Certification Reporting

# Overview

One of the largest changes with the move to Saba is the addition of certifications, which change how training requirements are assigned, tracked, and reported on. A certification is a wrapper around one or more courses that applies requirements, such as how long someone has to complete their training or if they need to redo it after some period of time.

The key difference is that now tracking course completions, and course expiry/redo dates are all handled entirely by the certification internally. This means that if we want to report on if someone has done their training or not, we generally only need to look at their status in the certification which will show if they are in an “Acquired” state (they are current on all the requirements), an “Overdue” state (they haven’t completed it in time), an “Expired” state (they did not redo it before expiry, and a few other possible states. This makes the reporting easier for you, as that one value will tell you everything you need to know about if someone meets their training requirements, without the need to check course completion dates, course pass/fail status, or anything else. The certification also applies in the same way no matter who or what assigns it as a requirement – a manager can assign training to their reports, system rules may automatically apply them (e.g. for a location), or they may be attached to a job title as a requirement of that job.

# Reporting Details

As noted, that certification status is really all that needs to be monitored in most cases. Here is an example of a few statuses (along with assignment date and acquired on date) for a few certs from one of the reports:

Graphical user interface, application

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Everyone listed as “Acquired” has met all the requirements of that certification, and as long as they continue to stay current, by completing the recertification requirements (if any) on time, they will stay in that acquired state, indicating that they are “good-to-go” with respect to all the training requirements in that certification. Each certification can have one course, or many courses.

## Filters

Because of this change, the same reports can be used to look at almost any training requirements – as long as they are wrapped in a certification, they will be tracked and reported on in the exact same way. This allows us to do away with specialized reports monitoring specific requirements in favor of multipurpose reports that are easier to maintain.

Since these reports can be repurposed to look at any training requirements, the setup of the filters is very important. We always want the same info, but we want it for a different subsection of the company, i.e. “training assigned to my direct reports”, “people certified to work at heights (they have completed the certification that contains the required training for working at heights)”, or those who are out of compliance with their training requirements.

The exact set of filters may vary a little from report to report, but they will all look something like this:

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Changing these filters will allow you to slice training assignments included in the report to see exactly what you need.

For example, if I wanted to see everyone who is noncompliant for a given certification I could set the status filter like this:

Graphical user interface, application

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Then set the Certification Name filter to the certification I care about. If I wanted to see everyone under a certain manager who is non-compliant on any training requirements, I could set the same status filter, but set the Manager Name filter to the manager, or managers, that I care about. These filters can be combined to capture any subgroup of training requirements.

In most (but not all) cases these filters are easy and quick to change in the reporting setup, so if there is a need to filter by something that isn’t included in the current filters, we can add it without much issue.

# Example Certification Report

Again, due to the standardization offered by the certification functionality, the same report can be used for most scenarios. Here is an example of the “base” certification reporting. As with the filters, adding fields is usually (but not always) quite easy, so if an additional piece of info is needed, it is usually quick to add it. Note that there is a system limit of 17 fields, so additions may require removing other fields.

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