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.

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

## 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.

# Reports List

## R100 - Active Department Employee Listing Report

**Replacement Type:** Recreation

**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

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

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Status - Large Filter

**See Also:** R103

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

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

**Replacement Type:** Recreation

**New Report:** UAT - Certification Status - Large Filter

**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.…

## R104 - What assigned training is incomplete?

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Status - Large Filter

**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 - Large Filter

**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 - Large Filter

**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 - Large Filter

**See Also:** R103

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

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

**QUESTION:** What exactly needs to be known for this one?

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

## R110 - NMMS Matrix Report

**Replacement Type:** Repurposing

**New Report:** UAT - Certification Matrix

**See Also:** R112

## R111 - Upcoming Registrations Report

**Replacement Type:** Recreation

**New Report:** UAT - Registrations Upcoming

**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

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

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

R116 – Does Not Exist

R117 - NPARB Report - CNL

R118 - NPARB Report - Whiteshell

## 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:** Recreation

**New Report:** UAT - No Show

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

## R122 – 4 Week Look Ahead – Site Transition

**Replacement Type:** Repurposing

**New Report:** UAT - Registrations Upcoming

Notes:

## R123 – Training this Week

**Replacement Type:** Repurposing

**New Report:** UAT - Registrations Upcoming

**See Also:** R122

## R124 – 4 Week Look Ahead

**Replacement Type:** Recreation

**New Report:** UAT - Registrations Upcoming

**See Also:** R122

## R125 - Data Verification Reports

**Replacement Type:**

**New Report:**

* UAT - Empty Person Info
* UAT - Open Old Scheduled Offering

**Notes:**

# Reports Used

Listing of reports created/modified for UAT: