

Learning Management User Guide

FDA Supervisor



Revision History

This document was prepared by:

Date	Document Version	Document Revision Description	Document Author
01.20.2022	01	First draft for FDA OTED review	Taylor Horrocks
07.01.2022	02	Second draft	Taylor Horrocks

Table of Contents

Revision History	2
FDA Supervisor System Overview	3
ORA LearnED: Glossary	5
_topView Your Team's Transcripts.....	7
Download/Print Your Team's Transcripts	9
Run A Standard Report	10
Access the Manager Dashboard.....	12
Run a Report in Reporting 2.0.....	15

FDA Supervisor System Overview

This section provides a brief introduction to your role in Cornerstone OnDemand.

This system stores & tracks your training. You will log into the portal by navigating to <https://fdaoted.csod.com> and clicking on the button “FDA: PIV Card Login.” You will be automatically redirected to your Welcome Page in ORA LearnED. You can navigate to your Transcript, which includes your completed training records as well as all the training you are currently taking. You will be assigned training through this system, which will also appear on your Transcript. You can access & launch mandatory online training from your Transcript within ORA LearnED. You will also see the training classes for which you are currently registered. You can search for and request training that has been made available to you through this system. Finally, you will be able to access & launch any pre-work associated with upcoming training sessions.

As a supervisor, you will be able to track the training progress of your team and run reports.

ORA LearnED: Glossary

This section provides definitions of common ORA LearnED terminology.

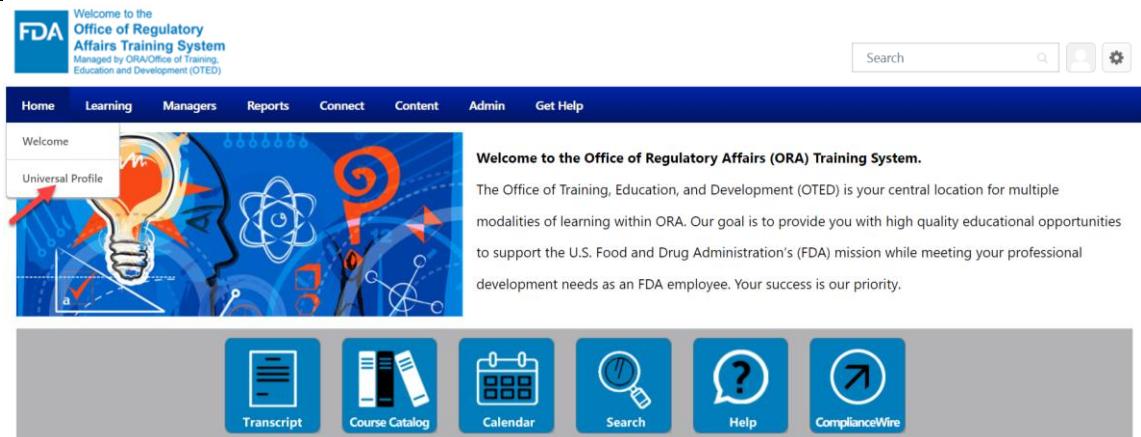
1. Curriculum	A Curriculum is a Learning Object which is made up of an association of other Learning Objects .
2. Event	An Event is a Learning Object which represents Instructor-Led Training (ILT) or Virtual Instructor-Led Training (vILT), given to users with credit tracked in the system.
3. Learning Object	A Learning Object is an individual unit of training; Online Class, Material, Session, Event, Video, Test, or Curriculum . A Curriculum can contain multiple Learning Objects (LOs) in a specific order for users to take.
4. Material	A Material LO is a basic Learning Object type which can be used to represent acknowledgement & requires users to mark them complete. Materials can support PDFs, Word Documents, Powerpoint Decks, & URLs to external sites.
5. Online Course	An Online Course is a SCORM package which surrounds the interactive learning content. This allows the LMS (ORA LearnED) & the user to engage with the content in new and more meaningful ways.
6. Session	A Session is a scheduled occurrence of an Event .
7. Subject	A Subject is any topic or item of interest. Users can choose from a pre-determined list and add Subjects to their Universal Profile Bio About page. These Subjects are searchable in Learning Search . Subjects added to your Universal Profile Bio About page also inform suggested training.
8. Statuses	Training on your Transcript can be in several statuses, including " Registered ", " In Progress ", " Past Due ", and " Completed ". These refer to the state of a particular item of training on your Transcript with regard to your progress in completing it. A " Registered " status indicates that you have been assigned the training but have yet to begin taking it. " Past Due " refers to the due date associated with the LO . When training is in " Completed " status, it is moved automatically from your Active Transcript to your Completed Transcript , providing a separate record for all of your completed training.

9. Test	A Test is a Learning Object in the system which captures an assessment of certain questions or exercises. This is an examination completed online in ORA LearnED which will then provide a record of completion on your Transcript .
10. Transcript	Every user has a personalized Transcript which enables the user to manage their training. The Transcript displays the status of each Learning Object (LO) requested by, assigned to, or required of the user, which allows the user to determine if the training is pending, approved, denied, or many other potential statuses. Depending on the training status, users can register, launch, and perform a variety of other training functions directly from the Transcript .
11. Video	Videos are supported as LOs in ORA LearnED, either as a URL or an uploaded file.
12. Universal Profile	Every user has a Universal Profile , representing the central user interface within the system. You can access all areas of your profile from this page.
13. Welcome Page	The Welcome Page is your landing page when you first access the system. It has widgets and tools to give you easy access to the different areas of the portal that you may frequent. You can always return to this page by clicking on the FDA logo in the top left corner of the screen.

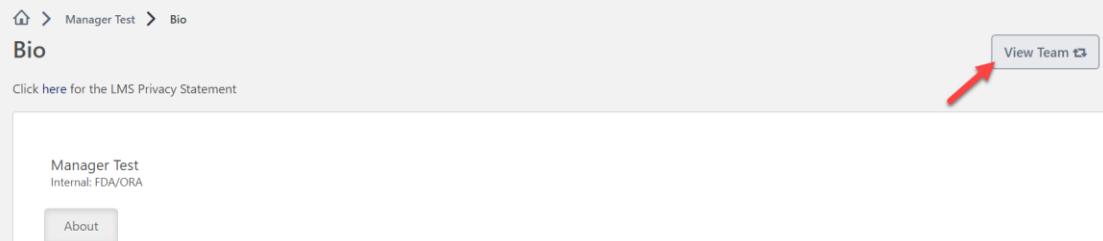
[View Your Team's Transcripts](#)

This section shows a supervisor how to view their team's Transcripts.

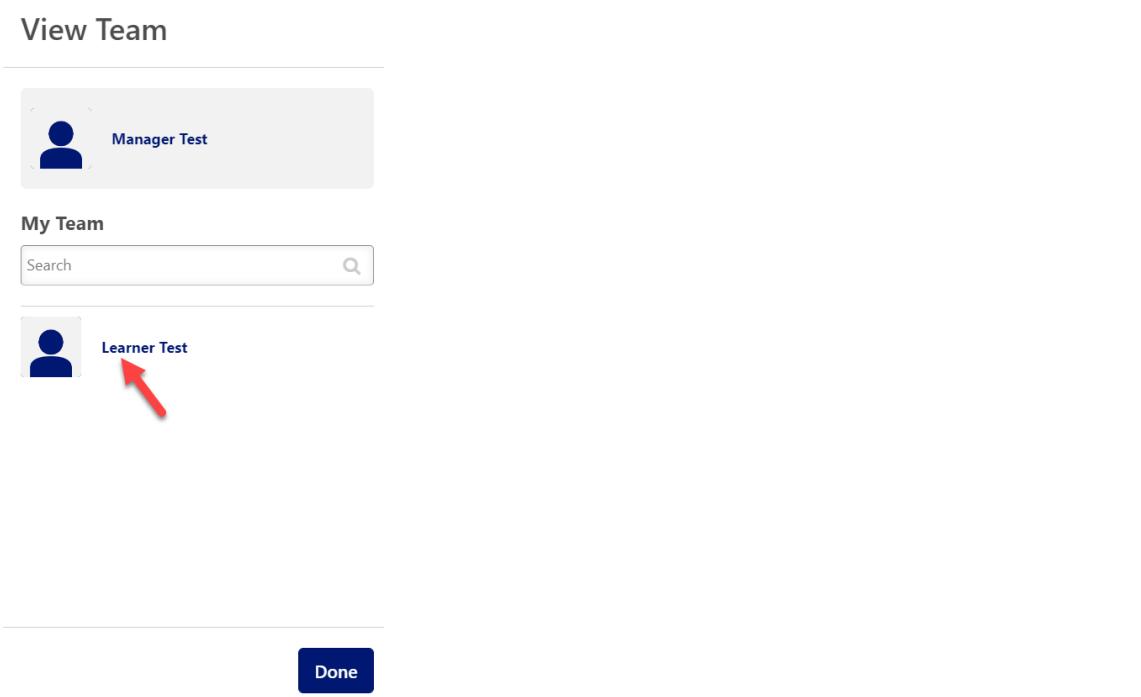
1. Hover over the **Home** tab and select **Universal Profile**.

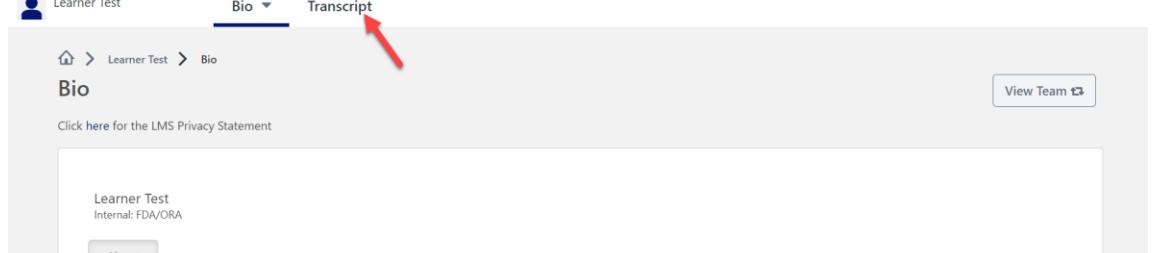
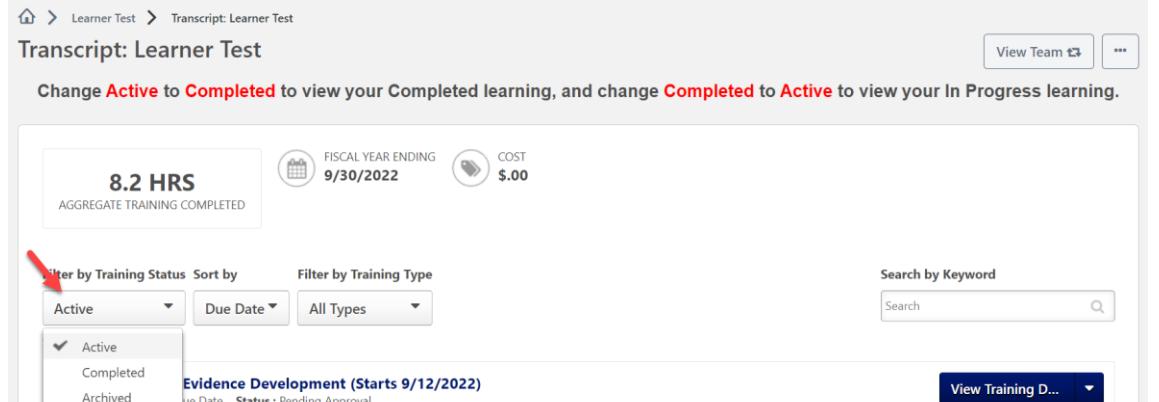


2. On this page, click on the **View Team** button.



3. A popup will appear with a list of your direct reports. Select the user whose **Universal Profile** you would like to view.



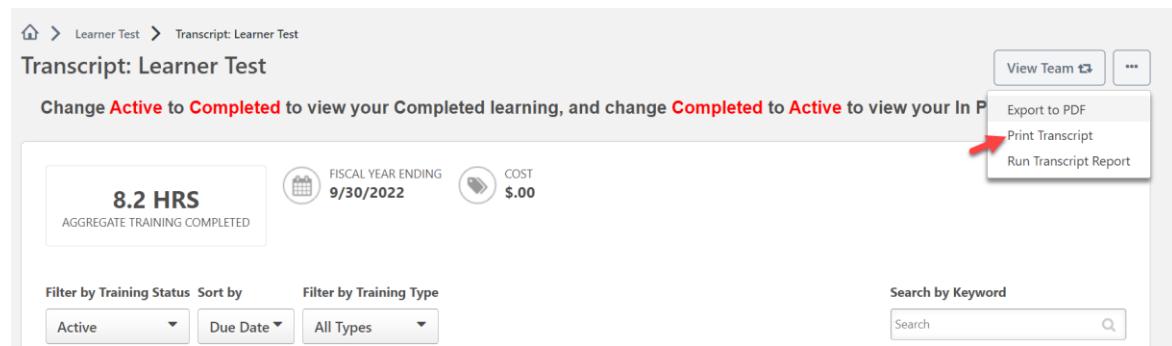
<p>4. Click on the Transcript tab to view the user's Transcript.</p>	
<p>5. View the user's Active, Completed, and Archived Transcripts.</p>	 <p>Change Active to Completed to view your Completed learning, and change Completed to Active to view your In Progress learning.</p> <p>8.2 HRS AGGREGATE TRAINING COMPLETED</p> <p>FISCAL YEAR ENDING 9/30/2022 COST \$0.00</p> <p>Filter by Training Status Sort by Filter by Training Type Search by Keyword</p> <p>Active Due Date All Types</p> <p><input checked="" type="checkbox"/> Active Completed Archived</p> <p>Evidence Development (Starts 9/12/2022) Due Date Status : Pending Approval</p> <p>View Training D...</p>

Download/Print Your Team's Transcripts

This section shows a supervisor how to print their team's Transcripts to get an output of their training record.

1. Access a team member's Transcript. Click on the **Options** icon.

Select **Print Transcript**. You could also select **Export to PDF**.



Transcript: Learner Test

Change **Active** to **Completed** to view your Completed learning, and change **Completed** to **Active** to view your In Progress learning.

8.2 HRS AGGREGATE TRAINING COMPLETED

FISCAL YEAR ENDING 9/30/2022 COST \$0.00

View Team **Print Transcript** Run Transcript Report

Filter by Training Status Sort by Filter by Training Type

Active Due Date All Types

Search by Keyword

2. You will now see a page listing your Active Training. Click **Print**.

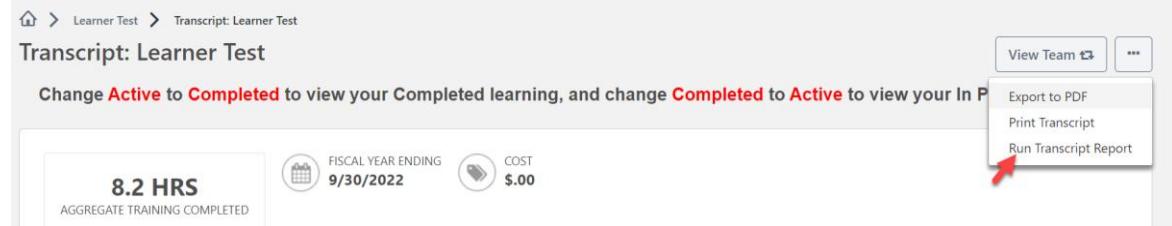
Active Training: Learner Test

Print

Title	Type	Due Date	Score	Status
MP102: Evidence Development (Starts 9/12/2022)	Session	None		Pending Approval
FD8006W: CUS Unit 1	Online Class	None		In Progress
ER234: Epi-Ready for Response Teams	External Training	None		Pending Completion Approval
CC8011W Curriculum: Communication Skills for Regulators	Curriculum	None		In Progress
BI205: Core Team Biologics (Starts 7/1/2022)	Session	None		Registered

3. To download and print a more detailed report, including completed training, return to your **Transcript** and click on the **Options** icon.

Select **Run Transcript Report**.



Transcript: Learner Test

Change **Active** to **Completed** to view your Completed learning, and change **Completed** to **Active** to view your In Progress learning.

8.2 HRS AGGREGATE TRAINING COMPLETED

FISCAL YEAR ENDING 9/30/2022 COST \$0.00

View Team **Print Transcript** **Run Transcript Report**

4. You can select specific **Learning Object** types, subjects, date criteria, and more. For a comprehensive report, do not make any additional selections. Click **Run Report**.

The report will immediately download to your desktop.

Advanced

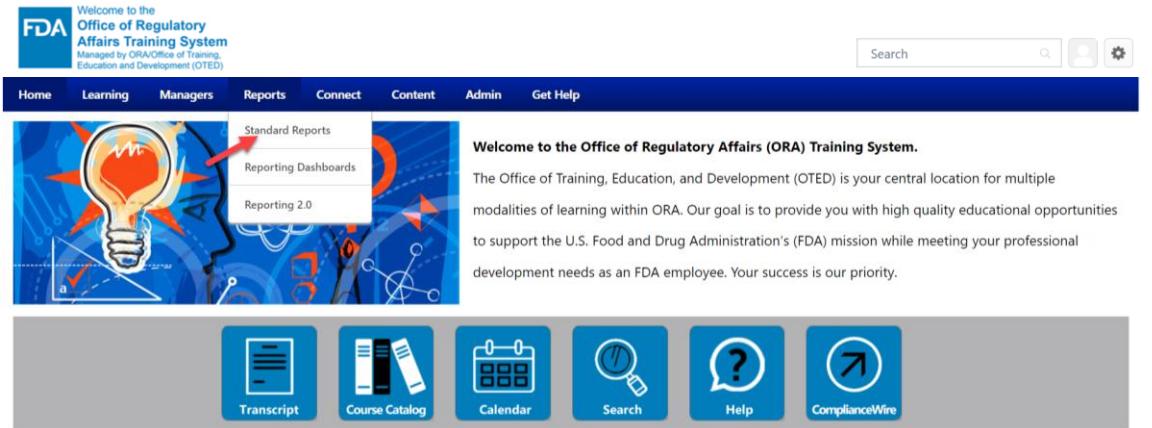
Include Associated Training (Curriculum Training and Pre or Post Work)
 Include Archived Training
 Include Completed Training Only
 Include Training Detail Information

[Back](#) [Run Report](#)

Run A Standard Report

This section shows a supervisor how to run a few Standard Reports that they can generate.

1. Hover over the **Reports** tab and select **Standard Reports**.



Welcome to the Office of Regulatory Affairs Training System. Managed by ORA/Office of Training, Education and Development (OTED)

Home Learning Managers Reports Connect Content Admin Get Help

Search

Standard Reports

Reporting Dashboards

Reporting 2.0

Welcome to the Office of Regulatory Affairs (ORA) Training System. The Office of Training, Education, and Development (OTED) is your central location for multiple modalities of learning within ORA. Our goal is to provide you with high quality educational opportunities to support the U.S. Food and Drug Administration's (FDA) mission while meeting your professional development needs as an FDA employee. Your success is our priority.

Transcript Course Catalog Calendar Search Help ComplianceWire

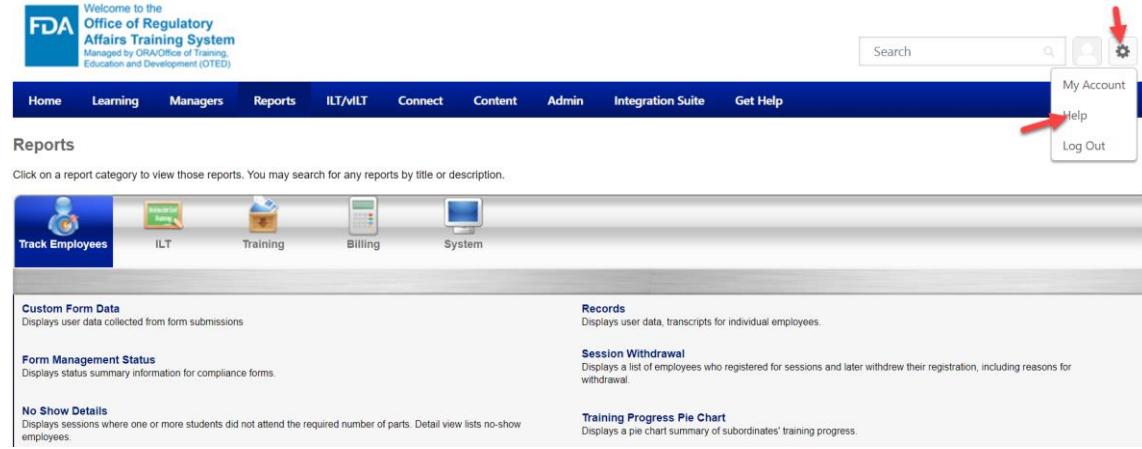
<p>1. The Standard Reports page will show a list of Reports that are available to you, as well as their descriptions.</p>	<p>Reports</p> <p>Click on a report category to view those reports. You may search for any reports by title or description.</p> <p>Track Employees ILT</p> <table border="1"> <tbody> <tr> <td>Custom Form Data Displays user data collected from form submissions</td><td>Pending User Records Respond to pending user records or view past requests for self registered users</td></tr> <tr> <td>Form Management Status Displays status summary information for compliance forms</td><td>Records Displays user data, transcripts for individual employees</td></tr> <tr> <td>No Show Details Displays sessions where one or more students did not attend the required number of parts. Detail view lists no-show employees</td><td>Session Withdrawal Displays a list of employees who registered for sessions and later withdrew their registration, including reasons for withdrawal</td></tr> <tr> <td>Past Due Displays employees past due training</td><td>Training Progress Pie Chart Displays a pie chart summary of subordinates' training progress</td></tr> <tr> <td>Past Requests Displays training requests you have already approved, deferred, or denied. You may change your decision for training that an employee has not yet registered for</td><td>Training Status Summary Displays a summary of how many training items each employee has that are not started, in progress, or completed</td></tr> <tr> <td>Pending Requests Displays outstanding training requests you must approve, defer, or deny</td><td>Transcripts Displays transcripts of employees for whom you are the approver, manager, or cost center approver</td></tr> </tbody> </table>	Custom Form Data Displays user data collected from form submissions	Pending User Records Respond to pending user records or view past requests for self registered users	Form Management Status Displays status summary information for compliance forms	Records Displays user data, transcripts for individual employees	No Show Details Displays sessions where one or more students did not attend the required number of parts. Detail view lists no-show employees	Session Withdrawal Displays a list of employees who registered for sessions and later withdrew their registration, including reasons for withdrawal	Past Due Displays employees past due training	Training Progress Pie Chart Displays a pie chart summary of subordinates' training progress	Past Requests Displays training requests you have already approved, deferred, or denied. You may change your decision for training that an employee has not yet registered for	Training Status Summary Displays a summary of how many training items each employee has that are not started, in progress, or completed	Pending Requests Displays outstanding training requests you must approve, defer, or deny	Transcripts Displays transcripts of employees for whom you are the approver, manager, or cost center approver
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<p>2. Select the Report you would like to run.</p> <p>Note: All reports in the Track Employees tab will display results for your direct and indirect reports only.</p>	<p>Reports</p> <p>Click on a report category to view those reports. You may search for any reports by title or description.</p> <p>Track Employees ILT</p> <table border="1"> <tbody> <tr> <td>Custom Form Data Displays user data collected from form submissions</td><td>Pending User Records Respond to pending user records or view past requests for self registered users</td></tr> <tr> <td>Form Management Status Displays status summary information for compliance forms</td><td>Records Displays user data, transcripts for individual employees</td></tr> <tr> <td>No Show Details Displays sessions where one or more students did not attend the required number of parts. Detail view lists no-show employees</td><td>Session Withdrawal Displays a list of employees who registered for sessions and later withdrew their registration, including reasons for withdrawal</td></tr> <tr> <td>Past Due Displays employees past due training</td><td>Training Progress Pie Chart Displays a pie chart summary of subordinates' training progress</td></tr> <tr> <td>Past Requests Displays training requests you have already approved, deferred, or denied. You may change your decision for training that an employee has not yet registered for</td><td>Training Status Summary Displays a summary of how many training items each employee has that are not started, in progress, or completed</td></tr> <tr> <td>Pending Requests Displays outstanding training requests you must approve, defer, or deny</td><td>Transcripts Displays transcripts of employees for whom you are the approver, manager, or cost center approver</td></tr> </tbody> </table>	Custom Form Data Displays user data collected from form submissions	Pending User Records Respond to pending user records or view past requests for self registered users	Form Management Status Displays status summary information for compliance forms	Records Displays user data, transcripts for individual employees	No Show Details Displays sessions where one or more students did not attend the required number of parts. Detail view lists no-show employees	Session Withdrawal Displays a list of employees who registered for sessions and later withdrew their registration, including reasons for withdrawal	Past Due Displays employees past due training	Training Progress Pie Chart Displays a pie chart summary of subordinates' training progress	Past Requests Displays training requests you have already approved, deferred, or denied. You may change your decision for training that an employee has not yet registered for	Training Status Summary Displays a summary of how many training items each employee has that are not started, in progress, or completed	Pending Requests Displays outstanding training requests you must approve, defer, or deny	Transcripts Displays transcripts of employees for whom you are the approver, manager, or cost center approver
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<p>3. Depending on the Standard Report selected, you will be prompted with varying filter criteria.</p> <p>Choose your filters, and then click Search. For some reports, the button will say Export to Excel or Submit.</p>	<p>Training Progress Pie Chart</p> <p>Report Criteria</p> <p>View training progress information for your subordinates. The date filters below refer to the date the training was requested/assigned. Click on a slice of the pie to see a detailed breakdown of users with that status. To return to the overview of all statuses, click on the "View All Statuses" link that appears in the detailed breakdown view</p> <p>DATE CRITERIA</p> <p>Date Criteria: This Year <input type="button" value="▼"/> From: <input type="text" value="1/1/2022"/> To: <input type="text" value="12/31/2022"/></p> <p>ADVANCED CRITERIA</p> <p>Training Type : <input checked="" type="checkbox"/> Online Class <input checked="" type="checkbox"/> Event <input checked="" type="checkbox"/> Quick Course <input checked="" type="checkbox"/> Curriculum <input checked="" type="checkbox"/> Test <input checked="" type="checkbox"/> Session <input checked="" type="checkbox"/> External Training <input checked="" type="checkbox"/> Library <input checked="" type="checkbox"/> Material <input checked="" type="checkbox"/> Posting <input checked="" type="checkbox"/> Video <input checked="" type="checkbox"/> Online Content Training Title : <input type="text"/> <input type="button" value="..."/> <input type="button" value="Delete"/> Options : <input checked="" type="checkbox"/> Hide Archived Training <input type="checkbox"/> Include Indirect Subordinates Display : <input checked="" type="radio"/> All Training <input type="radio"/> Assigned Training Equivalent Training : <input type="checkbox"/> Include users who have completed equivalent courses in the report. Include Removed Training : <input type="checkbox"/> Include training that was removed from user transcript User Status : <input type="checkbox"/> Include Inactive users</p> <p><input type="button" value="Search"/> </p>												

4. Once you click **Search**, a list of search results will appear. Click the **Export to Excel** button to download the **Standard Report**.

Search Results						View Details		
USER ID	USER	TYPE	TITLE	TRAINING PROVIDER	STATUS	Pending Approval	Registered	Details
TEST1	Test, Learner	Session	HP102j: Evidence Development	OTED	Pending Approval			
TEST1	Test, Learner	Session	B1205j: Core Team Biologica	OTED	Registered			
TEST1	Test, Learner	Online Class	CCB011Wj: Module 6-Course Summary	OTED Online	Registered			
TEST1	Test, Learner	Online Class	CCB011Wj: Module 2-Building a Communication Foundation	OTED Online	Registered			

5. For more detail on each type of **Standard Report**, you can click on the **Settings** icon in the upper right corner and select **Help**.

This will bring you to the Standard Reports Overview page in **Online Help**.



Welcome to the **FDA** Office of Regulatory Affairs Training System. Managed by ORA/Office of Training, Education and Development (OTED).

Home Learning Managers Reports ILT/vILT Connect Content Admin Integration Suite Get Help

Reports

Click on a report category to view those reports. You may search for any reports by title or description.

Track Employees ILT Training Billing System

Custom Form Data
Displays user data collected from form submissions

Form Management Status
Displays status summary information for compliance forms.

No Show Details
Displays sessions where one or more students did not attend the required number of parts. Detail view lists no-show employees.

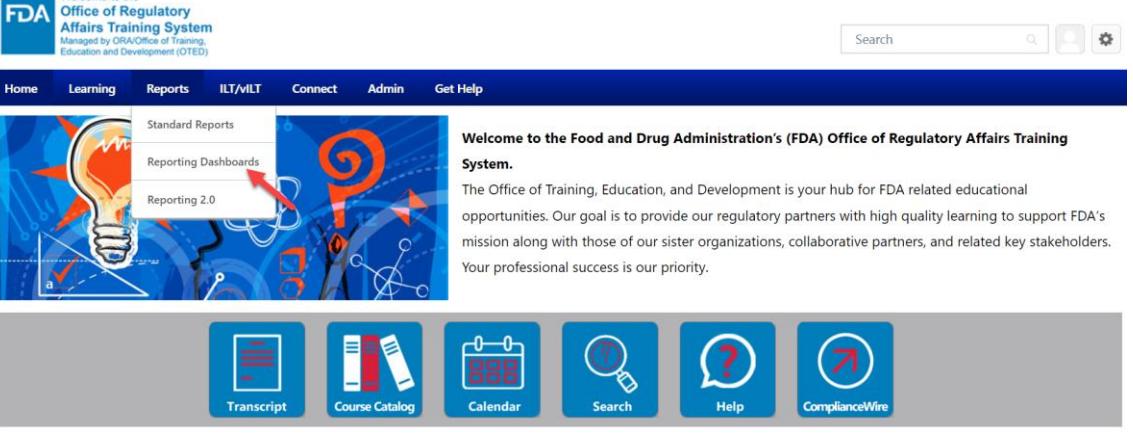
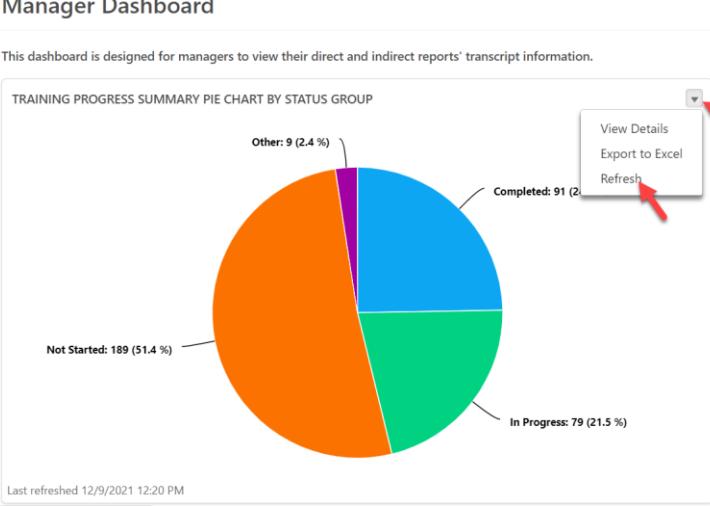
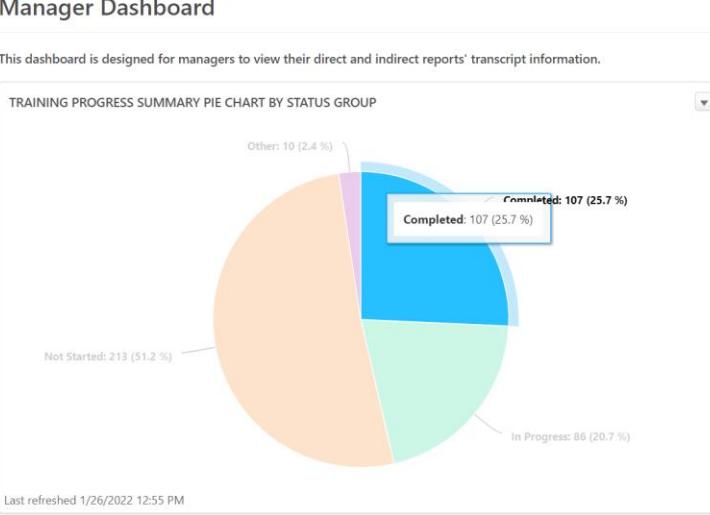
Records
Displays user data, transcripts for individual employees.

Session Withdrawal
Displays a list of employees who registered for sessions and later withdrew their registration, including reasons for withdrawal.

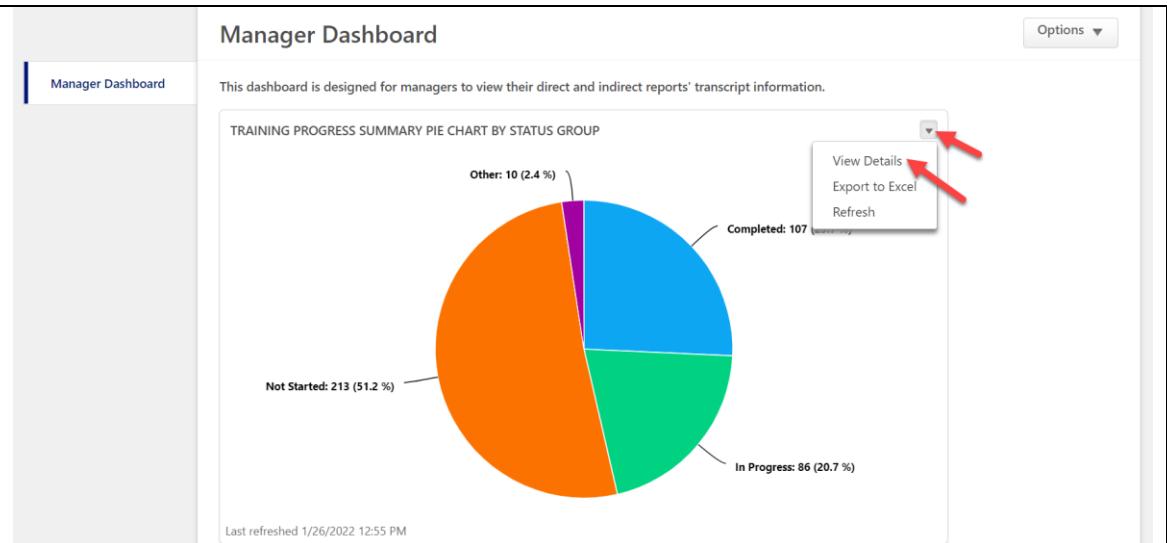
Training Progress Pie Chart
Displays a pie chart summary of subordinates' training progress.

Access the Manager Dashboard

This section shows a supervisor how to access and navigate the Manager Dashboard.

<p>1. Hover over the Reports tab and select Reporting Dashboards.</p>	
<p>2. Each graphic on the dashboard is called a Widget. Click on the dropdown arrow at the top right corner of your Widget and select Refresh. Wait a minute or two for the data to refresh.</p>	
<p>3. You can hover over a segment of the chart to highlight it.</p>	

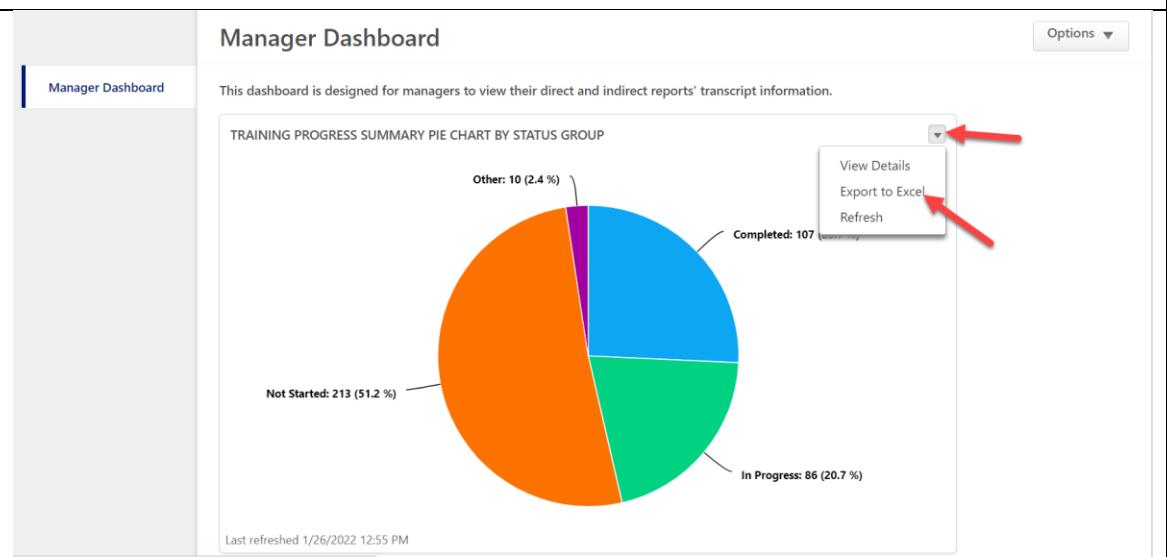
4. To view the underlying data that makes up the chart, click on the dropdown arrow again and select View Details.



5. A table will open in a new window. Here, you can view the report behind the chart.

Transcript Registration Date	Transcript Completed Date	Training Title	Transcript Status	User Status	Training Type
		MP102: Evidence Development	Approved	Active	Event
		MP102: Evidence Development	Approved	Active	Session
		Almonds	Pending Approval / Past Due	Active	Material
		MP118: Interviewing Skills and Personal Safety Report	Approved	Active	Event
		Test event 10.18 (waitlist)	Not Started	Active	Event
		MP100: New Hire Fundamentals Classroom Courses	Approved	Active	Event
		Test event 10.18 (waitlist)	Waitlist Expired	Active	Session
		Allergen Testing	Approved	Active	Event
		MP102: Evidence Development	Pending Approval	Active	Session
		Test event 2 request forms	Not Started	Active	Event
		Allergen Testing	Pending Approval	Active	Session
10/08/2021 05:00 PM	MP101: Basic Food and Drug Law		Completed	Active	Event
10/21/2021 04:50 PM	Introduction to OTED		Completed (Equivalent)	Active	Online Class

6. To export the full report to Excel, click on the dropdown arrow again and select Export to Excel.



7. Finally, you can print the entire **Dashboard** by clicking on the Options button and selecting Print.

Manager Dashboard

This dashboard is designed for managers to view their direct and indirect reports' transcript information.

TRAINING PROGRESS SUMMARY PIE CHART BY STATUS GROUP

Status Group	Count	Percentage
Not Started	213	51.2 %
Completed	107	25.7 %
In Progress	86	20.7 %
Other	10	2.4 %

Last refreshed 1/26/2022 12:55 PM

Options ▾

- Refresh
- Print** (highlighted with a red arrow)
- Copy
- New

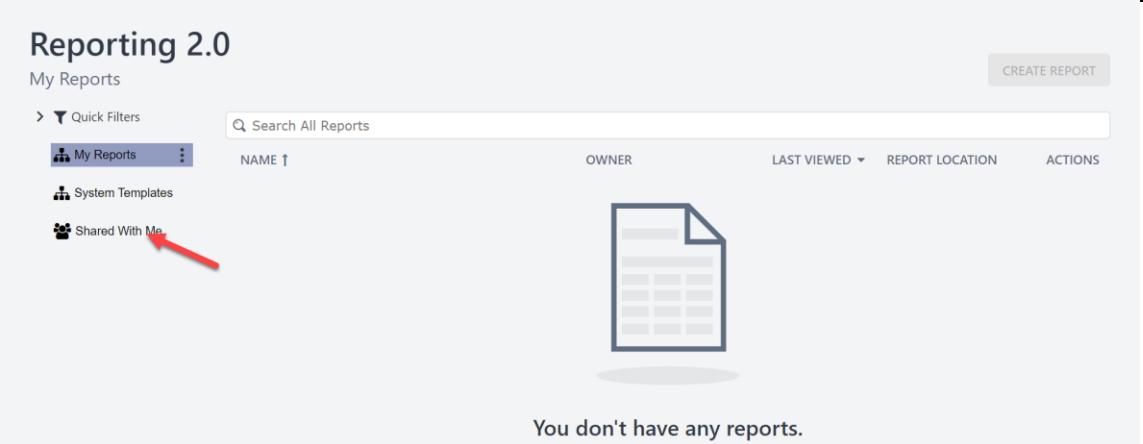
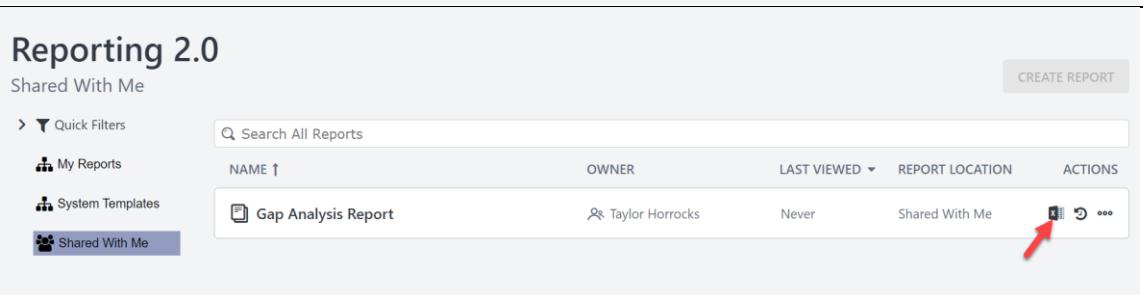
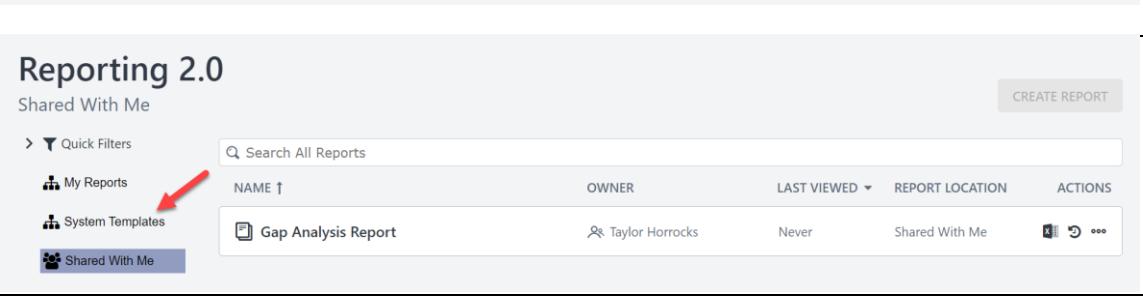
Run a Report in Reporting 2.0

This section shows a supervisor how to find custom reports that have been shared with them.

1. Hover over the **Reports** tab and select **Reporting 2.0**.



Search

	
2. Click on the tab "Shared With Me."	
3. Some reports will be shared with you because you are a supervisor. You can download the report to Excel by clicking on the Excel icon." data-bbox="65 480 225 625"/>	
4. You can download some standard reports here as well by selecting the "System Templates" tab." data-bbox="65 625 225 735"/>	

5. You can download any report to Excel by clicking on the Excel icon.

Note: These reports will only show data for your direct and indirect reports. If your direct and indirect reports are not included in the data, the report will be blank.

Reporting 2.0

System Templates

CREATE REPORT

Quick Filters

My Reports

System Templates

Shared With Me

Search All Reports

NAME ↑	OWNER	LAST VIEWED	REPORT LOCATION	ACTIONS
CSOD Data Source for Org Planning	Cornerstone Administrator	Never	System Templates	
Enterprise Training Report	Cornerstone Administrator	Never	System Templates	
Online Training Status	Cornerstone Administrator	Never	System Templates	
Past Due	Cornerstone Administrator	Never	System Templates	