Reports

# Overview

## 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

Not defined in document.

## 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

# 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\*