DOI LEARN Learning Management System (LMS)
Supervisor/Training Approver Guidance

**Please be sure to first read through the DOILEARN Interface Overview*

Session Objectives: At the end of this session, you will:

- Understand how supervisors and training approvers are identified in the system.
- Know how to approve your employees' training using DOI LEARN
- Understand how to use the system to provide billing information when required.
- Understand how to allow for non-supervisory Training Approvers in the LMS.
- Understand how to report on your employees training activity.

Supervisor/Training Approver Setup

Supervisors are identified in the system in the My Information area of the employee record. The Approves Training field denotes the supervisory capability. **If you are a supervisor, DO NOT change this field to 'No'.**

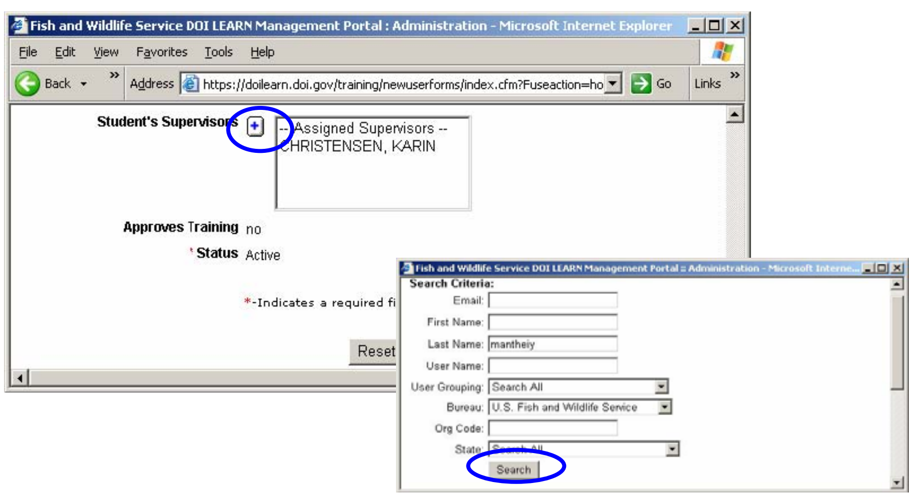
To assign additional Training Approvers/Supervisors and Credit Card Holders (CCH) that may need to provide information during approval, follow these steps.

1. In DOI LEARN, click on **Administration ->My Information.**

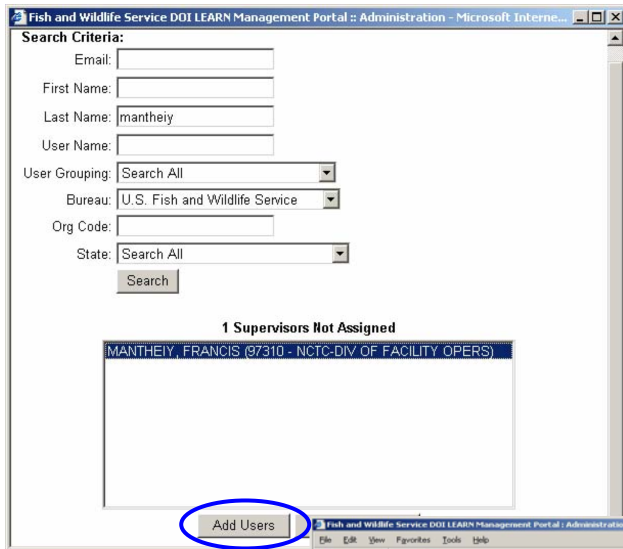
2. Scroll down to the Student's Supervisor field.

3. Click on the blue **'+'** sign to open a search box.

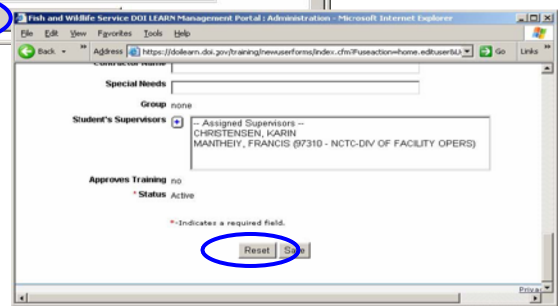
4. In the Last Name field input the Last Name of your supervisor, specify your bureau and click **Search**. If your Supervisor resides in another bureau, specify that bur eau.



5. In the results box, highlight the correct supervisor and click **Add Users**. This will close this box and return you to the My Information page. Your supervisor will now appear in the Student's Supervisors field.



6. Click **Save** at the bottom of the My Information page

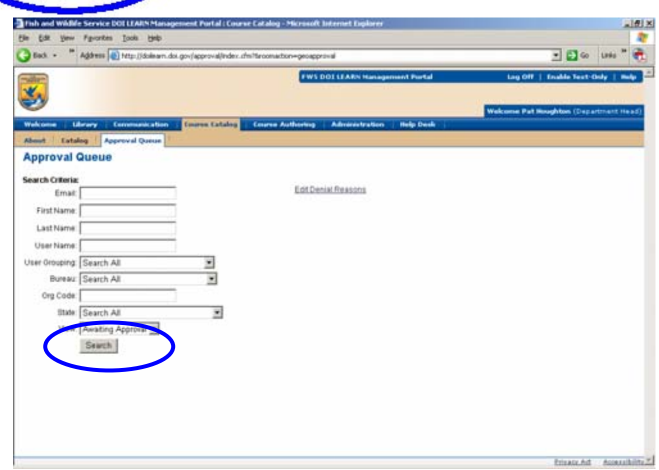


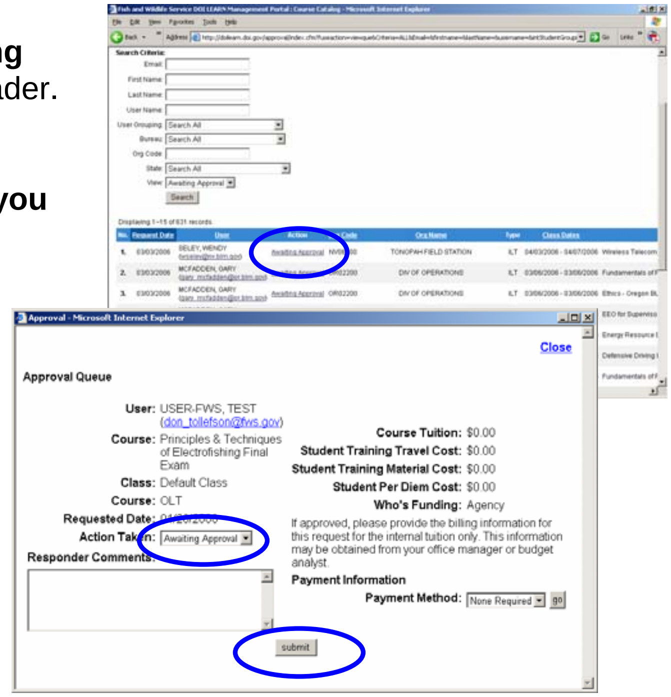
7. Repeat these same steps to add the person in your office who manages the credit card and can pay for training.

8. To remove a Supervisor from the Assigned Supervisor's box, simply highlight the name to remove and click Save at the bottom of the screen.

How to Approve Your Employees' Training

1. Click on **Course Catalog**.
2. Click on **Approval Queue.**
3. This will open a screen with a search function that will allow you view training requests that are awaiting approval or have been approved or denied in the past. To find requests awaiting approval, simply click **Search** noting the 'Awaiting Approval' in the View field. (To view Denied or Approved training requests, change the entry in the View field. Then click 'Search')





4. Scroll over to the right. Click on the **Awaiting Approval link** under the Action column header. This will open another window.

5. **If the request does NOT include tuition, you can proceed without providing payment information.**

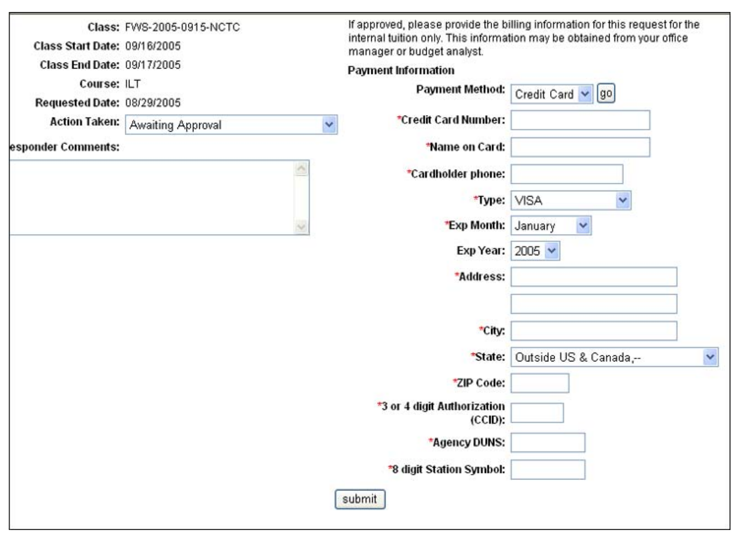
    - **Change the status in the Action Taken** field to Approved or Denied

    - **Add any comments** in the responder comments field. These comments will be forwarded in the email response to the requestor and the course leader.

    - Click **Submit,** to process the approval/denial.

6. **If the course does include tuition,** you will not be able to proceed with the approval until payment information is supplied.

    - To provide payment, click the drop-down in the **Payment Method** field and **select either credit card or IPAC (agency to agency fund transfer)**.



    - Type in any desired comments in **Responder Comments** field

    - Click Submit. The Approval Queue screen will refresh and you will be required to enter credit card or IPAC information. Important Note: A red asterisk denotes a required field. You will not be able to submit the form without text in all required fields. Fill in the appropriate data.

TIP: If you are not a credit card holder or cannot provide payment information at the time of approval, close out of DOI LEARN without approving the request. Then, forward the auto generated e-mail message regarding this request to the credit card holder of your office and ask that

person to approve training.

Enabling Non-Supervisors to Approve Training

As supervisors, you have the responsibility to approve training and to authorize payment for that training. However, you may not be the responsible Credit Card holder (CCH) authorized to purchase training for your employees. That responsibility may fall to an administrative officer or division secretary. While supervisors can authorize employees to attend training, credit card holders must be the ones to enter the credit card information into the LMS approval queue.

Supervisors should determine:

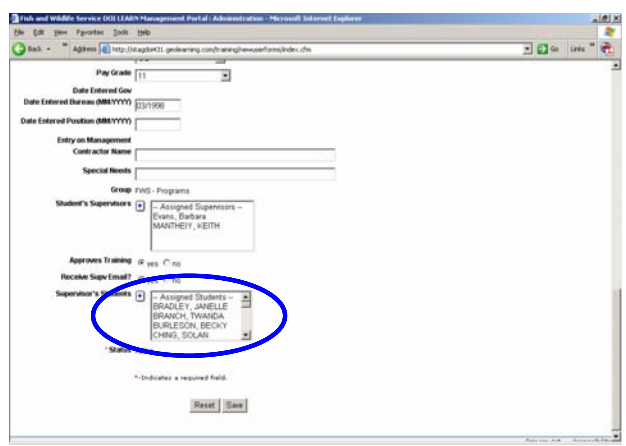
Who holds the credit card that is authorized for training payment?
Who will approve training in the absence of the primary supervisor?
Is there anyone else that would need to approve training globally for employees?

Once these persons are identified and if they are not supervisors, they must be authorized by their supervisors to approve training. Follow the steps below to authorize non-supervisors to approve training…

First, check be sure that you are a supervisor to the Credit Card holder/Non-Supervisor

1. Log into DOI LEARN as a Supervisor, click **Administration->My Information**.

2. Scroll down to the **Supervisor's Students** field.



3. Locate the Credit Card holder/Non-Supervisor name. **If the name is present, click User Management tab and continue with step 9** below.

4. If name does not appear, click the **blue + sign** next the to **Supervisor's Students** field.

5. Type in the **last name** of the Credit Card holder/Non-Supervisor; enter the **bureau** and/or **Org code**, if known.

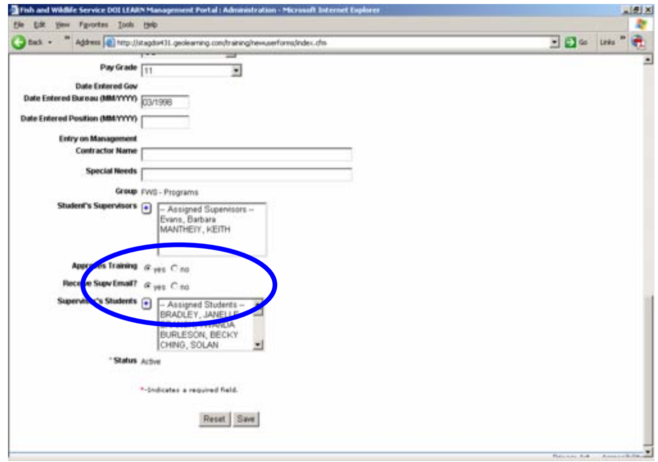
6. Click **Search**.

7. Highlight the correct name. Click **Add Users**. This window will now close and screen will refresh.

8. Scroll down to the bottom of the page and click **Save**.

9. Click **Administration->User Management**.

10. Click '**Search**'.



11. Find the Credit Card holder/Non-Supervisor name.

12. Click the **Edit** link, under the Edit column header. This opens the "My Information" area for this employee.

13. Scroll down to the **'Approves Training'** radio button. Select **'Yes'**.

14. Depending on whether or not the individual should receive email from the system, click the appropriate response in the **'Receive Supervisor Email'** radio button.

15. Scroll to the bottom of the page and click **Save**.

16. Scroll to the **Supervisor's Students** field.

17. Click the **blue + sign,**

18. Type in the last name of the employee(s) the non-supervisor needs to approve training for enter the bureau and/or Org code, if known.

19. Click **Search**.

20. Highlight the correct name(s). Click **Add Users**. This window will now close and screen will refresh.

21. Scroll down to the bottom of the page and click **Save**.

Paper Trail for Training Approval Scenario: An employee requests training approval via the LMS. The supervisor receives an email notification from DOI LEARN of a pending registration. The email directs them to access the approval queue and consider the training request. If the request does not involve a tuition payment, the supervisor can simply approve the request. Should the training require tuition payment, the supervisor would back out of the LMS, forward the original email to the Credit Card Holder (CCH), adding a note of approval; the CCH would then access the LMS, approve the training and input their card information. Training requests that require tuition payment will NOT go forward to the training centers for processing until payment information is entered into the LMS.

Reporting

Course Completion Information

Supervisors have the ability to generate detailed course statistics for their assigned employees. Various reports provide detailed information on employee activity and courses started and completed.

Reports can be generated in your choice of format, such as Portable Document Format (PDF), Microsoft Word and Excel, and Rich Text Format (RTF). The reports allow data to be filtered with the use of drop-down lists and keyword searches. A special "sort by" feature allows users to view their required data easily and conveniently.

Remember: Supervisors can only report on students that are assigned to them in the My Information area.

> **Note:** Course scores are shown only to the student who took the course. Supervisors cannot view a student's scores; they will only see whether the student passed or failed.

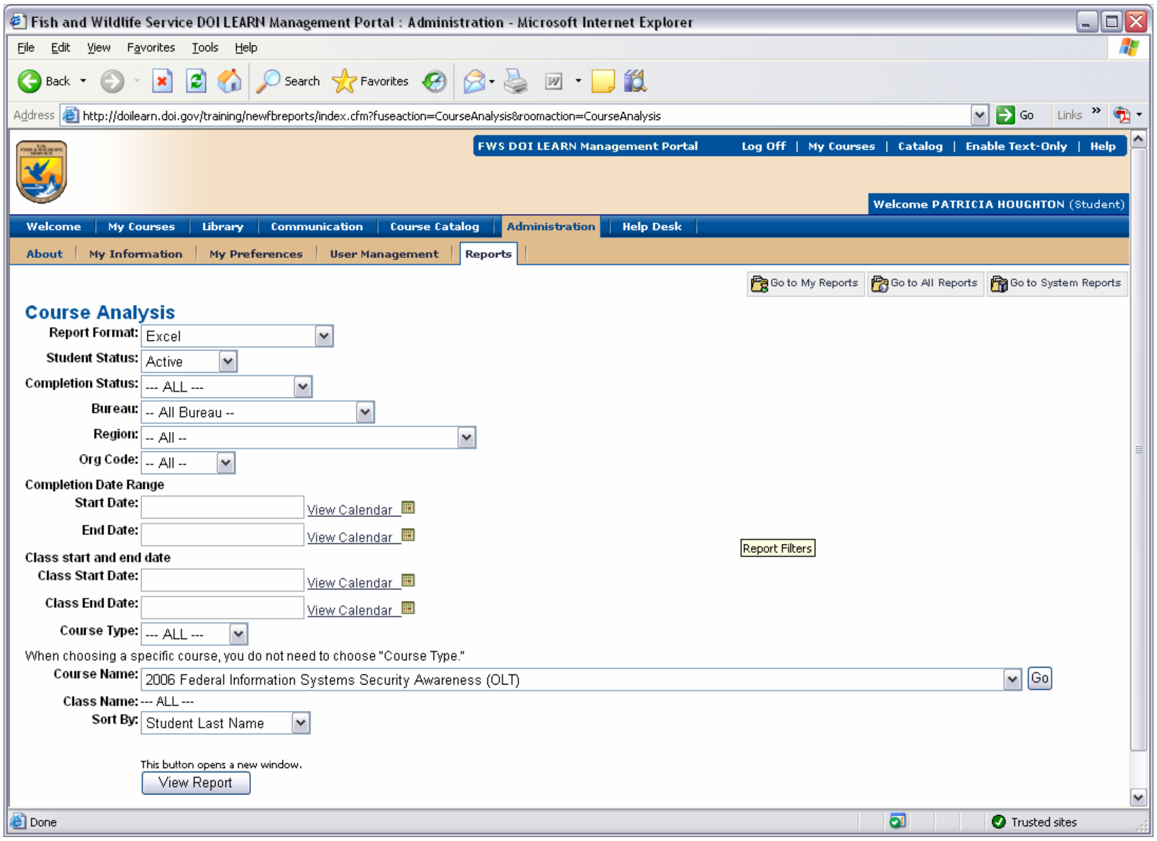
Navigating to the Reports

1. Click the **Administration** tab.
2. Click the **Reports** sub-tab.
3. Click the **System Reports** link on the left side.

Course Analysis Report -

This report provides information about student status, whether or not they have completed a course, as well as registration and completion dates. It also provides their status and e-mail address, and can display a complete list of classes for which all employees have registered.

1. Navigate to the reports. In the **Main** window, click the **System Reports** link.
2. Locate the **Course Analysis** Report, in the **Actions** column, click the **Run** link or Click the **Course Analysis** link.
3. From the **Report Format** drop-down, select the desired document type.
4. From the **Completion Status** drop-down, select the completion status. For all statuses, leave this field blank.



5. Within the **Completion Date Range** section, enter a **Start Date** and an **End Date** using the MM/DD/YYYY format. Click the View Calendar link to select the dates from a calendar view. For all dates, leave these fields blank.
6. From the **Course Name** drop-down, select the course. For all courses leave this field blank. (for example, 2006 Federal Information Systems Security Awareness (OLT))
7. Click the **Go** button.
8. From the **Sort By** drop-down, select the field on which the information will be ordered alphabetically.
9. Click the **View Report** button.