

Analytics for Admins

Reporting in Saba

SABA: BJC'S ONLINE LEARNING MANAGEMENT SYSTEM

ACCESSING ANALYTICS

This guide shows you how to access Analytics as a Saba Administrator, search for and select reports, where to edit filters, download and export reports, star your favorite reports, and create, edit, and delete scheduled recurring reports. If you have deeper questions regarding Analytics in Saba, please contact your Primary HSO Administrator.

1 Click **Menu** then click **Admin**.

2 Click **Analytics** at top right, then Click dropdown on left and select **All** to view all available reports.

3 Search by Report Title, Dashboard Name, or Keyword.

Set Default view to **All**.

Click **Here** to use filters to narrow list of reports returned. Enter data in filters then, Click **APPLY**.

CHOOSING A REPORT

Use keywords listed below to return reports with filters that appear right away.

Course Status by
Certification Status by
Curricula Status by
Learning Item Status by
(Learning Item's are the courses within Certifications / Curricula)
Roster Details by
Enrollment Details by
Audience Type Details by
Prescriptive Rule Details by
Person Organization Details by

by User
by Manager
by Cost Center or HSO
by Class ID
by Course Title or Class ID or Class Key
by Audience Type
by Prescriptive Rule
Multiple Filters
by Date Range
by Location and Date
by Instructor and Date
by Assessment or Course Title

Learning Dashboard
Multiple Filters
Data Extract
(Data Extract reports have up to 1,000,000 rows)
My Team
(My Team and by Manager reports, use manager hierarchy to view direct and indirect reports of managers)

CHOOSING A REPORT

Many reports and dashboards are available for viewing and exporting data from Saba. Based on your Admin privileges, you may not have access to all reports:

- Data Extract** – Reports are used when you need to pull more than 100,00 rows of data.
- Multiple Filters** – Reports offer advanced filtering options to refine data in Saba before exporting.
- My Team** – Reports and dashboards have filters that allow you to retrieve data on leaders’ direct and/or indirect reports. Reports that end in “**By Manager**” also contain Hierarchy Manager filters.

Use sample list of reports and dashboards below for your specific data needs:

Audience Type Details	Course Status - Data Extract - Active and Inactive Users	Curricula Status by Manager
Audience Type Details - Data Extract	Course Status - Multiple Filters	Curricula Status by Prescriptive Rule
Certification Learning Item Status - Dashboard	Course Status - My Team	Curricula Status by User
Certification Learning Item Status - Data Extract	Course Status by Audience Type	Enrollment Details by Course Title or Class ID
Certification Learning Item Status - Multiple Filters	Course Status by Content Name	Enrollment Details by Instructor and Date
Certification Learning Item Status - My Team	Course Status by Cost Center or HSO	Enrollment Details by Location and Date
Certification Learning Item Status by Cost Center or HSO	Course Status by Course Title or Class ID or Class Key	Enrollment Details by Manager
Certification Learning Item Status by Manager	Course Status by Date Range	Enrollment Details by User
Certification Learning Item Status by User	Course Status by Manager	Job Details
Certification Status - Dashboard	Course Status by Prescriptive Rule	Learning Dashboard
Certification Status - Data Extract	Course Status by User	Organization Details
Certification Status - Multiple Filters	Curricula Learning Item Status - Dashboard	Person Organization Details - Multiple Filters
Certification Status - My Team	Curricula Learning Item Status - Data Extract	Person Organization Details by Audience Type
Certification Status by Audience Type	Curricula Learning Item Status - Multiple Filters	Person Organization Details by Cost Center or HSO
Certification Status by Cost Center or HSO	Curricula Learning Item Status - My Team	Person Organization Details by Manager
Certification Status by Date Range	Curricula Learning Item Status by Cost Center or HSO	Person Organization Details by Prescriptive Rule
Certification Status by Manager	Curricula Learning Item Status by Manager	Person Organization Details by User
Certification Status by Prescriptive Rule	Curricula Learning Item Status by User	Prescriptive Rule Details
Certification Status by User	Curricula Status - Dashboard	Prescriptive Rule Details - Data Extract
Classroom Enrollment Summary - Dashboard	Curricula Status - Data Extract	Prescriptive Rule Details - Process Schedule and History
Classroom Enrollment Summary - My Team	Curricula Status - Multiple Filters	Roster Details by Course Title or Class ID or Class Key
Classroom NoShow Summary - Dashboard	Curricula Status - My Team	Roster Details by Instructor and Date
Classroom NoShow Summary - My Team	Curricula Status by Audience Type	Test Results by User
Course and Class Detail	Curricula Status by Cost Center or HSO	Test-Item Analysis
Course Status - Dashboard	Curricula Status by Date Range	Test-Item Responses by User and Assessment or Course Title

CHOOSING A DASHBOARD

Dashboards are visual report organizers, up to 8 graphs, that share high-level data views. Dashboards provide real time data on various learning events and activities tracked in Saba. Reports that are used in Dashboards can also be found individually by report title, using the search bar in Analytics. Customize your dashboard to refine data shown in graphs. (More dashboard info on p.8)

Learning Dashboard	Learning Dashboard - My Team
Annual Compliance Dashboard	Annual Compliance Dashboard - My Team
Epic Training Status Dashboard	Epic Training Status Dashboard - My Team
Epic Instructor Dashboard	Epic Training Status Dashboard - WashU
BLS and ACLS Certification Dashboard	BLS and ACLS Certification Status Dashboard - My Team
PALS and STARR Certification Dashboard	PALS and STARR Certification Dashboard - My Team
90 Day Review - PM Dashboard	90 Day Reviews - Status by Individual - My Team
GPS Check-in Conversations - Dashboard	GPS Check-in Conversations - Dashboard - My Team
HR Business Partner Dashboard	Goal Status Summary Dashboard - My Team
Overall Annual Reviews - PM Dashboard	Annual Review - Performance Dashboard - My Team

RUNNING A REPORT

4 Click on **Report** to show filters.

☆

Course Status by Cost Center or HSO

Created By: Megan M. Gallagher (Admin)

Filter using Person Organization Number and Course Title to return Course Activity Status and Person Organization Details, of users within ...

SCHEDULE

▼

5 Update filters, then click **Run**.
(Save and Run automatically applies the same filters the next time you access the report.)

Course Status by Cost Center or HSO

Is Terminated*

Course Title

Course Activity Status

Person Organization Number

Person Parent Organization Name

No

Yes

No

Type to search ..

Type to search ..

CANCEL

RUN

SAVE AND RUN

Is Terminated = **No**
(Active Saba Users)

Click **?** for info on this report

After you enter data in your filters and run the report, your data will appear on the next screen. Larger data sets may take longer to run. If it takes more than 5 minutes to retrieve data, the report will be emailed to your email listed in Saba.

04:58

Note: If this takes more than 5 minutes, we will schedule it for execution and notify you via email once it's ready.

Course Status by Cost Center or HSO

Flat List | Report Date: 30-DEC-2019 5:11 AM

+ CREATE CHART

Filters

Course Activity Status

Select an appropriate chart section to filter the report data accordingly

Course Activity Status

Successful

Unsuccessful

Not Evaluated

Pending Registr...

In Progress

Metric

None

Count Of

Course Acti...

Save as n...

Course Title

Course Title

Class Delivery Name

Class ID

Class Key

Registration Status

Course Activity Sta

25 per page

1-25

1 / 5

Click the **Filters** button if you need to modify the filters.

Click here to **Refresh** data in report.

Click here to **Download** report.

This dialogue will prompt you with additional directions.

Click a piece of the pie to see that specific data set.

Note: The **Legend Key** shows full data category titles. Colors may change based on percentages.

Click **arrows** to scroll through data. Scroll through pages at bottom right of screen.

DOWNLOAD REPORT

Download report and use Excel to refine your data. Clicking Data Only removes filter data from downloaded report. Try our “Using Excel to Refine your Saba Reports,” quick reference guide for tips on refining your data once exported and downloaded from Saba. Downloading report as a PDF will return data with associated chart.

1 Click Download.

Click Filters to edit filters and RUN again,

Clicking “Data Only” removes Filter data from downloaded Report.

2 Choose Excel to download report and further refine data. Downloading report as PDF will return data and associated chart.

3 Click Download. Task completion Status will show at bottom of screen.

4 Once task has been completed, click on file to open.

5 Report file will show at bottom left of internet browser. Click on file to further refine data. (Use the Excel QRG to learn how to best refine your data in Excel.)

Course Status by Cost Center or HSO

Flat List | Report Date: 30-DEC-2019 5:11 AM

Filters

Course Activity Status

Course Activity Status

Chart Name

Course Activity Status

Dimension

Course Activity Status

Metric

Download Report

PDF Excel CSV

☒ Data Only

Excel will only contain the data table. Blank columns will contain details, filters, grouping options, messages related to the report.

CANCEL DOWNLOAD

Course Title

Class ID

Course Activity Status

Person Organization Name In St. Louis Children's Hospital

Course Title In

Course Activity Status In

Person Organization Number In

Class Delivery

Name

Class ID

BILD - ACT - Accelerating Change & Transitions

Instructor-Led

00040596

BILD - Cause Mapping

Instructor-Led

00040604

BILD - Project Management Fundamentals

Instructor-Led

00040633

"Smile" Response Training

"Going the Extra Mile with a Smile" Response Training

"Going the Extra Mile with a Smile" Response Training

"Going the Extra Mile with a Smile" Response Training

"Going the Extra Mile with a Smile" Response Training

"Going the Extra Mile with a Smile" Response Training

- CDCC - BJH Cultural Competence eLearning

All tasks have been completed

XLSX file for "Course Status by Cost Center or HSO" is now available.

Course Status by....xlsx

SCHEDULING REPORTS

Add a schedule to a report to automate delivery of data, requested often from Saba. Choose frequency, dates, time, report format, and recipients for report to be delivered by email. Directions for setting filter criteria are on next page.

2 Click **ADD NEW SCHEDULE**

Certification Status - Multiple Filters

Search

ADD NEW SCHEDULE

No subscription found

SETTING REPORT DELIVERY SCHEDULE

Certification Status - Multiple Filters

ScheduleFiltersEdit report filters.

Frequency*

Weekly

Day of week

Monday

Date From

21-Apr-2019

Date To

21-Apr-2021

Time

04:21:00

CST - (GMT-06:00) Central Time (US & Canada)

Report Format*

XLSX

Data Only

Clicking Data Only will remove Filter data from top rows of Report.

Run as recipient context

Recipient Context

Select

Recipient Type

Email

Person

Email Address

Megan.Gallagher@bjc.org

+
to Add recipient by Email address or Person/Saba UserName

Megan.Gallagher@Bjc.org

Subject*

Edit Email Subject

Customize the Subject of your Scheduled Report to stand out in your mailbox!!

Body*

Edit Email Body

B I U S

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Paragraph Verdana 18px

Add a note here to explain report contents to recipient(s).

CANCEL

SAVE

SETTING FILTER CRITERIA

Filters allow you to define your report contents. Add values to filters when reports need to target and return specific sets of data. Adding values to optional filters, will reduce the rows of data in your report. Leaving optional filters blank will return maximum rows of data allowed.

Use % in filters as a wildcard.
Ex) BILD%Office 365%Teams

Asterisks * indicate required filters.
A value must be entered to save schedule.

Criteria is further refined by applying:
Equal, Not Equal
Greater Equal, Less Equal
Contains, Does Not Contain
Is Empty, Is Not Empty
In, Not In
Starts With, or Range

Use Person, Manager, Organization, Audience Type, Job Type Name, or Officer Code to target a specific user or group of users.

Use Date filters to target Specific Date or Current Date/Month/Year or Days/Months/Years Before Current Date/Month/Year or Days/Months/Years After Current Date/Month/Year

Course Status - Multiple Filters

Schedule Filters

1 Click Filters

2 Insert required values

Is Terminated = No (Active Saba Users)

Is Terminated* *

Person Full Name In Type to search

Manager Full Name In Type to search

Person Parent Organization Name In Type to search

Person Organization Number In

Person audience type In Type to search

Person Job Type Name In Type to search

Person Religion/Person Rel Officer Code In

Course Activity Status In Type to search

Course Assigned On Greater Equal Specific date

Course Assigned On Less Equal Specific date

Completed Courses (Transcript) Ended/Completed On Date Greater Specific date

Completed Courses (Transcript) Ended/Completed On Date Less Equal Specific date

Course Target Date Greater Equal Specific date

Course Target Date Less Equal Specific date

Group 1 - Operator Applied: OR

Course Title In Type to search

Course Title Contains

Class ID In Type to search

Class Key In

3 Complete schedule and filter requirements, Review then Click Save

CANCEL SAVE

Keep Status filters empty to retrieve all statuses. Or, check only the statuses you prefer.

Filters above gray line define dates and targeted users.

Filters below gray line target learning events for a group of users.

EDIT OR DELETE EXISTING REPORT SCHEDULE

To edit or delete a schedule, click the dropdown on top left side of screen, then click Scheduled. Choose report then click EDIT. To edit existing report schedule, click EDIT again. To Delete a report schedule, click dropdown, then Delete

Scheduled

1 Click dropdown, then click Scheduled

2 Click Edit on the appropriate report schedule.

EDIT

3 Edit Existing Report Schedule

In the pop-up, click EDIT again. Adjust schedule and filters as needed. Click Save

EDIT

WARNING: Clicking Delete is FINAL

3 Delete Existing Report Schedule

In the pop-up, click dropdown. Click Delete

Delete

WARNING: Clicking Delete is FINAL

DASHBOARDS

Dashboards provide real time data on various events and activities tracked in Saba. Run dashboard reports individually by typing report title in the Analytics search bar. Use “Show Filters,” enter criteria, then “Save and Run” to customize each report in your dashboard.

1

Select preferred Dashboard.

Learning Dashboard

Last Run Date: 02-JAN-2020 12:47 PM | Created By: Megan M. Gallagher (Admin)

This Learning Dashboard gives a high level overview of Learning Event Statuses. Use filters to narrow or refine your data for a custom view. Contains Certification, Curricula, and Course statuses.

SCHEDULE

Use the Refresh button to update the report.

Refresh

Options

The Options button allows you to access additional functions and filters.

In Progress: 1(14%)

Assigned: 5(71%)

Acquired: 1(14%)

Show others

Show Filters

Launch Report

Assigned

In Progress

Acquired

Show Filters – Customize each report view.

Launch Report will open the chart and supporting report detail in a separate window.

FILTERING DATA

2

Click Show Filters to refine data returned.
(You will need to customize each report's filters separately.)

Manager Hierarchy includes all reports: both direct and indirect. To see only leader's Direct Reports, choose No, then Run.

BJC - Corporate Compliance Certification Status - 2019 - My Team

The AND operator has been applied to all the filters.

Student Certification Assigned On

Less Equal

Current date

Certification Name*

Starts With

BJC - Corporate Compli

Certification Name*

Contains

2019

Include Manager Hierarchy

Equal

Person Parent Organization Name

In

Yes

Person Organization Number

In

No

CANCEL

RUN

SAVE AND RUN

Save and Run continues to apply the same filter data every time you access the dashboard.

DOWNLOADING YOUR REPORT

Click DOWNLOAD on the top right of the page and select the appropriate file format.

DOWNLOAD

PDF

XLSX

CSV

All tasks have been completed.

XLSX file for "BJC - Corporate Compliance Certification Status - 2018 - My Team" is now available.

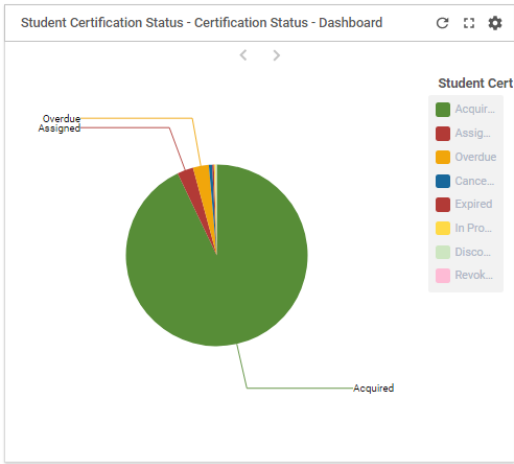
DOWNLOAD

Click DOWNLOAD once the export sequence has been completed.

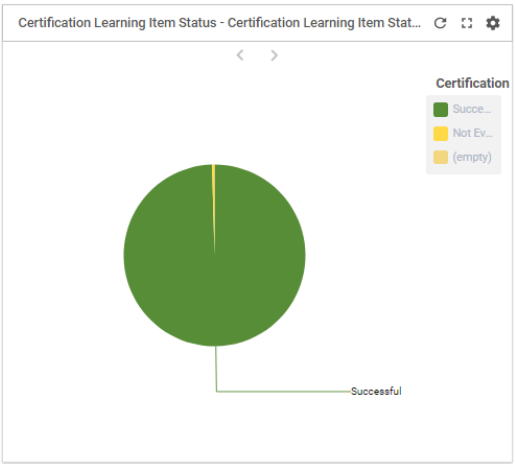
LEARNING DASHBOARDS

Customize filters in **Learning Dashboard** and/or **Learning Dashboard - My Team** for custom view.
Reports in **Learning Dashboard** end in “ - Dashboard”
Reports in **Learning Dashboard - My Team** end in “ - My Team”

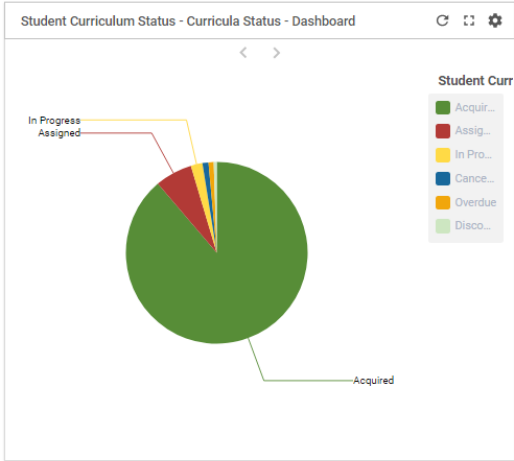
Certification Status



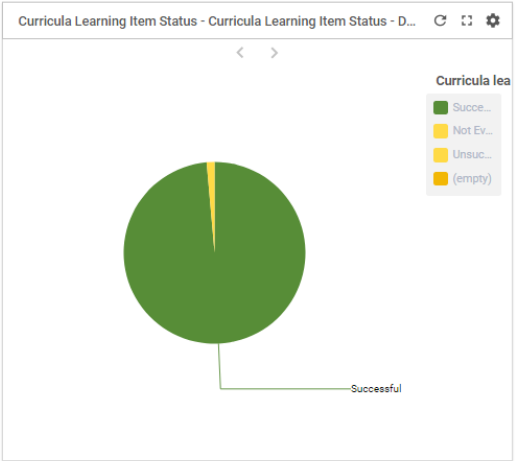
Certification Learning Item Status



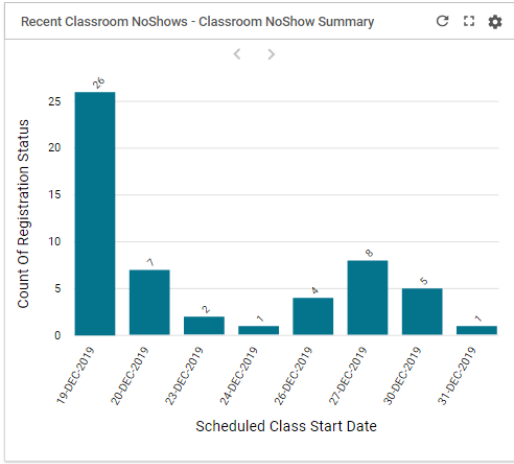
Curricula Status



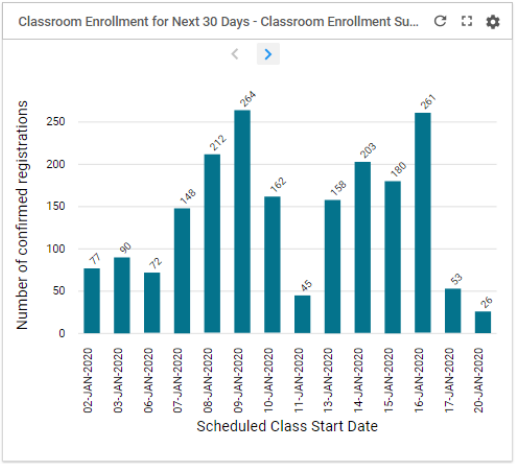
Curricula Learning Item Status



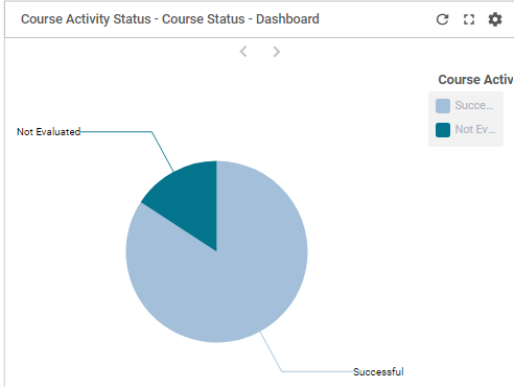
Classroom NoShow Summary
for the past 14 days.



Classroom Enrollment Summary
for the next 30 days.



Course Status



Learning items are the course/activities bundled within Certifications and Curricula.