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 is allowed to complete their training or if they need to redo it after some 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 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

## Statuses

There are several statuses that certifications may be in for a learner:

* **Assigned –** the learner has been assigned the certification, has not yet completed the training, but are still within the specified time limit.
* **Acquired –** the learner currently meets all the training requirements of the certification.
* **Overdue –** the certification was assigned, and the learner failed to complete the requirements by the specified time limit.
* **Acquired Recertification Needed –** the learner is still current in their qualification, and is currently in the window to complete the recertification requirements before the cert expires.
* **Expired –** the learner failed to complete the recertification requirements in time, and their status in the certification is no longer valid.
* **Revoked –** the learner has had their valid certification status revoked manually. This is rare and is equivalent to someone taking away a learner’s qualification in a certification.
* **Cancelled –** the assignment of a certification as a requirement has been taken away while the learner is in the process of completing it.
* **Discontinued –** the certification itself is no longer current, normally due to a new version of a certification being released and the old one being marked as old.

Each change of status generally has a date that can be reported on – acquired on date, expiration date, etc…

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 test reports:

Graphical user interface, application

Description automatically generated

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. If they turn to Overdue, Expired, or in this case, Revoked, that is an indication that the learner is not current in the requirements of that certification, so they need to complete something to make their status become acquired. You don’t (necessarily) need to worry about the specifics of those requirements either – the system will automatically track the learner’s progress in each course inside of the cert and show them what they need to do and when they need to do it. Each certification can have one course, or many courses, they work in the exact same way for reporting; when all the requirements of the certification are met, the status becomes Acquired.

## 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:

Table

Description automatically generated

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

Description automatically generated

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 – the result is always the same, the information on people and their certification status information, for the set of people/certs selected by the filters.

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. 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. Here is an example of the contents of the “base” certification reporting, exported as a CSV.

Table

Description automatically generated

# Matrix Reporting

## Overview

Matrix reporting is one thing that needs to change, due both to the functionality of the built-in Saba reporting tool and the ability of the other certification reporting to be more powerful. In the Saba tool, a crosstab report (the style of the matrix report) is limited to exactly 3 fields; in the case of certification reporting those 3 fields will almost certainly be the learner, the certification name, and the status. For more details, one of the other certification reports must be used.

Much of the core functionality of the matrix report can be replicated easily with a smart use of filters in the above reporting. For example, to see everyone who is qualified for a given task, a report can be run with filters set to a certification status of Acquired, and a certification name of the certification or certifications that make up that qualification. Switching the status filter to “not acquired” will give everyone who is not qualified.

## Example

Here is an example of the simple matrix reporting that is possible, as shown it is fairly simple in what it is able to provide.

Graphical user interface, application, table, Excel

Description automatically generated