Reports

# Overview

This document contains a list of the reports created to match the set of requirements provided along with some information to explain the differences stemming from either the differences in how the LMS functions, how the Saba reporting tool functions, and overall improvements in report usability.

## Scheduling vs Ad-hoc

All of the reports can be either run on demand on an ad-hoc basis, or scheduled to be generated at a specified time.

## Notes for Changes

All of the reports here are still able to be modified, or copied and modified into something new. In general we can group changes into two big categories based on what needs to be changed:

* Add/change filter or value – easy and quick.
* Change grouping or structure of report – hard and slow.

This is obviously a generalization, but it works as a good guide. If we need to make most common/simple changes like adding a forgotten value, such a change can likely be done pretty quickly and easily. In particular, things like filters and some of the less critical values included (e.g. email) are an educated guess on my part – making changes once the reports are used by stakeholders is expected, easy, and near zero risk.

Note that there are system limits on the number of variables or filters that can be included on one report.

## Variable or Column Names

The variable labels default to whatever value that field is labeled in Saba. These can be changed, but the change is universal for all reports. Any change will apply to every report that exists in the system.

I have not changed any of these column names as they are purely business judgements; changes do not impact the logic of the reports, so it is a low-risk change to do anytime, potentially only impacting reports where the data is imported into some other tool after leaving Saba.

## Certifications vs Courses

The largest change to reporting is that now training requirements are applied by a certification in Saba. A certification is just a list (one or more) of courses that someone must complete; the assignment can be done by the requirements of an employee’s job, by a rule, or by someone’s manager/administrator. Reporting changes as well – the certification does all the logic of determining if someone has completed the requirements properly, so our reporting no longer needs to worry about course completions, we can focus only on the status of the certification itself. This makes the reporting simpler, more powerful, and more interchangeable – though it does introduce a change.

## Important Notes

* Where similarly intended reports have been consolidated, I made a best guess on which values to include when the different reports conflicted. This may introduce some “extra” stuff that can be ignored if you’re used to the more sparse report. If something needs to be added, please just note it.

## NPARB

The NPARB reporting is one thing that is impacted by the certification change. On the existing NPARB report there are aspects of both courses and certification reported on – whether someone has completed their assigned training and when they need to do it again.

In Saba, the assignment of required training is done on the certification level, not the course level. The imposition of recertification dates is also done by a certification, not a course. Because of this, reporting on the status of assigned certification is the proper way to report on this data. This is a change. We could produce a report that is more similar to the existing NPARB sample, but the data would not be accurate – a course isn’t assigned, so if someone hasn’t started on one of the courses they are supposed to do they would not appear in the report as “assigned” like they currently do, they’d not be listed at all. With the certification reporting that person in assigned status would be captured as expected.

## Statuses, Dates, and Progress

One downside with the stock Saba reporting is that it does not allow us to create smart, calculated values for progress metrics; this means that we need to understand the dates and progress markers differently depending on the learner’s status in the certification. For each potential status, here are the relevant metrics to look at:

* Status: Assigned
  + Date: Due Date shows when it is to be completed by.
  + Certification Completion Percentage: shows the percentage of courses complete, as you would expect.
* Status: Assigned – Recertification Needed
  + Recertification Status: Is Recertification Required indicates if the certification is currently in the recertification period.
  + Certification Completion Percentage: shows the percentage of the recertification progress. Note that during this time the certification is still validly acquired, since the recertification has started the progress calculation resets to monitor that.
* Status: Acquired
  + Dates: Expires On Date shows when cert expires, Recertification Starts On Date shows when the window to complete the recertification requirement opens.
* Status: Overdue
  + Dates: Certificate Overdue by Days shows how many days past the target date the certification is.

# Reports List

## R100 - Active Department Employee Listing Report

**Replacement Type:** Re-creation

**New Report:** UAT - Active Employee Listing

**Notes:**

**Concerns:** Check organizational fields to ensure what is there meets requirements.

## R101 - QUICK LOOK UP for Course Completion Report Rev 2

**Replacement Type:** Re-creation

**New Report:** UAT - Transcript Completions in Date Range with Cost

**Notes:** The report here specifies course completions. If the desire is to see current training assignment status with expiration, due dates, etc… those requirements are now embedded into a certification in Saba, so the reporting used should be the below certification reports. This report shows course completions, which not have that expiry info anymore.

## R102 - QUICK LOOK UP - Check compliance against an assignment

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Status

**See Also:** R103

**Notes:** Run report with either the role or the list of certs set in filters. An “assignment” would become a certification rather than a course, so some things will be different. For complex assignment logic (e.g. something can be assigned by a job or a manager, the “or” version of the report should accommodate that.)

## R103 - What training is assigned to my employees?

**Replacement Type:** Re-creation

**New Report:** UAT - Certification Status

**Notes:**

* Here we can look at a slice of training requirements and statuses with one generic report, and change what we are looking at by modifying the filters – e.g. by department, by manager, by certification, by job role requirements, etc.…
* These reports have hit their limit for number of variables included. One would need to be removed to add others.

## R104 - What assigned training is incomplete?

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Status

**See Also:** R103

**Notes:** Run report with cert status in any of the non-compliant statuses.

## R105 - What Company-wide training is incomplete?

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Status

**See Also:** R103

**Notes:** Run report with cert status in any of the non-compliant statuses, do not filter the people.

## R106 - What job specific training is incomplete?

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Status

**See Also:** R103

**Notes:** Run report with either the role or the list of certs set in filters.

## R107 - What Manager training is incomplete?

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Status

**See Also:** R103

**Notes:** Run report with manager set for filtering people.

## R108 - What assigned training needs to be recertified this fiscal year?

**Replacement Type:** Re-creation

**New Report:** QA - Certifications Expiring in Range

## R109 - HR-1005 Mandatory Harassment and Violence Prevention

**Replacement Type:** Repurposing

**New Report:** UAT - Certification

**See Also:** R103

**Notes:** Run report with the specified certification as the argument.

## R110 - NMMS Matrix Report

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Matrix

**See Also:** R112

## R111 - Upcoming Registrations Report

**Replacement Type:** Re-creation

**New Report:** UAT – Scheduled Registrations in Date Range

**Notes:** Filters and data returned can be edited to allow for this report to capture almost any look at registrations.

## R112 - CNL Matrix Report

**Replacement Type:** Change

**New Report:** UAT - Certification Matrix

**Notes:** The matrix type of functionality is limited in the Saba reporting system. We can generate a ‘matrix’ that has only 3 variables – one on each axis, and the intersection. This report replicates, as closely as possible, something that has similar function to the original. The filters can be used to slice the data down to a sub-segment of all data, allowing the report to be targeted, thus still useful. Full details are better accessed via another certification report such as

## -R113 - CNL - Controlled List Report

Not defined in document. (Listed as in development)

## R114 - Cost Allocation Activity Completion Report - Finance ('ILT' Activity only)

**Replacement Type:** Re-creation

**New Report:** UAT – Cost Report

Note: Approved by Bailey

## R115 - Cost Allocation eLearn/CBT Completion Report - Finance ('Course' Activity only)

**Replacement Type:** Repurposing

**New Report:** UAT – Cost Report

**See Also**: R114

## R116 – Does Not Exist

## R117 - NPARB Report – CNL

**Replacement Type:** Re-creation

**New Report:** UAT – NPARB Certifications

## R118 - NPARB Report – Whiteshell

**Replacement Type:** Repurposing

**New Report:** UAT – NPARB Certifications

**See Also**: R117

## R119 - Training Matrix by Department Report – Whiteshell

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Matrix

**See Also:** R112

## R120 - Manager Monthly No-Show Report

**Replacement Type:** Re-creation

**New Report:** UAT - No Show

## R121 - Manager Monthly No-All Completions in Time Period

**Replacement Type:** Repurposing

**New Report:** UAT - Transcript Completions in Date Range

**Notes:** All transcript completion dates will be captured. Use filters to restrict to desired audience.

## R122 – 4 Week Look Ahead – Site Transition

**Replacement Type:** Repurposing

**New Report:** UAT – Scheduled Registrations in Date Range

## R123 – Training this Week

**Replacement Type:** Repurposing

**New Report:**

* For people registrations: UAT – Registrations Upcoming
* For classes running: UAT – Scheduled Offerings in Date Range

**See Also:** R122

## R124 – 4 Week Look Ahead

**Replacement Type:** Re-creation

**New Report:** UAT – Scheduled Registrations in Date Range

**See Also:** R122

## R125 - Data Verification Reports

**Replacement Type:**

**New Report:**

* UAT - Empty Person Info
* UAT - Open Old Scheduled Offering
* UAT - Scheduled Offerings with Missing Info

**Notes:** These reports are exception reports that capture all objects that have key data either missing, or where a class is still open after X days.

## Basic Certification and Roles Reporting

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Status

**See Also:** R103

**Notes:** Run report with either the role or the list of certs set in filters.

## CNL - Controlled List Report - Metrics are currently being evaluated

Should be covered by standard certification reporting, pending verification from Tiffany.

## Projection report that will give estimates on the number of people coming due by quarter

**Replacement Type:** Re-creation

**New Report:** QA - Certifications Expiring in Range

**See Also**: R108

## Standard Matrix Report that can be pulled by org and certification? I think

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Matrix

**See Also:** R112

## NPARB Report – CNL & OFFSITES – These will likely be modified assignment reports

## Course Completions

**Replacement Type:** Repurposing

**New Report:** UAT – NPARB Certifications

**See Also**: R117

## Quick Look Up – What Roles are Assigned to My Team

**Replacement Type:** Re-creation

**New Report:** UAT – Roles Assigned

## Which Certification Courses are Completed via Equivalency

**Replacement Type:** New

**New Report:** UAT – Certification Courses with Equivalency

Shows the current certification path of a learner along with the completion status of each course. Also shows if each of those courses was completed via an equivalent course, and what that equivalent course is.

**Note:** this report is dependent on the path that the learner is in. In general, that will be correct, however in cases where there are multiple paths it is possible for the path shown in the report to not be the intended path, e.g. if a learner selects a different path manually in their view of the cert. In such cases caution should be used. The value for number of courses in the path, as well as the path name should allow a user of this report to identify cases where the incorrect path is set.

# Reports Used

Listing of reports created/modified for UAT:

* UAT - Active Employee Listing
* UAT - Certification Expiring in Date Range: Grouped
* UAT - Certification Matrix
* UAT - Certification Status
* UAT - Certifications Expiring in Range
* UAT - Cost Report
* UAT - Empty Person Info
* UAT - NPARB Certifications
* UAT - No Show
* UAT - Open Old Scheduled Offerings
* UAT - Open Old Self-Paced Enrolments
* UAT - Roles Assigned
* UAT - Scheduled Offerings in Date Range
* UAT - Scheduled Offerings with Missing Info
* UAT - Scheduled Registrations in Date Range
* UAT - Transcript Completions in Date Range with Cost

# Changes in Prod

* All:
  + Add alternate manager where manager is included.
  + Add city where location is.
* Certification Matrix:
  + Add conditional formatting to certification status mirroring other cert reports.
* Open Old Self-Paced Enrollments:
  + Add manager, alternate manager, department code (org number).
  + Add email to fields.

# 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.

Table

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