

LEARNING MANAGEMENT SYSTEM (LMS) RUNNING THE ENROLLMENT DASHBOARD FOR MANAGER REPORT

The Enrollment Dashboard for Manager Report will provide a comprehensive list of enrollments and completions for a one or all of your Direct Reports (Learners). The report can be filtered to show all or a selection of training activities.

1. Log into the LMS.
2. Select the **My Team** icon.



Figure 1 – My Team icon in the Menu Bar

3. From the My Team page, select the **Reports** link in the left navigation menu.

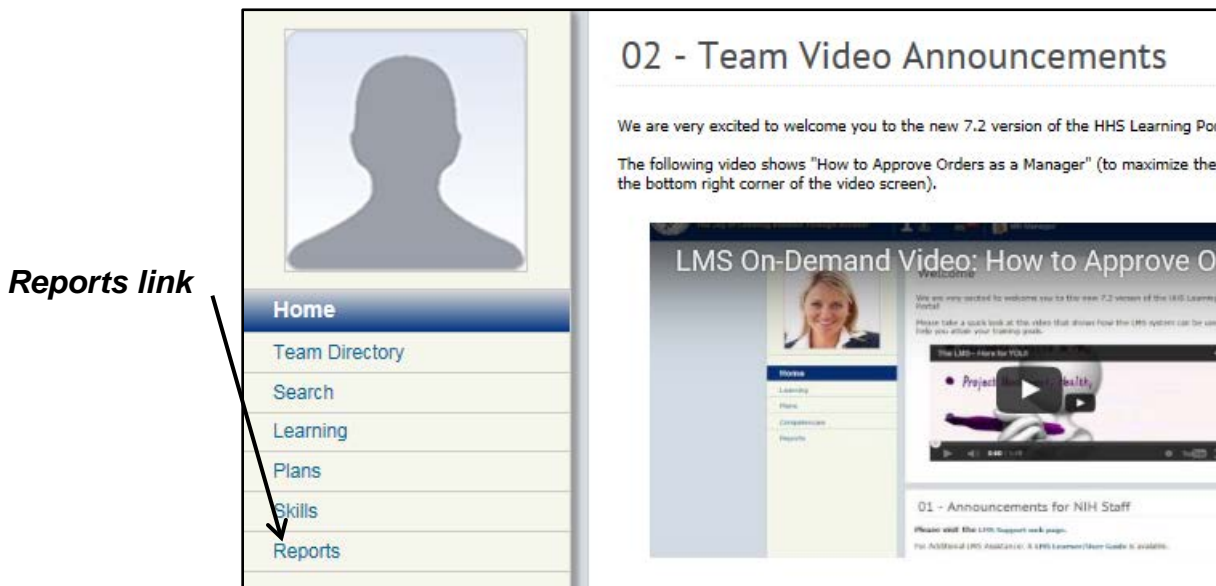


Figure 2 – Reports link in the left navigation menu

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

Reports

Reports contain data that you can use for analysis and decision-making. They can be printed or exported (hover over the Actions link for options).

Name Category

Report Template Engine Type

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

Figure 3 – Reports Search Screen

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

Reports

Reports contain data that you can use for analysis and decision-making. They can be printed or exported (hover over the Actions link for options).

Name Category

Report Template Engine Type

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

Reports [Print](#) | [Export](#) | [Modify T](#)

Name	Report Template	Description	Engine Type	Acti
Enrollment Dashboard for Manager	Enrollment Dashboard for Manager	This report displays all learner enrollments for a given Manager's direct reports	Managed Report	Actions


Actions


- [Print](#)
- [Email](#)
- [Execute](#)
- [Subscribe](#)


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

- To run the report for all of your Direct Reports in your supervisory chain, skip to Step 11. To run the report for a specific Direct Report, select the **Learner Name** pick icon.

Report Parameters - Enrollment Dashboard for Manager

Learner Name 

Offering Start Date After* 

Offering Start Date Before* 

Show Scheduled Offerings

Show Self-Paced Offerings

Show Physical Offerings

Show Cancelled/Late Cancelled/Dropped Enrolls

Show Confirmed Enrolls

Show Back Ordered Enrolls

Show Delivered/ Shipped Enrolls

Show Enrolls for Pending Approval

Show Graph

Show Summary

Sort by

Show Terminated Users

Display unformatted records

Learner Name pick icon

Figure 5 – The Enrollment Dashboard for Manager report parameters screen

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

Search Person, Internal

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.

Population* Username

Person ID First Name

Last Name Organization

Manager Search Depth* Location

Domain Person Type

Security Roles Manager

Include All Suborganizations

Figure 6 – The Search Person, Internal screen

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

People

Showing first 25 out of 31 results

Select	First Name	Last Name	Username
<input type="checkbox"/>	NIH	Learner	NIHLEARNE
<input type="checkbox"/>	NIH	LEARNER	NIHLEARNE
<input type="checkbox"/>	NIH	LEARNER01	NIHLEARNE

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

9. Insert a date range in the **Offering Start Date After** and **Offering Start Date Before** date range using MM/DD/YYYY format.

10. Additional parameters to consider for report filtering:

- Scheduled Offerings = Instructor-led training
- Self-Paced Offerings = Online training
- Physical Offerings = *not used in NIH*
- Cancelled/Late Cancelled/Dropped Enrollments
- Confirmed Enrollments
- Back Ordered Enrollments = *not used in NIH*
- Delivered/Shipped Enrollments = enrollments that have been completed
- Enrollments Pending Approval
- Show Graph = will display a graph that shows all direct reports training statuses include Cancelled, Delivered, Pending Approval, and Confirmed
- Show summary = will display a graph that shows all direct reports training statuses include Cancelled, Delivered, Pending Approval, and Confirmed

Report Parameters - Enrollment Dashboard for Manager

Learner Name: NIHLEARNER

Offering Start Date After*: 08/31/2016

Offering Start Date Before*: 11/29/2016

Show Scheduled Offerings:

Show Self-Paced Offerings:

Show Physical Offerings:

Show Cancelled/Late Cancelled/Dropped Enrolls:

Show Confirmed Enrolls:

Show Back Ordered Enrolls:

Show Delivered/ Shipped Enrolls:

Show Enrolls for Pending Approval:

Show Graph:

Show Summary:

Sort by: -Select One-

Show Terminated Users:

Display unformatted records:

Buttons: Generate Report, Cancel

Figure 8 – The Enrollment Dashboard for Manager report parameters screen

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

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

Print this report icon

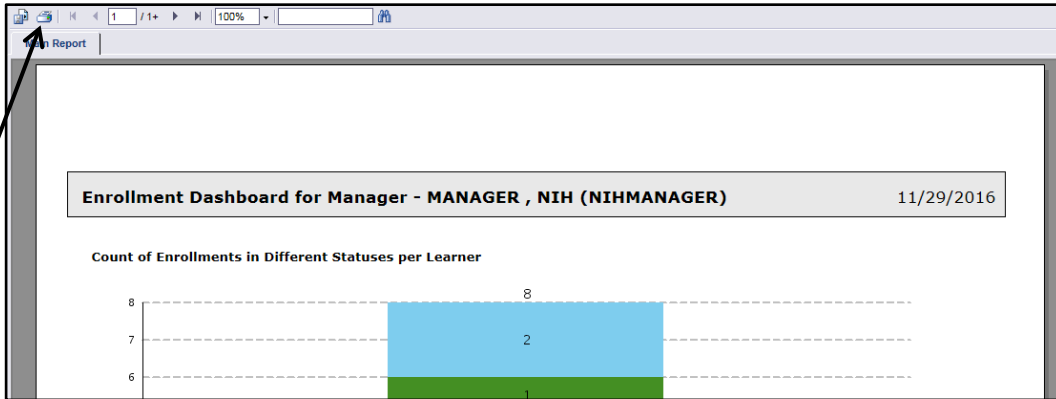


Figure 9 – The report output screen for the Enrollment Dashboard for Manager Report

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

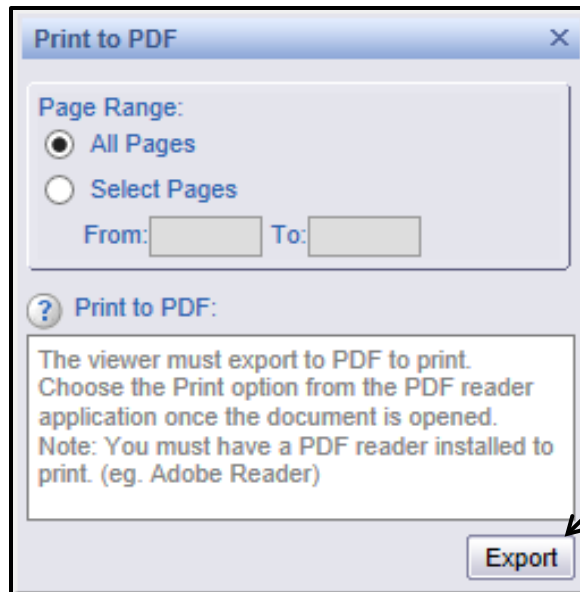


Figure 10 – Export button

14. Depending on the amount of data in the report, it could take a few minutes for the LMS to export the report data into a pdf file. A notification bar will display at the bottom of the screen in the Internet Explorer browser when the pdf has been created. Select the **Open** button on the notification bar to open the pdf file in Adobe Reader/Acrobat.

Open button



Figure 11 – Open button

If you experience trouble with this process, please submit a helpdesk ticket at: <http://intrahr.od.nih.gov/helpdeskform.htm>