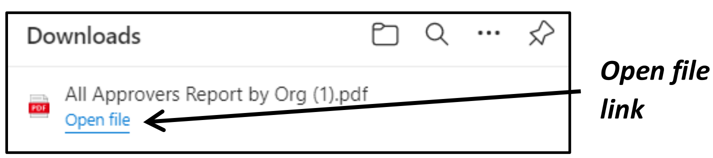


Figure 12 – Open file link

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

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.

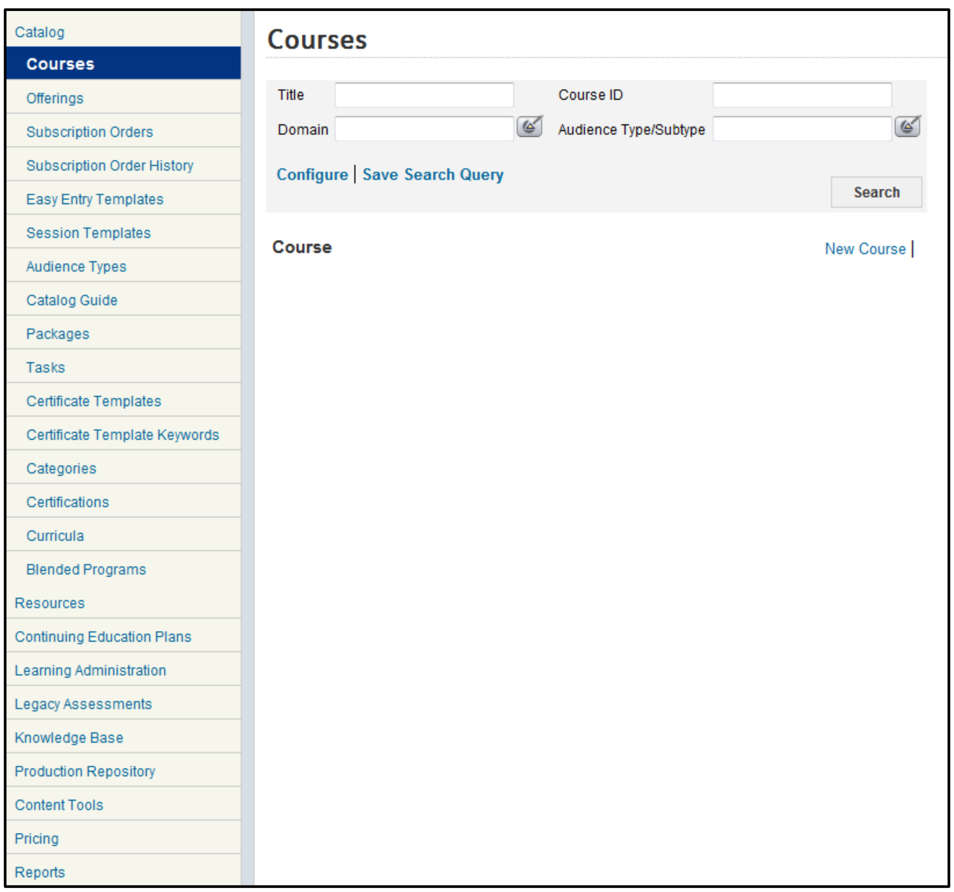
Log into the LMS.

Click the **Admin** icon.

Admin icon

Figure 1 – Admin icon

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



Reports link

Figure 2 – Reports link

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

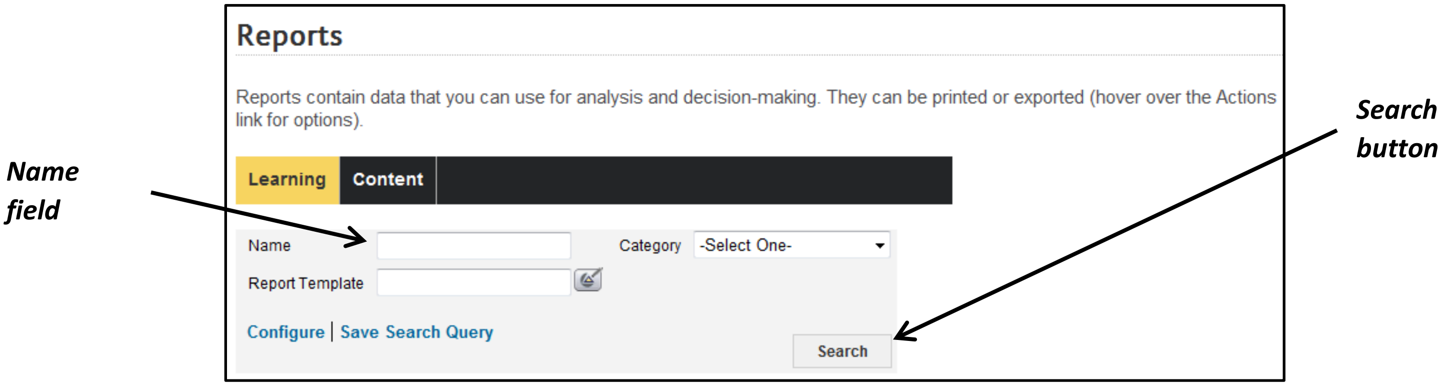


Figure 3 – Name field and Search button

Click the **Actions** link.

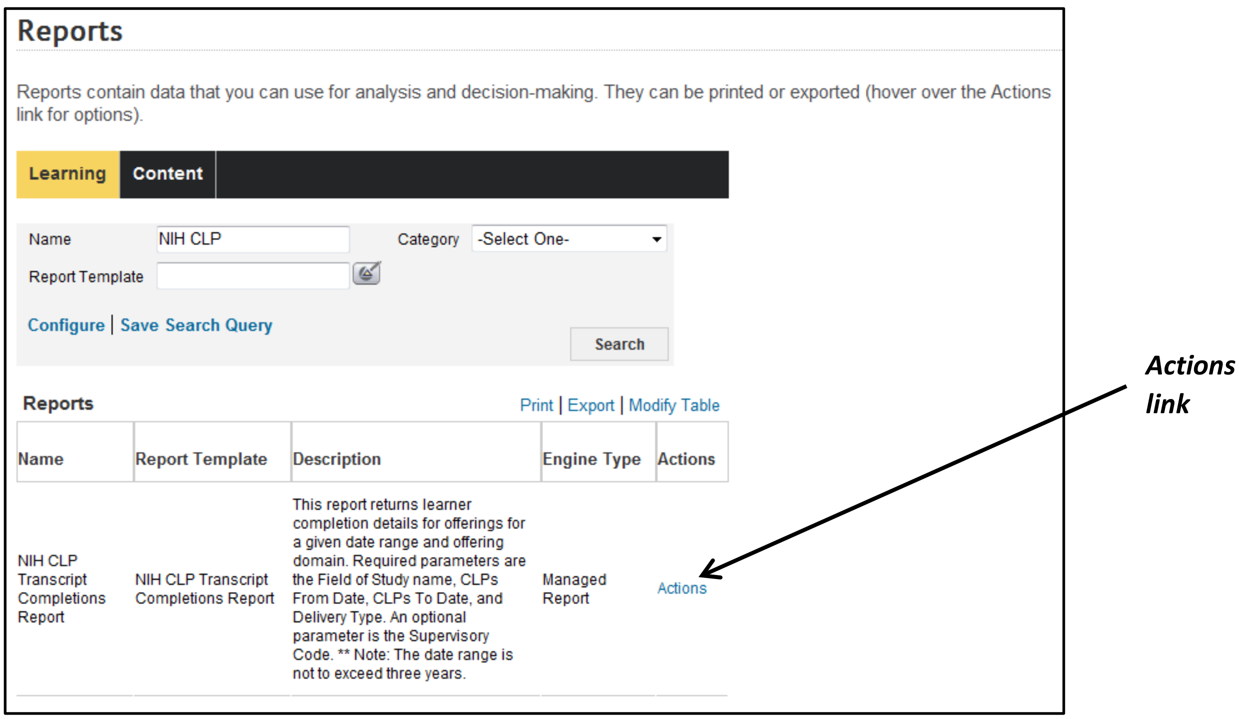


Figure 4 – Actions link

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

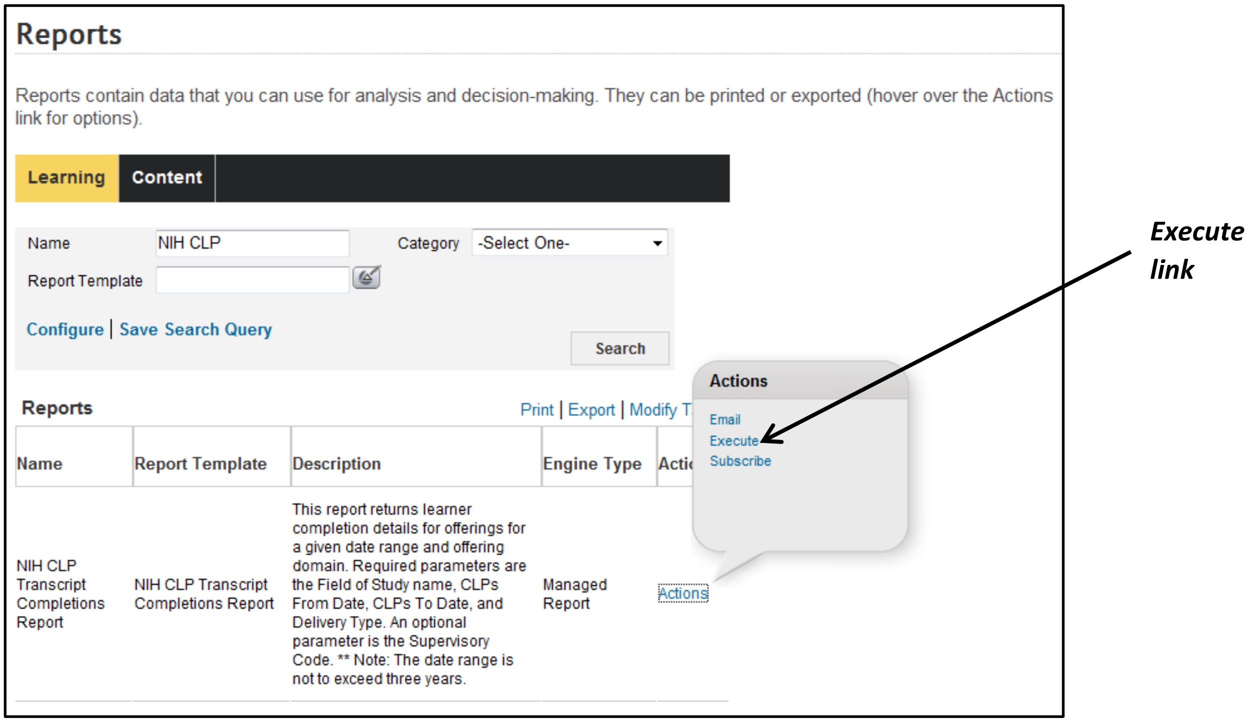


Figure 5 – Execute link on the Actions activity menu

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

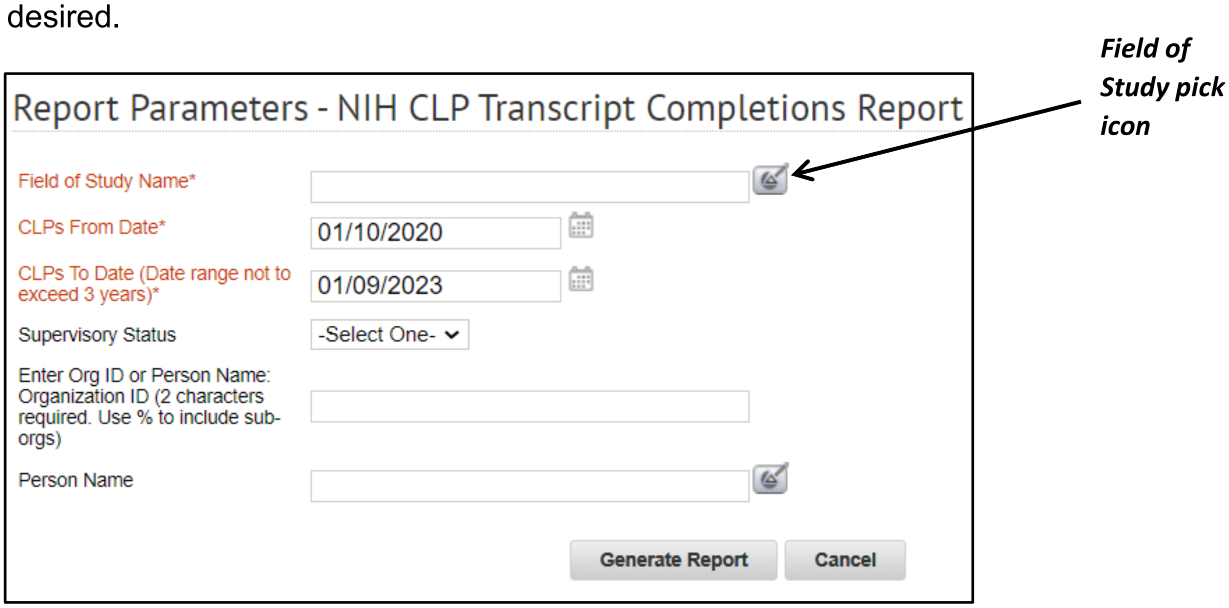


Figure 6 – Field of Study pick icon

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.

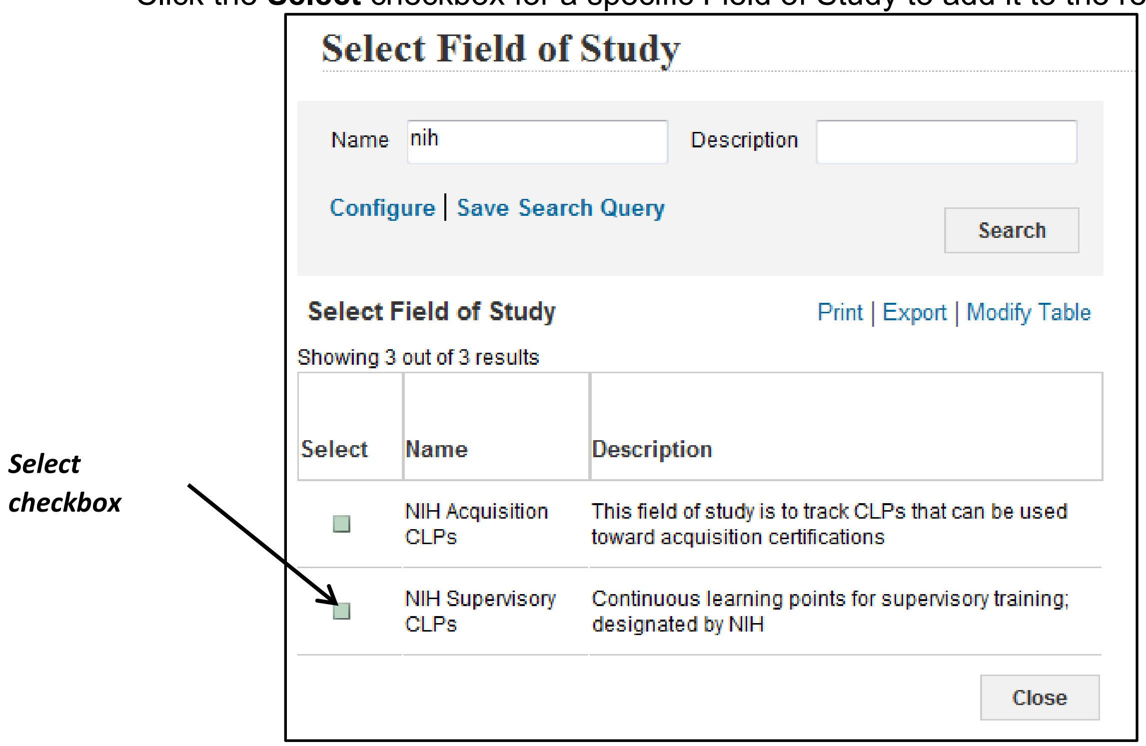


Figure 8 – Select checkmark

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.

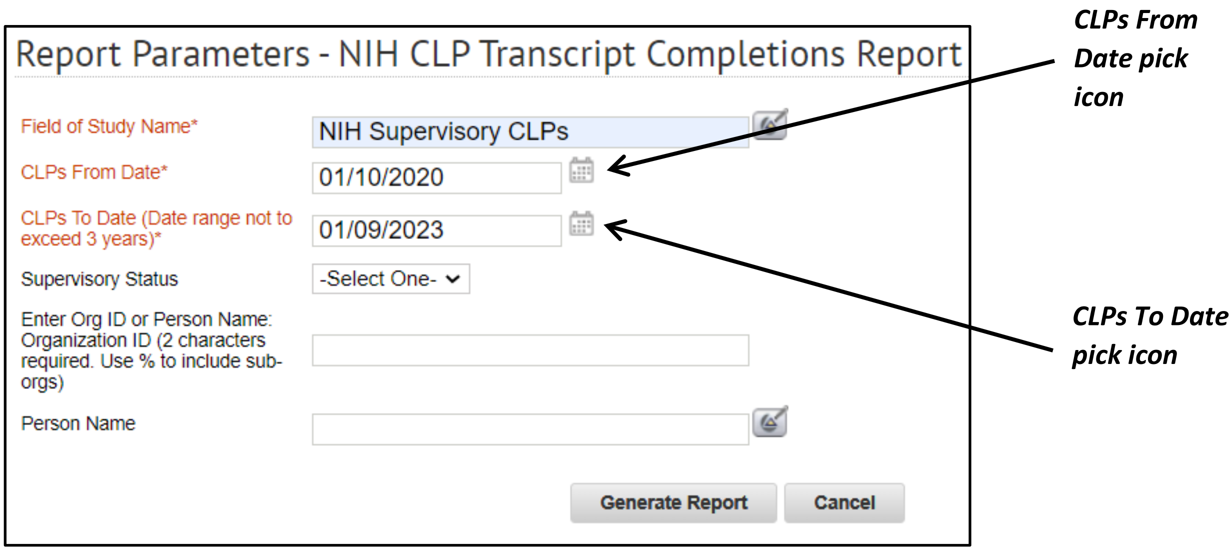


Figure 9 – CLPs From Date and CLPs To Date pick icons

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.

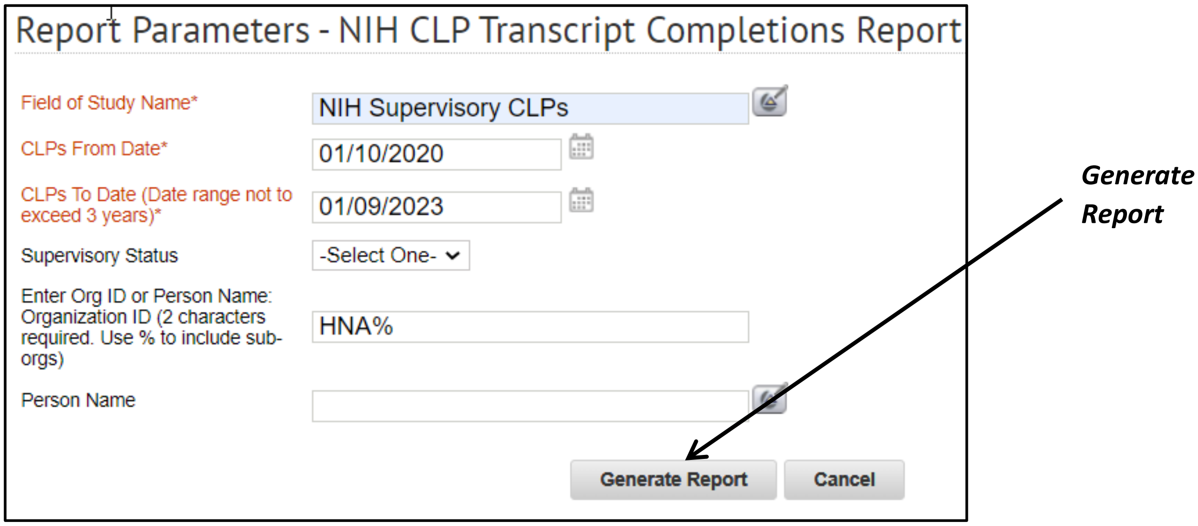


Figure 10 – Generate Report button

Click the **Print this report** icon.

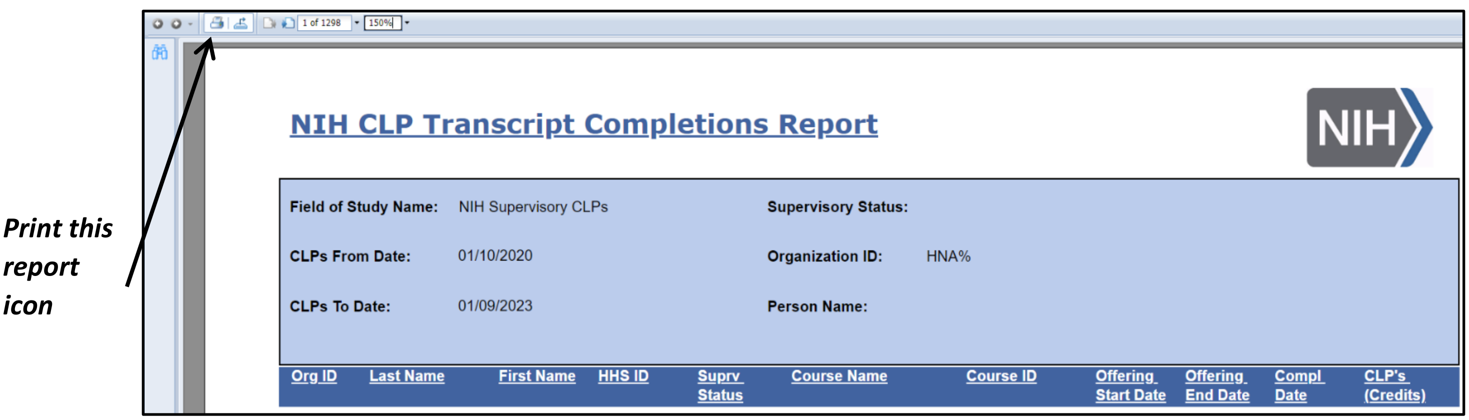


Figure 11 – Print this report button

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

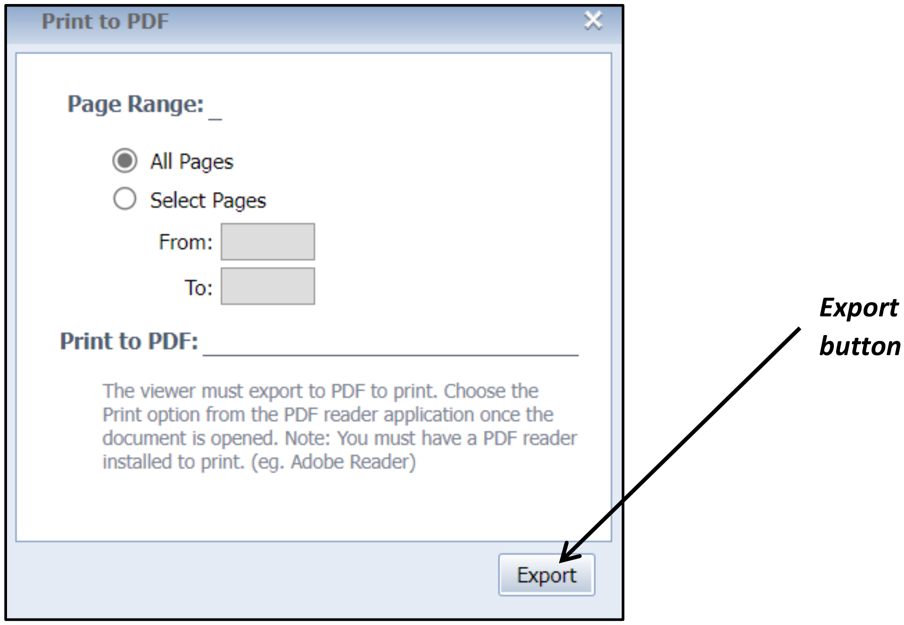


Figure 12 – Export button

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.

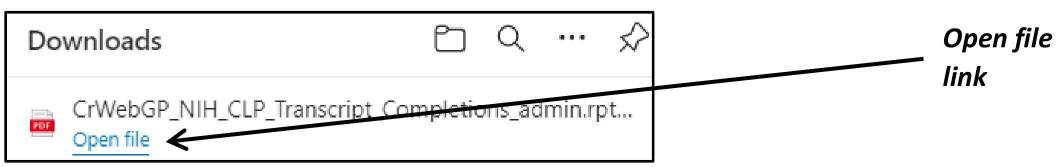


Figure 13 – Open file link

Print the file from Adobe Reader/Acrobat.

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

Running the NIH 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.

Reports link

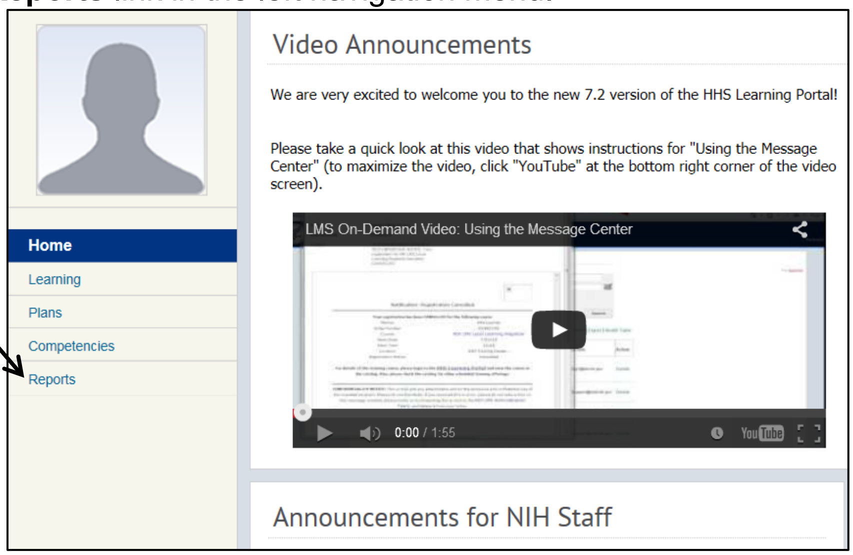


Figure 1 – Reports link

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

Name field

Search button

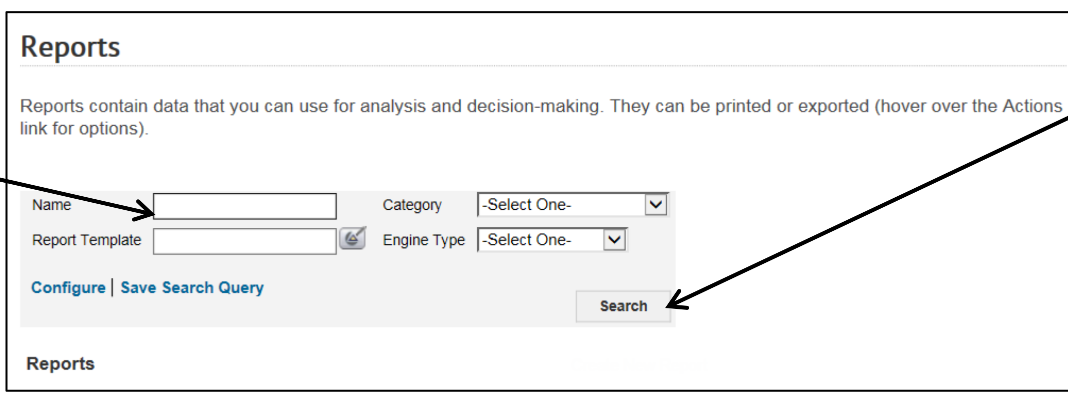


Figure 2 – Name field and Search button

Click the **Actions** link.

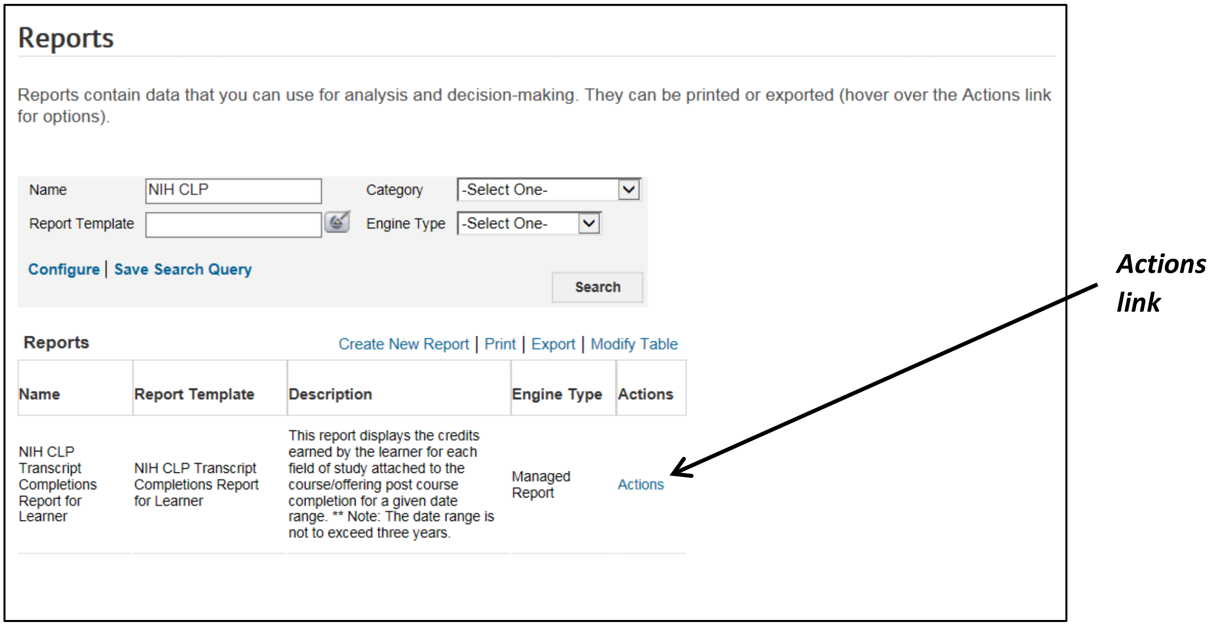


Figure 3 – Actions link

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

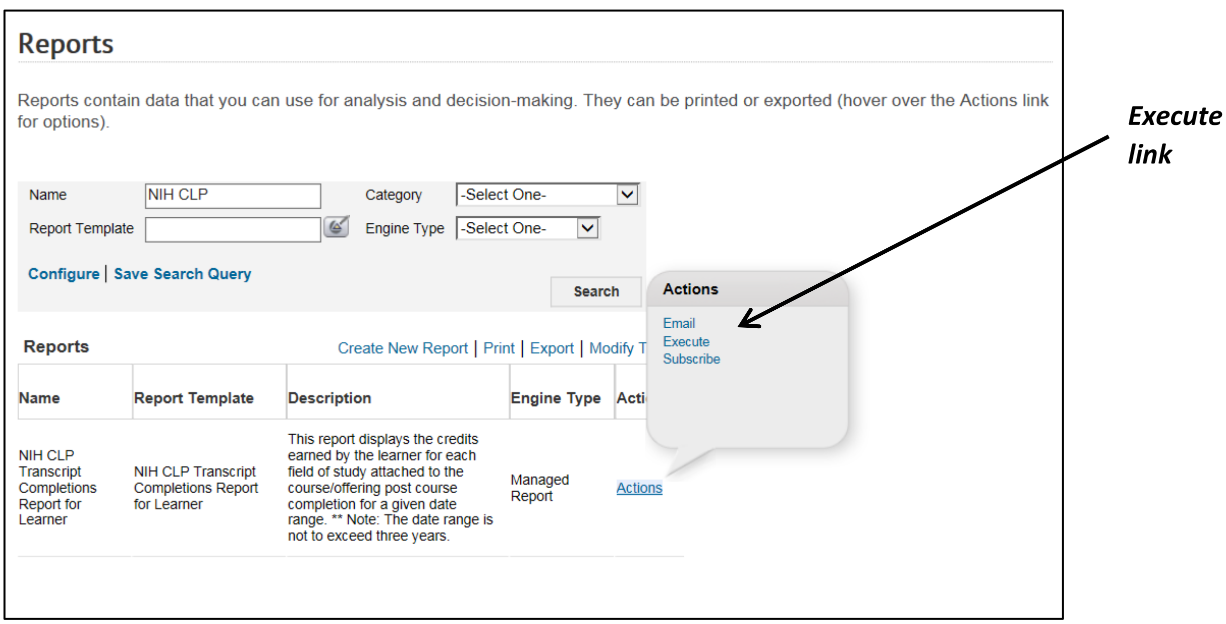


Figure 4 – Execute link on the Actions activity menu

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.

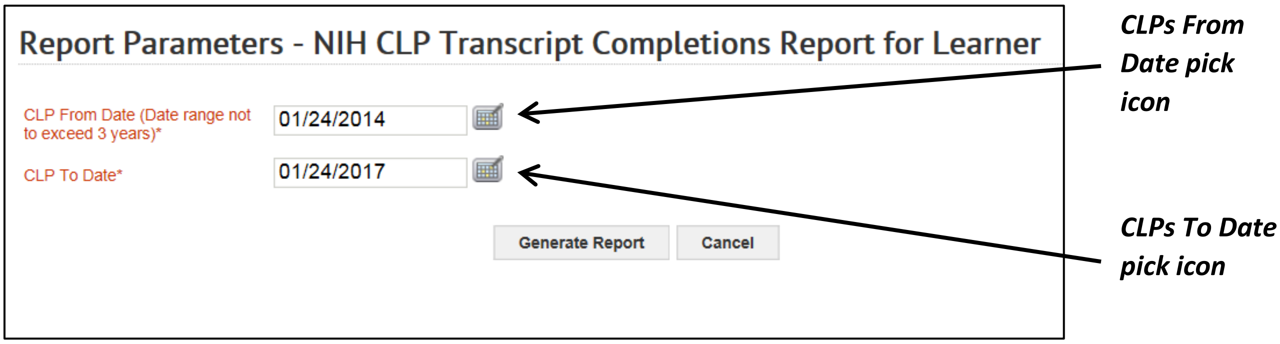


Figure 5 – CLPs From Date and CLPs To Date pick icons

Click the **Generate Report** button.

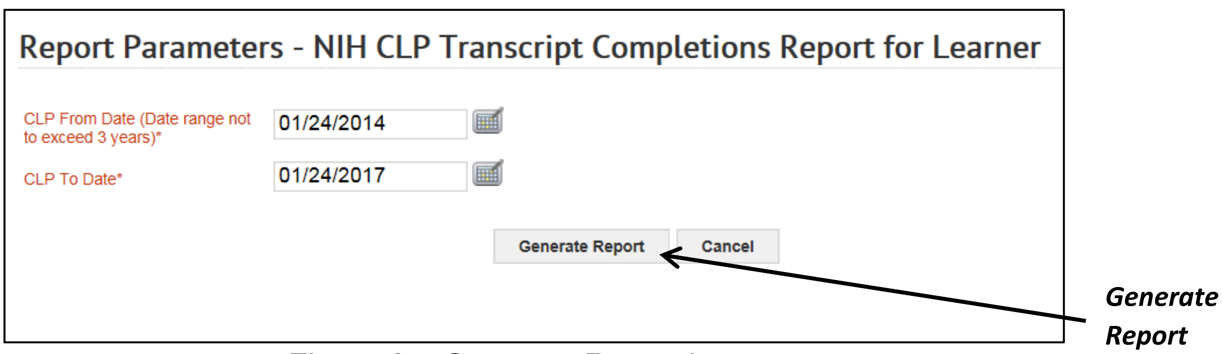


Figure 6 – Generate Report button

Click the **Print this report** icon.

Print this report icon

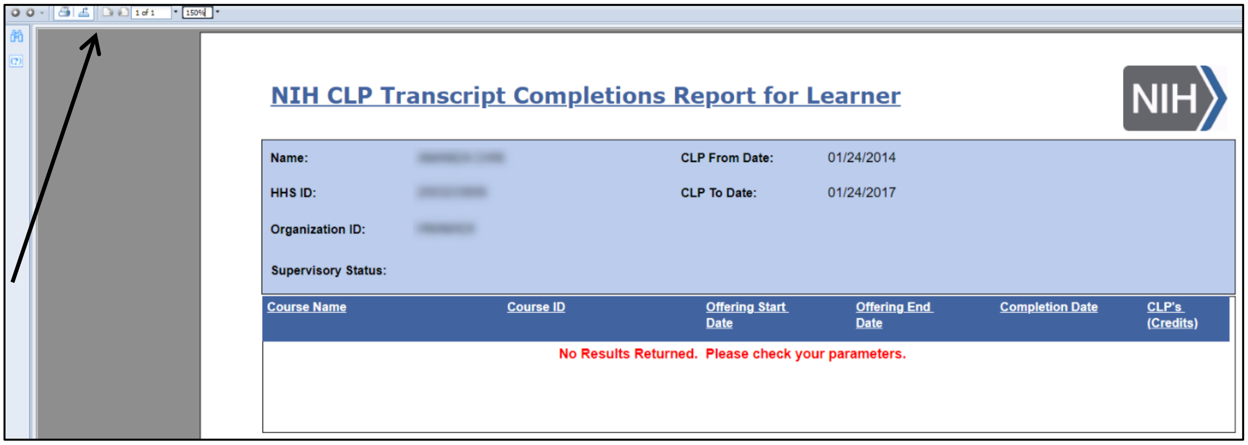
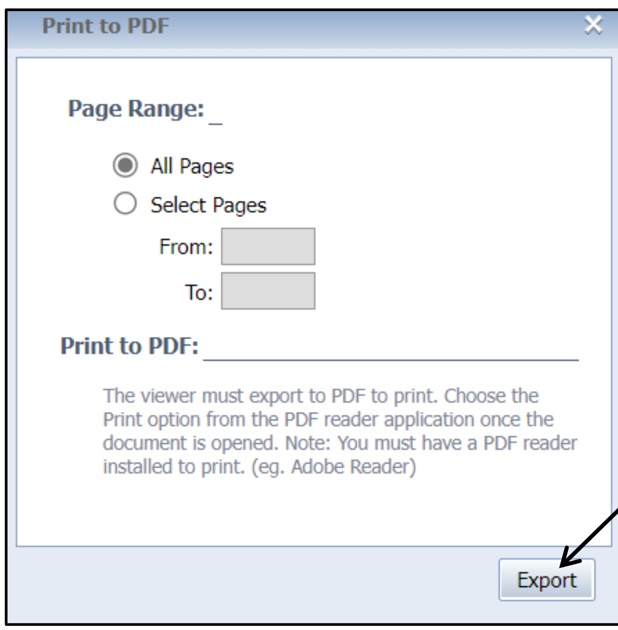


Figure 7 – Print this report button

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.

Admin icon

Figure 1 – Admin icon

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

Reports link

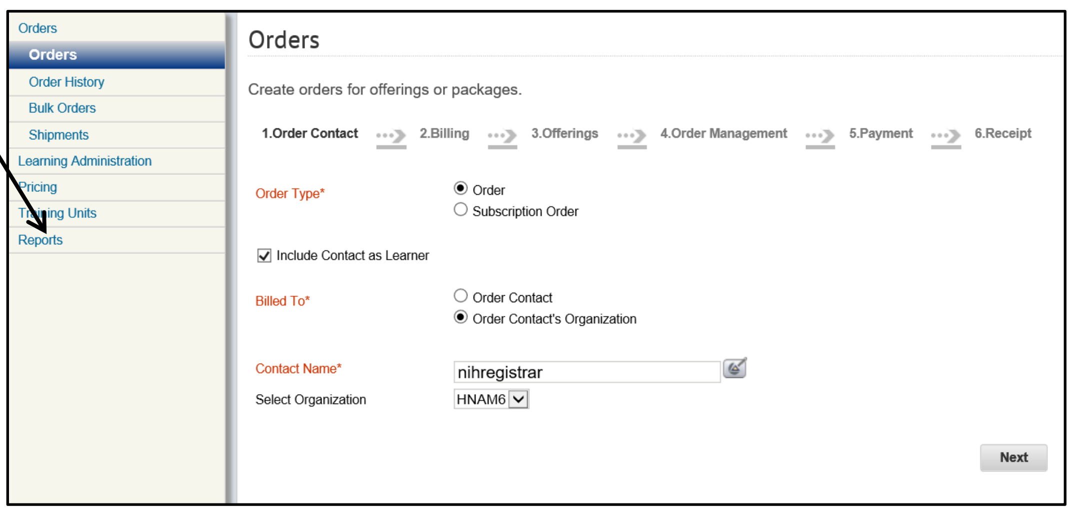


Figure 2 – Reports link

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

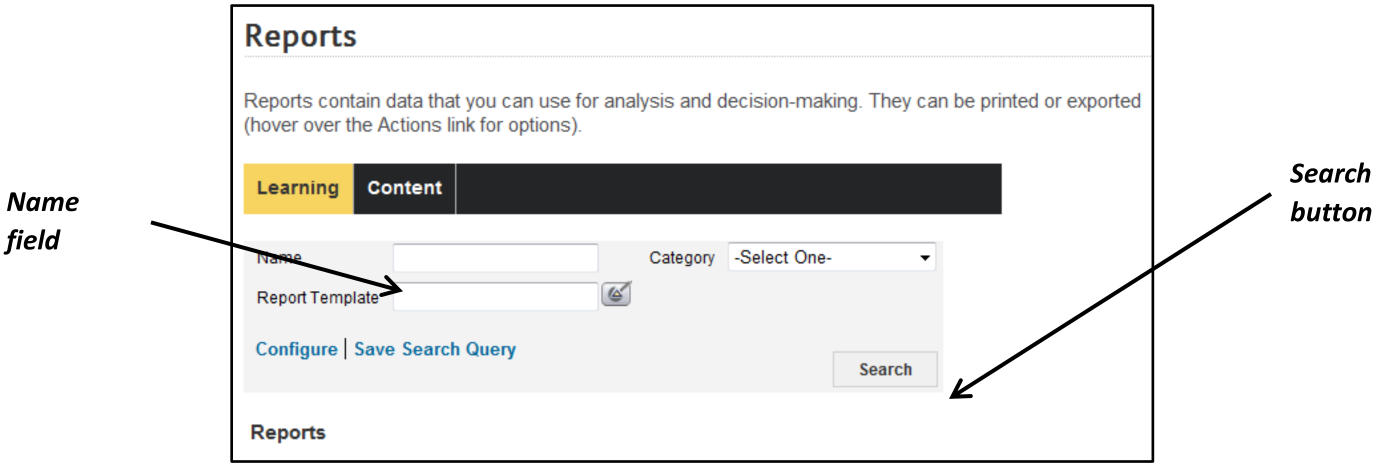


Figure 3 – Name field and Search button

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

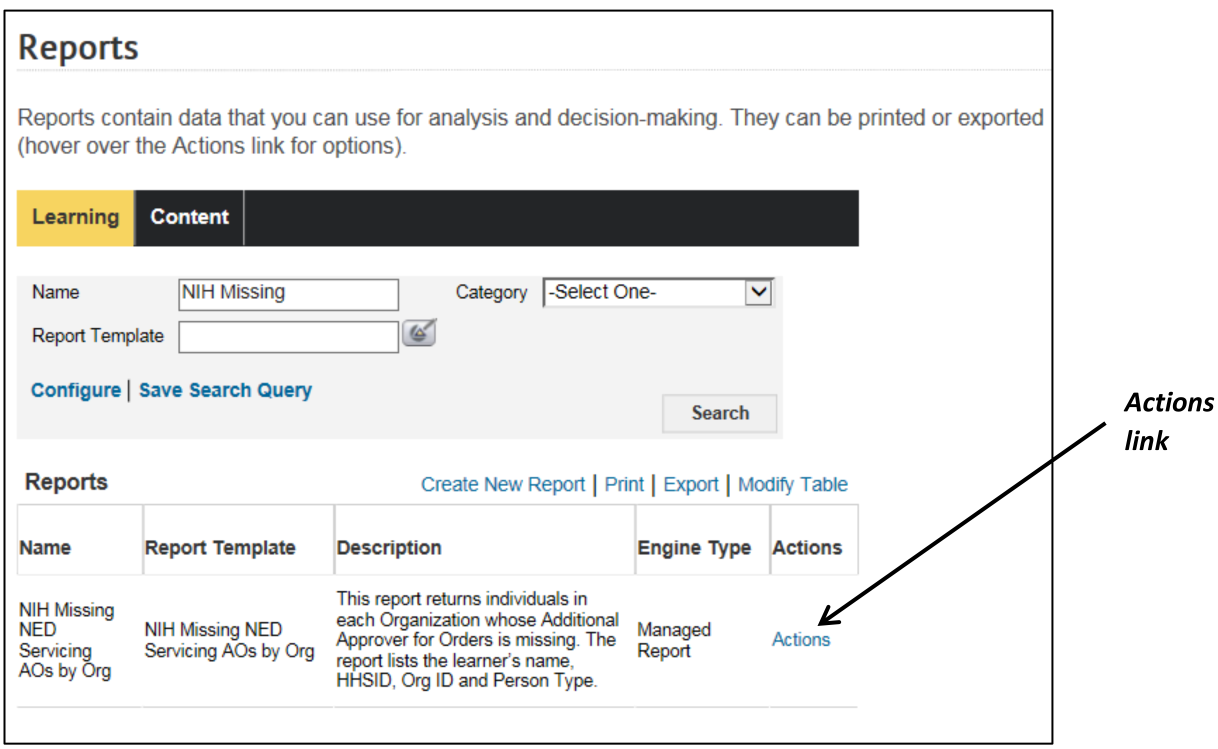


Figure 4 – Actions link

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

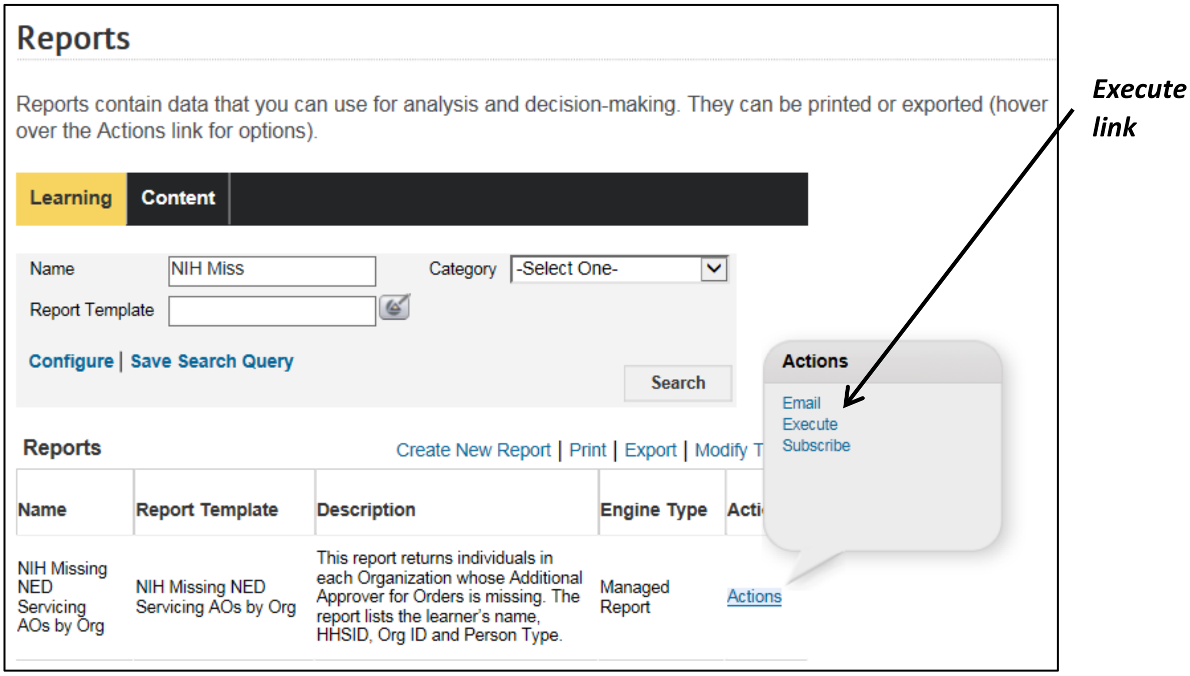


Figure 5 – Execute link on the Actions activity menu

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.

Figure 6 – Org Name field

Click the **Generate Report** link.

Generate Report button

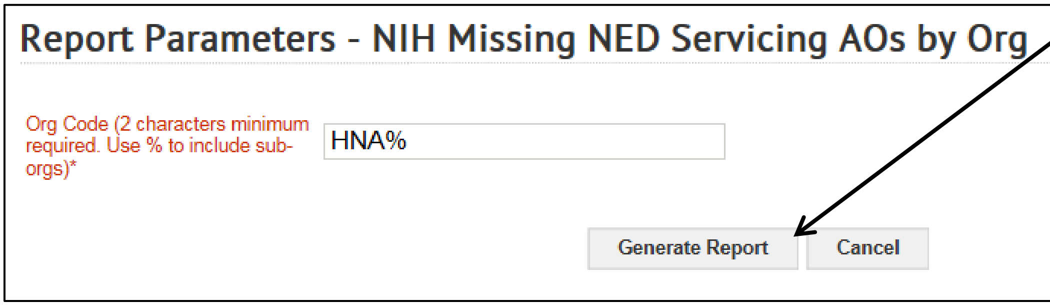


Figure 7 – Generate Report button

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

Print this report icon

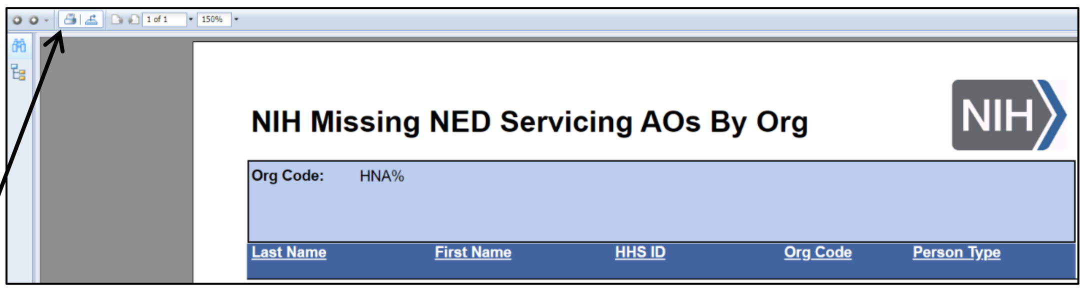


Figure 8 – Print this report icon

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

Export button

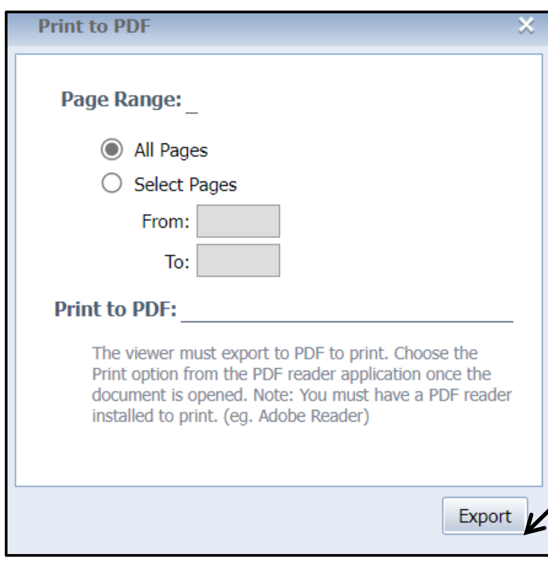


Figure 9 – Export button

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.

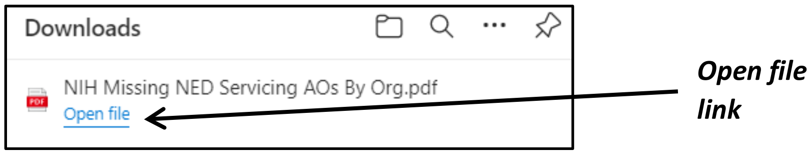


Figure 10 – Open file link

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.

Admin icon

Figure 1 – Admin icon

Click the Reports link from the left navigation menu.

Reports link

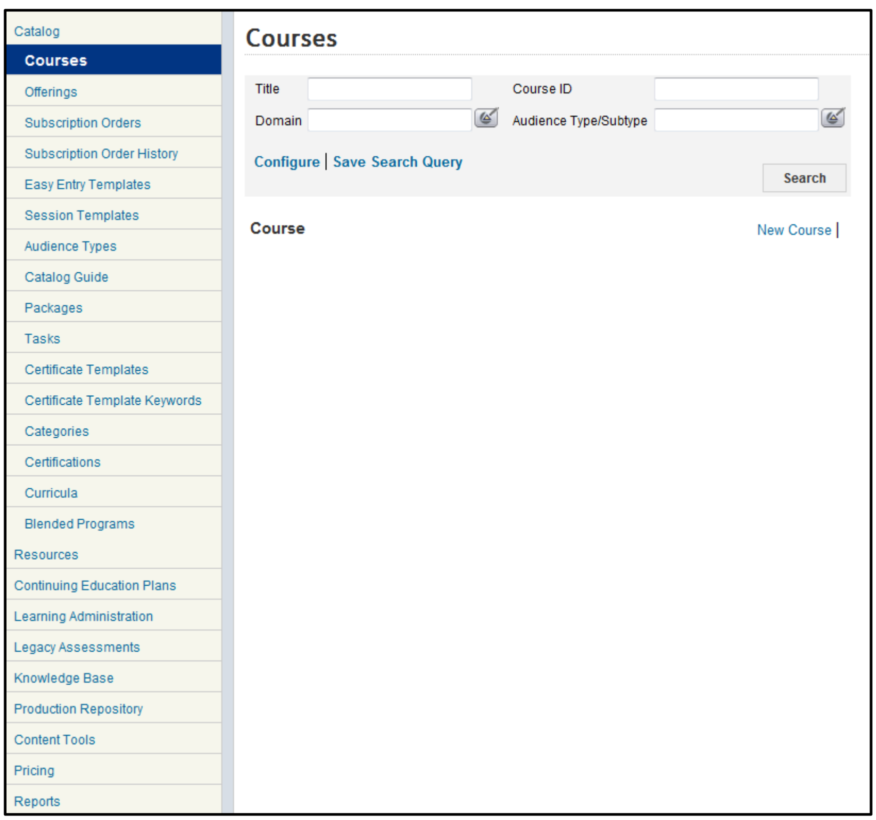


Figure 2 – Reports link

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

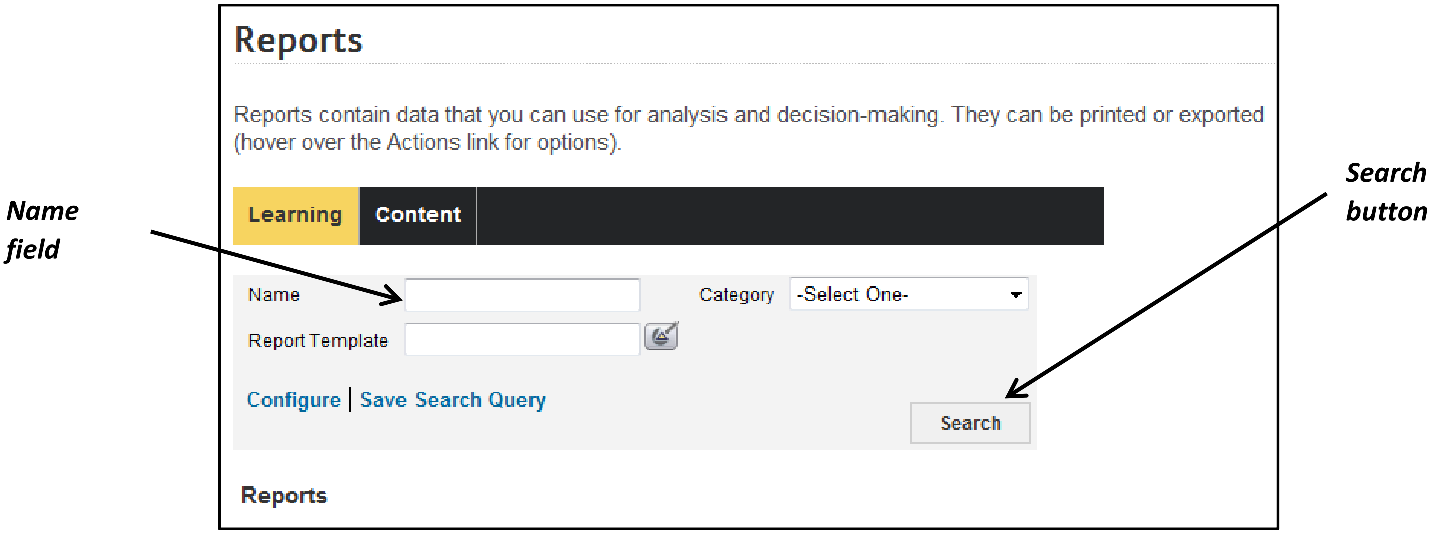


Figure 3 – Name field and Search button

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

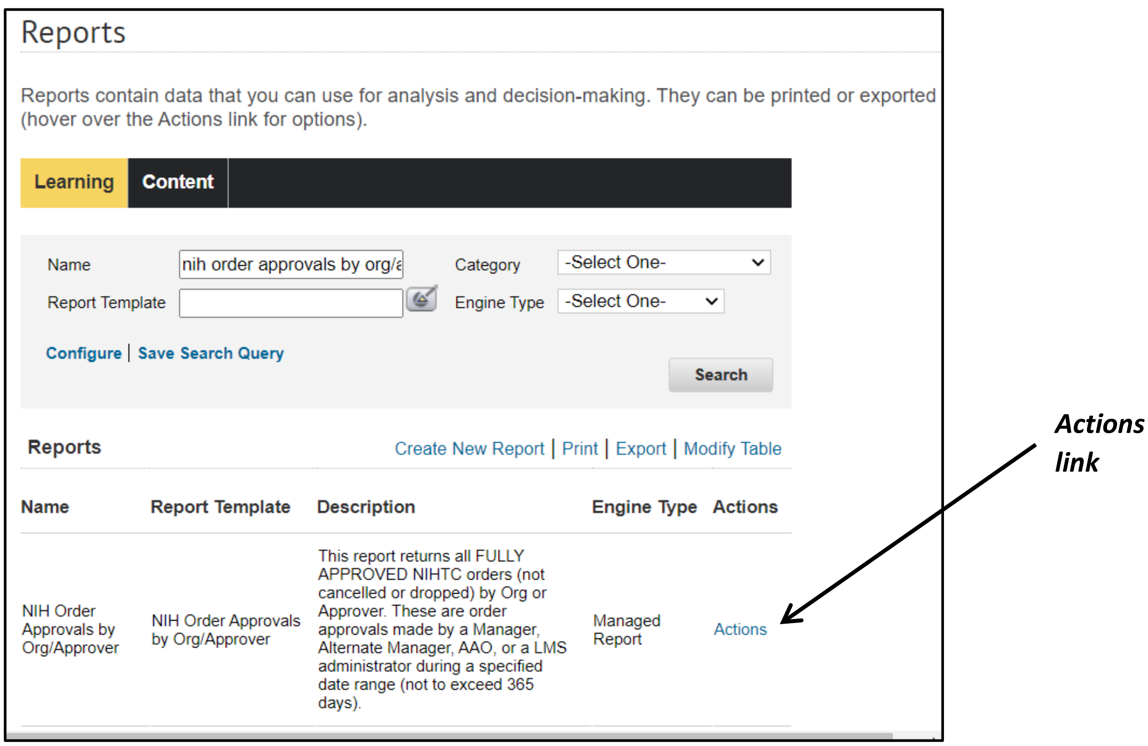


Figure 4 – Actions link

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

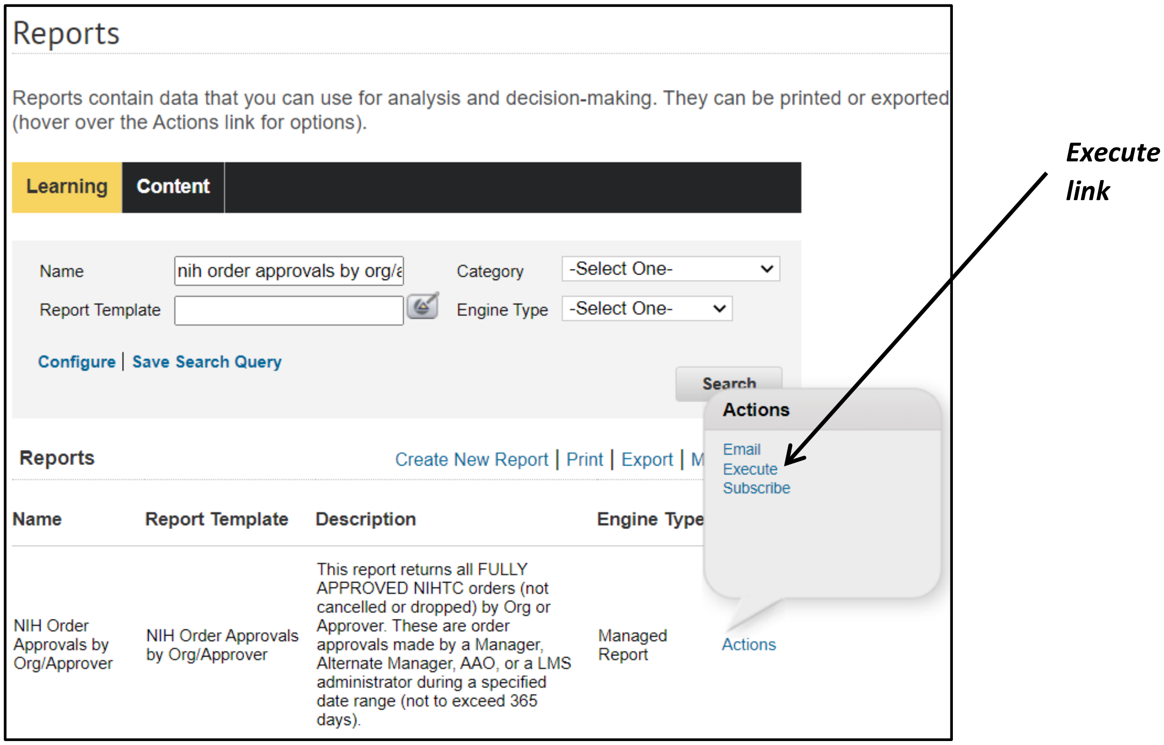


Figure 5 – Execute link on the Actions activity menu

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/DDD/YYYY format. Alternately, you can use the **From Order Approval Date** and **To Order Approval Date** pick icons to select the date.

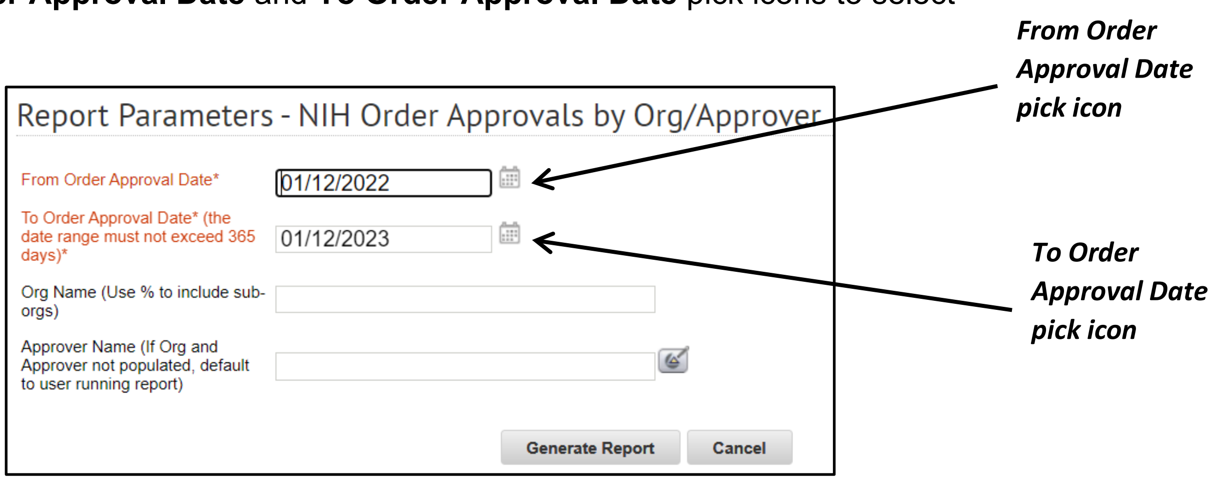
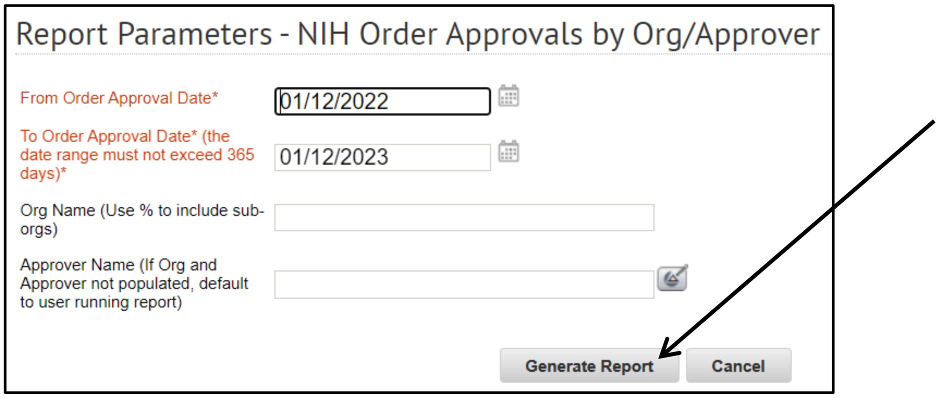


Figure 6 – From Order Approval Date and To Order Approval Date pick icons

Click the **Generate Report** button.



Generate Report button

Figure 7 – Generate Report button

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

Print this report icon

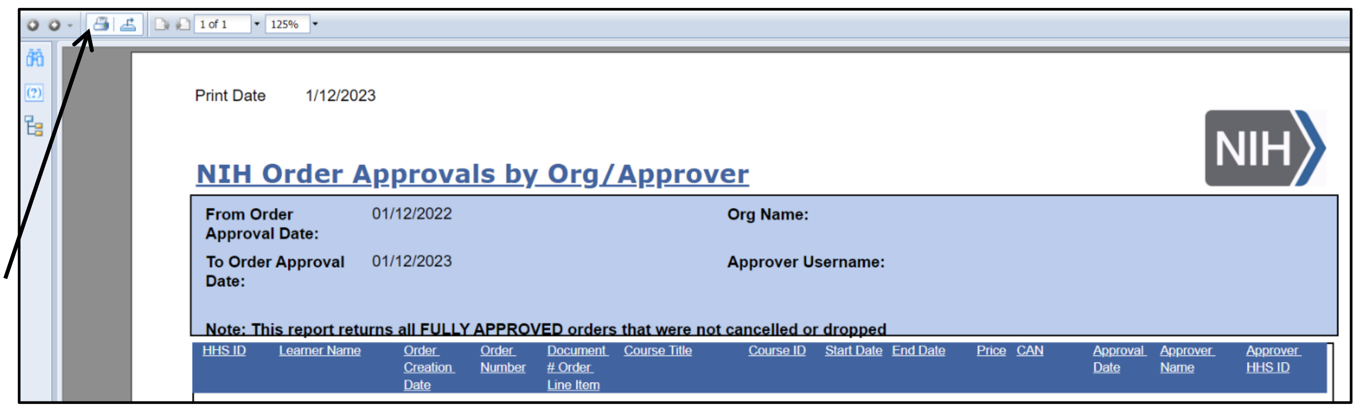


Figure 8 – Print this report icon

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

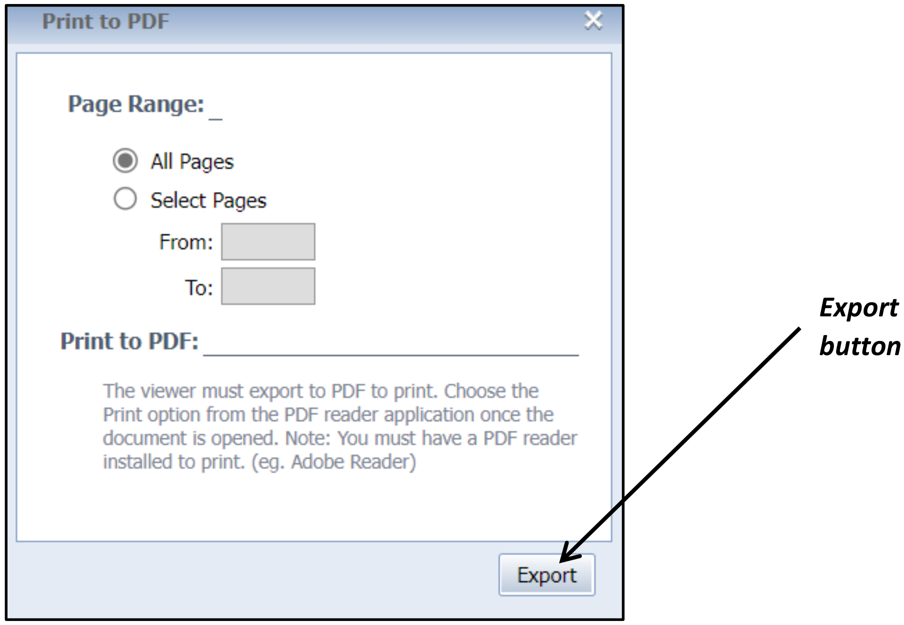


Figure 9 – Export button

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.

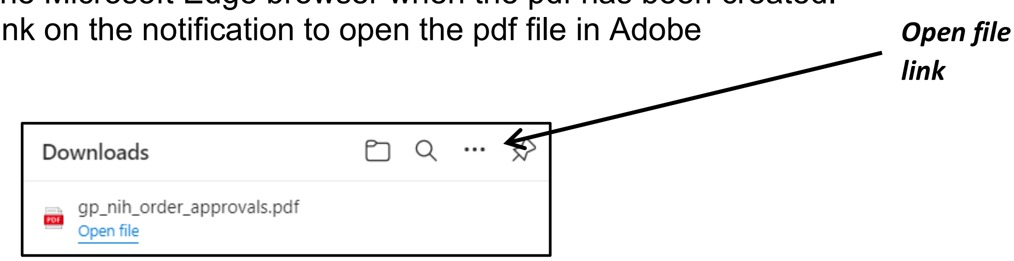


Figure 10 – Open file link

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

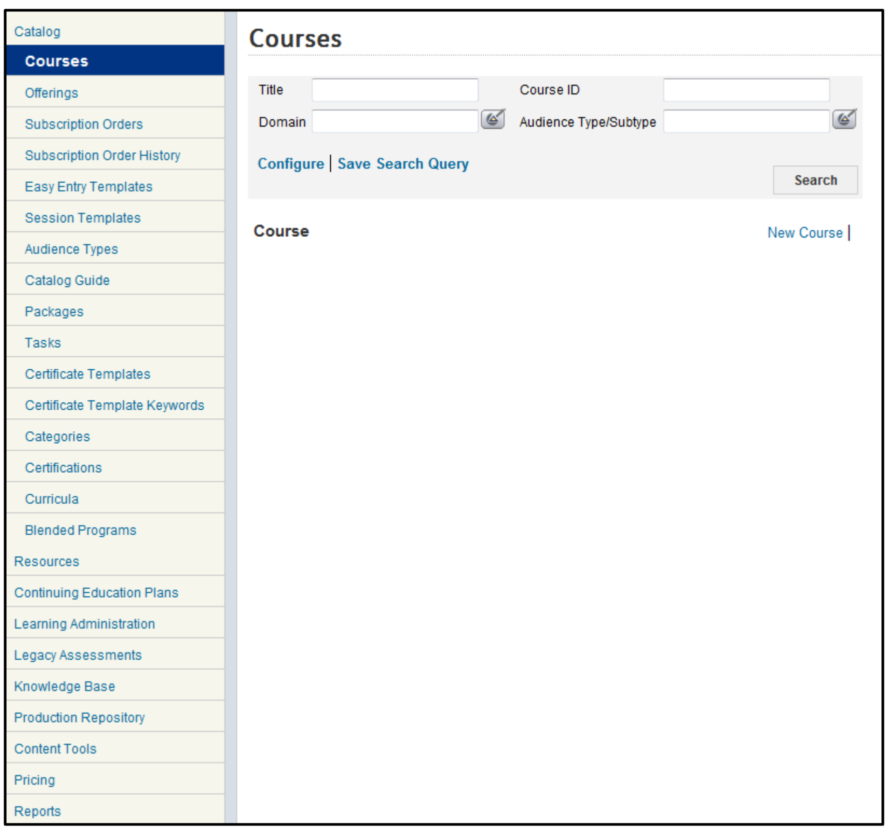


Figure 2 – Reports link

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

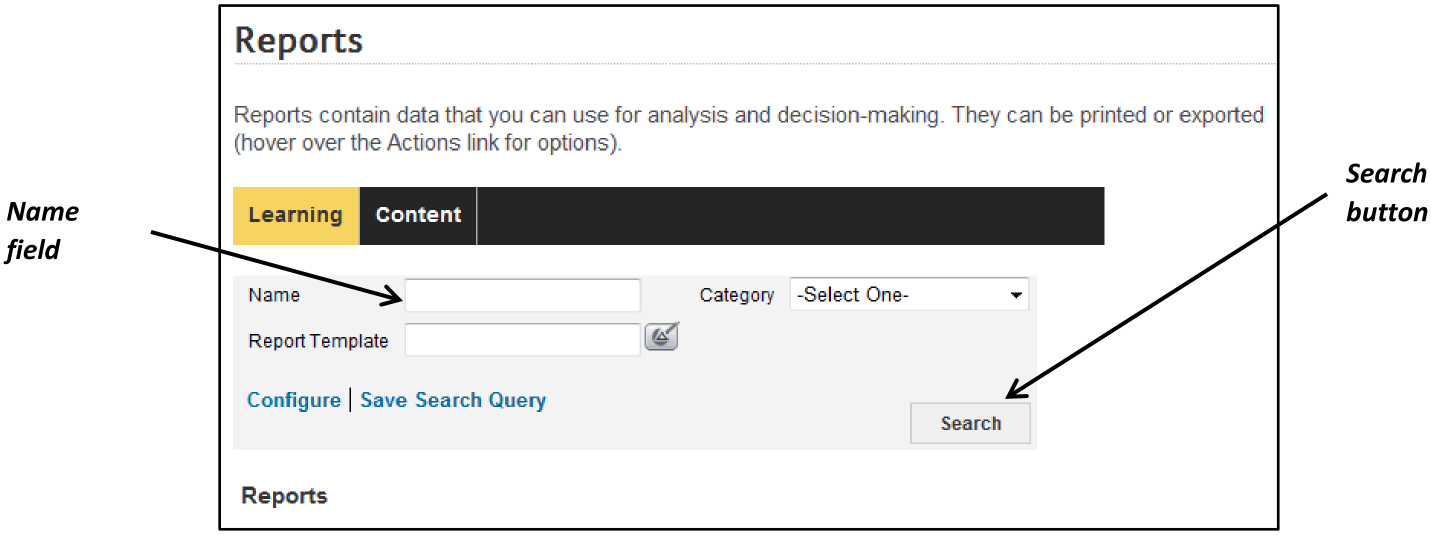


Figure 3 – Name field and Search button

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

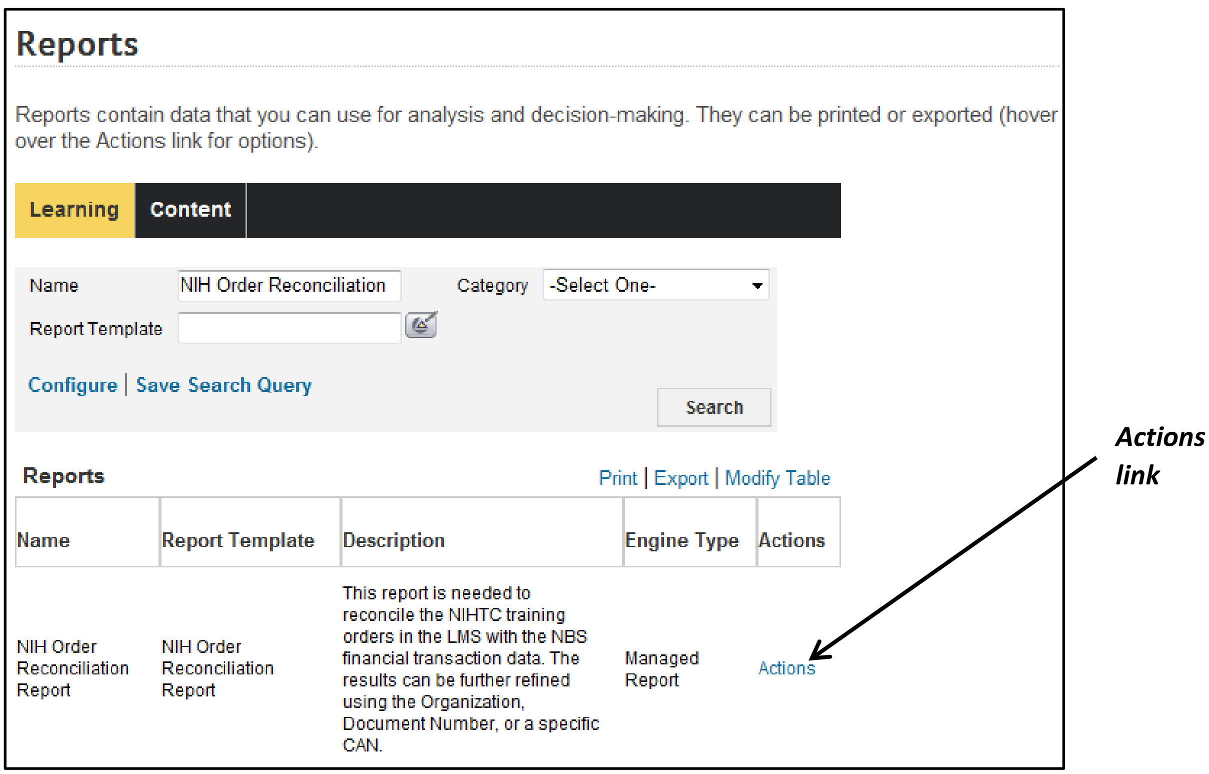


Figure 4 – Actions link

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

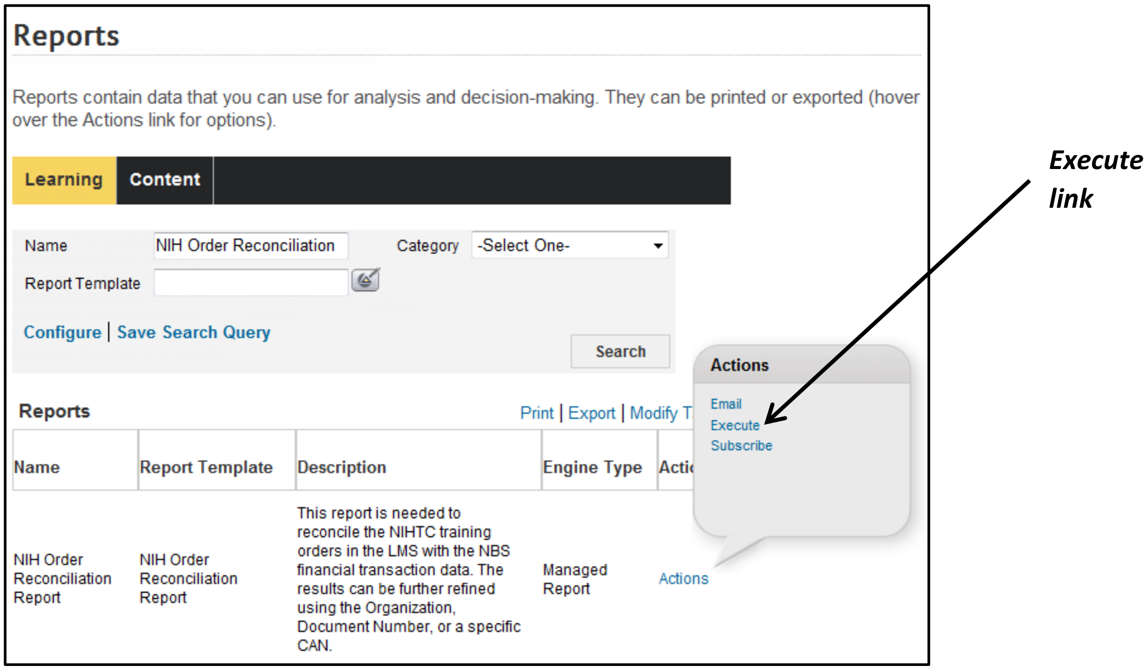


Figure 5 – Execute link on the Actions activity menu

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

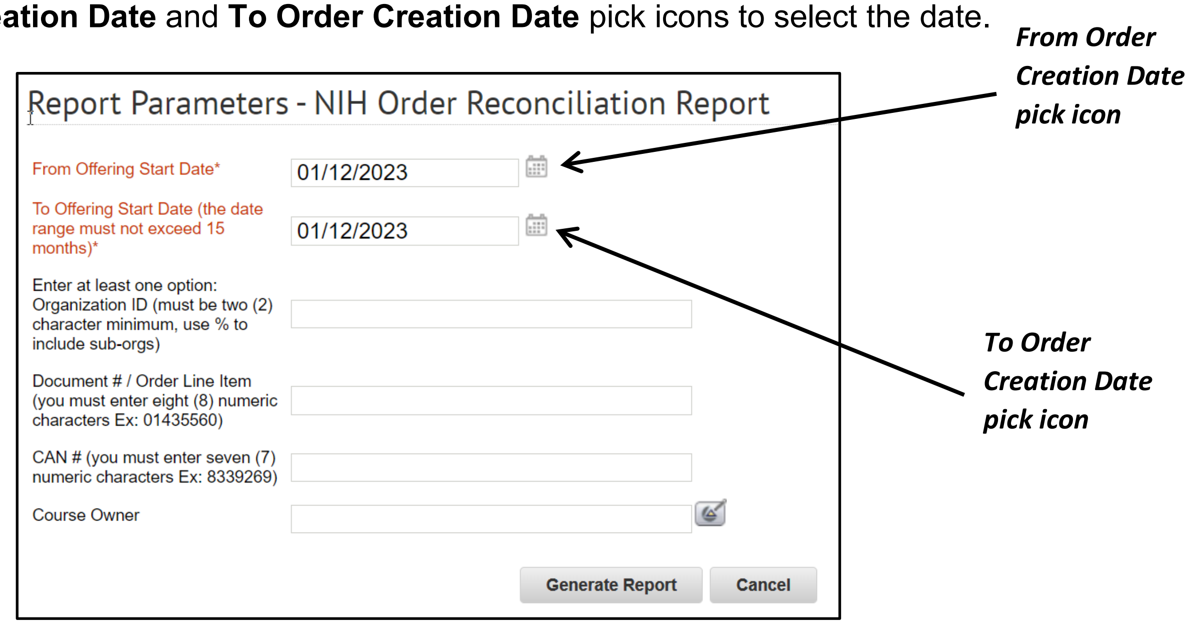
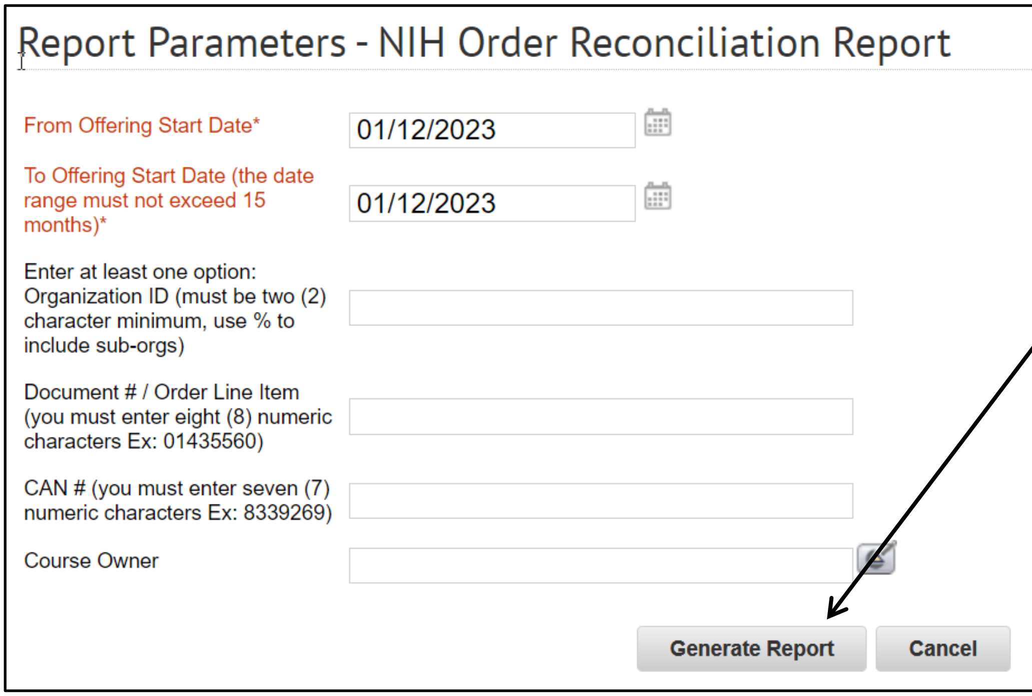


Figure 6 – From Order Creation Date and To Order Creation Date pick icons

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.



Generate Report button

Figure 7 – Generate Report button

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

Print this report icon

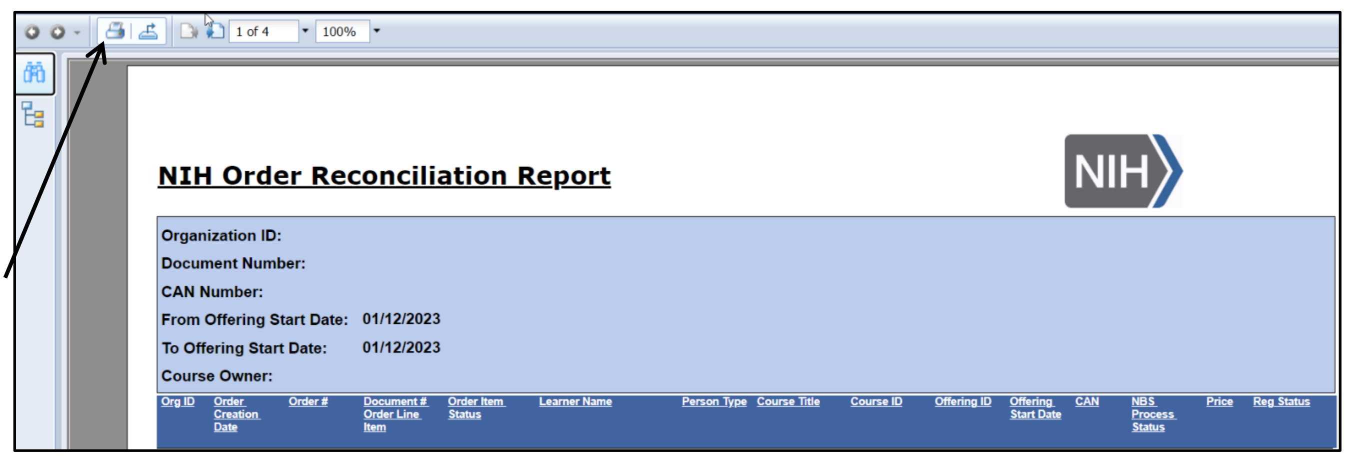


Figure 8 – Print this report icon

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

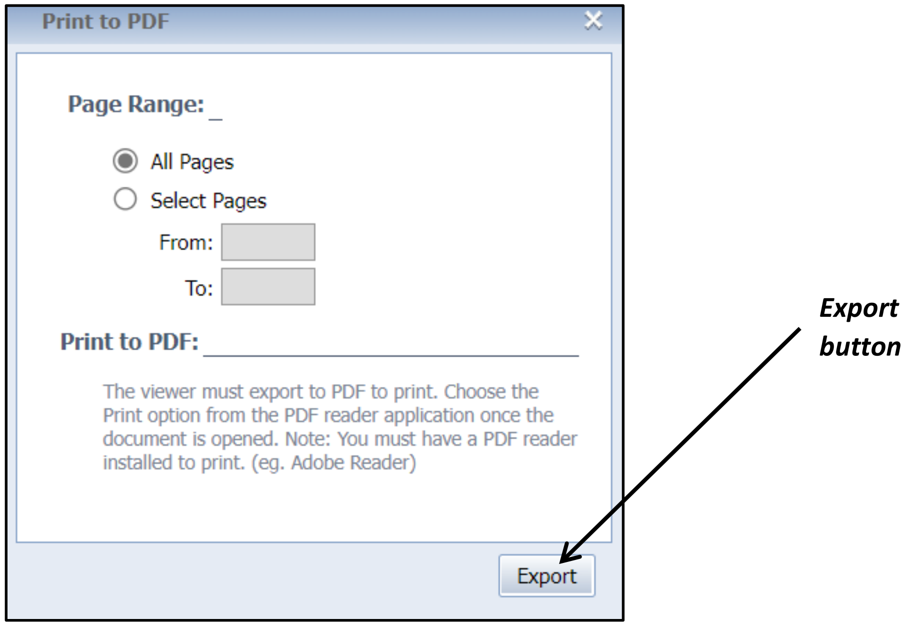


Figure 9 – Export button

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.

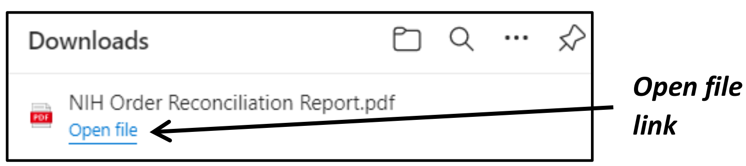


Figure 10 – Open file link

Print the file from Adobe Reader/Acrobat.

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

Running the NIH 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

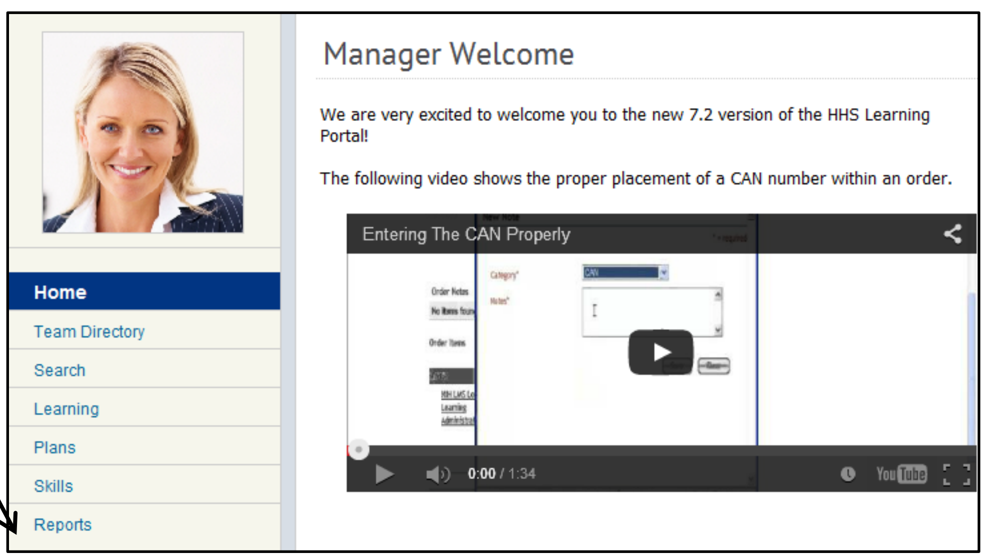


Figure 2 – Reports link

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

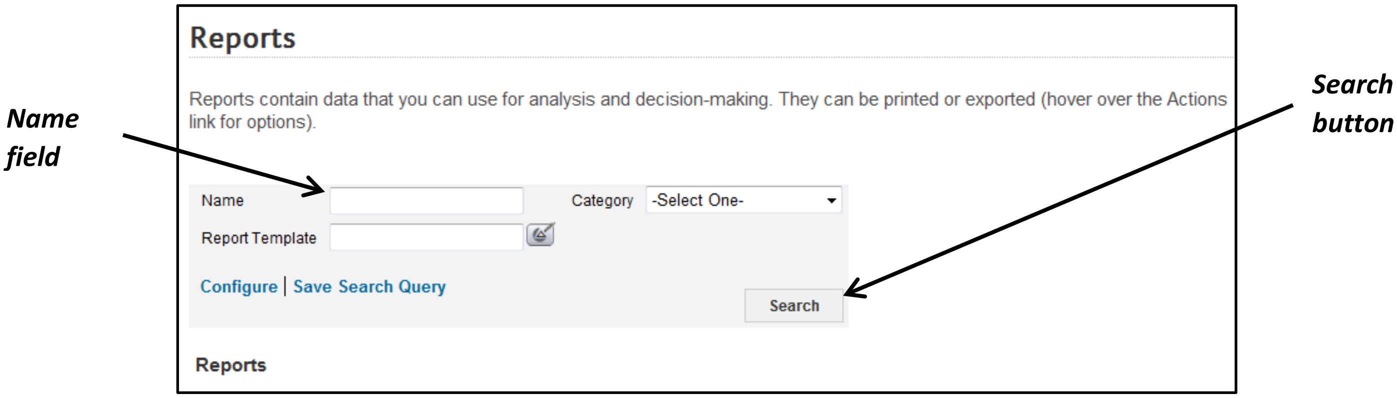


Figure 3 – Name field and Search button

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

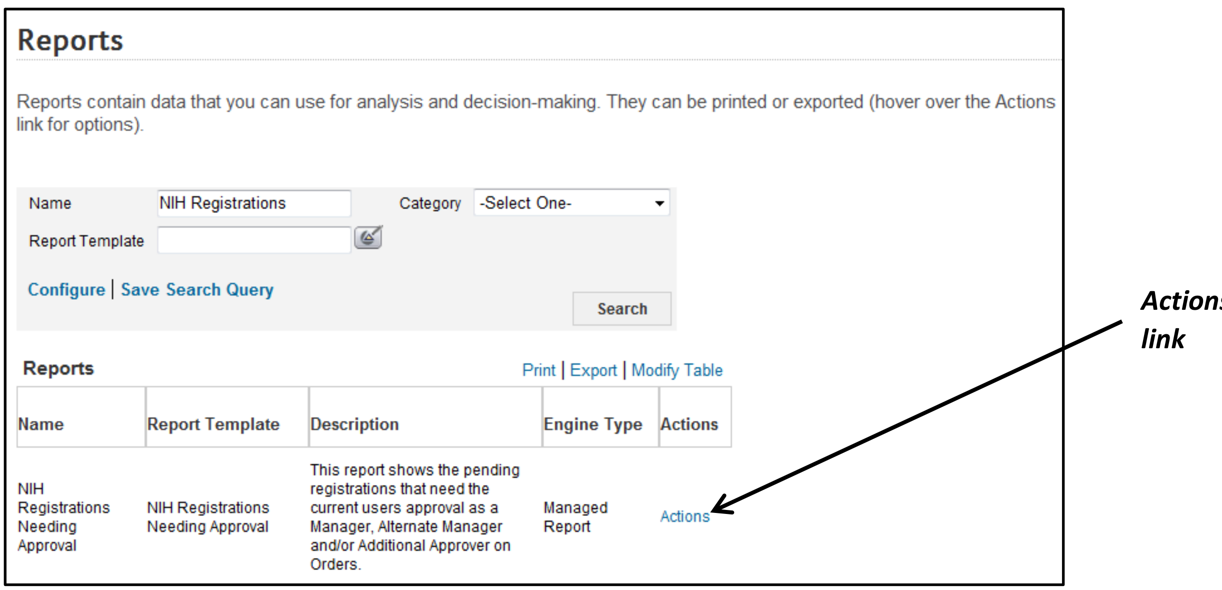


Figure 4 – Actions link

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

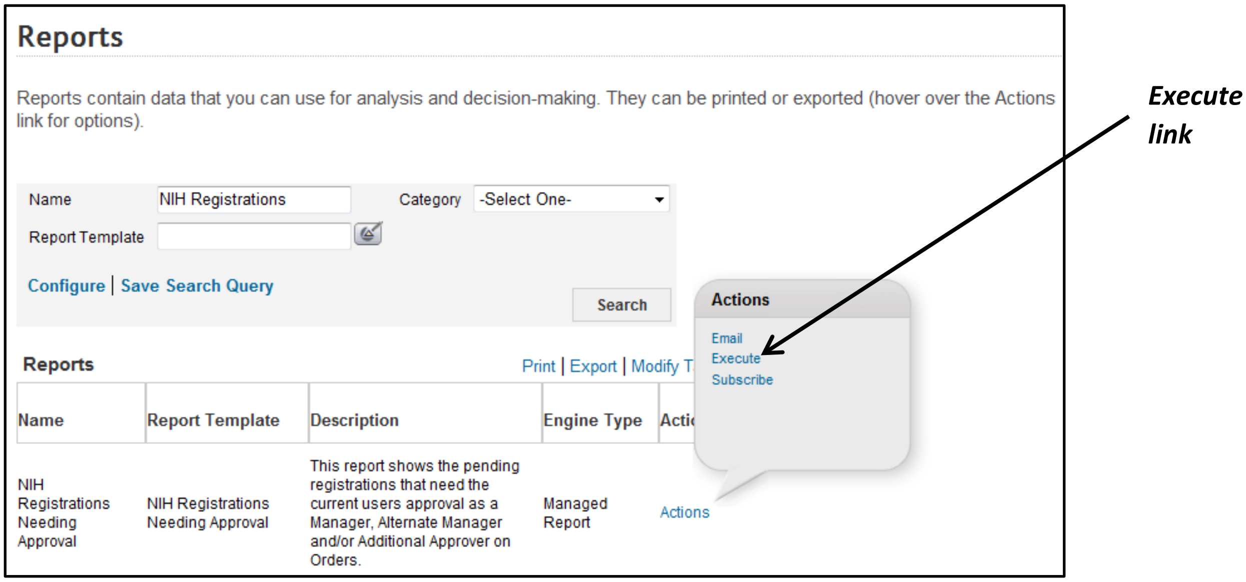


Figure 5 – Execute link on the Actions activity menu

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

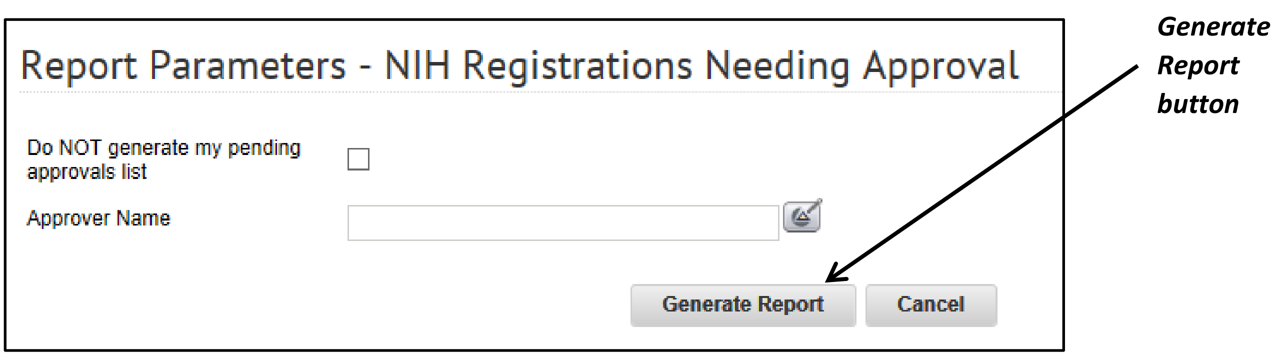


Figure 6 – Generate Report button

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.

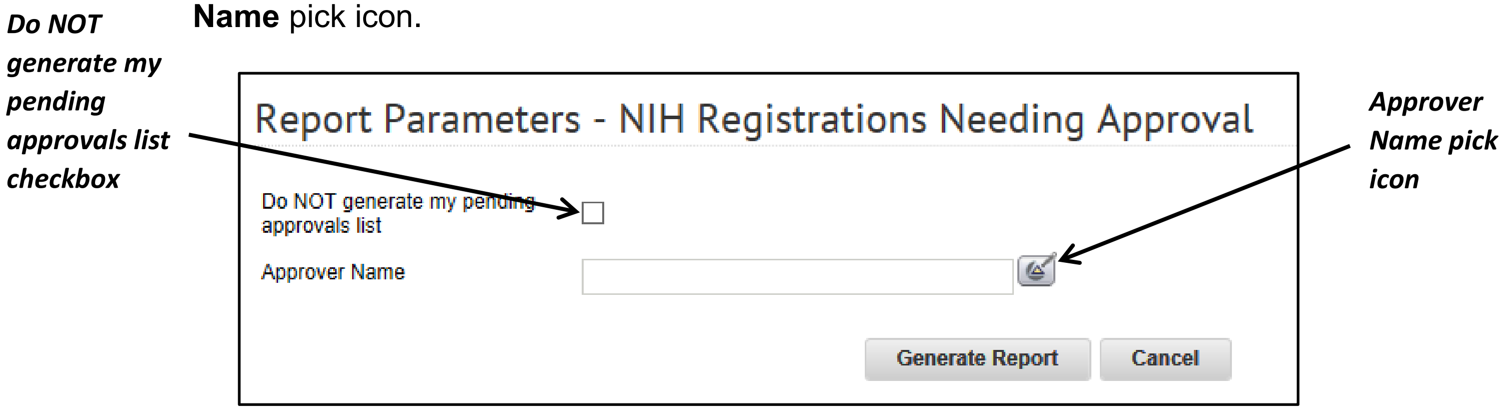


Figure 7 – Do NOT generate my pending approvals list checkbox and Approver Name pick icon

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

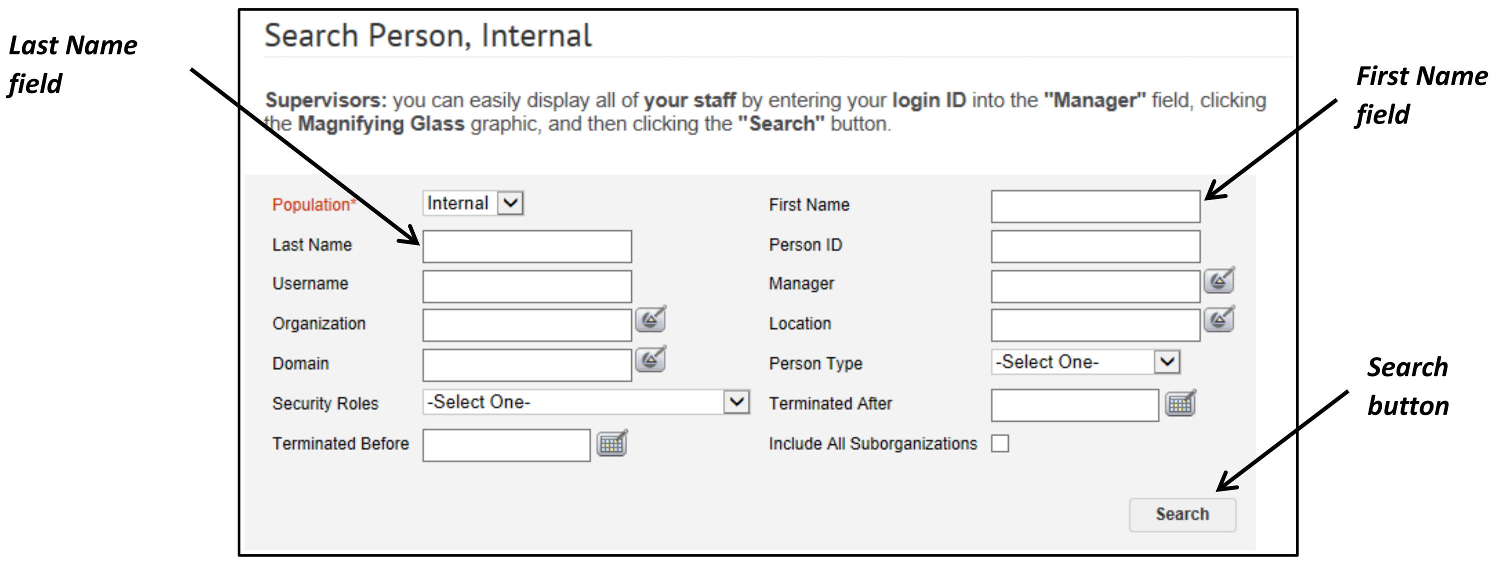


Figure 8 – First Name and Last Name fields and Search button

Select the checkbox for the name of the other approver.

Select checkbox

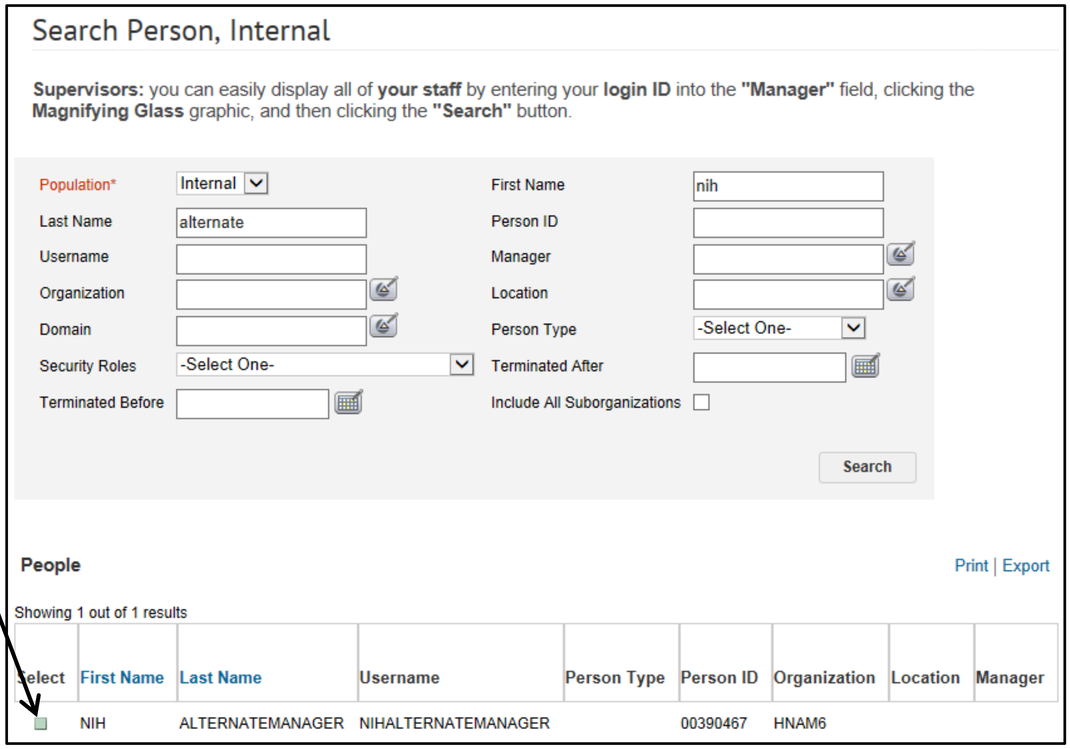


Figure 9 – Select checkbox

Select the **Generate Report** button.

Generate Report button

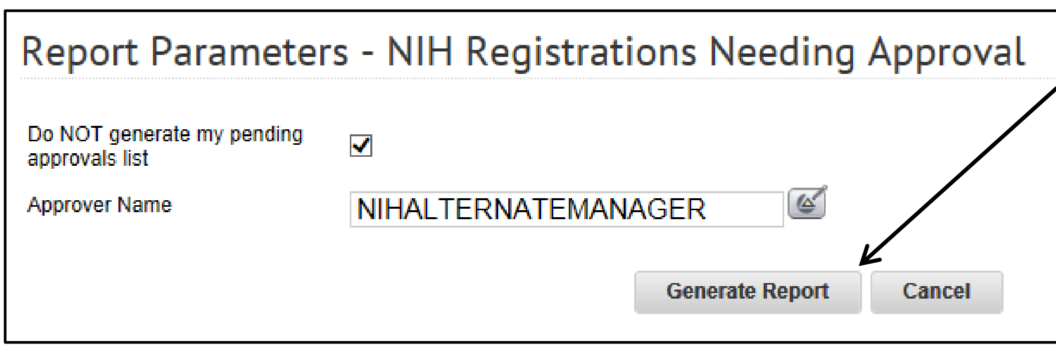


Figure 10 – Generate Report button

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.

Print this report icon

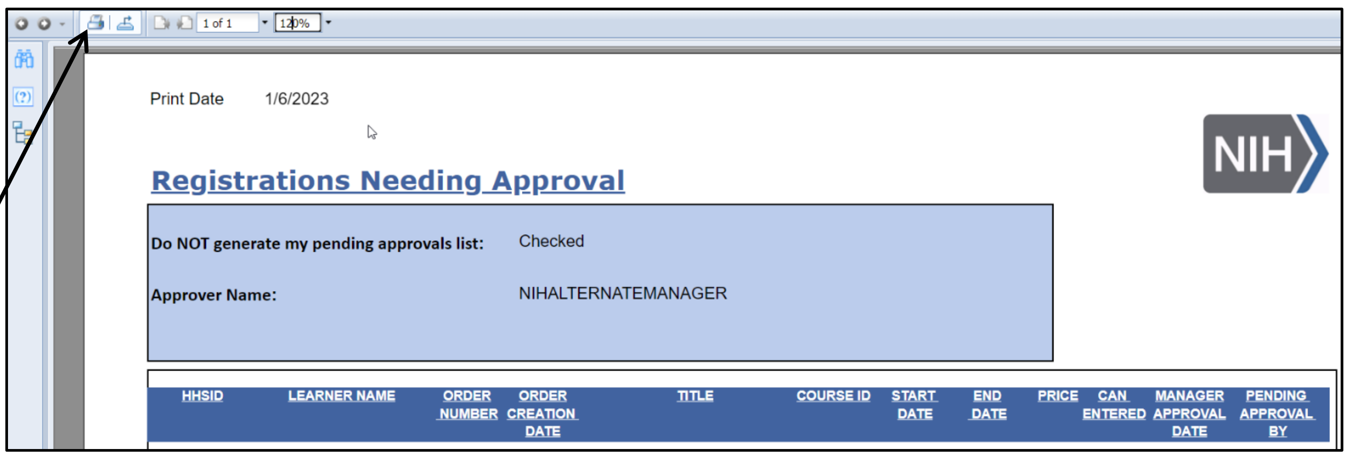


Figure 11 – Print this report icon

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

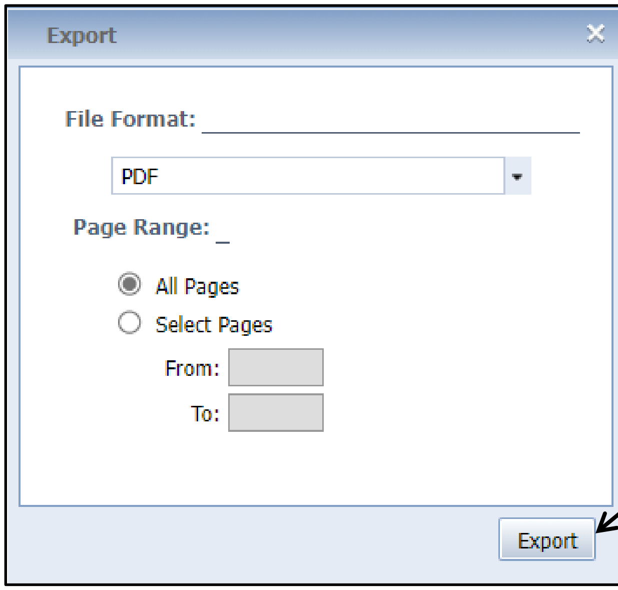


Figure 12 – Export button

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.

Admin icon

Figure 1 – Admin icon

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

Reports link

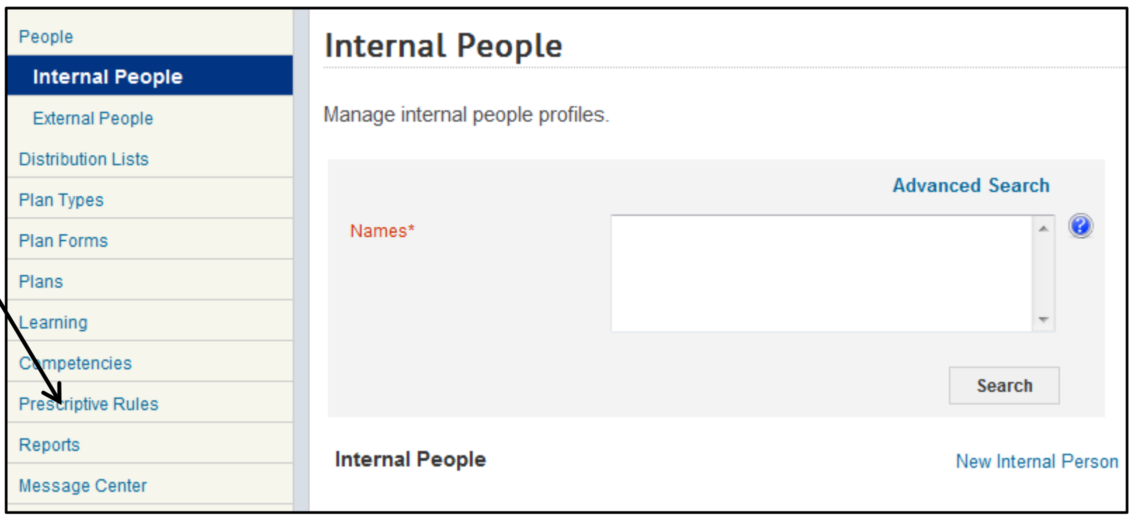


Figure 2 – Reports link

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

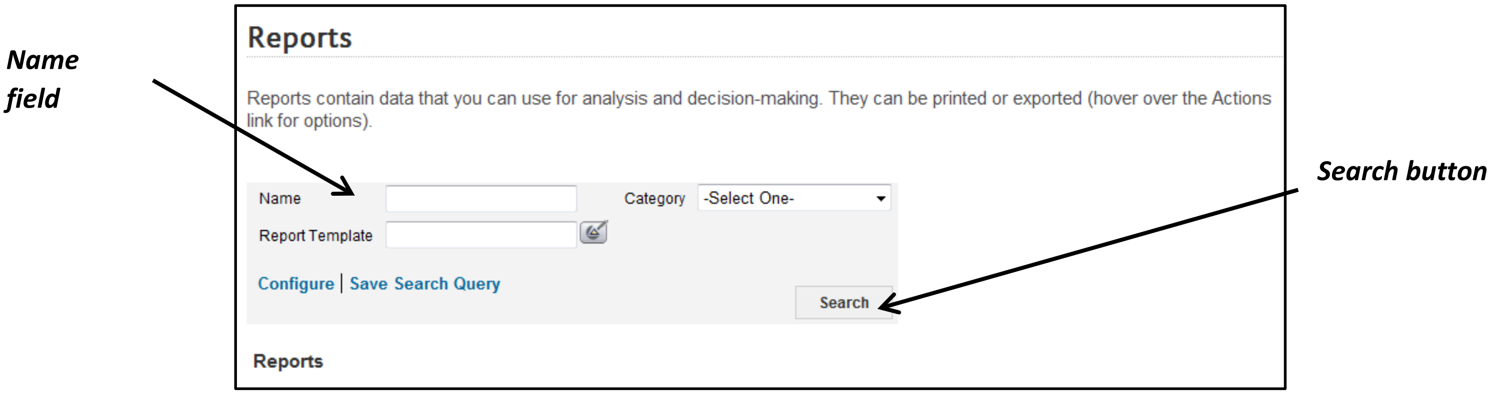


Figure 3 – Name field and Search button

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

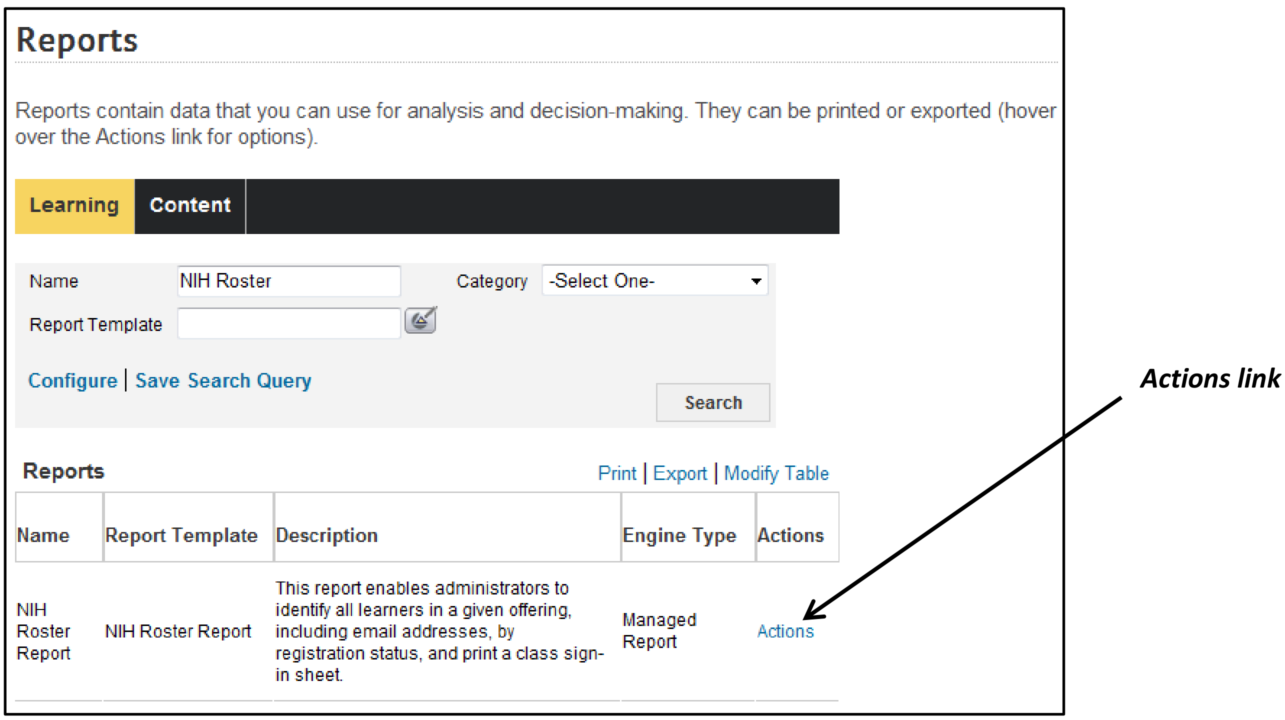


Figure 4 – Actions link

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

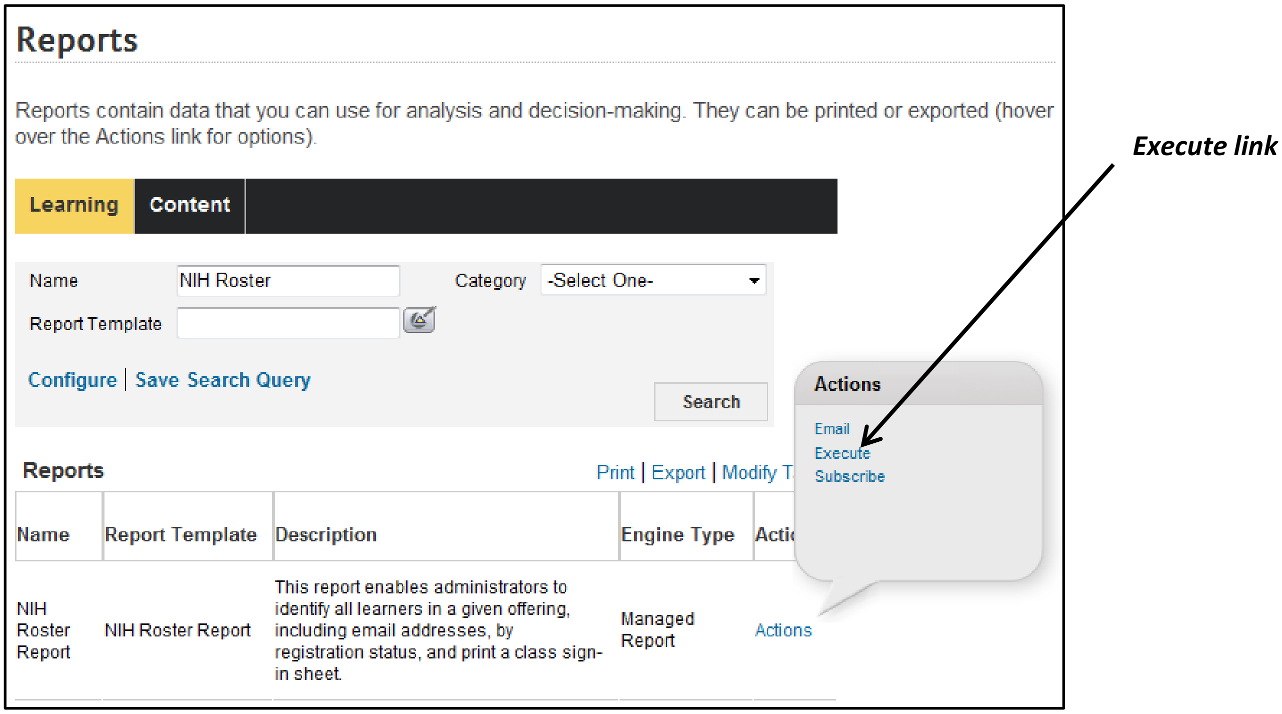


Figure 5 – Execute link on the Actions activity menu

Click the **Offering Number** pick icon.

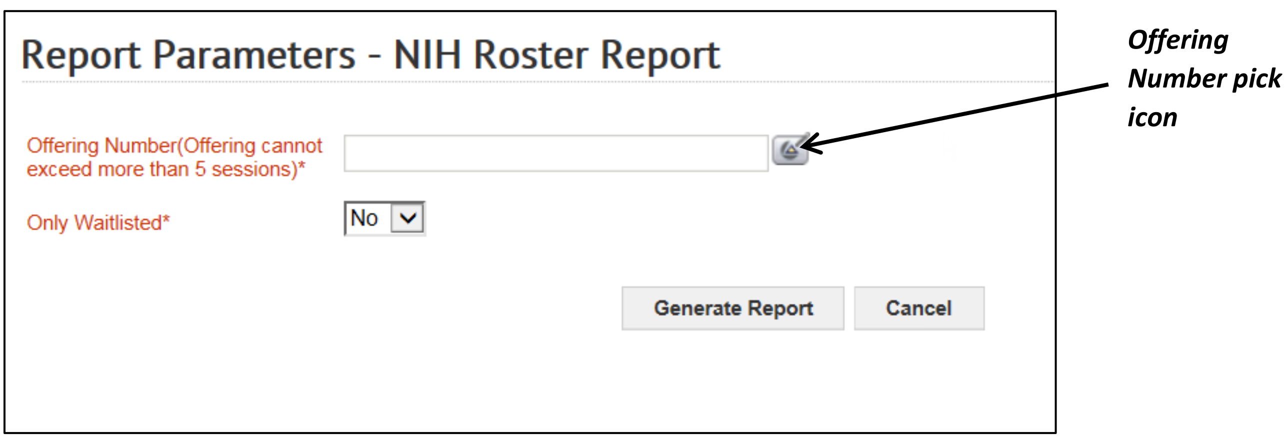


Figure 6 – Offering Number pick icon

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.

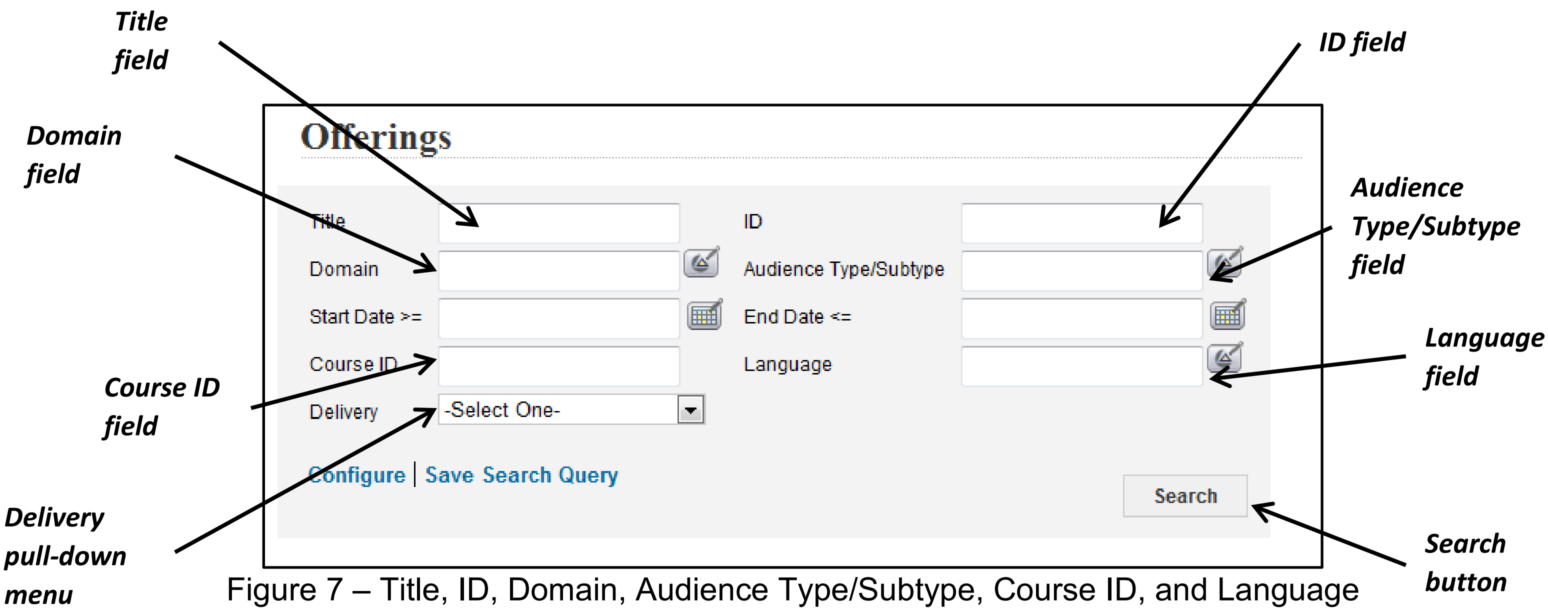


Figure 7 – Title, ID, Domain, Audience Type/Subtype, Course ID, and Language fields, the Delivery pull-down menu, and the Search button

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

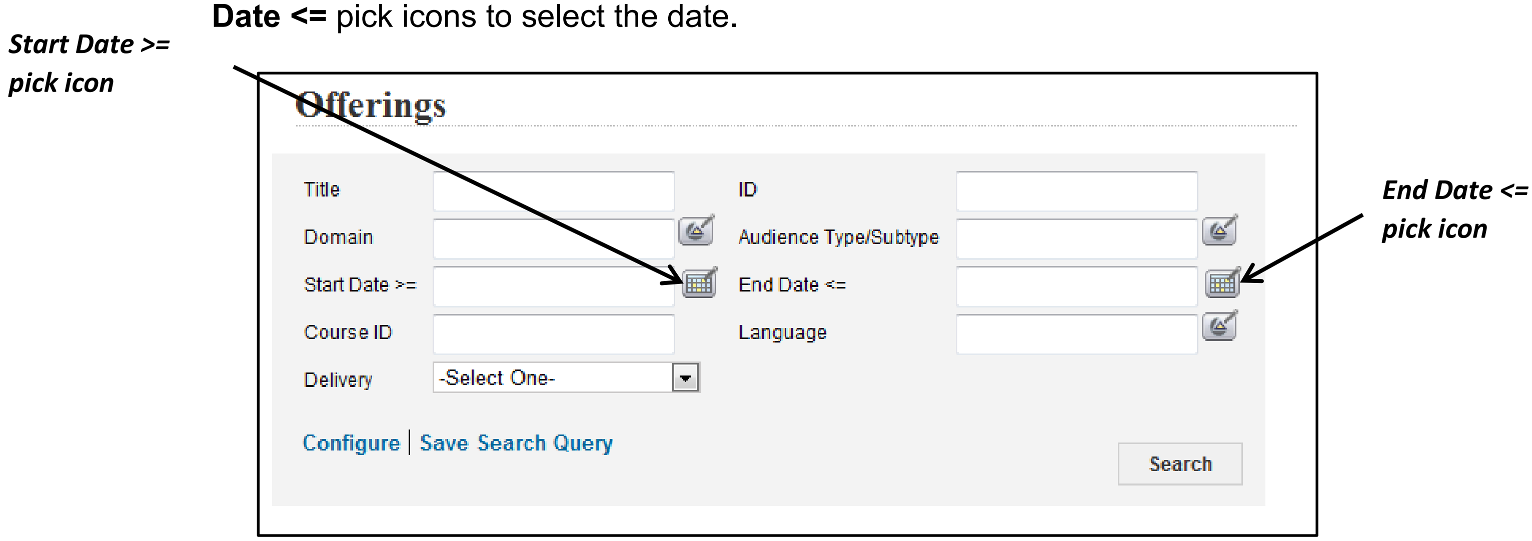


Figure 8 – Start Date >= and End Date <= pick icons

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

Select checkbox

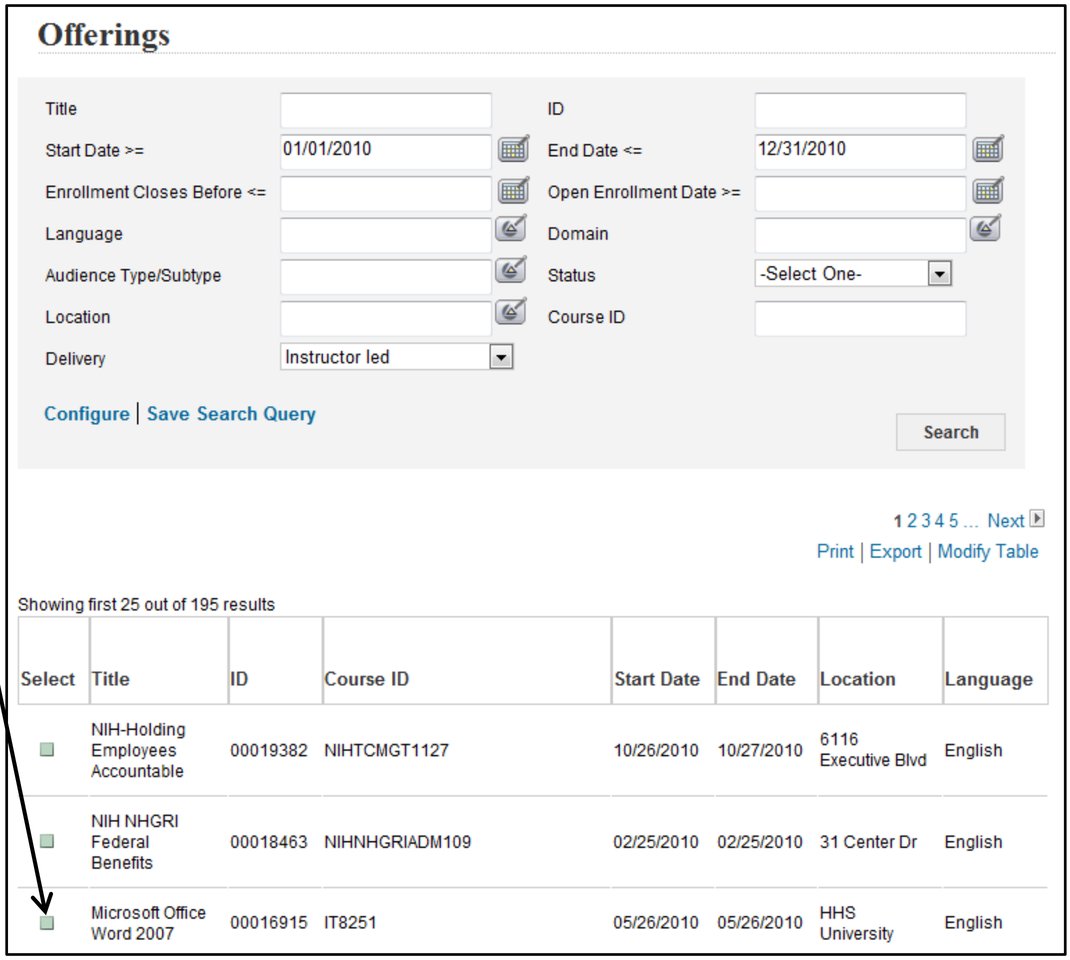
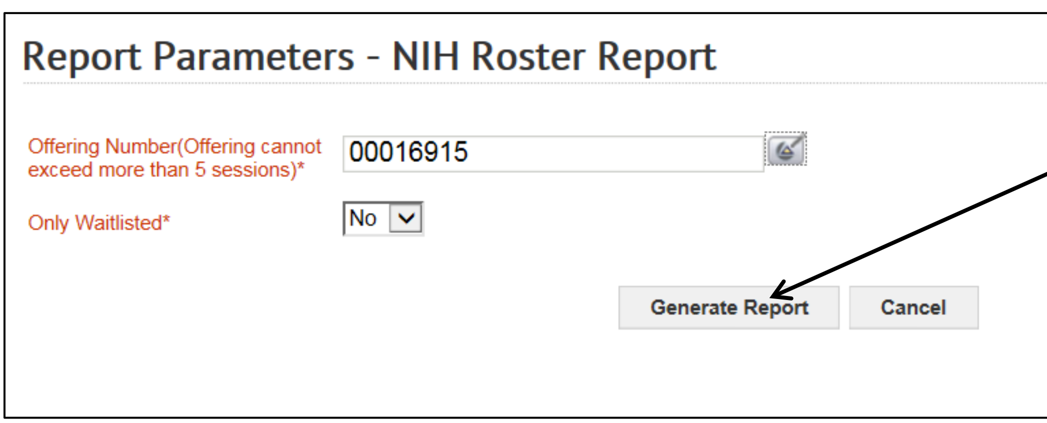


Figure 9 – Select checkmark

Click the **Generate Report** button.



Generate Report button

Figure 10 – Generate Report button

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

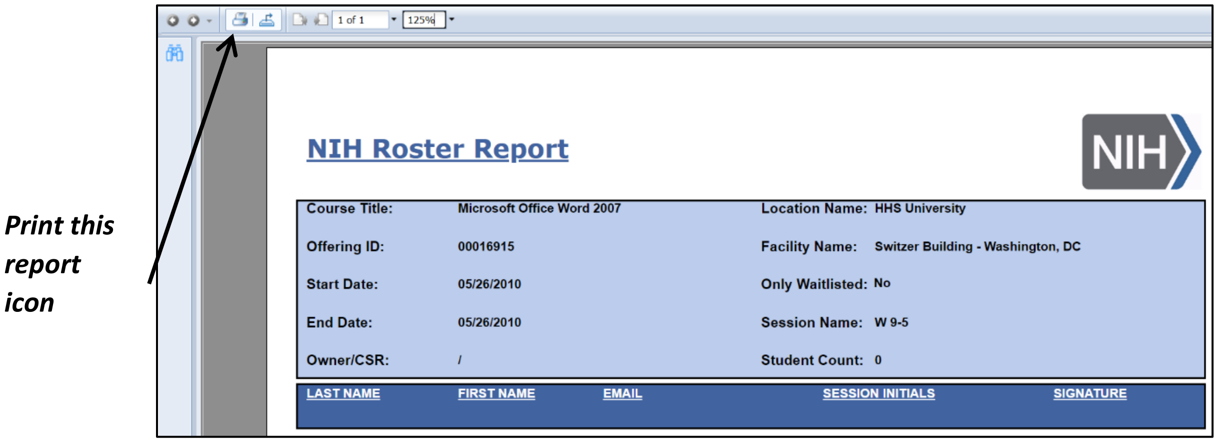


Figure 11 – Print this report button

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

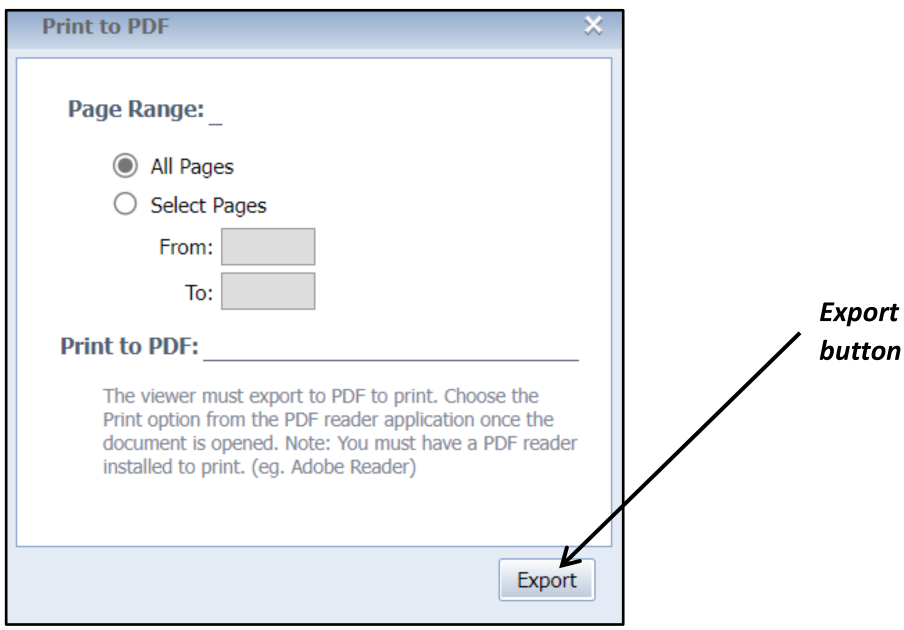


Figure 12 – Export button

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 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.

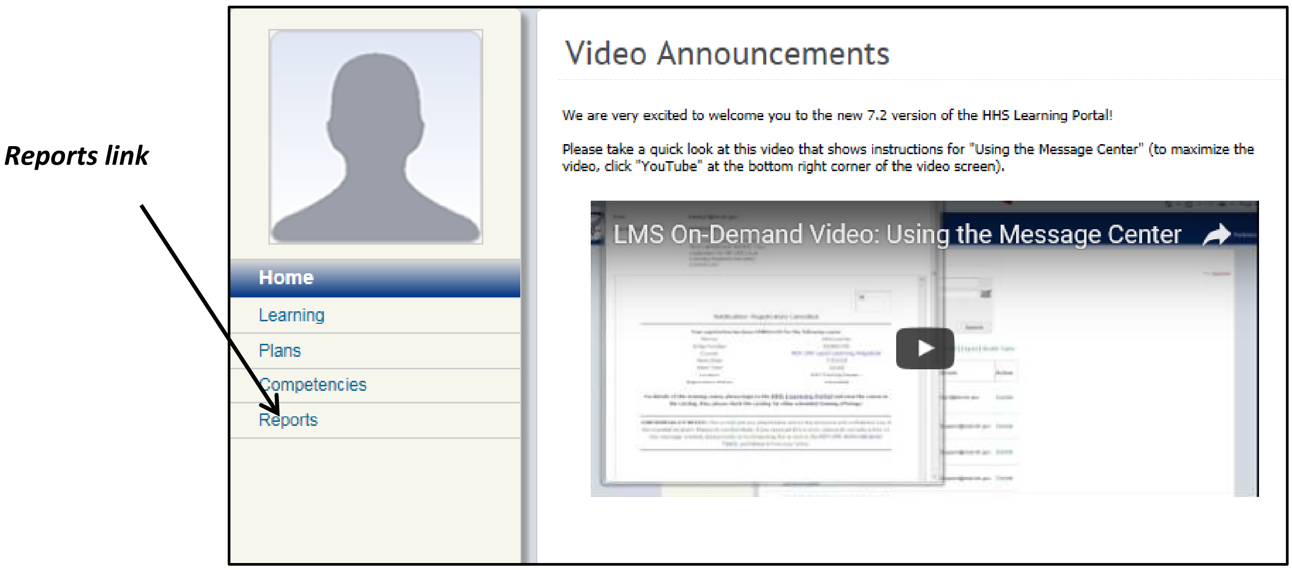


Figure 1 – Reports link in the left navigation menu

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

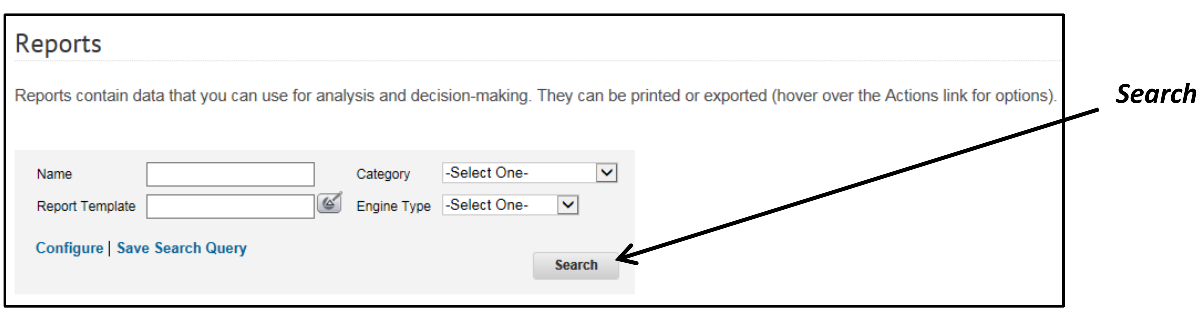


Figure 2 – Name field and Search button

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

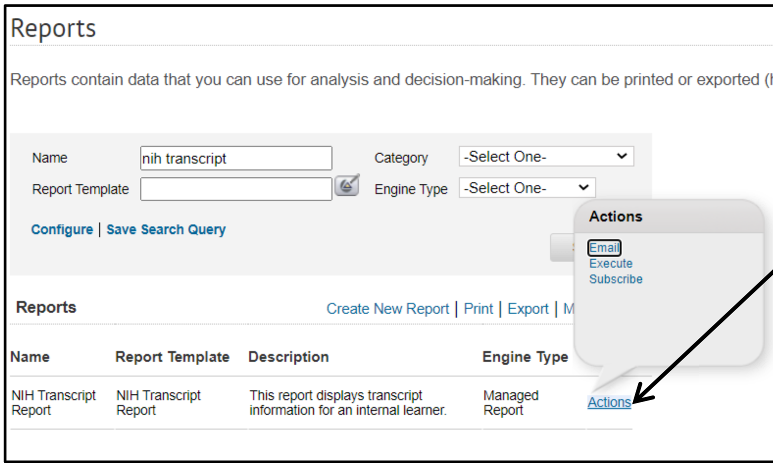


Figure 3 – Actions link for the NIH Transcript report

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.

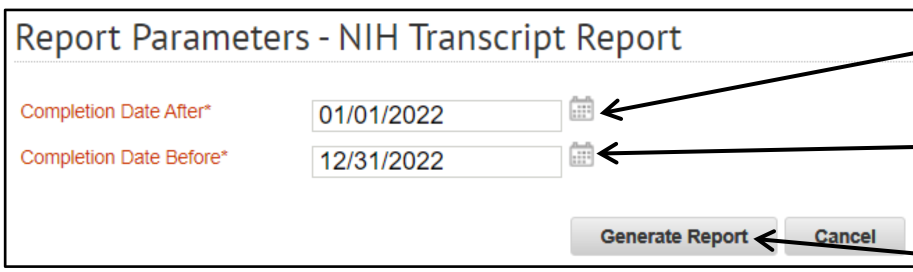


Figure 4 – Generate Report button

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

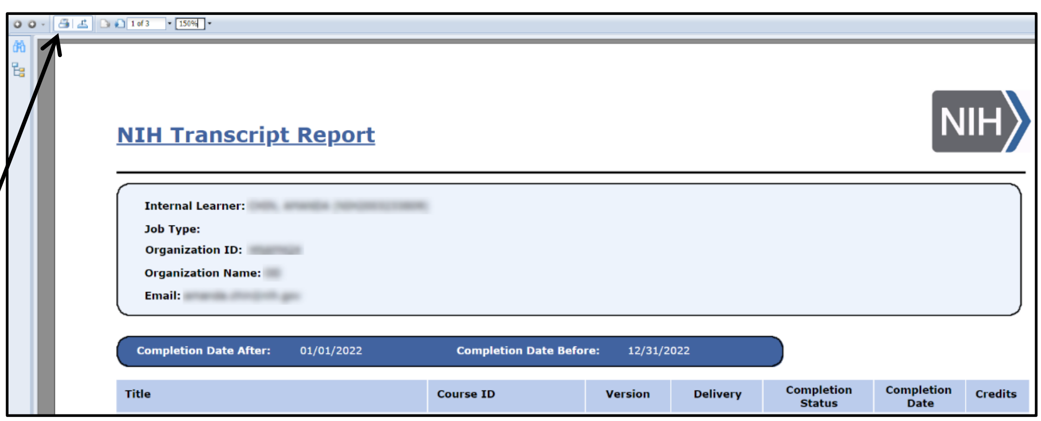


Figure 5 – Print this report button

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

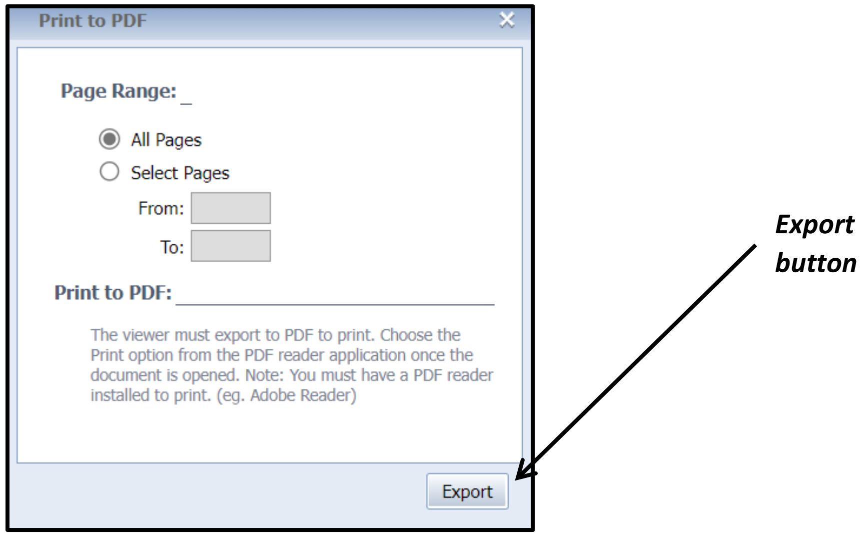


Figure 6 – Export button

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.

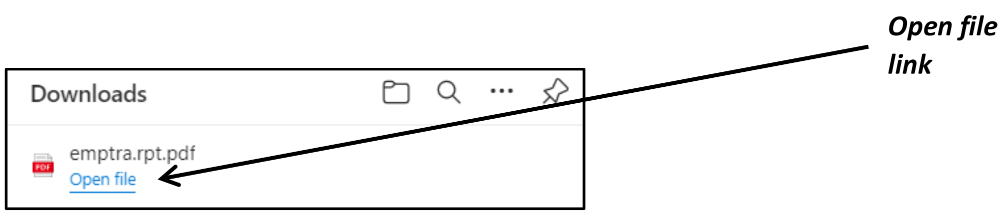


Figure 7 – Open file link

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