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 Your Team’s Enrollments or Registrations**

1. Select the My Team Learning Tab.
2. The Default view is My Team Registrations.
3. Click the Number under Current Enrolments for a staff member to view a list of courses they are enrolled.
4. To view details for a specific course click the course name.
5. To look up another staff member you can use the Back button on the browser (upper left) to go back several pages or you can select My Team Registrations in the left panel.

**Approve Pending Enrollment or Registrations for Your Team**

Only some offerings require manager approval.

1. At the My Team Learning tab, click the Approve Pending Registrations link to display the Approve Pending Registrations for Team page.
2. Click the **Approve** or **Reject** button next to a learning offering to approve or reject that enrollment of a team member. You can approve or reject only enrollments that are in ‘Pending Approval’ status.

**View Your Team’s Completed Courses**

1. At the **My Team Learning** tab, select **My Team Complete Courses** in the left panel.
2. Select **View Completed Course** for a user.
3. The default date range is only 6 months. Adjust the date range in the **Completion Date After** and **Completion Date Before** fields and click **Search**.

![Completed Courses](image)

- You can use the **Print** link to print the learner’s transcript.
- Not all training completion data has been converted into the Duke LMS. The Duke LMS will include training records for training that has been completed in the Duke LMS and some other data that has been imported into this system.

4. To look another staff member you can use the Back button on the browser to go back several pages or you can select **My Team Completed Courses** in the left panel.

---

**What If My Transcript Seems to Be Missing Items??**

Not all training completion data has been converted to the LMS. The LMS will include training records for training that has been completed in the LMS and some other data that has been imported into this system.
Also, note that the transcript displayed is only for the window of time listed in the search criteria at the top of the screen. To view training that was completed before this window of time, change the date in the Completion Date After field to an earlier date and click Search.

**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
4. To look up another staff member you can use the Back button on the browser to go back several pages or you can select My Team Curricula in the left panel

**View Your Team’s Required Learning**
Required learning and certification means that same thing in the Duke LMS. Required learning (or certification) is learning that will expire after a certain period of time. Often this learning is required for an employee due to the role or job tasks that the employee performs. Supervisors often want to be sure that the team is compliant with required training.
1. At the My Team Learning tab, select My Team Required Learning in the left panel.
2. Select View Required Learning for a user.
3. To view the number of completed and outstanding required learning items for the team, click the Required Learning Summary tab. To view the specific courses required for a team member, click the Required Learning Matrix.
4. To look up another staff member you can use the Back button on the browser to go back several pages or you can select My Team Required Learning in the left panel

**Assigning Additional Learning to Members of Your Team**
The Catalog is a list of all the learning items available in the Duke LMS. You use the catalog to find and assign learning to members of your team.

At the My Team Learning tab, the Browse by Category link allows you to search for learning items by category area rather than name. For example, L&OD courses are listed in the L&OD Offerings category.

At the My Team Learning tab, the Search Catalog link and Advanced Search feature allows you to find learning by a title, course number, keyword, category, or competency. Offerings are courses that are available to be taken by learners. Therefore, you should use the Offerings tab. 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%”.

1. Click Add Learners.
2. Search for and include the learners that you want to enroll in this course.
3. Click the **Register Seats and Learners** button to assign the selected offering to the listed team members.

---

### Running Reports About Your Team’s Learning

<table>
<thead>
<tr>
<th>Question</th>
<th>Name of the Report to Use</th>
<th>Information to Enter</th>
<th>Information Returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>What training has a specific employee completed? What do I provide to others certifying a learner’s training?</td>
<td>Transcript Report for a Learner</td>
<td>Use the picker tool to open a new window to search for and select the learner.</td>
<td>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.</td>
</tr>
<tr>
<td>Who on my team has registered for and completed a certain course?</td>
<td>Manager Report: Registration &amp; Completion by Course for Your Staff</td>
<td>Either use the picker tool to select the course name, or indicate words that are included within the course name.</td>
<td>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.</td>
</tr>
<tr>
<td>What courses has all employees within an org unit completed?</td>
<td>Completion Report by Org Unit</td>
<td>Use the picker tool to open a new window and search for the appropriate org unit. Enter the date range.</td>
<td>It lists the course title, status, start date, completion date, score, and grade.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>This report can be exported to Excel where you can manipulate or sort the data further.</td>
</tr>
</tbody>
</table>

### Searching for Reports

1. In the **Reports** tab, click the **Reports** link on the left-hand sidebar.
2. Enter the required search criteria and click the **Search** button.
3. You can search by the category. L&OD has created the “Popular” category to provide quick access to commonly used reports.
4. 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%)

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.

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your relationship is not established as the employee approver in</td>
<td>Contact your manager or HR representative to do this using the</td>
</tr>
<tr>
<td>Duke@Work... It has to be corrected in SAP so it can download into</td>
<td>following instructions:</td>
</tr>
<tr>
<td>Someone else may be established as the employee approver in</td>
<td>1. Ensure that the appropriate person has the approver relationship. See</td>
</tr>
<tr>
<td>Duke@Work and you want that person to continue to act as approver;</td>
<td>above.</td>
</tr>
<tr>
<td>however, you want to be able to manage learning in the LMS...</td>
<td>2. Contact Learning and Organization Development and request that you</td>
</tr>
<tr>
<td></td>
<td>be made <strong>a proxy for the approver</strong> in the Duke LMS by sending an</td>
</tr>
<tr>
<td></td>
<td>e-mail message and the name of the approver to</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:hr-lod-registration@duke.edu">hr-lod-registration@duke.edu</a>.</td>
</tr>
</tbody>
</table>
Once the change is made, it may take up to two days to have access to the Manager Dashboard in the Learning Management System.