

# Team Dashboard Guide

<http://train.ora.msu.edu>

You must have someone added to your team before you have access to the Team Dashboard dropdown (top right of your Home screen).

Saba training system offers **2 teams**:

- DIRECT - Direct teams are imported periodically from in HR personnel records. Subordinates are only on 1 direct team.
- ALTERNATE – Add additional people as necessary by contacting the Helpdesk.

## Navigation

Use tabs, menu items and links to navigate. Do not rely on your browser back button. Most browsers do not cache pages. If you accidentally use a back button and get an error, just refresh your browser or return to <https://train.ora.msu.edu/Saba/Web/Main>.

## My Team tab

Check to see who is assigned to your Alternate Team. You might have a Direct Team instead or in addition.

Team Dashboard | Team Learning | My Team

My Team

Contact the Helpdesk 517-884-4600 or [train@ora.msu.edu](mailto:train@ora.msu.edu) to add or remove someone from

By Individuals  by Positions (n/a)

Direct Team | Alternate Team Personnel

View by Person Type

Alternate Team Personnel

<input type="checkbox"/>	Name	Person Type	Actions
<input type="checkbox"/>	Kenneth Beer		Actions
<input type="checkbox"/>	Cally Cooley	staff	Actions

Action Profile

Currently, the only way to modify your team is through the Helpdesk. Terminated employees are also removed shortly after the HR database is updated.

## Assign a Proxy to view Your Team Dashboard

If you want a subordinate or colleague to assist you in monitoring training records, contact the Helpdesk to give that person “Proxy” access to your Team Dashboard. Your proxy will only use his/her own NetID to login rather than sharing your own.

Primary investigators and other managers are still responsible for employees receiving appropriate training and in overseeing safety and research integrity.

# CERTIFICATIONS

## General Information on Certifications:

- Certification is a wrapper around required training and often refresher training.
- In Reports, a Certification "Status" can be:
  - **Assigned** or In-progress – Have not completed the initial training
  - **Acquired** – Has completed the initial and refresher training. All requirements are complete and current. Compliant.
  - **Overdue** – Has not yet completed the initially assigned training. Some certification programs do not use target days so they never move to Overdue status.
  - **Expired** – Has not completed refresher training within the required deadline.
  - A certification/recertification period can be 1 year, 2 years, 4 years, etc.

## Check Certification Status:

### Look for Urgent Compliance Issues

Team Dashboard | Team Learning | **My Team**

**Team Certifications**

Completed Courses  
InProgress Courses  
Search Course Catalog

Team Certifications

Click "Certifications Matrix" tab for more details.

View Certifications for **My Alternate Team**

Certifications Summary | **Certifications Matrix**

**View by Person Type**

**Most urgent columns**

	Team Member	Person Type	Assigned	In Progress	Overdue	Acquired	Revoke	Expired	Discontinued	Total	Actions
<input type="checkbox"/>	Gina Marie Jones	student	0	0	0	1	0	0	0	1	View Certifications
<input type="checkbox"/>	Ginny Jones	faculty	0	0	0	1	0	0	0	1	View Certifications
<input type="checkbox"/>	Graciela	staff	0	0	0	2	0	0	0	2	View

Add Certification

You can see more detail. Click the Certification Matrix tab. Or click one employee's View Certifications link.

View Certifications for **My Direct Team**

Certifications Summary | **Certifications Matrix**

**View by Person Type**

View by **All Certifications**

Add Certification  
Modify Table

	Team Member	Person Type	Aerial Lift Operator Permit 1	Hearing Conservation Program 1	Respirator 1	Actions
<input type="checkbox"/>	Jose Admin					View Certifications
<input type="checkbox"/>	Sally Safety	Assigned	Assigned	Assigned	Assigned	View Certifications
<input type="checkbox"/>	Test PiMgr	Assigned	Assigned	Assigned	Assigned	View Certifications
<input type="checkbox"/>	Kenneth Young	staff	Assigned	Assigned	Assigned	View Certifications

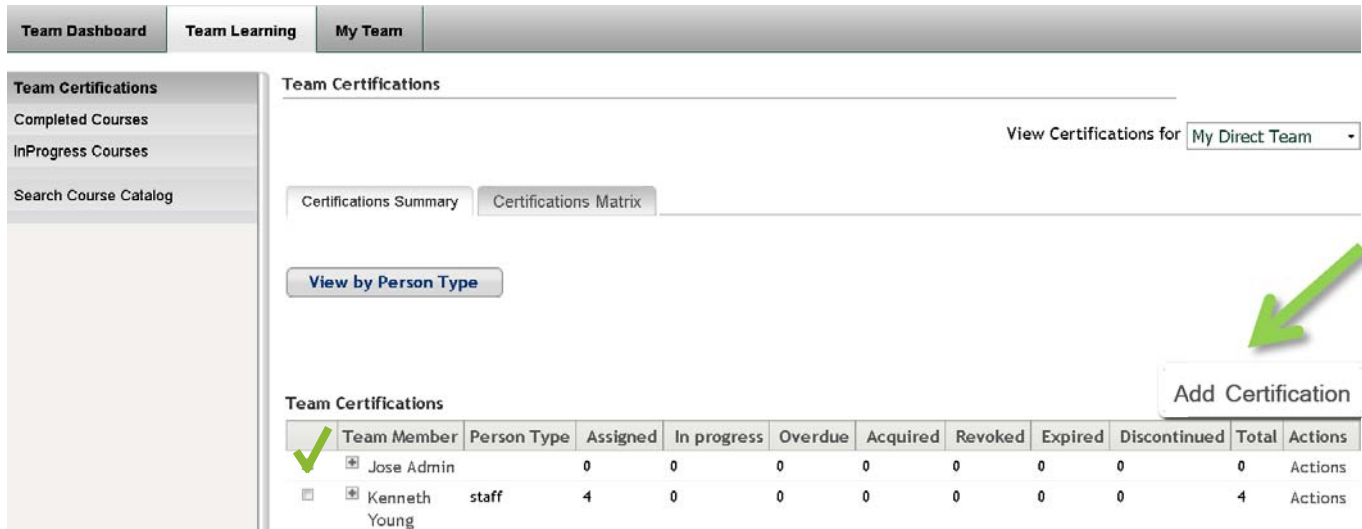
Next

Notice the **Next>** link at the bottom of your list.

## Add/Assign New Certifications:

Depending on the type of materials, location, equipment, or activity employees will be coming into contact with, you may need to assign certifications. If you aren't sure what training is required, email [train@ora.msu.edu](mailto:train@ora.msu.edu) for referrals.

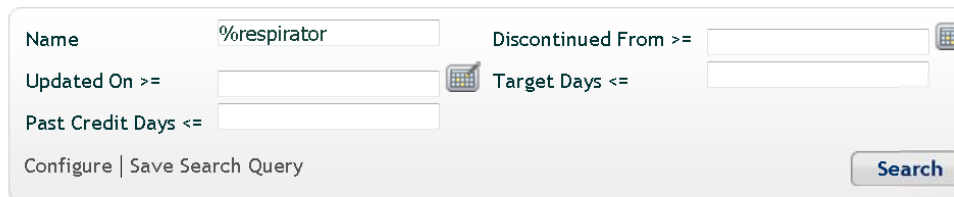
Click one or more team members (far left column) then click the Add Certification link (right above your list).



The screenshot shows the 'Team Certifications' page. At the top, there are tabs for 'Team Dashboard', 'Team Learning', and 'My Team'. Below the tabs, there are sections for 'Team Certifications' with sub-sections for 'Completed Courses', 'InProgress Courses', and 'Search Course Catalog'. A dropdown menu shows 'View Certifications for My Direct Team'. There are buttons for 'Certifications Summary' and 'Certifications Matrix', and a 'View by Person Type' button. A table lists team members with columns for 'Team Member', 'Person Type', 'Assigned', 'In progress', 'Overdue', 'Acquired', 'Revoked', 'Expired', 'Discontinued', 'Total', and 'Actions'. A green checkmark is next to 'Jose Admin'. An 'Add Certification' button is highlighted with a green arrow.

Team Member	Person Type	Assigned	In progress	Overdue	Acquired	Revoked	Expired	Discontinued	Total	Actions
✓ Jose Admin		0	0	0	0	0	0	0	0	Actions
Kenneth Young	staff	4	0	0	0	0	0	0	4	Actions

## Add Certification



The screenshot shows the 'Add Certification' search form. It has fields for 'Name' (containing '%respirator'), 'Discontinued From >=' (with a calendar icon), 'Updated On >=' (with a calendar icon), 'Target Days <=' (with a calendar icon), and 'Past Credit Days <=' (with a calendar icon). There are 'Configure' and 'Save Search Query' links, and a 'Search' button highlighted with a green arrow.

A pop-up search window will open. To get the full list available, leave the Name blank and just click the Search button.

## Certifications

Select	Name	Version	Available From	Discontinued From	Target Days	Expire In (days)	Not
<input type="checkbox"/>	N95 Respirator	1	07/07/2016		0	365	30
<input type="checkbox"/>	Powered	1	07/07/2016		0	365	30

When you find the right certification, click the far left green box to select it.

By assigning a certification, you ensure the employee will get email reminders to complete training. Certification status is reviewed by University compliance personnel and auditors from federal and state agencies.

## Remove a Certification:

An error in removing a training requirement may lead to non-compliance for the University. An employee may need the certification for another manager. Contact the Regulatory training helpdesk at [train@ora.msu.edu](mailto:train@ora.msu.edu) to remove training requirements for you or your team members. Managers and relevant safety officers are notified when a certification is removed from an account.

## View each person's Completed Courses.

Click the Team Learning Tab. The default view is for Alternate Teams.

You can toggle the view to change it to Direct Team.

Team Dashboard | Team Learning | My Team

Team Certifications  
**Completed Courses**  
InProgress Courses  
Search Course Catalog

Team Completed Courses

View by Person Type

View Completed Courses For  
Direct Team  
**Direct Team**  
My Alternate Teams

Full Name	Person Type	Items On Completed Course	Actions
Jose Admin		5	View Completed Course
Kenneth Young	staff	0	View Completed Course

Click View Completed Course link to go to that person's transcript page.

Team Dashboard | Team Learning | My Team

Team Certifications  
**Completed Courses**  
In Progress Course Enrollments  
Search Course Catalog

Completed Courses: Suzy TestWorker

Tip: Default is past 3 months. Type in older date to go back further.

Tip: To print a course certificate, mouse-over Actions for that course (right column). Review course assignments using Actions also. Certificates cannot be viewed/printed in Internet Explorer

Courses

Start Date (back to): 04/27/20 00

End Date (up to): 07/26/2016

Delivery Type: All

Search

Profile Quicklink  
Certifications  
Enrollments  
Completed Courses  
Profile Snapshot

Completed Courses | Modify Table

Title	Delivery Type	Completion Status	Date Marked Complete	Actions
Foreign Corrupt Practices Act	Web Based Training	Successful	10/10/2013	Actions

You can also enroll your direct and alternate team members to new courses.

If necessary, you can PRINT a Certificate of Completion.