

# Manager's Guide to the LMS

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The LMS is the system of record for Duke University and DUHS employee training. This document is focused on showing how managers can access information needed to manage research administration staff and their certifications.

Learn how to identify key information on the progress of your employees' learning that is not available in other systems.

## AVAILABLE TOOLS FOR MANAGERS

### Training Tracker: Training Search

Available for Company Code 0010 only. Search for any team member's completed training transcript. Find certificates achieved over time, a full history of successful class completions, and continuing education credits earned.

### Training Tracker: Certification Search

Available for Company Code 0010 only. Quickly check active certifications held by team member's and their continuing education (CE) credit totals for the current and previous Fiscal Year (FY).

### Duke LMS: Saba Cloud

Find information not available in Training Tracker. The LMS only shows details on your direct reports. Information includes training course sign-ups, quiz scores, classes with unsuccessful results, and time spent in online modules.

*Find more details about using the Training Tracker in its dedicated guide.*

## HOW TO SELECT THE RIGHT TOOL

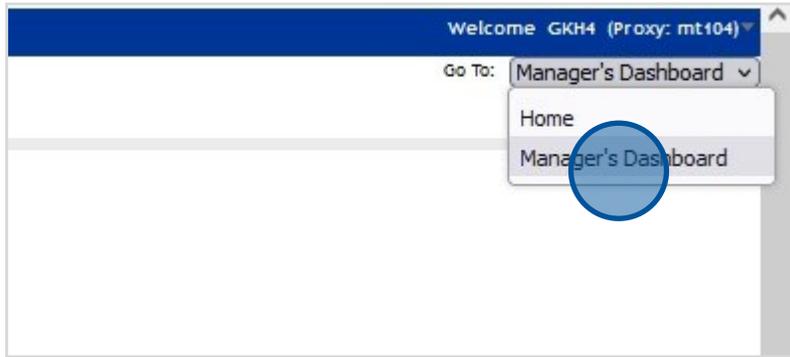
Review the different features and learn how to choose the best option to find the information you need.

Tool Features	LMS	Training Search	Certification Search
Search for any Duke Employee's records	No	<b>Yes</b>	<b>Yes</b>
Filter by RACI Job Code or BFR	No	<b>Yes</b>	<b>Yes</b>
Access records for direct reports only	<b>Yes</b>	No	No
Find information for non CC 0010 employees	<b>Yes</b>	No	No
Review successfully completed courses	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>
Review unsuccessful courses	<b>Yes</b>	No	No
Find class schedules	<b>Yes</b>	No	No
Check quiz grades	<b>Yes</b>	No	No
Check attempts & time spent with online modules	<b>Yes</b>	No	No

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### ► Part 1 - Access the Manager's Dashboard

1. Go to <https://lms.duhs.duke.edu/Saba/Web/Cloud>
2. Select **Manager's Dashboard** from the **Go To** dropdown in the top left of the home screen.



3. The Dashboard consists of multiple ways to get at the same information:
  - a. Registration/Enrollments: information on team members' pending classes that have not occurred yet or online modules that have not been completed
  - b. Transcript/Course Completion: information on team members' classes that have occurred or online modules that have been completed

The screenshot displays the 'Duke Learning Management System' Manager Dashboard. The dashboard includes several key sections:

- Team Registrations (What they need to complete):** A table showing team members and their pending offerings.
 

Name	Person Type	Total Offerings
<a href="#">Alysha Cieniewicz</a>	Staff	7
<a href="#">Katherine Norris</a>	Staff	27
<a href="#">Kimberly Brock</a>	Staff	8
<a href="#">Kristin Lawrence</a>	Staff	41
<a href="#">Megan Tirpak</a>	Staff	24
- Team Course Completion Status:** A table showing team members and their completed course items.
 

Team Member	Job Role	Items on Completed Course
<a href="#">Alysha Cieniewicz</a>	00001222	4
<a href="#">Katherine Norris</a>	00001483	4
<a href="#">Kimberly Brock</a>	00002418	0
<a href="#">Kristin Lawrence</a>	00001222	1
<a href="#">Megan Tirpak</a>	00002507	1
- Navigation Links:** A section with links to 'My Team Enrollments' (marked with a red ribbon icon and letter 'A') and 'My Team Transcripts' (marked with a green checkmark icon and letter 'B').

Additional dashboard elements include a 'Manager Welcome' section with instructions and links, and a 'Personalize' button in the top right corner.

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### ► Part 2 - Pending Registrations

Use this tool to find the following details on pending learning opportunities:

- | Classes  | Online Modules  | Both   |
|--|---|--|
| <ul style="list-style-type: none"> <li>• Number of sessions included in the course</li> <li>• Session dates &amp; times</li> </ul> | <ul style="list-style-type: none"> <li>• Length of the module</li> <li>• Attempts available and completed</li> <li>• Amount of time spend by learner in the module</li> </ul> | <ul style="list-style-type: none"> <li>• Title and description of content</li> <li>• Number of Continuing Education credits</li> </ul> |

1. Click on the name of a team member in the **Team Registrations** widget on the Manager's Dashboard.

Name	Person Type	Total Offerings
Alysha Cieniewicz	Staff	7
Katherine Norris	Staff	27
Kimberly Brock	Staff	8
Kristin Lawrence	Staff	41
Megan Tirpak	Staff	24

Team Member	Job Role	Items on Completed Course
Alysha Cieniewicz	00001222	4
Katherine Norris	00001483	4
Kimberly Brock	00002418	0
Kristin Lawrence	00001222	1

2. The **Current Learning** screen shows all pending or incomplete learning opportunities for the team member.
3. Click on the link in the **Title** column to view the Details Screen for that course.

Select Title	Course ID	Delivery Type	Start Date	Location	Facility	Status	Mandatory	Actions
<a href="#">Grants Management Tab - Approving a PI Registration</a>	FIN-CLOSEOUT-PIATTAP	Web Based Training				Confirmed	<input type="checkbox"/>	<a href="#">Actions</a>
<a href="#">Grants</a>	FIN-	Web Based				Confirmed	<input type="checkbox"/>	<a href="#">Actions</a>

4. The Details Screen shows the important information in the header and then in two tabs: **Main**, **Learning Assignments**, and **Associated Learning**. The page defaults with the **Learning Assignments** tab selected.

Virtual Buy@Duke Shopper/Submitter Training (00182718)

To view the class location, click the Main tab. To view additional details such as the class date and time, click the Learning Assignments tab below. Then, click the View All Sessions button.

(0 Reviews)

Start Date	11/28/2023	End Date	11/29/2023
Language	English		
Location	Virtual Class (EST)		

Description: Virtual Delivery: This TWO part course is intended for those in the Shopper or Submitter role in the University, School of Medicine, School of Nursing, and PDC whose departments use Buy@Duke as their primary method for requisitioning. The course will cover the details needed to perform both the [...more](#)

**- Blended**

Go to Current Learning

- [View Audit Trail](#)
- [Export to Calendar](#)
- [Drop](#)

Main | Learning Assignments | Associated Learning | Ratings

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## For Instructor-Led Classes

5. The **Learning Assignments** tab for classroom sessions will include the scheduling date for all sessions required to be completed to finish the courses. The example below is a 2-part class.

The screenshot shows the 'Learning Assignments' tab with the following data:

Module	Assignment Type	Requirement	Details	Completion Status	Completed On	Actions
Buy@Duke PART 1	Session	Required	Start Date: 11/28/2023 Start Time: 2:00 PM End Time: 4:00 PM	Not Evaluated		
Buy@Duke PART 2	Session	Required	Start Date: 11/29/2023 Start Time: 10:00 AM End Time: 12:00 PM	Not Evaluated		

## For Online Modules

6. The **Learning Assignments** tab for online modules will show the available attempts to complete the module.

The screenshot shows the 'Learning Assignments' tab with the following data:

Module	Assignment Type	Requirement	Details	Completion Status	Completed On	Actions
Clear and Authentic Communication with Principal Investigators	Training Content	Required	Attempts Allowed: 2 Attempts Made: 1 Attempts Left: 1	Not Evaluated		Actions

7. The **Main** tab shows the estimated amount of time needed to complete the module.

The screenshot shows the 'Main' tab with the following data:

Scheduling Information	
Start Date	07/08/2022
End Date	
Facility	
Duration	00:15

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8. Click **Actions** > **View Results...** to access details on the attempts.

The screenshot shows the 'Associated Learning' tab. At the top, learner information is displayed: Learner Name: Alysha Cieniewicz, Completion Status: Not Evaluated, Score: 0. Below this is a table of Learning Assignments. A callout box points to the 'View Results by Lesson' link in the 'Actions' column of the table.

Module	Assignment Type	Requirement	Details	Completion Status	Completed	Actions
Clear and Authentic Communication with Principal Investigators	Training Content	Required	Attempts Allowed: 2 Attempts Made: 1 Attempts Left: 1	Not Evaluated		View Results by Lesson

9. This displays historical information and time spent in the online modules.

Lesson	Status	Total Attempts	Last Accessed	Time Spent	Score	Mastery Score	Objectives	Responses	History
Clear and Authentic Communication with Principal Investigators	Incomplete	1	02/15/2022	00:01:07.90				Responses	History

## All Learning Types

10. Click the **Associated Learning** tab to see the Continuing Education credits available for the course.

The screenshot shows the 'Associated Learning' tab with sections for Associated Competencies, Certifications, and Curricula, all showing 'No items found.' Below these is the 'Continuing Education Credits' section, which includes a table with a red box highlighting the 'Duke RCC Cont Ed Credits' row.

Field of Study	Description	Default Credits	Actions
Duke RCC Cont Ed Credits	Continuing education credit for maintaining RCC, RAA, AGM, and RAI certifications.	2	View Credits
<b>Total Credits:</b>		<b>2</b>	

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## ► Part 3 - Course Completions

Use this tool to find the following details on completed learning opportunities:

- When they registered for the class
- When the class was marked complete
- When the class occurred (if applicable)
- What the Completion Status is
- What was their Quiz Scores (if applicable)
- How many CE credits were gained

### Team Course Completion Status Widget

The Manager's Dashboard widget shows a quick snapshot of completed courses for your team based on a time period selection.

Team Member	Job Role	Items on Completed Course
Alysha Cieniewicz	00001222	4
Katherine Norris	00001483	4
Kimberly Brock	00002418	0
Kristin Lawrence	00001222	1
Megan Tirpak	00002507	1

### Reviewing Course Completion Details

1. Click the My Team Learning from the Manager Dashboard home screen.



2. Select a team member and click on **View Completed Learning** in the **Actions** column.

Person Name	Person Type	Completed Learning Items	Actions
<a href="#">Alysha Cieniewicz</a>	Staff	17	<a href="#">View Completed Learning</a>
<a href="#">Katherine Norris</a>	Staff	201	<a href="#">View Completed Learning</a>
<a href="#">Kimberly Brock</a>	Staff	136	<a href="#">View Completed Learning</a>
<a href="#">Kristin Lawrence</a>	Staff	185	<a href="#">View Completed Learning</a>
<a href="#">Megan Tirpak</a>	Staff	54	<a href="#">View Completed Learning</a>

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3. The **Completed Courses** screen shows the list of all learnings completed based on the default search parameters based on dates.

Completed Learning for Alysha Cieniewicz

NOTE: The Completed Courses view defaults to the last 3 months. To expand beyond 3 months adjust the Completion Date After field. Use the Print link to print a completion transcript.

**Completed Courses** | [View Deletions](#) | [Cancelled](#)

From: 06/10/2023 To: 09/08/2023  
 Delivery Type: All Search

Completed Learning [Add Completed Courses](#) | [Print](#) | [Export](#) | [Modify Table](#)

Item Name	Status	Marked Complete By	Delivery Type	Learner Name	Credits	Actions
SCRI Module 2 - Conflict of Interest & Commitment in Research Registration Date: 01/27/2023	Successful On: 08/30/2023 Score: 0		Web Based Training	Alysha Cieniewicz		<a href="#">View Details</a>
SCRI Module 2 - Conflict of Interest & Commitment in Research Registration Date: 08/30/2023	Successful On: 08/30/2023 Score: 0		Web Based Training	Alysha Cieniewicz		<a href="#">View Details</a> <ul style="list-style-type: none"> <li><a href="#">View Learning Assignments</a></li> </ul>

4. You can adjust the filters to view different results.
- Use the **From** and **To** date fields to adjust the time period
  - Keep the **Delivery Type** selection as **All** to avoid filtering out different instruction types
  - Click **Search** to update the results based on your filters

Completed Learning for Megan Tirpak

NOTE: The Completed Courses view defaults to the last 3 months. To expand beyond 3 months adjust the Completion Date After field. Use the Print link to print a completion transcript.

[Completed Courses](#) | [View Deletions](#) | [Cancelled](#)

From: **A** 06/09/2023 To: 09/07/2023  
 Delivery Type: All **B** Search **C**

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5. Completed Learning search results provide overview information:
  - a. Item Name: Full name of the course
  - b. Registration Date: when the learner registered for the course
  - c. Status: Current status of the course, date marked complete, quiz score (if applicable)
    - Successful: Attended and successfully completed all classwork, received credit for the course.
    - Unsuccessful: Incomplete attendance, coursework, or failed quizzes. No credit for course.
    - Not Evaluated: Instructor has not completed the grading and processing for this class yet.
  - d. Credits: Number of CE credits provided
6. Click the **View Details** button to see additional information

7. The **Completed Courses Detail** shows the course information and additional learner details

- a. Completion Status
- b. Delivery Type:
  - Instructor-Led Classes: Instructor-Led, Blended, Virtual Class
  - Online Modules or Event Attendance: Web Based Training
- c. Ended/Completed: Date of class or date module was completed
- d. Registration Date
- e. Score: Quiz grade
- f. Default Credits: the number of CE credits available for this course

Course Name	The Duke Way - Research Administration@Duke
Learner Name	Megan Tirpak
ID	RCC-RAA-DW-RA
Description	--- APPLY TO RAA AND COMPLETE RAA ORIENTATION BEFORE TAKING THIS CLASS. --- This course is part of the RAA Onboarding Series. The session will cover introductory information related to research administration at Duke.
Completion Status	Successful <b>A</b>
Marked Complete by	MT104
Delivery Type	Blended <b>B</b>
Offering Start Date	09/07/2023
Ended/Completed On Date	09/07/2023 <b>C</b>
Registration Date	09/07/2023 <b>D</b>
Marked Complete Date	09/07/2023
Start Time(HH:MM)	
End Time(HH:MM)	
Duration(HH:MM)	01:00
Location	Zoom
Score	93 <b>E</b>
Grade	
Default Credits	2 <b>F</b>

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## Completed Course Screen: Online Modules vs. Classroom Sessions

Some details will have different meanings or be found in different locations based on the Delivery Type.

1. Status: Successful, Unsuccessful, Not Evaluated
  - a. Online Modules: Listed in **Transcript Details** and detailed below under **Results by Module**
  - b. Classroom Session: Listed in **Transcript Details** only
2. Duration
  - a. Online Modules: Estimated length it takes to complete the course
  - b. Classroom Session: Length of the scheduled session(s)
3. Schedule
  - a. Classroom Session Only: Date and time of the classroom sessions(s)

<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Completion Status</td> <td style="border: 1px solid #ccc; padding: 2px;">Successful</td> <td style="border: 1px solid #ccc; padding: 2px; color: red; font-weight: bold;">1A</td> </tr> <tr> <td colspan="3">Marked Complete by</td> </tr> <tr> <td>Delivery Type</td> <td colspan="2">Web Based Training</td> </tr> <tr> <td colspan="3">Offering Start Date</td> </tr> <tr> <td>Ended/Completed On Date</td> <td colspan="2">08/30/2023</td> </tr> <tr> <td>Registration Date</td> <td colspan="2">01/27/2023</td> </tr> <tr> <td>Marked Complete Date</td> <td colspan="2">08/30/2023</td> </tr> <tr> <td colspan="3">Start Time(HH:MM)</td> </tr> <tr> <td colspan="3">End Time(HH:MM)</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Duration(HH:MM)</td> <td style="border: 1px solid #ccc; padding: 2px;">00:15</td> <td style="border: 1px solid #ccc; padding: 2px; color: green; font-weight: bold;">2A</td> </tr> <tr> <td colspan="3">Location</td> </tr> <tr> <td>Score</td> <td colspan="2">0</td> </tr> <tr> <td colspan="3">Grade</td> </tr> <tr> <td>Default Credits</td> <td colspan="2">0</td> </tr> </table> <p style="text-align: center; font-weight: bold; margin-top: 20px;">ONLINE MODULES</p>	Completion Status	Successful	1A	Marked Complete by			Delivery Type	Web Based Training		Offering Start Date			Ended/Completed On Date	08/30/2023		Registration Date	01/27/2023		Marked Complete Date	08/30/2023		Start Time(HH:MM)			End Time(HH:MM)			Duration(HH:MM)	00:15	2A	Location			Score	0		Grade			Default Credits	0		<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Completion Status</td> <td style="border: 1px solid #ccc; padding: 2px;">Successful</td> <td style="border: 1px solid #ccc; padding: 2px; color: red; font-weight: bold;">1B</td> </tr> <tr> <td colspan="3">Marked Complete by</td> </tr> <tr> <td>Delivery Type</td> <td colspan="2">Blended</td> </tr> <tr> <td colspan="3">Offering Start Date</td> </tr> <tr> <td>Ended/Completed On Date</td> <td colspan="2">06/20/2023</td> </tr> <tr> <td>Registration Date</td> <td colspan="2">07/04/2022</td> </tr> <tr> <td>Marked Complete Date</td> <td colspan="2">06/20/2023</td> </tr> <tr> <td colspan="3">Start Time(HH:MM)</td> </tr> <tr> <td colspan="3">End Time(HH:MM)</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Duration(HH:MM)</td> <td style="border: 1px solid #ccc; padding: 2px;">01:00</td> <td style="border: 1px solid #ccc; padding: 2px; color: green; font-weight: bold;">2B</td> </tr> <tr> <td colspan="3">Location</td> </tr> <tr> <td>Score</td> <td colspan="2">0</td> </tr> <tr> <td colspan="3">Grade</td> </tr> <tr> <td>Default Credits</td> <td colspan="2">1</td> </tr> </table> <p style="text-align: center; font-weight: bold; margin-top: 20px;">CLASSROOM SESSION</p>	Completion Status	Successful	1B	Marked Complete by			Delivery Type	Blended		Offering Start Date			Ended/Completed On Date	06/20/2023		Registration Date	07/04/2022		Marked Complete Date	06/20/2023		Start Time(HH:MM)			End Time(HH:MM)			Duration(HH:MM)	01:00	2B	Location			Score	0		Grade			Default Credits	1	
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