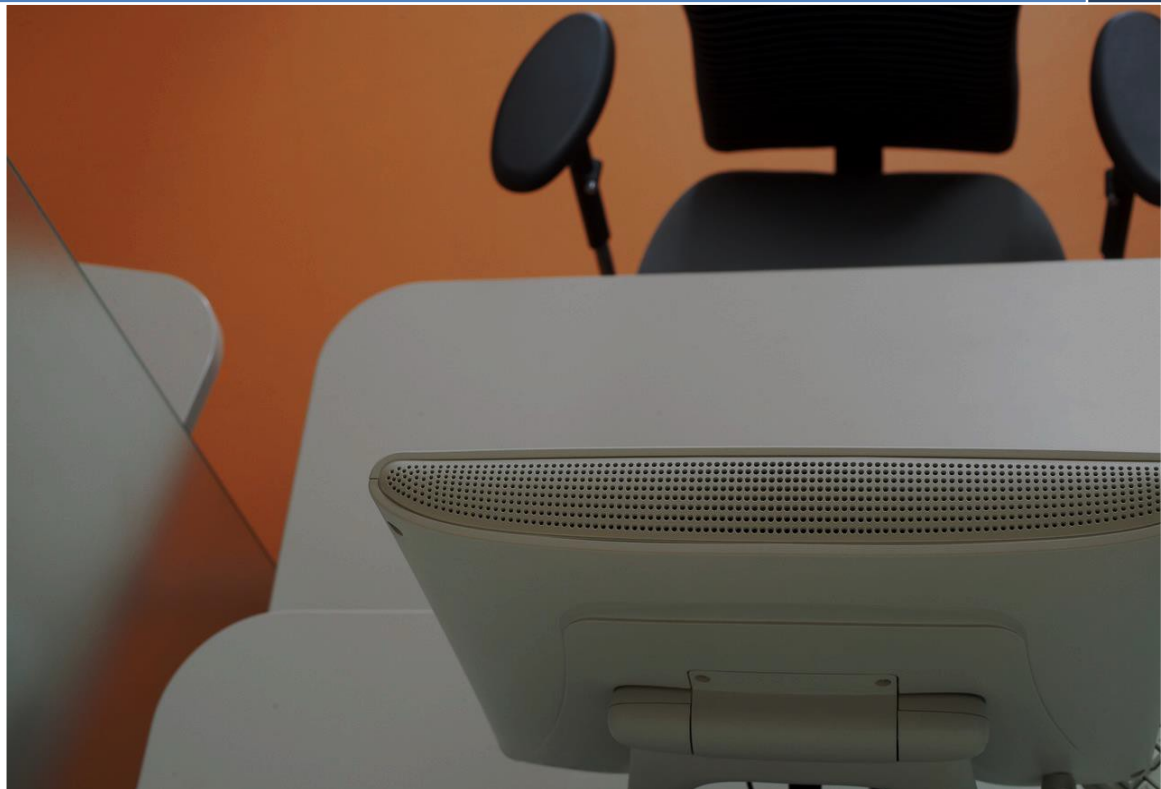




# HHS Learning Portal

## LMS MANAGER/SUPERVISOR USER GUIDE



National Institutes of Health  
OHR/HRSAID/CSBAB



HHS LEARNING PORTAL

LMS MANAGER/SUPERVISOR

Version 4.0

National Institutes of Health

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## PREFACE: ABOUT THIS GUIDE

### INTENDED AUDIENCE

This guide is intended to provide guidance to NIH Managers/Supervisors who need to access the HHS Learning Portal and manage their team's learning. Management of team learning consists of the following:

- View team member enrollments
- Approve training for your team members
- Update a team member's transcript
- Assign a curriculum or certification to a team member
- Register a team member for a course
- Add a competency requirement to a team member
- Manage the learning plan of a team member
- Perform an assessment on a required competency for a team member
- Run reports based on team member learning

You will need to have a team in order to perform these tasks. A team consists of people that have *you* designated as manager in their HHS Learning Portal profile. The manager for federal employees is the ITAS Timecard Approver which is received directly from the ITAS system. Contractors may have their managers entered manually. Management of your team extends down to your team members' subordinates as well.

### HOW TO GET HELP

If you encounter technical difficulties with the LMS or while performing any tasks in this user guide, please submit a ticket at: [https://nihohrweb.nih.gov:1010/WITS\\_IntraHR/index.aspx](https://nihohrweb.nih.gov:1010/WITS_IntraHR/index.aspx)

If you have questions about the NIH training center policy, please contact the NIH Training Center at [training1@od.nih.gov](mailto:training1@od.nih.gov), or call the NIH Training Center at 301-496-6211 and ask to speak with a NIH Training Center representative.

### ADDITIONAL HHS LEARNING PORTAL INFORMATION

Additional information about the HHS Learning Portal can be found at:

[http://trainingcenter.nih.gov/lms\\_courses.html](http://trainingcenter.nih.gov/lms_courses.html)

<https://hr.nih.gov/hr-systems/lms>

QRG's for Manager/Supervisor tasks are located at:

<https://hr.nih.gov/hr-systems/lms>

## ACCESSING THE LMS

The HHS Learning Portal can be accessed by navigating to the HHS Learning Portal/LMS URL (<https://lms.learning.hhs.gov/>), You will automatically be redirected to the AMS log on page.

If you need help accessing the HHS Learning Portal through HHS Access Management System (AMS), please refer to the NIH-specific log on instructions found at: <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

## GETTING STARTED

### USING WEB BROWSERS

The LMS can be used online with multiple computer platforms. The recommended web browsers for each major platform are listed below.

#### PC USERS

PC users should use Microsoft Internet Explorer to access the HHS Learning Portal.

#### MAC USERS

Mac users should use Safari to access the HHS Learning Portal.

### POP-UPS AND DOWNLOADS

Many functions in the LMS require pop-up windows. Make sure your browser allows pop-ups from the HHS Learning Portal. For help with this, please contact the NIH IT Service Desk at <http://itservicedesk.nih.gov/>

Some LMS functions require you to download files, such as printing a certificate of completion from your transcript. You can facilitate this function by checking your browser security settings and allowing file downloads from the HHS Learning Portal. For help with this, please contact the NIH IT Help Desk at <http://itservicedesk.nih.gov/>

### LMS TERMS AND DEFINITIONS

**Audience Types** - Audience Types are used to group organizations and learners in the system. Similarly, Audience Sub-Types allow for the Audience Types to be grouped further into smaller groups. These groups can then be used to control access to learning offerings in the LMS.

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



**Certification** – A certification is a predefined set of courses, other certifications, or any combination thereof, that have been grouped together with a deadline for completion. Credentials earned by completing the certification may expire on a predetermined date.

**Competency** – A competency is a skill, knowledge, ability, or behavior that can be measured, calculated, acquired, specified, or tested. Examples of competencies include “Project Management”, “Written Communications”, and “Interpersonal Communications”. Competencies are notated as either “held” or “required” in the LMS.

**Competency Gap** – A competency gap is the numerical difference between the required level of a competency and the individual’s currently assessed level of a competency.

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

**Curriculum** – A curriculum is a predefined set of courses, other curricula, or any combination thereof, that have been grouped together. A learner must complete all courses and curricula to complete the curriculum.

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

**Held Competency** – A competency receives the status of held in the LMS when it is assessed by the user or others.

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

**Job Role** – A job role is a group of specific skills required to perform a job function. Roles can be shared across multiple jobs.

**Jobs** – A job is a collection of job roles.

**Learning Plan** – A Learning plan is a list of learning items a user intends to take and other tasks you need to perform as part of your general development. All LMS users have a single learning plan. Progress is monitored for all items on the plan.

## *LMS Manager/Supervisor*

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

**Multi-Rater Assessment (MRA)** – A multi-rater assessment (MRA) is an assessment of competencies by a user's supervisors, peers, and subordinates.

**Order** – An order is a summary of registrations for learners. An order may include multiple learners or offerings.

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

**Ratee** – A ratee is the employee whose performance is evaluated.

**Rater** – A rater is an individual that will evaluate the performance of another employee in a multi-rater assessment.

**Registration** – A registration is a process that creates an enrollment for a learner and places their name on the roster for physical training or provides access to other methods of delivery such as online training.

**Required Competency** – A competency receives the status of required when it has been assigned to a user.

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

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

**User Profile** – The User Profile contains information about the learner such as the employee status, start date, name, and organization. The profile does not contain sensitive information such as the employee's social security number or date of birth.

## THE HHS LEARNING PORTAL DEFINED

### WHAT IS THE HHS LEARNING PORTAL?

The HHS Learning Portal is a Department-wide training system designed to facilitate management of training for all Health and Human Services employees. It is also known as the Learning Management System or simply LMS. As we proceed through this manual, the term LMS will be used when referring to the HHS Learning Portal.

## OVERVIEW OF THE LMS USER INTERFACE

### THE MENU BAR

Once you have logged in, you will see a blue menu bar at the top of the every page within the LMS. On the menu bar you will always see your account name.

The menu bar has several options for you to use including a calendar, LMS preferences, proxy (if one has been defined), and a log out option.



The major functionality of each menu bar option is listed below:

**Preferences:** This option allows you to change the look and functionality of your Home Page. You may also set the default Location and Delivery Type used when searching the catalog for courses.

**Calendar:** The Calendar link will open a calendar that displays any scheduled (e.g., classroom) training that you are registered for in the LMS. The Calendar includes a Month, Week, and Day view. There is also a Create Appointment link that allows you to enter other events on your personal calendar.

**NOTE:** This calendar does NOT automatically update your Microsoft Outlook calendar.

**Log Out:** This link Logs you off of the system and takes you back to the login screen.

The Menu Bar is explained in more detail in the **LMS Learner/User Guide**

## LMS PREFERENCES

The LMS allows you to alter your preferences and default search settings. You can change the visibility of portlets, catalog search preferences, proxy settings, and change your login password.

STEP-BY-STEP (SETTING YOUR LMS PREFERENCES)

1. Log on to the LMS.

**NOTE: NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at: [http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L\\_EmployeeLogOn.pdf](http://hr.od.nih.gov/hrsystems/benefits/lms/documents/TS02-L_EmployeeLogOn.pdf)

2. Click **Preferences** link on the LMS Menu Bar.



3. **NOTE:** Make sure pop-ups are not blocked by your web browser.

A screenshot of the 'My Account: Preferences' web form. The form is titled 'My Account: Preferences' and contains several sections: 'Website Preferences' with 'Locale\*' set to 'English' and 'Notification Method' set to 'E-mail'; 'Catalog Search Preferences' with 'Location' as a text field, 'Language' and 'Delivery Type' as dropdown menus; 'Table Row Display Preferences' with 'Main Screens' and 'Popup Screens' as dropdown menus (both with 'Default Value= 25' noted); and 'Default home page' with 'Default role' as a dropdown menu. At the bottom right, there are three buttons: 'Save', 'Save and Close', and 'Cancel'. An arrow labeled 'Save and Close' points to the 'Save and Close' button.

**Website Preferences** - Do not change the settings.

**Catalog Search Preferences** - you can select your default location, language, and delivery type options for the course catalog search feature.

**Table Row Display Preferences**- you can edit the number of search results the LMS will display in the results tables and pop-up screens. (default value = 25)

**Default Home Page** - you can choose which role you would like to start in when you login to the LMS (for users with multiple roles).

4. Click **Save and Close**.

## THE TEAM HOME ROLE

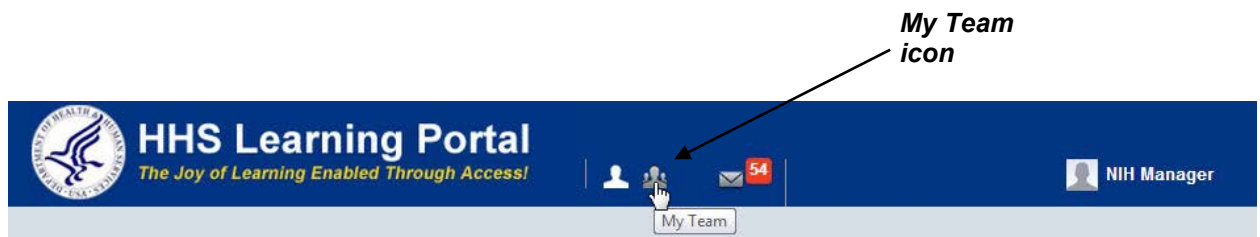
### OVERVIEW

The Team Home role gives supervisors permissions to managing the learning of their employees. As a supervisor, you can:

- View your team member's profiles
- View and add competencies
- View previous competency assessments
- Identify competency gaps
- View team member's enrollments
- Update team member's transcripts
- Assign curriculum/ certification to tem members
- Register a team member for an offering
- Approve first level training registrations
- Verify and update CAN
- Create new competency assessments
- Run reports
- Manage the team's learning plans.

To access the Team Home role, follow these steps:

1. Log on to the LMS.  
**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>
2. Select the **My Team icon** on the LMS menu bar on the top.



**NOTE:** If there isn't a **My Team** icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. You will be taken directly to My Team Home page.

## THE TEAM HOME PAGE

The My Team Home page has portlets available that display important team information. These portlets provide access to the following:

- View NIH specific and general announcements
- View Team member transcripts
- View and add team certifications
- View and add team competencies
- View team enrollments
- View LMS catalog of training and register team members

## MY TEAM'S HOME PAGE PORTLETS

The *HHS Manager Welcome* portlet displays general announcements from the department with information on how to take an online course about how to use the LMS functions as a manager.

The *NIH Managers Announcement* portlet displays general announcements from NIH with information and links on how to use the LMS functions as a manager.

## Announcements for NIH Managers

Need to approve a NIH Training Center training order? Newly revised **Tip Sheets** are available to help you enter/verify CAN numbers and approve training orders.

**Note:** The CAN must be entered on all NIHTC training orders. Additional Approvers for Orders (AAOs) must take the training and have the LMS Local Learning Registrar role in order to be able to do this.

For LMS assistance, please submit a help desk ticket at <http://intrahr.od.nih.gov/helpdeskform.htm>.

LMS Highlights: A new **LMS Manager/Supervisor User Guide** is now available that contains detailed instructions on how to use your Manager privileges.

## NIH Manager Announcements

Need to Approve a Training Order? Newly revised **Tip Sheets** are available to help you enter/verify CAN numbers and approve training orders.

**Note:** The CAN must be entered on all NIHTC training orders. Additional Approvers for Orders (AAOs) must take the training and have the LMS Local Learning Administrator role in order to be able to do this.

For LMS assistance, please submit a help desk ticket at <http://intrahr.od.nih.gov/helpdeskform.htm>.

LMS Highlights: A new **LMS Manager/Supervisor User Guide** is now available that contains detailed instructions on how to use your Manager privileges.

The *NIH Team Navigational Links* portlet allows you view your team's enrollments, transcripts, certifications and competencies.

## NIH Team Navigational Links

**Go to:**

- [View Team Enrollments](#)
- [View Team Transcripts](#)
- [View Team Certifications](#)
- [View Team Competencies](#)

The *Video Announcements* portlet allows you to view any announcements which have been posted via video.



The *HHS Announcement* portlet allows you to view any announcements which have been posted by the Department.

## HHS Announcements

**Welcome to the HHS Learning Portal!**

**New Offering Available!**  
**HHS “Safety Awareness for Managers and Supervisors”**

The “Safety Awareness for Managers and Supervisors” online training introduces key laws, regulations, policies, principles, and practices surrounding safety programs for Federal workers; promotes compliance; and provides managers with valuable information to help ensure a safe and healthy workplace. Unique learning paths are available for Senior Executive Service members, managers and supervisors, and employees. Offered sections include:

- Part 1: Laws and Regulations
- Part 2: Injury and Illness Reporting, Course A
- Part 2: Injury and Illness Reporting, Course B
- Part 3: Workplace Hazards and Remediation, Course A
- Part 3: Workplace Hazards and Remediation, Course B

Select [here](#) to access the training and then select the appropriate learning

## TEAM DIRECTORY

The Team Directory is used to view all of your team members and provide access to their profiles. All of your direct reports should be listed on the Direct Team tab. If there are any inaccuracies to your team, any changes should be done in the NED, which would then be reflected in the LMS. If changes in the NED cannot be easily done, a



## LMS Manager/Supervisor

Local Learning Administrator or Human Capital Administrator may change the direct reports manually as needed in the LMS.

### STEP-BY-STEP (VIEW A TEAM MEMBER'S PROFILE)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Select the **My Team** icon on the LMS Menu bar at the top of the screen.



**NOTE:** If there isn't a **My Team** icon, you are not set up as a supervisor in the LMS. Please contact a LMS administrator. A list of NIH IC LMS administrators can be found at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click on the **Team Directory** link on the left menu.

**Team Directory**

Home  
**Team Directory**  
Search  
Learning  
Plans  
Skills  
Analytics  
Reports

Direct Team    Alternate Team

Direct Team Modify Table

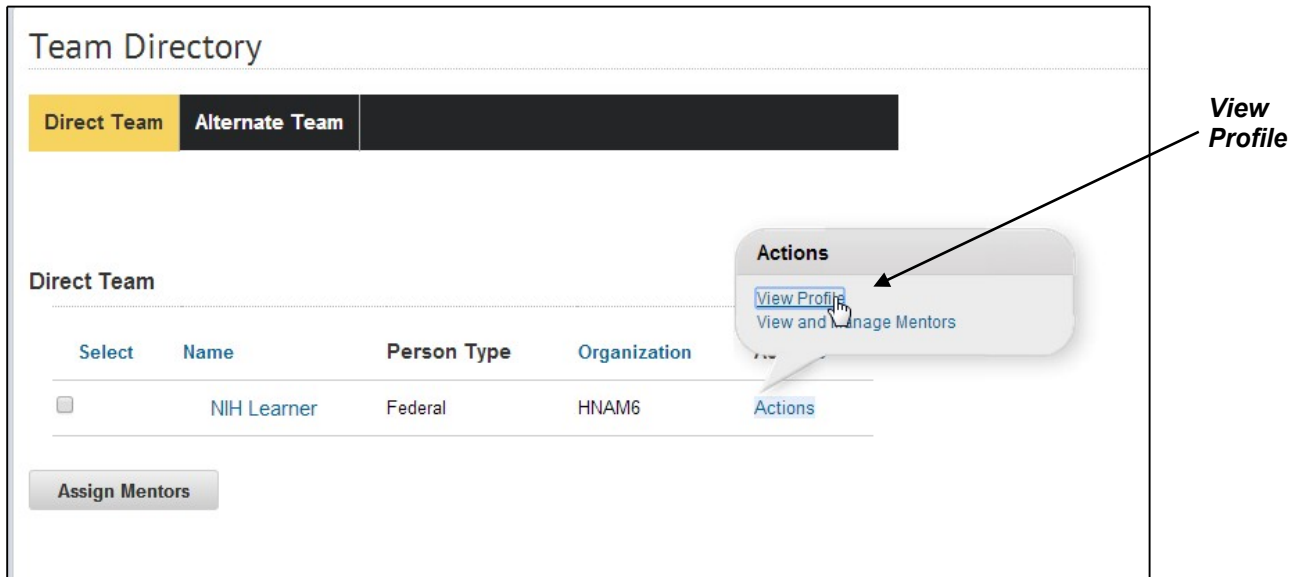
Select	Name	Person Type	Organization	Actions
<input type="checkbox"/>	NIH Learner	Federal	HNAM6	Actions

Assign Mentors

**Team Members**

## LMS Manager/Supervisor

- In the Actions Column of the Direct Team Table, place your cursor over the **Actions** link of the team member profile you wish to view.
- Click the **View Profile** link.

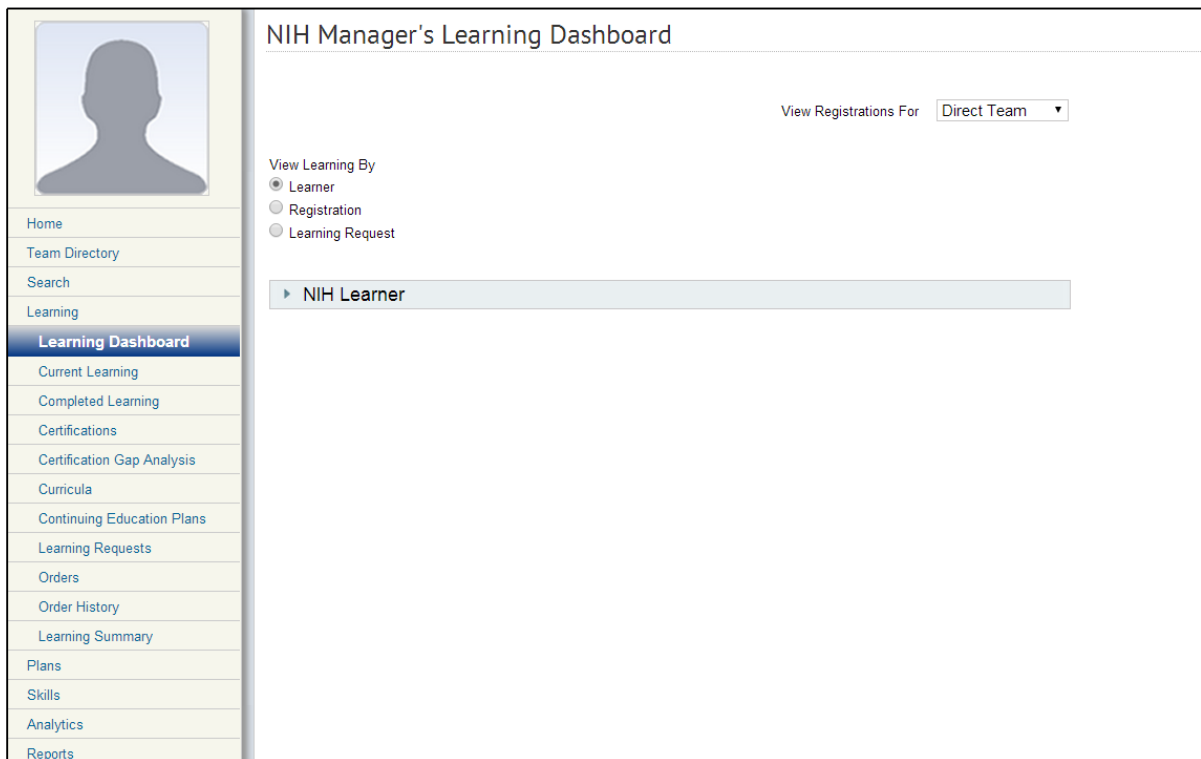


The screenshot shows the 'Team Directory' interface. At the top, there are two tabs: 'Direct Team' (highlighted in yellow) and 'Alternate Team'. Below the tabs is a table titled 'Direct Team'. The table has columns for 'Select', 'Name', 'Person Type', and 'Organization'. A row is visible with a checkbox, the name 'NIH Learner', 'Federal' as the person type, and 'HNAM6' as the organization. To the right of this row is an 'Actions' link. A mouse cursor is hovering over the 'Actions' link, which has opened a dropdown menu. The menu contains two options: 'View Profile' and 'View and Manage Mentors'. An arrow points from the text 'View Profile' to the 'View Profile' option in the dropdown menu.

Select	Name	Person Type	Organization	Actions
<input type="checkbox"/>	NIH Learner	Federal	HNAM6	Actions

- You will now see the user's profile.

## THE NIH MANAGER'S LEARNING DASHBOARD



The screenshot shows the 'NIH Manager's Learning Dashboard'. On the left is a navigation sidebar with a user profile picture at the top. The sidebar menu includes: Home, Team Directory, Search, Learning, Learning Dashboard (highlighted), Current Learning, Completed Learning, Certifications, Certification Gap Analysis, Curricula, Continuing Education Plans, Learning Requests, Orders, Order History, Learning Summary, Plans, Skills, Analytics, and Reports. The main content area is titled 'NIH Manager's Learning Dashboard'. It features a 'View Registrations For' dropdown menu set to 'Direct Team'. Below this is a section titled 'View Learning By' with three radio button options: 'Learner' (selected), 'Registration', and 'Learning Request'. At the bottom of the main content area, there is a link labeled 'NIH Learner'.

The Learning Dashboard provides quick access to the major components of your team's learning in one location. From the **Learning Dashboard** screen you have access to the following:

- **Learner-** View Registrations and Learning request for specific team members.
- **Registrations** – view your team members registrations.
- **Learning Requests** –view learning requests for your team members.

## REGISTRATIONS

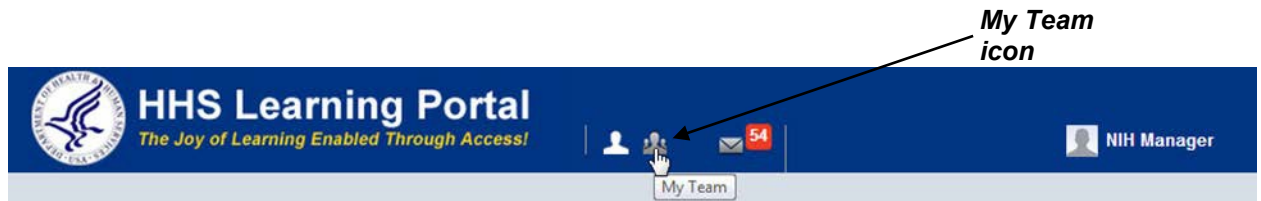
As a supervisor, you may manage your team members' registrations. When a team member is registered for a course, the LMS creates a registration. A registration is confirmed immediately unless a supervisor is required to approve the training. Until a supervisor approves the training, the team member is not officially part of the training. The following steps will guide you through the process of viewing and approving any unapproved training as well as rejecting or dropping the registration altogether.

## STEP-BY-STEP (APPROVING PENDING REGISTRATIONS FOR TEAM MEMBERS)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at: <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>.

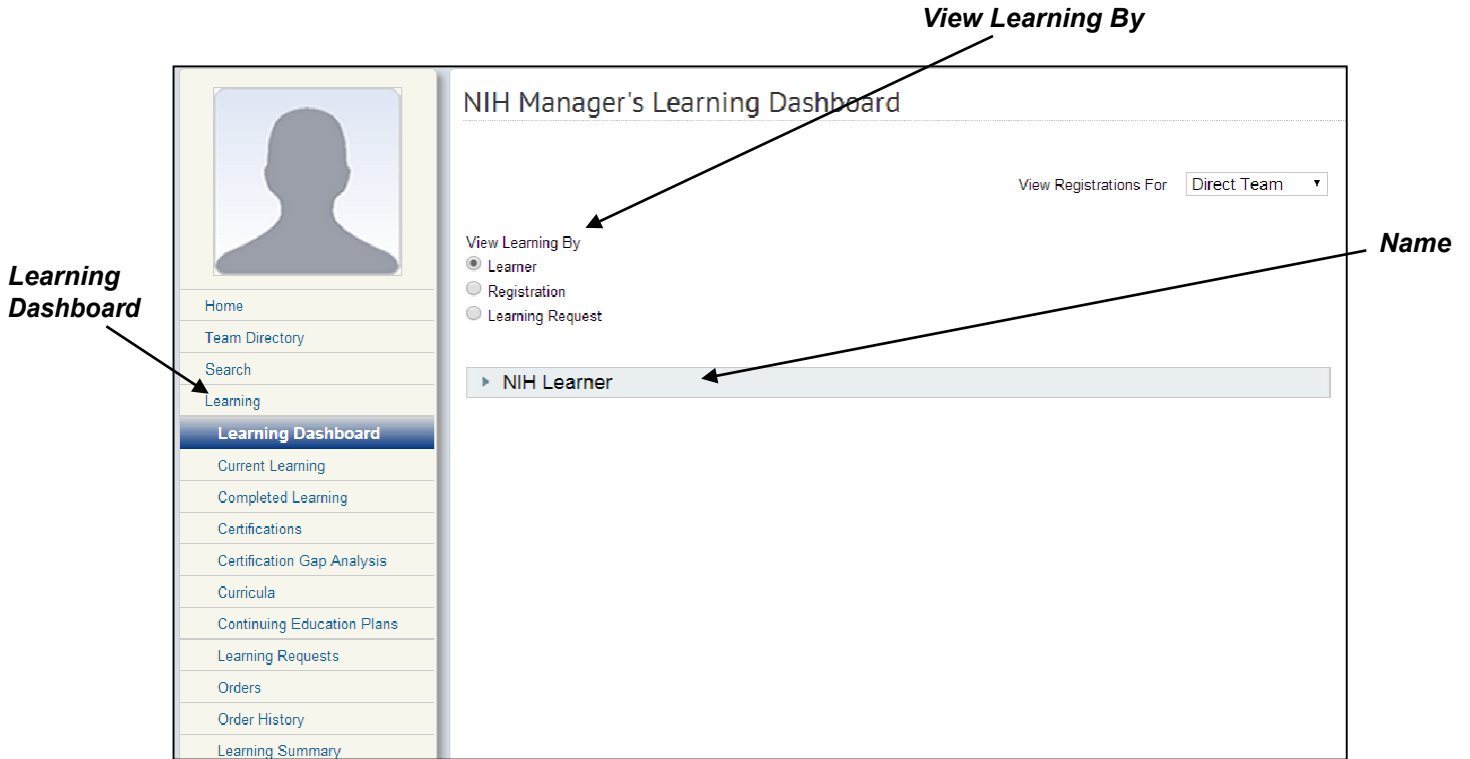
2. Click on the **My Team** icon on the LMS Menu bar at the top of the screen.



**NOTE:** If there isn't a **My Team** icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click the **Learning** link on the left menu.
4. Click on the arrow next to the name of the team member you want to approve a registration.



5. You now you will be able to see all the Registrations for that team member. You can also see the Status of the Registrations.
6. If you don't see the Registration you need to approve click on **More..** at the end of the Registration section.

## LMS Manager/Supervisor

**Registrations**

View Learning By  
 Learner  
 Registration  
 Learning Request

NIH Learner

**Registration** Print | Export | Modify Table

Title	Delivery Type	Start Date	Location	Facility	Status	Package	Mandatory	Actions
Adopting an Agile Approach to Project Management	Online Training				Confirmed		<input type="checkbox"/>	Actions
Becoming an HHS Mentor: Tips on how to mentor someone	Instructor led	06/16/2014	HHS University		Confirmed		<input type="checkbox"/>	Actions
Books 24x7	Online Training				Confirmed		<input type="checkbox"/>	Actions
Critical Thinking Essentials: Applying Critical Thinking Skills	Online Training				Confirmed		<input type="checkbox"/>	Actions More...

**Learning Requests** Print | Export | Modify Table

Course	Request Number	Delivery Type	Start Date	End Date	Location	Status	Prerequisite Status	Manager Approval Status	Created By	Actions
NIH-LMS Domain System Administrator	02016515	Computer Laboratory	02/25/2009	06/30/2009	NIH Training Center	Pending Offering	Not Required	Not Required	nihlocallearningadmin	Actions
Learning With Saba	02016590		07/10/2009	09/30/2009	6120 Executive Blvd	Pending Offering	Not Required	Not Required	NIH0014306293	Actions

**Status**

**More...**

- Place your cursor over the **Actions** link of the registration you wish to approve, reject or drop.

<input type="checkbox"/>	Introduction to SharePoint 2010	Instructor led	06/19/2014	Fernwood Building - Room 1NW02	Confirmed	<input type="checkbox"/>	Actions
<input type="checkbox"/>	NIH Basic COR Training	Instructor led	08/18/2014	NIH Training Center	Confirmed	<input type="checkbox"/>	Actions
<input type="checkbox"/>	NIH Environmental Management System (NEMS) Awareness Training	Online Training			Confirmed	<input type="checkbox"/>	Actions
<input type="checkbox"/>	NIH LMS Local Learning Administrator	Computer Laboratory	09/09/2014	NIH Bldg 29, Rm 29-121	Pending Approval	<input type="checkbox"/>	Actions

**Actions**

- [Drop](#)
- [Drop and Request Learning](#)
- [Reject](#)
- [Approve](#)
- [View Audit Trail](#)

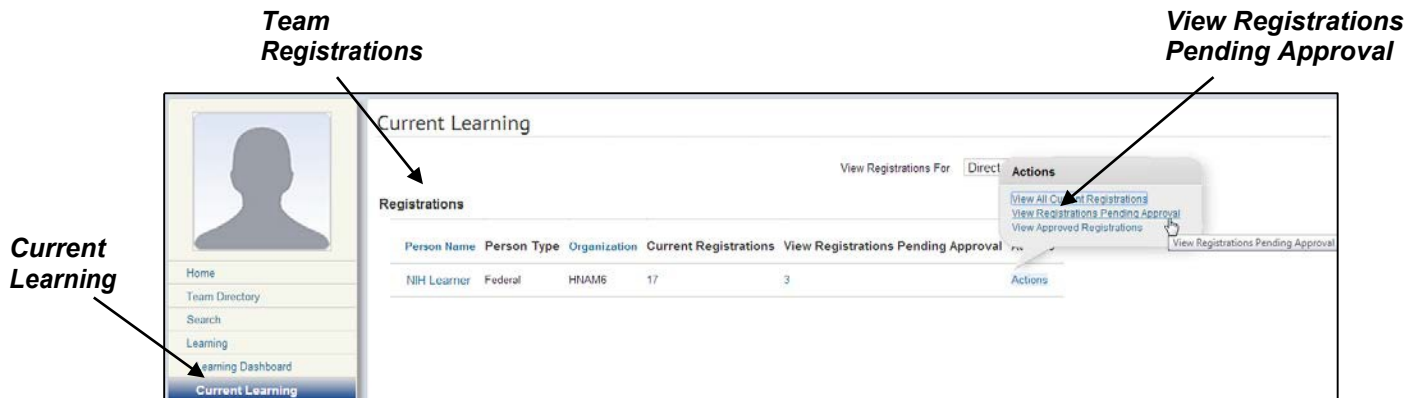
**Actions**

- Select **Approve**, **Reject** or **Drop** in the Actions pop-up menu.

**Important:** Before approving training orders in the LMS, the order **must** contain a valid CAN to ensure the proper obligation of funds in NBS. If there is no tuition (i.e. the Price is 0.00), the CAN is not required. All **approved training orders without** a CAN number will automatically have the Learner's Payroll CAN number added to the training order the following night. This default CAN will be charged the price of the approved training class. You cannot change the CAN

number on an approved order; the Learner must be dropped, and then re-registered.

**Note:** To view all team registrations, select **Learning** and then **Current Learning** from the menu on the left.



**Note:** The number of enrollments needing your approval is displayed under the **View Registrations Pending Approval** column. For more details you can click on **Actions** and then click on **View Registrations Pending Approval**.

## MESSAGE CENTER -- ***NEW!***

The new message center in 7.2 provides a central place for Managers to see registrations waiting for approval.

### STEP-BY-STEP (VIEW REGISTRATIONS USING THE MESSAGE CENTER)

1. Click on the envelop icon to access the Message Center on the LMS Menu bar.



**Note:** The number next to the icon is for the total number of **unread messages**.

## LMS Manager/Supervisor

2. Click on Approve Team Enrollments link.

**Approve Team Registrations**

**Actions**

3. Click on **Actions** next to the registration you need to approve, reject or drop.
4. Select **Approve**, **Reject** or **Drop** in the Actions pop-up menu.

## MANAGE TEAM CURRICULA

A curriculum is a group of one or more training items. You can view the training items needed to complete each curriculum as well as the progress made for all of your team members.

### STEP-BY-STEP (VIEW MEMBER CURRICULUM)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at: <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Click on the **My Team** icon.



**NOTE:** If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click the **Learning** link on the left menu.

**Learning**

**Curricula**

**Curricula Summary tab**

**View Curricula for: drop-down menu**

**View by:**

**View Curricula**

Person Name	Person Type	EEO & Diversity Awareness Training for Employees	LMS Training	NIAID Art of Leadership Cohort 21	Actions
NIH Learner	Federal	Discontinued	Acquired	Discontinued	View Curricula

4. Click **Curricula** in the left menu.

5. Click **View Curricula** associated with the team member.

**NOTE:** You can also click the **View Curricula for:** drop-down menu to toggle between your direct team and alternate team or click the **View by:** drop-down menu to cycle through the views All Curricula, curricula by Job, curricula by Role. Click the **Curricula Summary** tab to view the summary view of your entire team's curricula.



Curricula for NIH Learner

View **Active** ▾

Name  Show Required Curricula Only

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

**Profile Quicklinks**

- [Certifications](#)
- [Curricula](#)
- [Competencies](#)
- [Enrollments](#)
- [Completed Courses](#)
- [Continuing Education Status](#)
- [Profile Snapshot](#)
- [Plans](#)

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

Showing 8 out of 8 results

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
LMS Training	<div style="display: flex; align-items: center;"> <span style="color: green; font-weight: bold; margin-right: 5px;">●</span> <div style="flex-grow: 1; border: 1px solid #ccc; background-color: #eee; position: relative;"> <div style="width: 0%; height: 10px; background-color: green; position: absolute; top: -10px; left: -10px;"></div> </div> <span style="font-size: 0.8em; margin-left: 5px;">Path 1 - 0% Completed</span> <span style="margin-left: 10px; font-size: 0.8em; color: blue;">i</span> </div>	Acquired	JESUS BONET (More)		<a href="#">Actions</a>
NIAD Art of Leadership Cohort 21	Art of Leadership	Discontinued	Ann WITHINGTON		<a href="#">Actions</a>
NIH Core Curriculum	<div style="display: flex; align-items: center;"> <span style="color: green; font-weight: bold; margin-right: 5px;">●</span> <div style="flex-grow: 1; border: 1px solid #ccc; background-color: #eee; position: relative;"> <div style="width: 0%; height: 10px; background-color: green; position: absolute; top: -10px; left: -10px;"></div> </div> <span style="font-size: 0.8em; margin-left: 5px;">Path 1 - 0% Completed</span> <span style="margin-left: 10px; font-size: 0.8em; color: blue;">i</span> </div>	Acquired	NIH AlternateManager (More)		<a href="#">Actions</a>
NIH NIBIB Administrative Officer Non-Technical Competency Training	<div style="display: flex; align-items: center;"> <span style="color: green; font-weight: bold; margin-right: 5px;">●</span> <div style="flex-grow: 1; border: 1px solid #ccc; background-color: #eee; position: relative;"> <div style="width: 0%; height: 10px; background-color: green; position: absolute; top: -10px; left: -10px;"></div> </div> <span style="font-size: 0.8em; margin-left: 5px;">3 Courses in this Module - 0% Completed</span> <span style="margin-left: 10px; font-size: 0.8em; color: blue;">i</span> </div>	Assigned	NIH Learner	06/15/2014	<a href="#">Actions</a>
NIH NIBIB Budget Analysis Non-Technical Competency Training	<div style="display: flex; align-items: center;"> <span style="color: green; font-weight: bold; margin-right: 5px;">●</span> <div style="flex-grow: 1; border: 1px solid #ccc; background-color: #eee; position: relative;"> <div style="width: 33%; height: 10px; background-color: green; position: absolute; top: -10px; left: -10px;"></div> </div> <span style="font-size: 0.8em; margin-left: 5px;">3 Courses in this Module - 33% Completed</span> <span style="margin-left: 10px; font-size: 0.8em; color: blue;">i</span> </div>	Acquired	Thomas HOLSCHER		<a href="#">Actions</a>
NIH NIBIB Communication Skills for all Staff	<div style="display: flex; align-items: center;"> <span style="color: red; font-weight: bold; margin-right: 5px;">●</span> <div style="flex-grow: 1; border: 1px solid #ccc; background-color: #eee; position: relative;"> <div style="width: 0%; height: 10px; background-color: green; position: absolute; top: -10px; left: -10px;"></div> </div> <span style="font-size: 0.8em; margin-left: 5px;">3 Courses in this Module - 0% Completed</span> <span style="margin-left: 10px; font-size: 0.8em; color: blue;">i</span> </div>	Overdue	NIH Learner	03/02/2014	<a href="#">Actions</a>
NIH NIBIB Team Building Skills for all Staff	<div style="display: flex; align-items: center;"> <span style="color: green; font-weight: bold; margin-right: 5px;">●</span> <div style="flex-grow: 1; border: 1px solid #ccc; background-color: #eee; position: relative;"> <div style="width: 33%; height: 10px; background-color: green; position: absolute; top: -10px; left: -10px;"></div> </div> <span style="font-size: 0.8em; margin-left: 5px;">3 Courses in this Module - 33% Completed</span> <span style="margin-left: 10px; font-size: 0.8em; color: blue;">i</span> </div>	Acquired	JESUS BONET		<a href="#">Actions</a>

6. You will now see a list of the curricula for the team member. If the team member has not been assigned a curriculum, you will see “No items found” displayed where the curriculum is shown.
7. Place your cursor over the **Actions** link to see available options.

Curricula for NIH Learner

View | Active

Name  Show Required Curricula Only

Configure | Save Search Query

Search

Profile Quicklinks

- Certifications
- Curricula
- Competencies
- Documents
- Deleted Courses
- Learning Education Status
- Snapshot

Actions

- View Curricula History
- View Progress for All Paths
- View Acquisition History
- Delete
- Print Certificate

Curricula

Grant Curricula | Add Curricula | Print | Export | M

Showing 8 out of 8 results

Name	Selected Path (% Complete)	Status	Assigned By	Target Date	Actions
LMS Training	<input type="text"/> Path 1 - 0% Completed	Acquired	JESUS BONET (More)		Actions
NIAID Art of Leadership Cohort 21	Art of Leadership	Discontinued	Ann WITHERINGTON		Actions
NIH Core Curriculum	<input type="text"/> Path 1 - 0% Completed	Acquired	NIH AlternateManager (More)		Actions

### STEP-BY-STEP (ADD CURRICULUM TO A TEAM MEMBER)

1. Log on to the LMS.  
**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Click on the **My Team** icon on the menu bar.



- NOTE:** If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a LMS administrator. A list of NIH LMS administrators can be found at: <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click the **Learning** link on the left menu.
4. Click the **Curricula** link from the left menu.
5. Click the **checkbox** that is associated with the team member to which you will add a curriculum.

## LMS Manager/Supervisor

6. Click the **Add Curricula** link.

The screenshot shows the LMS Manager/Supervisor interface. On the left is a navigation sidebar with a user profile icon at the top. Below the icon are links for Home, Team Directory, Search, Learning, Learning Dashboard, Current Learning, Completed Learning, Certifications, Certification Gap Analysis, **Curricula** (highlighted), Continuing Education Plans, Learning Requests, Orders, Order History, Learning Summary, Plans, Skills, and Reports. The main content area is titled 'Curricula' and has a 'View Curricula For' dropdown set to 'Direct Team'. Below this are tabs for 'Curricula Summary' and 'Curricula Matrix'. A 'View by' dropdown is set to 'All Curricula'. There are links for 'Grant Curricula', 'Add Curricula', and 'Modify Table'. A table of curricula is displayed with columns: Person Name, Person Type, EEO & Diversity Awareness Training for Employees, LMS Training, NIAID Art of Leadership Cohort 21, and Actions. One row is visible:  NIH Learner, Federal, Discontinued, Acquired, Discontinued, View Curricula. A 'Next' link is at the bottom right.

7. Enter the name of the curriculum you wish to add in the **Name** field.
8. Click **Search**.
9. Click checkbox associated with the curriculum you wish to add.
10. Click on Select and Close.
11. The curriculum will now be assigned to the team member.

The screenshot shows the 'Add Curricula' form. The title is 'Add Curricula'. Below the title are search criteria fields: Name (ASAM), Discontinued From >=, Updated On >=, and Target Completion Duration <=. There are 'Configure' and 'Save Search Query' links. A 'Search' button is highlighted. Below the search results, there is a table with columns: Name, Available From, Discontinued From, and Target Completion Duration. One row is visible:  ASAM Action Officer Training, 10/30/2008, 0 Days. Below the table are 'Select and Close' and 'Close' buttons.

## MANAGE TEAM TRANSCRIPTS

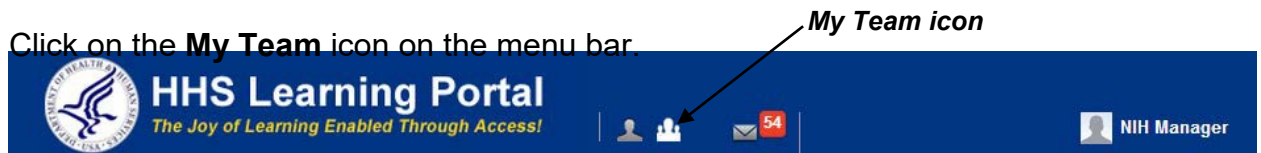
### STEP-BY-STEP (VIEW TEAM MEMBER TRANSCRIPT)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Click on the **My Team** icon on the menu bar.



**NOTE:** If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click the **Learning** link on the left menu.
4. Click **Completed Learning** from the left menu.

**NOTE:** You may toggle between your direct team and alternate team by clicking the View Completed Courses For: drop-down menu.

**Learning**

**Completed Learning**

**View Completed Courses For drop-down menu**

**View Completed Courses**

Completed Learning

View Completed Courses For Direct Team

Add Completed Learning | Modify Table

Person Name	Person Type	Completed Learning Items	Actions
NIH Learner	Federal	87	<a href="#">View Completed Courses</a>

5. Click the **View Completed Courses** link associated with the desired team member.
6. You will now see the team member's transcript. (By default the last 3 months is displayed.)

**NOTE:** You may view a larger/smaller range of transcript history by changing the **Completion Dates** and clicking **Search**. Also, you may view inactive transcript items by clicking the **Inactive** link.

## LMS Manager/Supervisor

**Inactive**

**Search**

**Completion Dates**

Item Name	Status	Course No	Delivery Type	Duration(HH:MM)	Learner Name	Part Number	Version	Ended/Completed On Date	Offering End Date
adding to multiple learners as a Learning Administrator	Successful On: 04/29/2014 Score: 0	ADDING_TO_MANY_AS_A_LA		00:00	NIH Learner				
Supervisory Training Course This is a test course Registration Date: 06/06/2014	Successful On: 06/06/2014 Score:	TEST06062014	Instructor led	00:00	NIH Learner			06/06/2014	
Test Course 4/29/2014 Registration Date: 05/05/2014	Successful On: 05/07/2014 Score:	TEST4292014	Instructor led	08:00	NIH Learner	00067287		05/05/2014	05/05/2014
NIAD Property Online Training Registration Date: 05/01/2014	Successful On: 05/01/2014 Score: 31.579	NIADOASPROP100	Online Training	00:25	NIH Learner	00067206	2.0	05/01/2014	

## REGISTER TEAM MEMBERS FOR COURSES

### STEP-BY-STEP (SEARCH THE LMS CATALOG AND REGISTER TEAM MEMBERS)

As a supervisor, you have the ability to register your team members for training.

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at: <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Click on the **My Team** icon on the menu bar.



**NOTE:** If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a LMS administrator. A list of NIH LMS administrators can be found at: <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click the **Learning** link on the left menu.
4. Click the **Orders** link on the left menu.

**Learning**

**Orders**

**Include Contact as Learner**

**Set me as the contact**

**Next**

**Note:** If you want to be the contact for the order leave the **Set me as contact** checkbox checked. If not click on it to uncheck the checkbox and add a new contact for the order.

**Note:** If the Contact is the same as the Learner leave the **Include Contact as Learner** checkbox checked. If not, click on it to uncheck the checkbox.

5. Click **Next**.
6. Enter the name of the course you want to find in the **Search** textbox.
7. Click **Search**.
8. Click **Register** associated with the offering.

# LMS Manager/Supervisor

The screenshot displays the LMS Manager/Supervisor interface. On the left is a navigation sidebar with a user profile icon at the top and a list of menu items: Home, Team Directory, Search, Learning, Learning Dashboard, Current Learning, Completed Learning, Certifications, Certification Gap Analysis, Curricula, Continuing Education Plans, Learning Requests, **Orders** (highlighted), Order History, Learning Summary, Plans, Skills, and Reports. The main content area is titled "Search Catalog" and includes a breadcrumb trail: 1.Order Contact >> 2.Billing >> 3.Offerings >> 4.Order Management >> 5.Payment >> 6.Receipt. Below the breadcrumb are links for "Advanced Search", "Search Tips", and "Search Preferences". A search bar contains the text "Microsoft" and a "Search" button. A "Register" label with an arrow points to the "Orders" menu item in the sidebar. A "Search" label with an arrow points to the search button. A "Search textbox" label with an arrow points to the search input field. The search results show "Showing first 25 out of 125+ results for 'Microsoft'". Two results are visible: "New Features for End Users in Microsoft Office 2007" and "CompTIA A+ 220-802: Introducing Microsoft Windows". A "Refine/Expand search results" panel on the right lists filters such as Resource Type, Delivery Types, Location, Start Date, Price, Categories, Competencies, Languages, and Hide courses. A "Register" label with an arrow points to the "Register" link under the first search result.

9. Click **Add Learners**.



### Create Order

1.Order Contact >>> 2.Billing >>> 3.Offerings >>> 4.Order Management >>> 5.Payment >>> 6.Receipt

[Expand All](#) | [Collapse All](#)

▼ New Features for End Users in Microsoft Office 2007 (Online Training, ID: 239866\_ENG)

[Notes](#) | [Add Learners](#) | [Remove Offering](#)

Learner	Status	Price	Training Units	Actions
NIH Manager	Confirmed	0.00 USD		<a href="#">Remove From Cart</a>

Order Total 0  
Discount 0  
Total 0

[Continue Shopping](#) [Place Order](#)

**Add Learners**

10. Enter search criteria for the team member then click **Search**.

### Add Seats And Learners

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

Select Learners

Select Learners

Enroll from Learning Requests

#### Add Seats

Unassigned Learners

#### Add Learners

Population*	Internal ▼	Username	<input type="text"/>
Person ID	<input type="text"/>	First Name	<input type="text"/>
Last Name	<input type="text"/>	Organization	<input type="text"/>
Manager Search Depth*	Direct Report ▼	Location	<input type="text"/>
Domain	<input type="text"/>	Person Type	-Select One- ▼
Security Roles	-Select One- ▼	Manager	<input type="text"/>

Include All Suborganizations

[Search](#)

[Select People](#)

[Select](#) [Close](#)

**Search**

## LMS Manager/Supervisor

**NOTE:** Clicking **Search** without entering any criteria will display all of your team members.

11. Click the **Checkbox** associated with each team member you wish to register.

12. Click **Select**.

The screenshot shows the 'Add Seats And Learners' interface. At the top, there is a section for 'Supervisors' with a 'Search' button. Below this is the 'Add Seats' section, which includes a text input field for 'Unassigned Learners' and a 'Select' button. The 'Add Learners' section contains various search criteria fields: Population\* (Internal), Person ID, Last Name, Manager Search Depth\* (Direct Report), Domain, Security Roles (-Select One-), Username, First Name, Organization, Location, Person Type (-Select One-), and Manager. A 'Search' button is located at the bottom right of this section. Below the search criteria is a 'People' table with one row of results. The table has columns for First Name, Last Name, Username, Person Type, Person ID, Organization, Location, and Manager. The first row shows 'NIH Learner NIHLERNER Federal 00165395 HNAM6 NIHMANAGER'. A checkbox is checked in the first column of this row. At the bottom of the table, there are 'Select' and 'Close' buttons. Annotations with arrows point to the 'Unassigned Learners' field (labeled 'Unassigned Learners'), the checkbox in the table (labeled 'Checkbox'), and the 'Select' button at the bottom of the table (labeled 'Select').

**Unassigned Learners**

**Unassigned Learners**

**Checkbox**

**Select**

	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	Learner	NIHLERNER	Federal	00165395	HNAM6		NIHMANAGER

**NOTE:** If you want to hold seats in the offering for your staff and you do not know which person(s) will be attending, you can enter a number in **Unassigned Learners**.

13. You will now be taken back to the **Create Order** screen.

Create Order

1.Order Contact >>>| 2.Billing >>>| 3.Offerings >>>| 4.Order Management >>>| 5.Payment >>>| 6.Receipt

[Expand All](#) | [Collapse All](#)

▼ New Features for End Users in Microsoft Office 2007 (Online Training, ID: 239866\_ENG)

[Notes](#) | [Add Learners](#) | [Remove Offering](#)

Learner	Status	Price	Training Units	Actions
NIH Manager	Confirmed	0.00 USD		<a href="#">Remove From Cart</a>
NIH Learner	Confirmed	0.00 USD		<a href="#">Remove From Cart</a>

Order Total 0  
Discount 0  
Total 0

[Continue Shopping](#) [Place Order](#)

**Note:** You can repeat Steps 9-12 to add more Learners.

**14. Click Place Order**

15. The **Registration Confirmation** screen will be displayed. You may print this screen for your records; however, this information can be retrieved at anytime.

### Registration Confirmation

Thank you, your request has been processed. Please check your email or In-Progress Learning for training status updates.

1. Review Learning Items <img alt="arrow icon" data-bbox="420 158 450 172"/> 2. Print Receipt

[Printer Friendly Version](#)

Order Contact	NIH Manager
Billed To	HNA
Order Status	Confirmed
Order Number	02023888

#### Order Items

Title	Learners	Delivery Type	Status	Actions	Price
New Features for End Users in Microsoft Office 2007	NIH Manager	Online Training	Confirmed	<a href="#">Notes</a>	0.00 USD
New Features for End Users in Microsoft Office 2007	NIH Learner	Online Training	Confirmed	<a href="#">Notes</a>	0.00 USD

Order Total	0
Discount	0
<b>Total</b>	<b>0</b>

[Go to Current Learning](#)

**Important:** NIH Training course offerings that have tuition must contain a valid **CAN** to ensure the proper obligation of funds in NBS.

## VIEW TEAM ORDER HISTORY

### STEP-BY-STEP (VIEW TEAM ORDER HISTORY)

1. Log on to the LMS.  
**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>
2. Click on the **My Team** icon on the LMS Menu bar.



**NOTE:** If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a LMS administrator. A list of NIH LMS administrators can be found at: <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click the **Learning** link on the left.
4. Click the **Order History** link on the left.
5. Enter search criteria for the order then click **Search**.
6. Click the **Order Number** you wish to view.

Order Number	Learner	Person Type	Title	Version	Price	Part Number	Status	Created On	Mandatory
02023888	NIH Learner	Federal	New Features for End Users in Microsoft Office 2007	2.2	0.00 USD	239866_ENG	Confirmed	06/19/2014	<input type="checkbox"/>

7. You will now see the Order Details screen.

### Order Details: Order Number 02023888

---

Order Contact: NIH Manager  
 Created On: 06/19/2014  
 Order Status: Confirmed

**Order Items** [Modify Table](#)

---

Title	Learner	Delivery Type	Status	Actions	Price	Cancellation Reason
New Features for End Users in Microsoft Office 2007	NIH Manager	Online Training	Confirmed	<a href="#">Change Learner</a> <a href="#">Price</a> <a href="#">Notes</a> <a href="#">Drop</a>	0.00 USD	
New Features for End Users in Microsoft Office 2007	NIH Learner	Online Training	Confirmed	<a href="#">Change Learner</a> <a href="#">Price</a> <a href="#">Notes</a> <a href="#">Drop</a>	0.00 USD	
<b>Total</b>					<b>0.00 USD</b>	

**STEP-BY-STEP (ACTIONS: ADD THE CAN TO AN ORDER)**

1. View the order for the learner. (See View Team Order History instructions above for details)

### Order Details: Order Number 02023888

Order Contact: NIH Manager  
Created On: 06/19/2014  
Order Status: Confirmed

**Order Items** [Modify Table](#)

Title	Learner	Delivery Type	Status	Actions	Price	Cancellation Reason
New Features for End Users in Microsoft Office 2007	NIH Manager	Online Training	Confirmed	<a href="#">Change Learner</a> <a href="#">Price</a> <a href="#">Notes</a> <a href="#">Drop</a>	0.00 USD	
New Features for End Users in Microsoft Office 2007	NIH Learner	Online Training	Confirmed	<a href="#">Change Learner</a> <a href="#">Price</a> <a href="#">Notes</a> <a href="#">Drop</a>	0.00 USD	
<b>Total</b>					<b>0.00 USD</b>	

[Cancel](#)

**Notes** ←

2. Click the **Notes** link.

3. Click the **Add Note** link.
4. Select **CAN** from the **Category drop down** list and enter the CAN number on the **Notes** section.
5. Click **Save**.

6. The CAN has been added.



### Add/View Notes

Notes

View By Category

Generally used to capture short comments and suggestions about learning content and training courses. Add Note | Modify Table

Showing 1 out of 1 results

Created On	Created By	Category	Note
06/19/2014	NIH Manager	CAN	123457

Close

**Note:** The CAN field only accepts the 7 digits CAN. Fiscal year information is not necessary. The CAN number used in this example is for instructional purposes only and is not a real/valid CAN number.

## MANAGING CERTIFICATIONS

### STEP-BY-STEP (VIEW TEAM MEMBER CERTIFICATIONS)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Click on the **My Team** icon on the LMS Menu bar.



**NOTE:** If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>.

3. Click the **Learning** link on the left.
4. Click the **Certifications** link on the left.

**NOTE:** You may view team members on your alternate team by clicking the **View Certifications for** drop-down menu and selecting Alternate Team.

**NOTE:** To view a summary of your team's certifications, click the **Certifications Summary** tab.

5. Click **View Certifications** in the **Actions** column on the same line as the team member.

The screenshot shows the LMS Manager/Supervisor interface. On the left is a sidebar with a 'Learning' menu and a 'Certifications' menu. The main content area is titled 'Certifications' and has a 'Certifications Summary' tab selected. A table of certifications is displayed with columns for 'Person Name', 'Person Type', 'HHS Appropriations Law Certification 1.0', 'HHS Records Management for All Employees Certification 1.0', 'NIH Diversity Management Training - NIDDK 1.0', and 'Actions'. The 'Actions' column contains a 'View Certifications' link. Annotations with arrows point to the 'Certifications Summary' tab, the 'View Certifications For' dropdown, and the 'View Certifications' link.

6. You will now see a list of certifications for your team member.

**NOTE:** No Items Found will be displayed if the team member is not enrolled in a certification.

**NOTE:** If the list is long, you may enter the name of a certification in the **Name** field then click **Search** to quickly find and view the certification status.

**Search**

Certifications for NIH Learner

Internal External

View Active

Name  Show Required Certifications Only

Configure Save Search Query

**Internal Certifications** Grant Certifications Add Certifications Print Export Modify Table

Showing 9 out of 9 results

Name	Version	Selected Path (% Complete)	Mastery Score	Status	Assigned By	Target Date	Actions
HHS Appropriations Law Certification	1.0	<input type="text"/> HHS Appropriations Law Online Course - 0% Completed	N/A	Acquired	JESUS BONET		Actions
NIH Diversity Management Training - NIDDK	1.0	NIH Diversity Management Training	N/A	Revoked	Kimberly HILL	06/17/2011	Actions
NIH EEO Laws & Regulations Certification - NIDDK	1.0	NIH EEO Laws & Regulations	N/A	Revoked	Kimberly HILL	06/17/2011	Actions
NIH Information Security Awareness Course Certification OBSOLETE	1.0	<input type="text"/> Recertification for the NIH Information Security Awareness Training - 0% Completed	N/A	Acquired	Thomas HOLSCHER		Actions

**Profile Quicklinks**  
 Certifications  
 Curricula  
 Competencies  
 Enrollments  
 Completed Courses  
 Continuing Education Status  
 Profile Snapshot  
 Plans

**Name** →

7. You can now view the status and percent complete for the certification path.

**STEP-BY-STEP (ADD CERTIFICATIONS TO TEAM MEMBERS)**

1. Log on to the LMS.  
**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Click on the **My Team** icon on the LMS Menu bar.



**NOTE:** If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at:  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click the **Learning** link on the left.
4. Select **Certifications** from the left menu.

## LMS Manager/Supervisor

**NOTE:** You may view team members on your alternate team by clicking the **View Certifications for** drop-down menu and selecting Alternate Team.

5. Select the **checkbox** to the left of your team member's name.
6. Click the **Add Certification** link.

The screenshot shows the LMS Manager/Supervisor interface. On the left is a navigation menu with 'Learning' and 'Certifications' highlighted. The main content area is titled 'Certifications' and includes a 'View Certifications For' dropdown menu set to 'Direct Team'. Below this is a 'Certifications Matrix' tab and a table of certifications. The table has columns for 'Person Name', 'Person Type', and 'Actions'. A 'View Certifications' link is visible in the 'Actions' column. Annotations with arrows point to the 'Learning' menu, the 'Certifications' menu, a checkbox in the table, the 'View Certifications For' dropdown, and the 'Add Certification' link in the 'Actions' column.

Person Name	Person Type	HHS Appropriations Law Certification 1.0	HHS Records Management for All Employees Certification 1.0	NIH Diversity Management Training - NIDDK 1.0	Actions	
<input type="checkbox"/>	NIH Learner	Federal	Acquired	Discontinued	Resoked	View Certifications

7. Type the name of the certification in the **name** field then click **Search**.

**Name**

**Search**

**Select and Close**

**Checkbox**

**Select and Close**

**Close**

8. Click the checkbox to the left of the Certification name and click **Select and Close**.

9. The certification will now be added to the team member’s learning plan.

## COMPETENCIES

A competency is a skill, knowledge, or behavior that can be measured, calculated, acquired, specified, or tested. Examples of competencies include “Java Programming”, “Written Communications”, “Product Knowledge”, and “People Skills”. A competency consists of one or more proficiency levels, which represent the scale on which the competency is measured. Examples of proficiency levels used at NIH include “Fundamental Awareness”, “Novice”, “Intermediate”, “Advanced”, and “Expert”.

For general information about competencies and how to use them for your team’s professional development, visit

<http://hr.od.nih.gov/workingatnih/competencies/default.htm>.

The LMS allows you to assign competencies to your team members that you want them to work on. You may assess your team member’s competency proficiency levels and find training to improve their skills and knowledge.

### STEP-BY-STEP (VIEW COMPETENCY ROLLUP ACROSS TEAM)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG-LMS Log on Instructions at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

- Click on the **My Team** icon on the LMS Menu bar.



**NOTE:** If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a LMS administrator. A list of NIH LMS administrators can be found at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

- Click the **Skills** link on the left.
- Click the **Competencies** link.
- Click **Competency Rollup Summary** from the left menu.

**NOTE:** You may click the **Alternate Team** tab to view your alternate team members. Also, you may change which competencies you wish to view by selecting an option from the **View by** drop-down menu.

**Skills**

**Competency Rollup Summary**

Competency Rollup Summary

Direct Team | **Alternate Team**

View By: All Competencies

Showing first 25 out of 51 results

Competency Name	Source	Team Members	Avg. Required Level	Avg. Held Level	Avg. Gap	Actions
Conflict Management (HHS)	Required Competency	1	3	5	0	
Flexibility (HHS)	Required Competency	1	3	4	0	
Interpersonal Skills (HHS)	Required Competency	1	3	5	0	
NIH Acquisition Planning	Required Competency	1	5	3	-2	
NIH Acquisition Planning Assistance	Required Competency	1	3	0	-3	
NIH Adaptability	Required Competency	1	1	1	0	
NIH Administrative Support	Required Competency	1	3	0	-3	
NIH Advisory Assistance	Required Competency	1	2	3	0	

**View By**

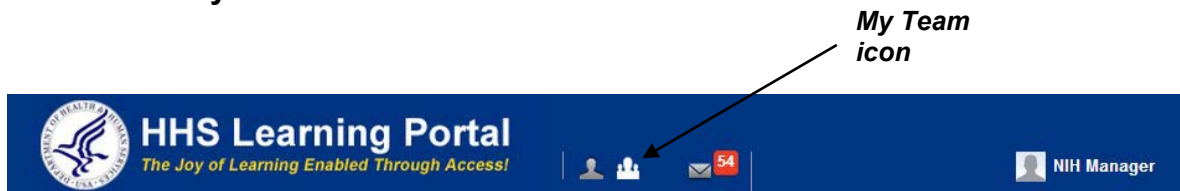
STEP-BY-STEP (VIEW TEAM MEMBER COMPETENCIES SUMMARY)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

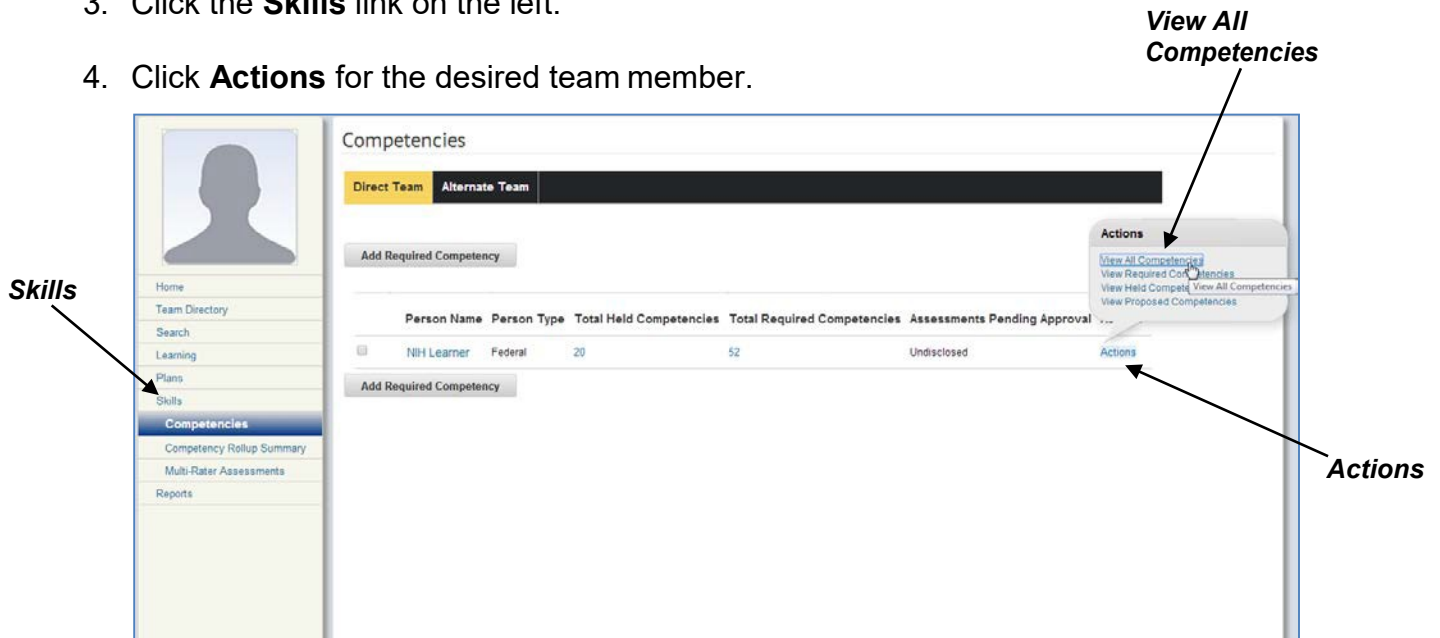
2. Click on the **My Team** icon on the LMS Menu bar.



**NOTE:** If there isn't a My Team icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click the **Skills** link on the left.
4. Click **Actions** for the desired team member.



5. Click **View All Competencies**.

NIH Learner: All Competencies

View By: All Competencies

1 2 3 Next

**All Competencies** [Add Held Competencies](#) | [Add Required Competencies](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing first 25 out of 52 results

<input type="checkbox"/>	Competency Name	Source	Required Level	Held Level	Gap	Expert	Pending Approvals	Group	Actions
<input type="checkbox"/>	NIH Financial Budget and Program Analysis		3 - Intermediate	3				NIH Accounting (GS-510), NIH Finance	Actions
<input type="checkbox"/>	NIH Achieve Desired Results		3 - Intermediate	3				NIH Executive Level Proficiencies	Actions
<input type="checkbox"/>	NIH Message Development and Delivery				0		4 - Advanced	NIH Communications Specialty (GS-1001), NIH Public Affairs (GS-1035), NIH Technical Writer Editor (GS-1085) (more)	Actions
<input type="checkbox"/>	NIH Scientific Knowledge for Administrative Staff				0		4 - Advanced	NIH Communications Specialty (GS-1001), NIH Technical Writer Editor (GS-1085), NIH Communications	Actions

**Profile Quicklinks**

- Certifications
- Curricula
- Competencies
- Enrollments
- Completed Courses
- Continuing Education Status
- Profile Snapshot
- Plans

6. You will now see a summary of all required competencies for the team member.

### STEP-BY-STEP (ACTIONS: DELETE A REQUIRED COMPETENCY)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Click on the **My Team** icon on the LMS Menu bar.



**NOTE:** If there isn't a **My Team** icon, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click on the **Skills** link on the left.



## LMS Manager/Supervisor

4. Click **Competencies** from the vertical navigation on the left side of the page.
5. Click Actions and then View All Competencies
6. Follow instructions to **View Team Member Competencies Summary** (Previous Section).
7. Click the **Actions** link in the row of the competency you want to delete.
8. Click **Delete**.

**NIH Learner: All Competencies**

A competency is a skill, knowledge, ability, or behavior that can be rated at a certain proficiency level. Competencies can be assessed by yourself, your manager, or by others.

View By: All Competencies

New Manager Assessment New MRA

1 2 Next

**All Competencies** Add Held Competencies | Add Required Competencies | Print | Export | Modify Table

Showing first 25 out of 44 results

<input type="checkbox"/>	Competency Name	Source	Required Level	Held Level	Gap	Expert	Pending Approvals	Group	Actions
<input type="checkbox"/>	<a>NIH Financial Budget and Program Analysis</a>			1 - Fundamental Awareness	1			NIH Finance, NIH Accounting (GS-510)	<a>Actions</a>
<input type="checkbox"/>	<a>NIH Reconciliation and Financial Reporting</a>			2 - Novice	2			NIH Finance, NIH Accounting (GS-510)	<a>Actions</a>
<input type="checkbox"/>	<a>NIH Influence and Negotiation</a>	Person: Jaime MARTINEZ-BORRERO (more)	5 - Expert	3 - Intermediate	-2			NIH Ethics Specialist (GS-301 or GS-343), NIH Security Specialist (GS-080), NIH Safety and Occupational Health Specialist (GS-018) (more)	<a>Actions</a>

**Actions**

- Close Gap
- View All Assessments for Competency
- New Manager Assessment
- New MRA
- Add As Expert
- Delete
- View Ratings

**Delete**

9. **Select** the source assigned to the competency.

**Delete: NIH Influence and Negotiation**

**IMPORTANT NOTE:** Competencies assigned by a Prescriptive Rule cannot be deleted by a manager. If this competency was added manually you may either delete this activity completely, remove requirements or you may choose specific plan(s) that you want to remove it from.

Delete Completely

This activity is assigned by the following source(s).

Select	Source Type	Source Name
<input checked="" type="checkbox"/>	Person	Jonathan LAPPIN
<input type="checkbox"/>	Person	Jaime MARTINEZ-BORRERO

Note: Removing or completely deleting the competency does not delete the corresponding held competency.

Remove

This activity resides on the following plan(s).

No plans found for this activity.

Delete from plan(s) Close

**Select**

**Remove**

## *LMS Manager/Supervisor*

10. Click **Remove**.
11. Click **Ok** on the confirmation pop-up.
12. You will see a confirmation message that the competency was removed.

---

### STEP-BY-STEP (ADD A REQUIRED COMPETENCY)

1. Log on to the LMS.  
**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>
2. Click on the **My Team** icon on the LMS Menu bar..  
**NOTE:** If there isn't a drop down list, you are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at.  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>
3. Click on the **Skills** tab.
4. Click **Competencies** from the vertical navigation on the left side of the page.
5. Click the **checkbox** next to the name of one or more team members.
6. Click **Add Required Competency**.

**Checkbox**

**Competencies**

**Add Required Competency**

Person Name	Person Type	Total Held Competencies	Total Required Competencies	Assessments Pending Approval	Actions
<input checked="" type="checkbox"/> NIH Learner	Other	17	44	Undisclosed	Actions
<input type="checkbox"/> NIH LearningAdmin	Other	0	1	Undisclosed	Actions
<input type="checkbox"/> NIH LocalLearningRegistrar	Other	0	1	Undisclosed	Actions
<input type="checkbox"/> NIH PeopleAdmin	Other	0	5	Undisclosed	Actions

7. Enter the name of the competency you wish to add in the **Name** field.

**NOTE:** NIH competencies are prefixed with NIH.

8. Click **Search**.


**NOTE:** Clicking search without entering a competency will show all competencies in your search results.

9. Select the **checkbox** for the competency you wish to add.

10. Click Set Required Levels.

### Add Required Competencies to Team Members

1. Select Competencies **→** 2. Set Required Levels

Name  Competency Group  

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

Competencies [Modify Table](#)

Showing 1 out of 1 results

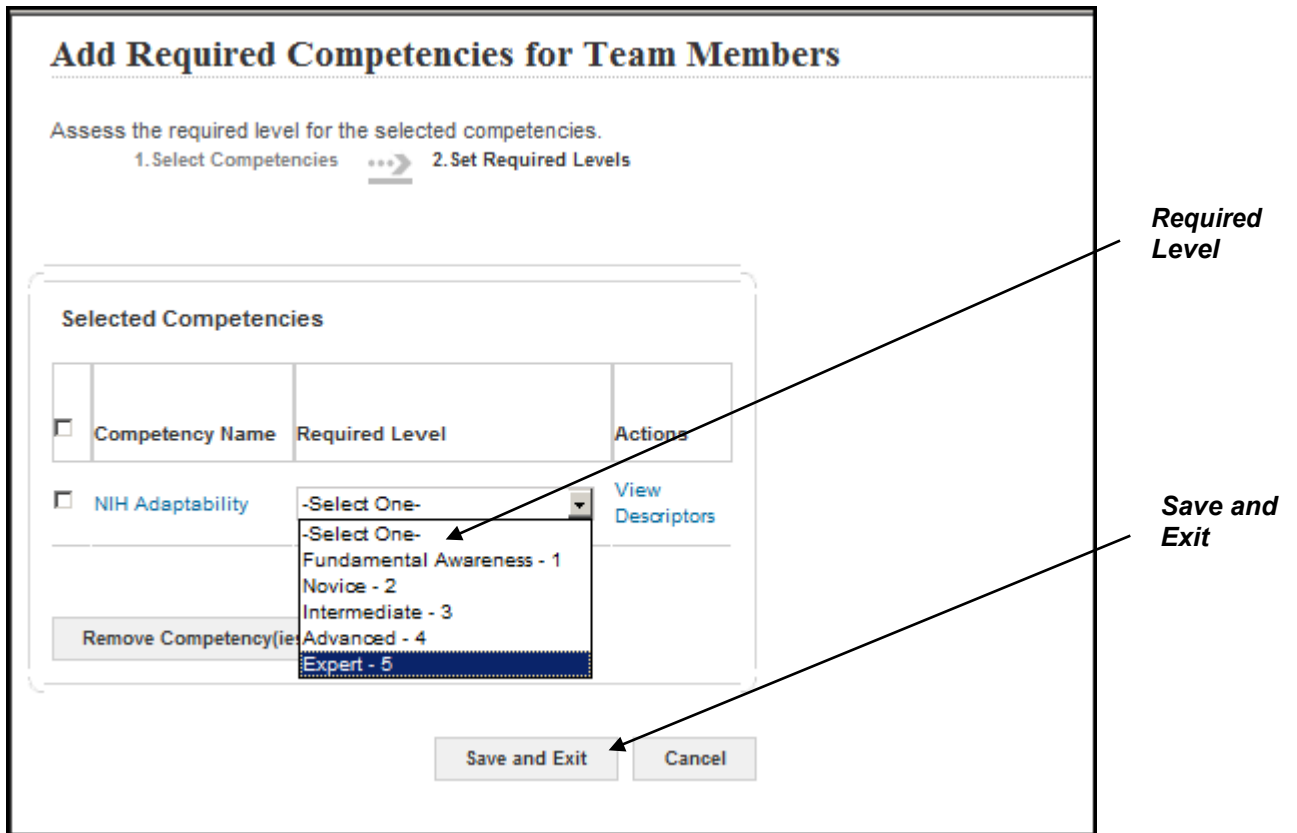
<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	NIH Adaptability

Name

Checkbox

Set Required Levels

11. Select the **Required Level** you wish the team member to attain by selecting a level from the drop-down menu.



12. Click **Save and Exit**.

13. The competency will now be required by the team member.

---

#### STEP-BY-STEP (VIEW TEAM MEMBER ASSESSMENTS)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Click on the **My Team** icon on the LMS Menu bar.

**NOTE:** If there isn't a **My Team** icon, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

## LMS Manager/Supervisor

3. Click on the **Skills** tab.
4. Click **Competencies** from the vertical navigation on the left side of the page.
5. Click the **Actions** link in the row of the team member whose assessments you want to view.
6. Click **View Required Competencies** for the desired team member.

**NOTE:** Only competencies that have been assessed will yield results.

The screenshot shows the 'Competencies' page in the LMS Manager/Supervisor interface. The page has a left-hand navigation menu with options like Home, Team Directory, Search, Learning, Plans, Skills, and Competencies (which is highlighted). The main content area is titled 'Competencies' and has two tabs: 'Direct Team' (selected) and 'Alternate Team'. Below the tabs is an 'Add Required Competency' button and a 'Modify Table' link. A table lists team members with the following columns: Person Name, Person Type, Total Held Competencies, Total Required Competencies, Assessments Pending Approval, and Actions. The table contains four rows of data:

	Person Name	Person Type	Total Held Competencies	Total Required Competencies	Assessments Pending Approval	Actions
<input checked="" type="checkbox"/>	NIH Learner	Other	17	44	Undisclosed	Actions
<input type="checkbox"/>	NIH LearningAdmin	Other	0	1	Undisclosed	Actions
<input type="checkbox"/>	NIH LocalLearningRegistrar	Other	0	1	Undisclosed	Actions
<input type="checkbox"/>	NIH PeopleAdmin	Other	0	5	Undisclosed	Actions

Below the table is another 'Add Required Competency' button. An arrow points from the text 'View Required Competencies' to the 'View Required Competencies' link in the Actions column of the first row.

7. Click the **Actions** link in the row of the competency for which you'd like to view the assessment.
8. Click **View Assessments**.

### NIH Learner: Required Competencies

A required competency is a competency that has been assigned to you.

Show only competencies that have never been assessed. View By: All Required Competencies

New Manager Assessment New MRA Submit 1 2 Next

**Required Competencies** Add Required Competencies | Print | Export | Modify Table

Showing first 25 out of 41 results

<input type="checkbox"/>	Expert	Competency Name	Source	Required Level	Held Level	Gap	Pending Approvals	Group	Actions
<input type="checkbox"/>		NIH Acquisition Planning	Person: Jaime MARTINEZ-BORRERO (more)	5 - Expert	4 - Advanced	-1		NIH Finance, NIH Administrative Officer (GS-341), NIH Contracting Specialist (GS-1102)	<a>Actions</a>
<input type="checkbox"/>		NIH Acquisition Planning Assistance	Person: Jonathan LAPPIN	3 - Intermediate		-3		NIH Administrative Technician (GS-303)	<a>Actions</a>
<input type="checkbox"/>		NIH Adaptability	Self: NIH Learner	1 - Fundamental Awareness	1 - Fundamental Awareness	0		NIH Ethics Specialist (GS-301 or GS-343), NIH Technology Transfer, NIH Public Affairs (GS-1035) (more)	<a>Actions</a>

**Profile Quicklinks**

- Certifications
- Curricula
- Competencies
- Current Learning
- Completed Learning

**Actions**

- Delete
- Close
- View Assessments
- New Manager Assessment
- New MRA

9. You will now see the results of the assessment for the competency you selected.

### NIH Acquisition Planning: View All Assessments

Competency Name: NIH Acquisition Planning

Description: Develops and guides program management through a comprehensive plan for fulfilling acquisition needs in a timely manner and at a reasonable cost in accordance with Federal and Departmental regulations, policies and procedures.

Current Required Level: 5 - Expert

Current Held Level: 4 - Advanced

**Assessments for Held Level** Print | Export | Modify Table

Showing 1 out of 1 results

Date	Method	Details	Assessed Level	Approval Status	In Calculation?	Comments	Actions
12/18/2010	Manager Assessment	Jaime MARTINEZ-BORRERO	4 - Advanced		Yes	This is for SSO Testing purposes only.	<a>Actions</a>

**Expert List**

No items found

Cancel

## LMS Manager/Supervisor

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Click on the **My Team** icon on the LMS Menu bar..

**NOTE:** If there isn't a **My Team** icon, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click on the **Skills** tab.

4. Click **Competencies** from the vertical navigation on the left side of the page.

5. Click the **Action** link in the row of the team member for whom you want to create a new manager assessment.

6. Click **View Required Competencies**.

The screenshot shows the 'Competencies' page in the LMS. On the left is a vertical navigation menu with 'Competencies' highlighted. The main content area has tabs for 'Direct Team' and 'Alternate Team'. Below the tabs is a table with columns: Person Name, Person Type, Total Held Competencies, Total Required Competencies, Assessments Pending Approval, and Actions. A callout box points to the 'Actions' column, showing options: 'View All Competencies', 'View Required Competencies', 'View Held Competencies', and 'View Proposed Competencies'. Annotations with arrows point to the 'Competencies' menu item, the 'Person Name' column header, the 'View Required Competencies' option in the callout, and the 'Actions' column header.

Person Name	Person Type	Total Held Competencies	Total Required Competencies	Assessments Pending Approval	Actions
<input type="checkbox"/> NIH Learner	Other	17	44	Undisclosed	Actions
<input type="checkbox"/> NIH LearningAdmin	Other	0	1	Undisclosed	Actions
<input type="checkbox"/> NIH LocalLearningRegistrar	Other	0	1	Undisclosed	Actions
<input type="checkbox"/> NIH PeopleAdmin	Other	0	5	Undisclosed	Actions

7. Click the **checkbox** next to the competencies that you want to create a new manager assessment.



8. Click New Manager Assessment tab.

New  
Manager  
Assessment

A required competency is a competency that has been assigned to you.

Show only competencies that have never been assessed.

View By: All Required Competencies

1 2 Next

**Required Competencies** [Add Required Competencies](#) | [Print](#) | [Export](#) | [Modify T](#)

Showing first 25 out of 41 results

<input type="checkbox"/>	Expert	Competency Name	Source	Required Level	Held Level	Gap	Pending Approvals	Group	Actions
<input checked="" type="checkbox"/>		NIH Acquisition Planning	Person: Jaime MARTINEZ-BORRERO (more)	5 - Expert	4 - Advanced	-1		NIH Finance, NIH Administrative Officer (GS-341), NIH Contracting Specialist (GS-1102)	Actions
<input type="checkbox"/>		NIH Acquisition Planning Assistance	Person: Jonathan LAPPIN	3 - Intermediate		-3		NIH Administrative Technician (GS-303)	Actions
<input type="checkbox"/>		NIH Adaptability	Self: NIH Learner	1 - Fundamental Awareness	1 - Fundamental Awareness	0		NIH Ethics Specialist (GS-301 or GS-343), NIH Technology Transfer, NIH Public Affairs (GS-1035) (more)	Actions

**Profile Quicklinks**

- Certifications
- Curricula
- Competencies
- Current Learning
- Completed Learning

**Actions**

- Delete
- Close Gap
- View Assessments
- New Manager Assessment
- New MRA

Checkbox

9. Select the **New Assessed Level** from the drop down menu.

Descriptors screen will open when clicking on View Descriptors link

New Assessed Level

Level	Description
1 - Fundamental Awareness	You have a common knowledge or an understanding of basic techniques and concepts.
2 - Novice	You have the level of experience gained in a classroom and/or experimental scenarios or as a trainee on-the-job. You are expected to need help when performing this skill.
3 - Intermediate	You are able to successfully complete tasks in this competency as requested. Help from an expert may be required from time to time, but you can usually perform the skill independently.

**NOTE:** To view the descriptors for the levels, click the **View Descriptors** link.

11. Add **Comments** as needed.

12. Click **Save**.

New Assessed Level

Comments

Save

13. The team member will now hold the new level for the competency.

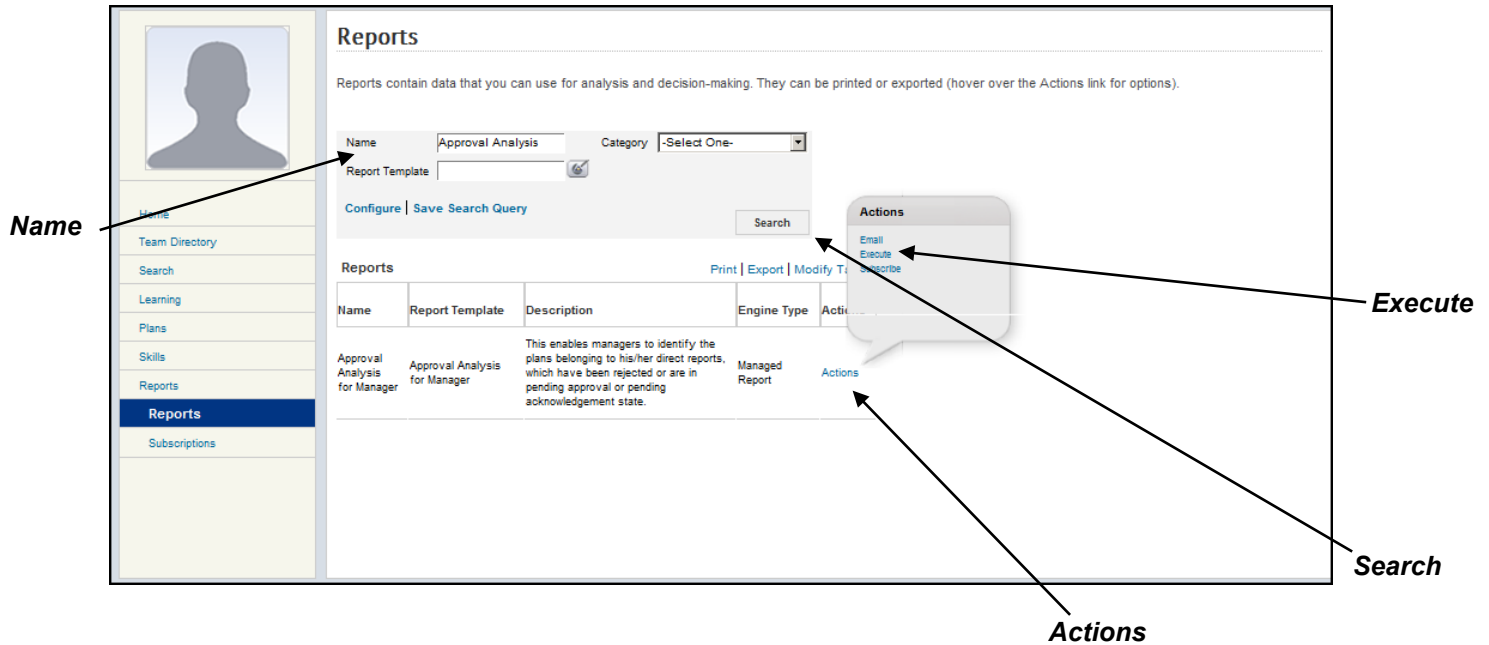
## REPORTS FOR THE MANAGER

### RUNNING REPORTS

Under the **Reports** tab on the Team Home page, the manager/supervisor has access to a variety of reports in the LMS. Reports can be generated, exported, printed, emailed and subscribed to if desired. Below you will find instructions on how to work with reports in the LMS.

#### STEP-BY-STEP (GENERATE A REPORT)

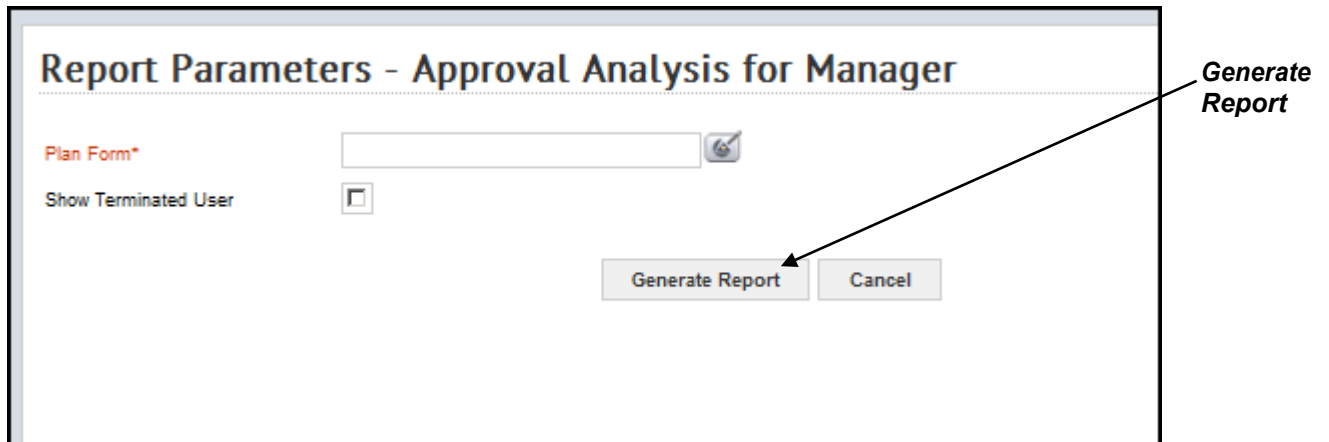
1. Log on to the LMS.  
**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at: <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>
2. Click on the **My Team** icon on the LMS Menu bar.  
**NOTE:** If there isn't a **My Team** icon, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>
3. Click **Reports**.
4. Enter the name of the report which you wish to view into the **Name** field.
5. Click **Search**.  
**NOTE:** If click **Search** without completing the search fields, all available reports will be displayed.
6. Click the **Actions** link.
7. Click **Execute**.



8. Enter values for all **required fields**.

**NOTE:** Required field names are displayed with **red letters** and must contain a value to run the report. All other fields are optional.

9. Click **Generate report** when you are finished entering in report parameters.

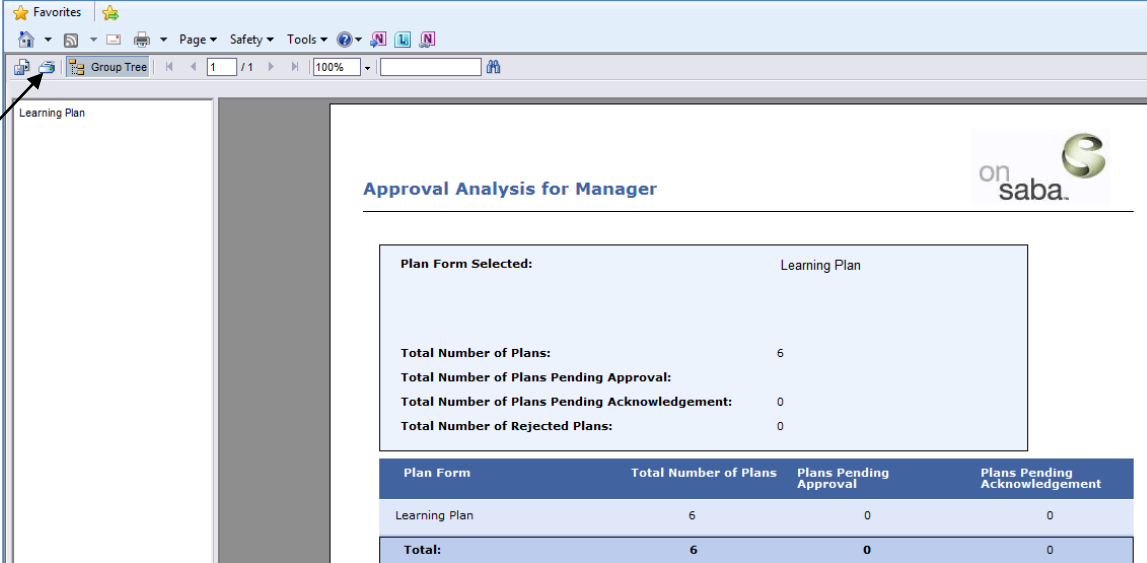


10. You will now see the report on your screen.

**NOTE:** The time it takes the report to generate will be determined by a number of variables such as the report parameters entered, users concurrently using the system, and your internet connection speeds. If no results are found, try changing your parameters or call the help desk for assistance.

## STEP-BY-STEP (PRINT A REPORT)

1. Generate a report. (For instructions on generating reports see the Step-By-Step directions above (Generate Report))
2. Click the **Print icon** in the upper left corner of the report.



The screenshot shows a web browser window displaying the 'Approval Analysis for Manager' report. The report title is 'Approval Analysis for Manager' and the logo 'on saba.' is visible in the top right. The report content includes a summary box with the following information:

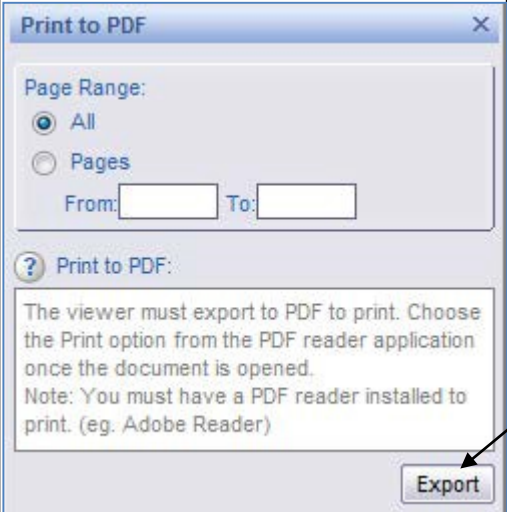
Plan Form Selected:	Learning Plan
Total Number of Plans:	6
Total Number of Plans Pending Approval:	0
Total Number of Plans Pending Acknowledgement:	0
Total Number of Rejected Plans:	0

Below the summary box is a table with the following data:

Plan Form	Total Number of Plans	Plans Pending Approval	Plans Pending Acknowledgement
Learning Plan	6	0	0
<b>Total:</b>	<b>6</b>	<b>0</b>	<b>0</b>

An arrow labeled 'Print icon' points to a printer icon in the top left corner of the report area.

3. Indicate the **Page Range** you want, and click **export**.



The screenshot shows a 'Print to PDF' dialog box. The 'Page Range' section has 'All' selected. The 'Export' button is highlighted with an arrow labeled 'Export'.

Print to PDF

Page Range:

All

Pages

From:  To:

? Print to PDF:

The viewer must export to PDF to print. Choose the Print option from the PDF reader application once the document is opened.

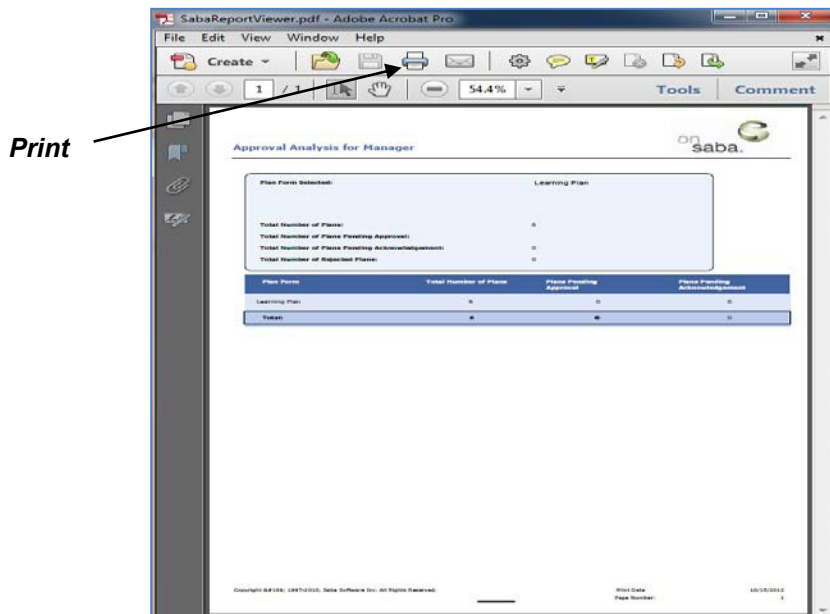
Note: You must have a PDF reader installed to print. (eg. Adobe Reader)

Export

4. You will be prompted to open or save the file. Click **Save**.
5. Locate where you want to save the file and give it a meaningful name; click **Save**.

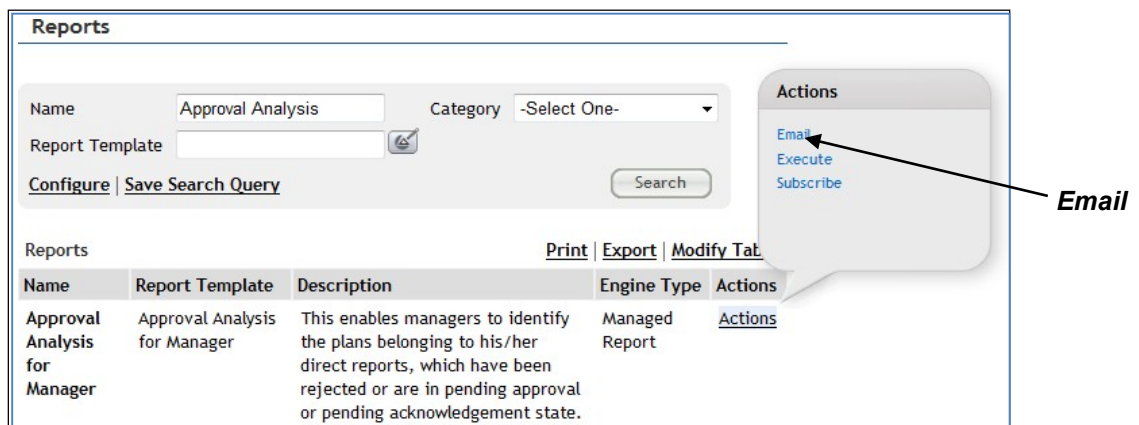
## LMS Manager/Supervisor

6. You will receive a prompt when the download is complete. Click **Open** to open the report file you just downloaded in Adobe Reader and click the Adobe Reader **Print** icon to send the report to your printer.



## STEP-BY-STEP (EMAIL A REPORT)

1. Search for a report. (For instructions on searching for reports see the Step-By-Step instructions above (Generate Report))
2. From the Reports Page, click the **Email** link from the Actions Pop Up Menu.



3. Enter one or more recipient email addresses in the **To Email Address(es)** field.
4. Modify the **Subject** and **Mail Text** fields to appear as you want them in the email.
5. Choose a **Report Format** from the drop-down choices.

**To Email Address(es)**

6. Select a **Plan Form**.

Run Reports > Email HHS All ...

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

Character Limit:255

Subject\*

Mail Text\*

Character Limit:255

Report Format\* Acrobat Format (PDF)

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

Preview Report Send Cancel

*Preview*

*Send*

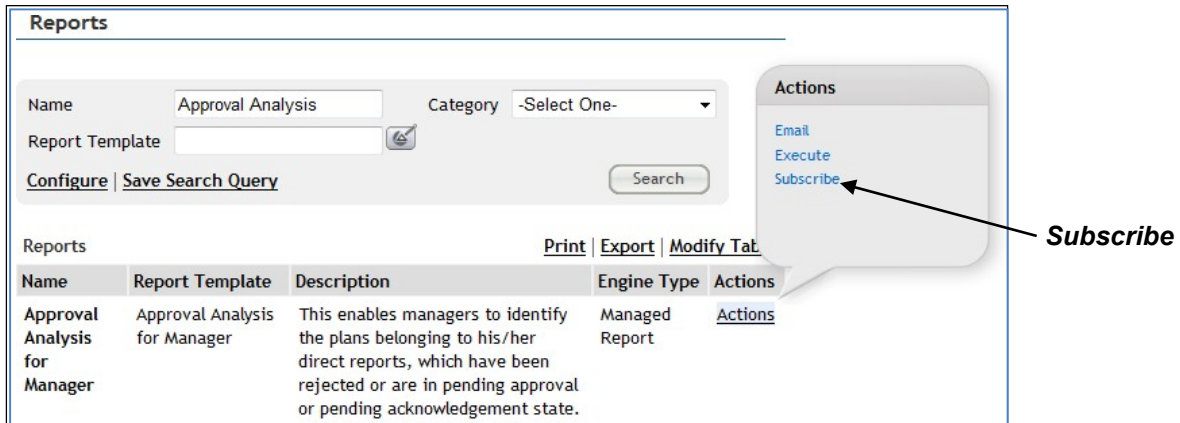
**IMPORTANT:** All fields in red with an asterisk (\*) require data in order to save changes.

7. Click **Preview Report** to see the report as it will appear with the parameters you entered.
8. Review the report and click the **Send button** to send the report to the email recipients.

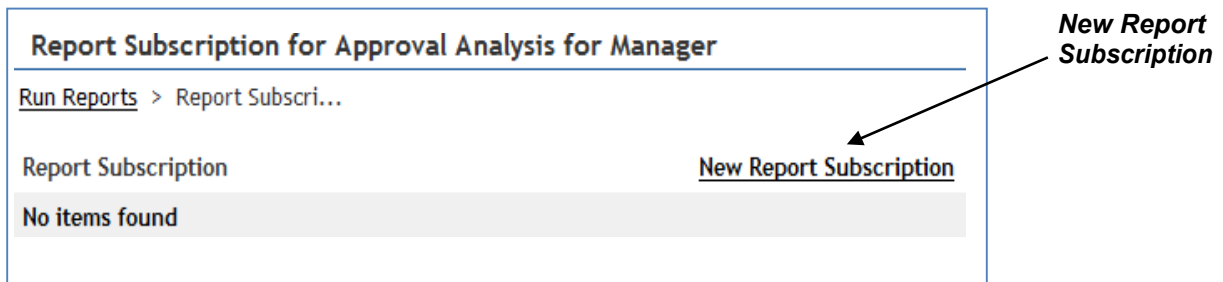
---

#### STEP-BY-STEP (SUBSCRIBE TO A REPORT)

1. Search for a report. (For instructions on searching for reports see the Step-By-Step instructions above (Generate Report))
2. From the Reports Page, click the **Subscribe** link from the Actions Pop Up Menu.



3. Click the **New Report Subscription** link on the right.



4. Enter a **Name** for the report subscription and a meaningful **Description**.

**NOTE:** The fields required beyond this point **will vary depending upon the report you are running**. Complete all required fields listed in red.

5. Select the **Plan Form**.

6. Enter an email address into the **To** field.

7. Modify the **Subject** and **Mail Text** fields to appear as you want them in the email.

8. Choose a **Report Format** from the drop-down choices.

9. Select how often the report generation Occurs: **Daily**, **Weekly**, or **Monthly**, and indicate the number for each.

10. Set corresponding options for **Frequency**.

11. Click **Preview** to see the report as it will appear.

12. Click **Save** to activate the report subscription. The report will send at the times you designated, to email recipients you entered.



**Report Subscription for Approval Analysis for Manager**

Run Reports > Report Subscri... > Report Subscri...

Report Subscription Name\* Approval Analysis for Manager

Description\* Send Monthly IC reports

Plan Form\* Leaning Plan

Show Terminated User

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

Character Limit:255  
Remaining character count: 255

Subject\* Approval Analysis for Manager

Mail Text\* This monthly report is for approval analysis

Character Limit:255  
Remaining character count: 211

Report Format\* Acrobat Format (PDF)

Occurs  Daily  Weekly  Monthly

Occurs Daily Every\* 1 day(s)

Frequency  Once  Every 1 Hour(s)

Start Time\* 09 : 00 a.m. p.m.

Start Date\* 01/01/2014

Preview Report Save Cancel

**Labels:** Name, Description, Subject, Mail Text, Occurs, Start Time, Start Date, Plan Form, To, Report Format, Frequency, Save

**IMPORTANT:** All fields in red with an asterisk (\*) require data in order to save changes.

- Click the subscription title to edit details, or click the red **X** to delete the subscription.

**Report Subscription for Approval Analysis for Manager**

Run Reports > Report Subscri...

Report Subscription [New Report Subscription](#) | [Print](#) | [Export](#)

Showing 1 out of 1 results

Name	Description	Actions
<a href="#">Approval Analysis for Manager</a>	Send Monthly IC Reports	

**Label:** Delete

## LEARNING PLANS

Under the **Plans** link on the Team Home page, the manager/supervisor can view, add, and edit the activities that are on their team's current learning plans.

## MANAGING YOUR LEARNING PLAN

### STEP-BY-STEP (VIEW ACTIVITIES FOR A TEAM MEMBER IN TEAM PLANS)

1. Log on to the LMS.

**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>

2. Click on the **My Team** icon on the LMS Menu bar.

**NOTE:** If there isn't a drop down list, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at

<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>

3. Click on **Plans**.
4. Click **Actions** to view the Actions pop-up window.
5. Click **View All Plans** in the Actions pop-up window.

LMS Manager/Supervisor **My Team Icon**

**My Team Plans**

If a member of your staff is not on your list, contact your LMS Administrator.  
Blank Plans may have been assigned by your administrator and appear under the "Draft" column. If not, select the employee(s) without the Plan and create the Plan for them by clicking the "CREATE ... PLAN" button.  
Click the underlined number in the columns or use the "Actions" link below to bring up all the plans for an employee.

Direct Team    Alternate Team

Activate Plan    CREATE Training PLAN    Add Activity or Critical Element

**Direct Team Plans**

Person Name	Person Type	Draft	Pending Approval	Pending Acknowledgement	Activated	Completed	Cancelled	Not Signed	ACB...
<input type="checkbox"/> NIH Learner	Other	0	0	0	1	0	0	0	Actions
<input type="checkbox"/> NIH LearningAdmin	Other	0	0	0	1	0	0	0	Actions
<input type="checkbox"/> NIH LocalLearningRegistrar	Other	0	0	0	1	0	0	0	Actions
<input type="checkbox"/> NIH PeopleAdmin	Other	0	0	0	1	0	0	0	Actions

Activate Plan    CREATE Training PLAN    Add Activity or Critical Element

Plans

View All Plans

Actions

6. Click on **Learning Plan** under the Plan Name column.

**Plans for NIH Learner**

All Performance and Learning Plans in the identified Status are listed for this employee.  
To view or update a Plan, click on the **Plan Name** below.  
[Click here to view PMAP policies and procedures.](#)  
If an employee declines their Performance Plan, it is recommended that you consider notifying the employee that the plan is official and is final as previously submitted.

Back to Team View

View Plans by Status: All

Activate Plan

Modify Table

Showing 1 out of 1 results

Plan Name	Status	Start Date	End Date	Plan Type	Actions
<input type="checkbox"/> Learning Plan	Activated			Learning Plan	Actions

Activate Plan    Back to Team View

Learning Plan

7. You will now view that team member's learning plan.

Plan Details: Learning Plan Printer Friendly View

Activities/Critical Elements | Details/Instructions | Change Log

Plan Name: Learning Plan      Status: Activated  
 Assignee: NIH Learner      Approval Policy: No Approval

View Current Activities     View Closed Activities

**Assigned Learning** Add Element or Activity | Modify Table

Name	Version	Type	Due Date	Completed On	Status	Source	Mandatory	Is Compliant	Actions
Learning With Saba	1.0	Course	07/22/2010		In Progress	NIH Manager	<input type="checkbox"/>		Actions
Test Goal		Goal	12/31/2010		<div style="display: inline-block; width: 100px; height: 10px; background-color: #ccc; border: 1px solid #000; position: relative;"> <div style="position: absolute; left: 0; top: 0; bottom: 0; width: 0%; background-color: #000;"></div> <span style="position: absolute; left: 0; top: 0; bottom: 0; width: 0%; background-color: #000; font-size: 8px;">New: 0% Completed</span> </div>	NIH Manager	<input type="checkbox"/>		Actions
NIH NIAID OWER ELD Working with Contractors at NIAID		Course	06/01/2012		New	Ann WITHINGTON	<input type="checkbox"/>		Actions

STEP-BY-STEP (ADD ACTIVITY TO A TEAM MEMBER IN TEAM PLANS)

1. Log on to the LMS.  
**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at: <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>
  
2. Click on the **My Team** icon on the LMS Menu bar.  
**NOTE:** If there isn't a drop down list, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at <https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>
  
3. Click on the Click on **Plans**.
  
4. Select the **checkbox** associated with the team member you want to add an activity for.  
**NOTE:** You may select more than one team member at a time.
  
5. Click Add Activity or Critical Element.

6. Select the activity or element you wish to add from the popup menu.

Plans

Checkbox

Add Activity or Critical Element

7. Fill in the required information and then click **Save**.

**IMPORTANT:** All fields in red with an asterisk (\*) require data in order to save changes.

Add Course

\* = required

Course\* NIH Orientation

Notes

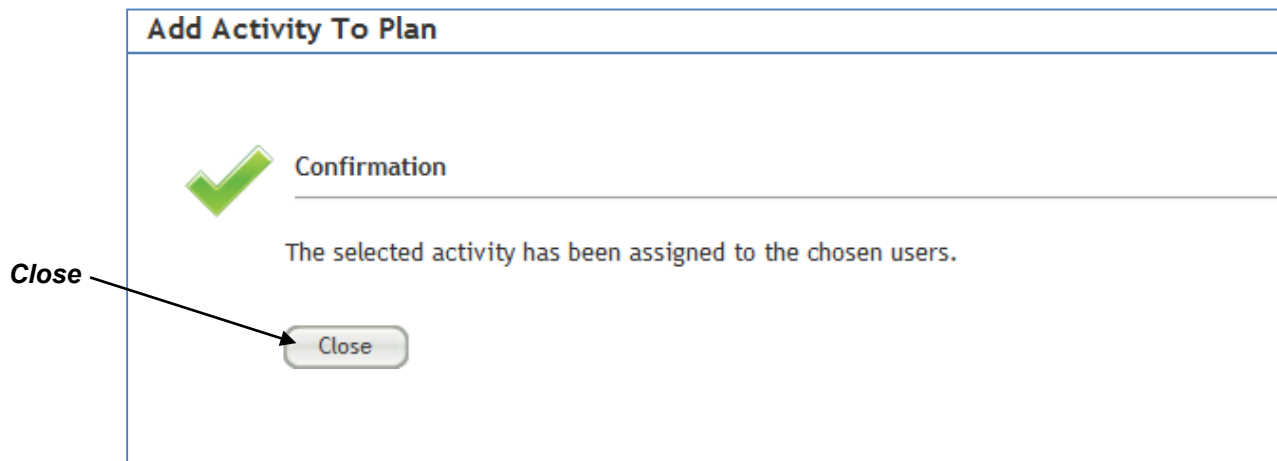
Due Date\* 12/04/2012

Save Cancel

Save

8. The item will be added to the team member's learning plan.

9. Click **Close**.



---

#### STEP-BY-STEP (DELETE AN ACTIVITY IN A TEAM MEMBER'S PLAN)

1. Log on to the LMS.  
**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>
2. Click on the **My Team** icon on the LMS Menu bar.  
**NOTE:** If there isn't a **My Team** icon, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>
3. Click on the **Plans** tab.
4. Click **Actions** to view the Actions pop-up window.
5. Click **View All Plans** in the Actions pop-up window.

**Plans**

**View All Plans**

**Actions**

6. Click on **Learning Plan** under the Plan Name column.

**Learning Plan**

7. Click **Actions** on the line associated with the activity you wish to delete.

8. Click **Delete** from the Actions pop-up window.

**Plan Details: Learning Plan** Printer Friendly View

Activities/Critical Elements | **Details/Instructions** | Change Log

Plan Name: Learning Plan      Status: Activated  
 Assignee: NIH Learner      Approval Policy: No Approval

View Current Activities     View Closed Activities

**Assigned Learning** Add Element or Activity | Modify T

Name	Version	Type	Due Date	Completed On	Status	Source	Mandatory	Is Compliant	Actions
Learning With Saba	1.0	Course	07/22/2010		In Progress	NIH Manager	<input type="checkbox"/>		Actions
Test Goal		Goal	12/31/2010		New: 0% Completed	NIH Manager			Actions
NIH NIAID OWER ELD Working with Contractors at NIAID		Course	06/01/2012		New	Ann WITHINGTON	<input type="checkbox"/>		Actions

Actions

- Edit
- View Progress
- View Enrollment
- View Completed Course
- Delete

Actions

Delete

Actions

9. Click **Delete Completely** when you see this next screen.

**Delete: Test**

"IMPORTANT NOTE: Competencies assigned by a Prescriptive Rule cannot be deleted by a manager." If this competency was added manually you may either delete this activity completely, remove requirements or you may choose specific plan(s) that you want to remove it from.

This activity is assigned by the following source(s).

Select	Source Type	Source Name
<input type="checkbox"/>	Person	NIH Supervisor

This activity resides on the following plan(s).

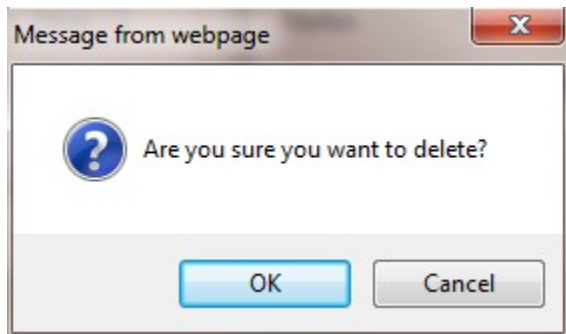
Select	Plan Name	Status
<input type="checkbox"/>	Learning Plan	Activated

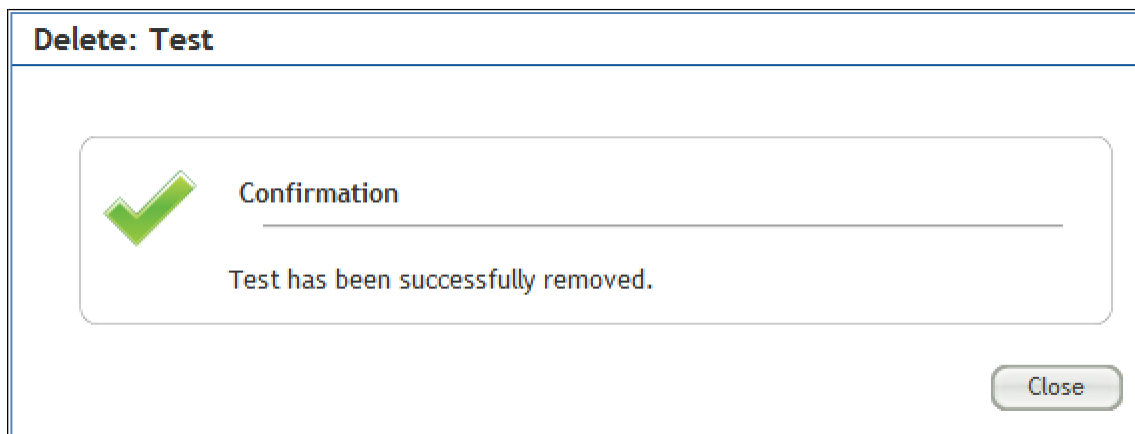
Delete Completely

10. Click **OK**.





11. The activity is now deleted. Click **Close**.



---

## STEP-BY-STEP (REGISTER A TEAM MEMBER FOR TRAINING FROM A LEARNING PLAN)

1. Log on to the LMS.  
**NOTE:** For instruction about logging on, see the QRG- LMS Log on Instructions at:  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/ts02-l-employee-log.pdf>
2. Click on the **My Team** icon on the LMS Menu bar.  
**NOTE:** If there isn't a drop down list, then they are not set up as a supervisor in the LMS. Please contact a system administrator. A list of system administrators can be found at  
<https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf>
3. Click on the **Plans**.
4. Click **Actions** to view the Actions pop-up window.

5. Click **View All Plans** in the Actions pop-up window.

**Plans**

**View All Plans**

**Actions**

Person Name	Person Type	Draft	Pending Approval	Pending Acknowledgement	Activated	Completed	Cancelled	Not Signed	Actions
NIH Learner	Other	0	0	0	1	0	0	0	Actions
NIH LearningAdmin	Other	0	0	0	1	0	0	0	Actions
NIH LocalLearningRegistrar	Other	0	0	0	1	0	0	0	Actions
NIH PeopleAdmin	Other	0	0	0	1	0	0	0	Actions

6. Click on **Learning Plan** under the Plan Name column.

**Learning Plan**

Back to Team View

View Plans by Status: All

Activate Plan

Modify Table

Showing 1 out of 1 results

Plan Name	Status	Start Date	End Date	Plan Type	Actions
Learning Plan	Activated			Learning Plan	Actions

Activate Plan

Back to Team View

7. Click the **Actions** link in the row with the learning you want to register for.

8. Click **Register** in the Actions pop-up window.

## LMS Manager/Supervisor

NIH Clinical Center: Fire Safety Training for Health Care Personnel	2014	Course	12/31/2014	In Progress	NIH Learner	<input type="checkbox"/>	Actions
NIH 2-Way Match Invoice Processing	1	Course	01/07/2015	New	NIH Me		Actions
Alternative Dispute Resolution (ADR)	2.1	Course		Not Evaluated	Test Prescriptive Rule	<input type="checkbox"/>	Actions

Actions

- Edit
- Register
- View Enrollment
- View Completed Course
- Delete

**Register**

9. The Learning Catalog now appears.

10. Click on the **Register** link for the offering that you would like to register your team member for.

### Search the Catalog

You may use a percent sign % as a wildcard character.

[Download Catalog Guide](#)

Location

Delivery Type

Language

Category

Competency

ID

Title

Keyword

Start Date >=

End Date <=

Facility

Currency

Field of Study

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

---

#### Learning Offerings

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

Showing 1 out of 1 results

Title	Version	Delivery Type	Start Date	End Date	Session	Location	Facility	Language	Default Credits	Course ID	Price	Actions
Alternative Dispute Resolution (ADR)	2.1	Online Training						English		ED6016	0.00 USD	Register

**Register**

**IMPORTANT!** Offerings with tuition must have a CAN to make the registration official.

11. You will now see a registration confirmation page.

## Registration Confirmation

Thank you, your request has been processed. Please check your email or In-Progress Learning for training status updates.

[Printer Friendly Version](#)

Order Contact	NIH Manager
Billed To	HNAM6
Order Status	Confirmed
Order Number	02491183

### Order Items

Title	Learners	Delivery Type	Status	Actions	Price
Alternative Dispute Resolution (ADR)	NIH Learner	Online Training	Confirmed	<a href="#">Notes</a>	0.00 USD

<b>Order Total</b>	<b>0</b>
<b>Discount</b>	<b>0</b>
<b>Total</b>	<b>0</b>

[Go to Current Learning](#)

## HELPFUL INFORMATION

HHS Learning Portal log on page

<https://lms.learning.hhs.gov>

NIH LMS Help Desk

Submit your LMS Help Desk Tickets to:

[https://nihohrweb.nih.gov:1010/  
WiTS\\_IntraHR/index.aspx](https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx)

NIH Training Center web site

<http://trainingcenter.nih.gov>

NIH LMS Information and support information

[http://trainingcenter.nih.gov/lms\\_courses.html](http://trainingcenter.nih.gov/lms_courses.html)

<https://hr.nih.gov/hr-systems/lms>

LMS Administrators in the ICs

[https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-  
admin-list.pdf](https://hr.nih.gov/sites/default/files/public/documents/hr-systems/lms/pdf/nih-lms-admin-list.pdf)

NIH CIT Help Desk

<http://itservicedesk.nih.gov/>