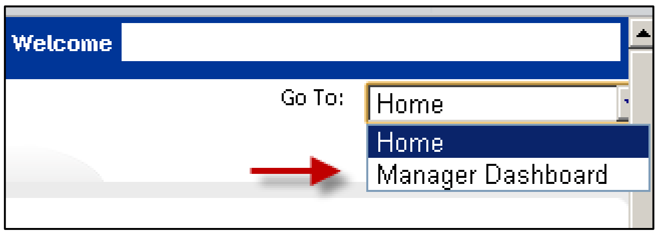
Using the Manager's Dashboard

The reporting relationship in the Duke LMS comes from the approver role in the SAP system. If you are established in Duke@Work as a timesheet approver, you can manage the learning activities for those employees and their employees.

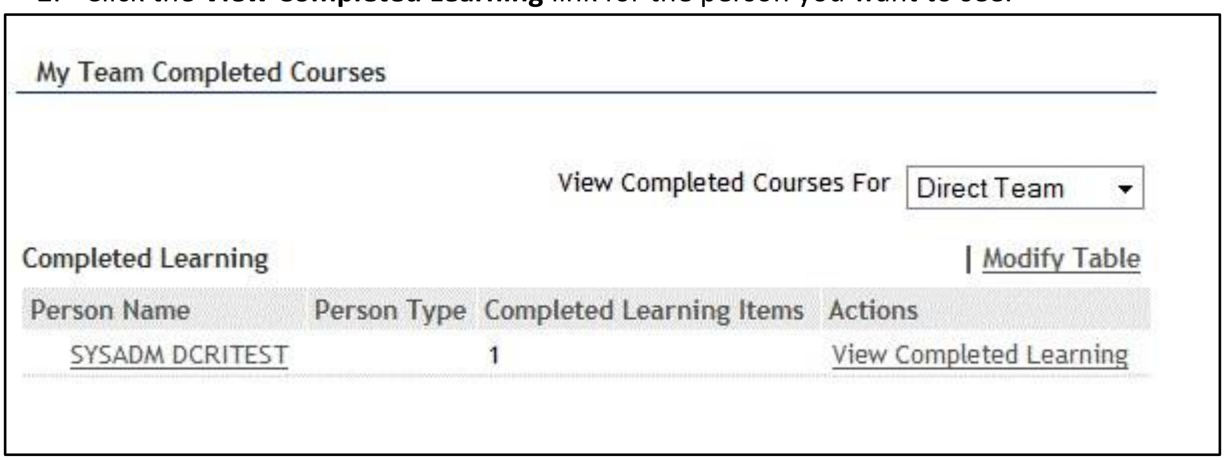
Log Into the Manager's Dashboard

1. Log into the LMS.
2. In the upper-right **Go To** field, select **Manager Dashboard**.



View the Completed Courses for Your Direct Report

1. At the Manager Dashboard main screen, click **My Team Transcripts**.
2. Click the **View Completed Learning** link for the person you want to see.



1. The top of the screen represents the search criteria that you will use to find the completed training in the LMS. Notice that the default only displays the training completed in the past six months. You can adjust the dates and delivery type, then click **Search**.

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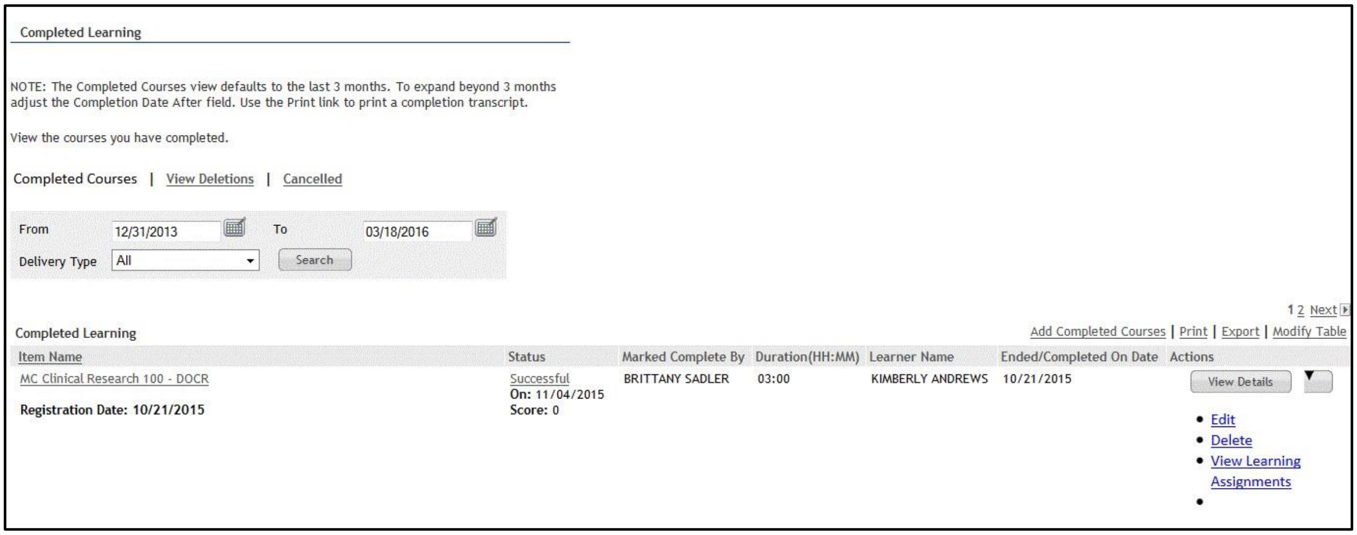
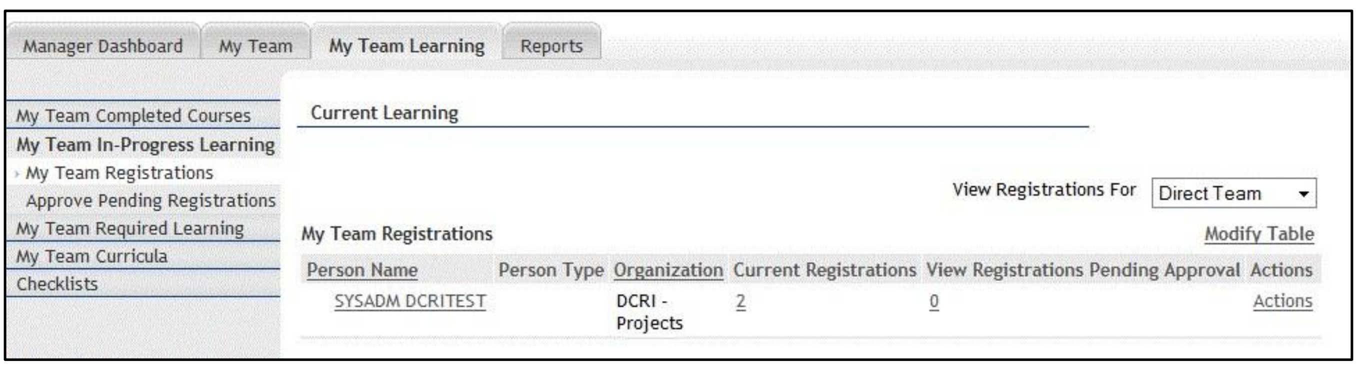


View In-Progress Learning for Your Direct Report

In-Progress Learning includes courses for which the learner is registered, enrolled, or awaiting approval.

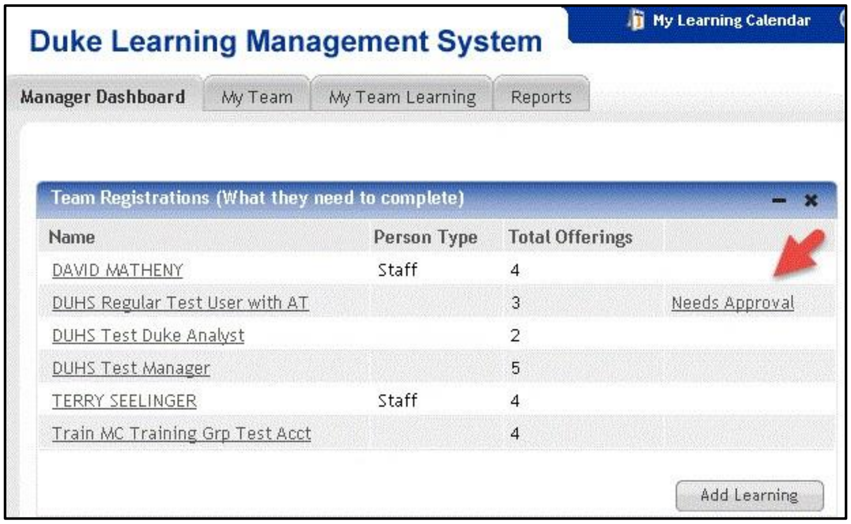
1. At the Manager Dashboard main screen, click **My Team Enrollments**.
2. Click the **Number** under Current Enrolments for a staff member to view a list of course they are enrolled. To view details for a specific course click the course name.



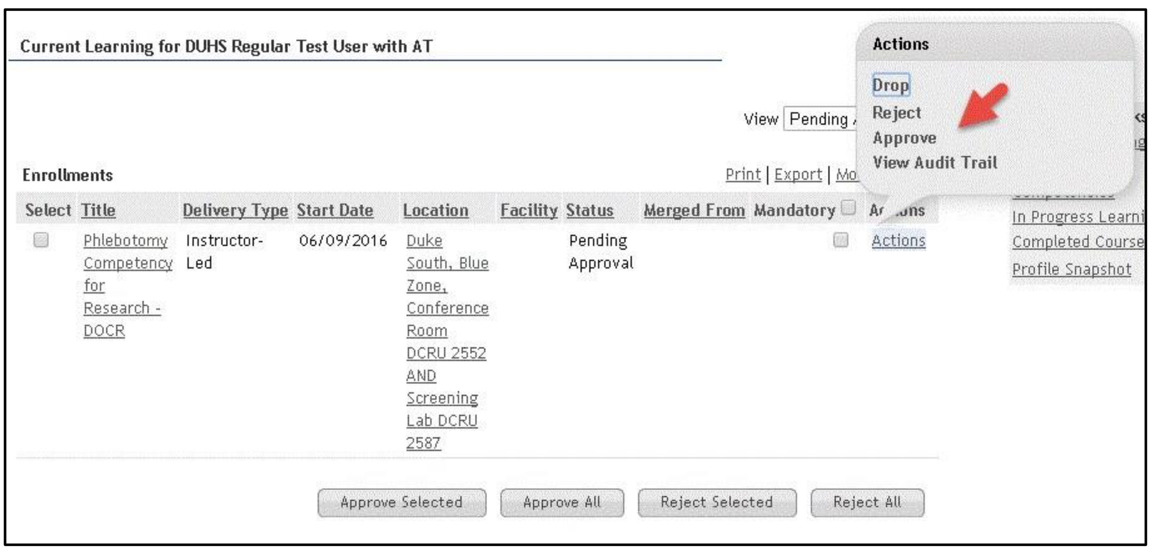
Approve Pending Enrollment or Registrations for a Direct Report

Only some courses require management approval for the learner to attend. Therefore, the learner can register for the class; however, it is listed as "**Pending Approval**" and the learner doesn't receive a confirmation email message until the learner's manager has approved the registration in the Duke LMS. When your direct report registers for a class that requires approval, you receive an email indicating that your approval is needed.

1. Select the **Manager Dashboard** tab.
2. Click the **Needs Approval** link in the Team Registration section of the screen.



3. There are two ways to approve the item.
    a. Hover over the **Actions** link and then select **Approve**.
    OR
    b. Select the item by click the checkbox and click the **Approve Selected** button.



When you either approve or reject the learner's request to take the class, the learner will receive an automated email message from the Duke LMS indicating the action you took.

View Your Team's Curricula Assignments

Curricula contain a number of courses that a user is expected to complete.

1. At the **My Team Learning** tab, select **My Team Curricula** in the left panel.
2. Select **Actions** then **View Curricula** for a user.
3. To view details click the Curriculum name. It will show what components they have completed

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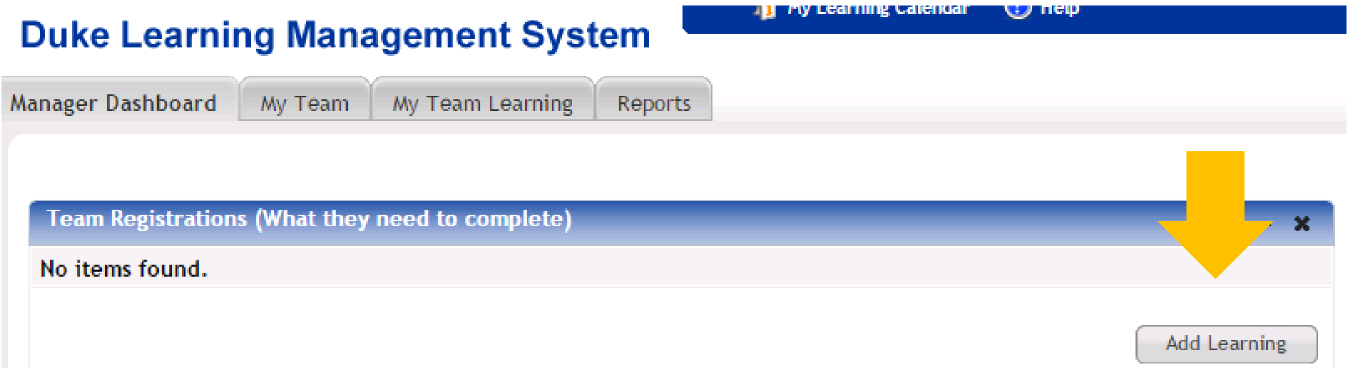
Assigning Training to Members of Your Team

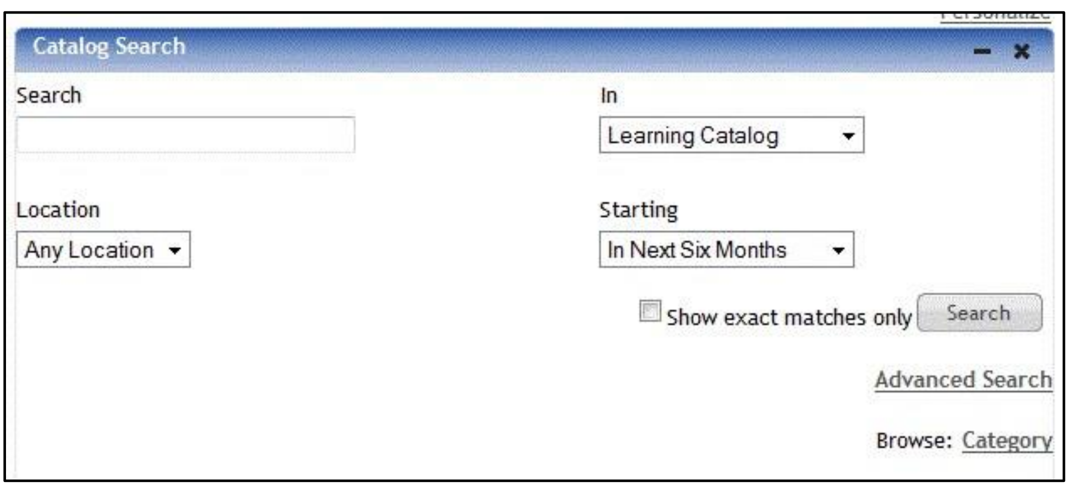
When the manager registers or enrolls a direct report into a course, the LMS calls the registration an "order."

1. At the Manager Dashboard main screen, in the Team Registrations section of the screen, click **Add Learning**.

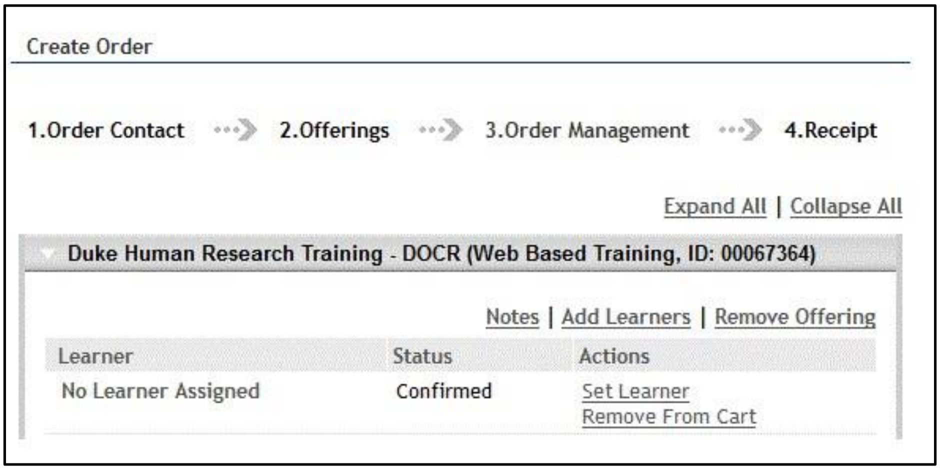


2. You are the default contact.
3. If you DO NOT want to also assign the training to yourself, uncheck the **Include Contact as a Learner** checkbox.
4. Click **Next**.

The default catalog search field allows you to find learning by a title, course number, keyword, category, or competency. In the text field, you can use the % as the wildcard character to replace one or more characters. So, you could search for instructor-led research-related courses in the next six months using the search string "%research%".



4. Click the **Register** link for the selected offering.



5. Click **Add Learners**.
6. Search for and include the learners that you want to register. Repeat as necessary.
7. Click the **Place Order** button.

Running Reports About Your Team's Learning

Question	**Name of the Report to Use**	**Information to Enter**	**Information Returned**
What training has a specific employee completed? What do I provide to others certifying a learner's training?	Transcript Report for a Learner	Enter the UserID of the employee for which you want the report.	This is the official transcript for Duke staff training. It provides the course title, status, start date, completion date, duration and any score or grade, if applicable.
Who on my team has registered for and completed a certain course?	Manager Report: Registration & Completion by Course for Your Staff	Either use the picker tool to select the course name, or indicate words that are included within the course name.	List of enrolled and completed. Date for completed. If there is no date in the Completed Date column, the learner hasn't completed it yet. If the learner is not listed on the report, the learner hasn't registered for the course.

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What courses has all employees within an org unit completed?	Manager Report: Registration & Completion by Course for an ORGANIZATIONAL Unit	Use the picker tool  to open a new window and search for the appropriate org unit. Either use the picker tool to select the course name, or indicate words that are included within the course name. Enter the date range.	It lists the course title, status, start date, completion date, score, and grade. This report can be exported to Excel where you can manipulate or sort the data further.

Searching for Reports

1. In the **Reports** tab, click the **Reports** link on the left-hand sidebar.
2. Enter the required search criteria, such as the name of the report, and click the **Search** button. To see all available reports, leave all fields blank and click the **Search** button.

Executing a Report

1. Place the cursor over the **Actions** link corresponding to the report. The Actions popover appears.
2. Click the **Execute** link. If you have not specified any report parameters during report creation, then the generated report appears in a report viewer.
3. Some reports require you to enter criteria for creating the report called report parameters. The parameters that you must provide vary by report. If the report requires you to provide report parameters during run time, then the Report Parameters page for the report appears. Enter or select the required parameters. On some reports you select the picker icon to search for a specific course or user. On some others you can use the Contains parameter to generate a report for all courses with a similar name (e.g. %wave 4%)

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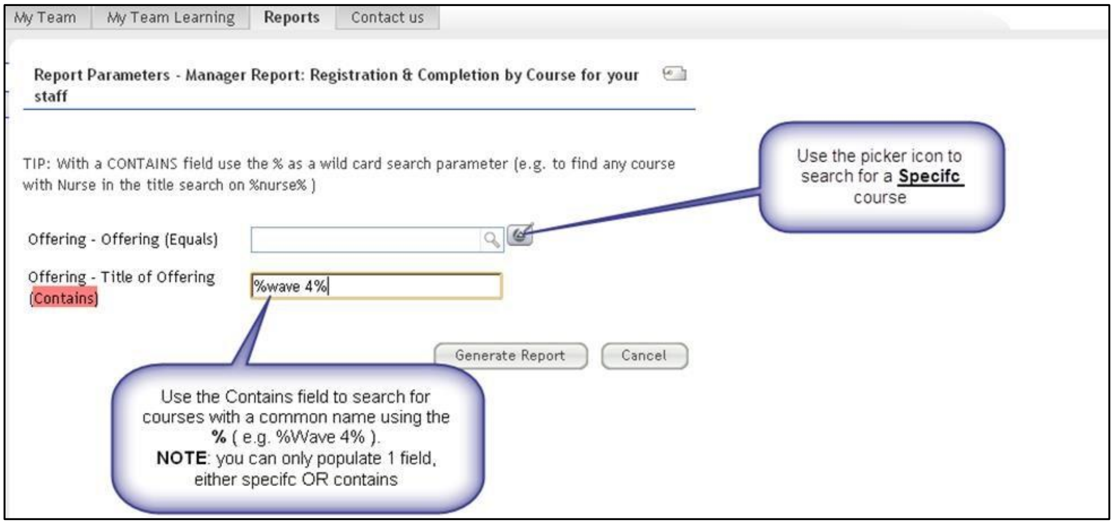

4. Click the **Generate Report** button. The report details are provided in various tabs available in the report viewer. The report viewer contains the Print, Export, and Email links that allow you to print, export, and email individual tabs of the report.

If You Are Not Able to View Learning for Your Direct Reports

The reporting relationship in the Duke LMS comes from the approver role in the SAP system.

If…	**Then…**
Your relationship is not established as the employee approver in Duke@Work... It has to be corrected in SAP so it can download into the LMS.	Contact your manager or HR representative to do this using the following instructions: http://finance.duke.edu/payroll/policies/policy/MaintainingApprovers.pdf.

Once the change is made, it may take up to two days to have access to the **Manager Dashboard** in the Learning Management System.