Using Excel to Refine your Saba Reports

BJC Saba Administrators have access to Analytics in Saba to run reports showing the status of various learning items. Sometimes a downloaded report provides more data than necessary, so you may have to follow a few steps to get the answers you need. By exporting your report to Excel you can take advantage of many tools to refine your data including cleaning up, formatting and summarizing, therefore focusing on the exact data you need to share.

Downloading the Saba Report

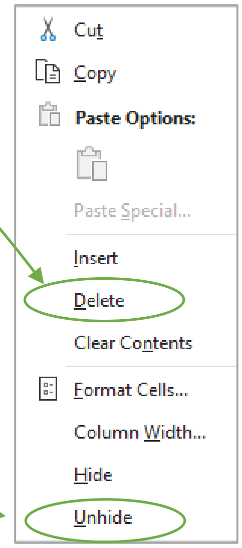
Please review the Analytics for Admins Quick Reference Guide for details on how to access and download reports to Excel.

Here is a list of reports available in Saba:

- ☐ *Certification Learning Item Status - Dashboard*
- ☐ *Certification Learning Item Status - Data Extract*
- ☐ *Certification Learning Item Status - Multiple Filters*
- ☐ *Certification Learning Item Status by Cost Center or HSO*
- ☐ *Certification Learning Item Status by Manager*
- ☐ *Certification Learning Item Status by User*
- ☐ *Certification Status - Dashboard*
- ☐ *Certification Status - Data Extract*
- ☐ *Certification Status - Multiple Filters*
- ☐ *Certification Status by Audience Type*
- ☐ *Certification Status by Cost Center or HSO*
- ☐ *Certification Status by Date Range*
- ☐ *Certification Status by Manager*
- ☐ *Certification Status by Prescriptive Rule*
- ☐ *Certification Status by User*
- ☐ *Classroom Enrollment Summary - Dashboard*
- ☐ *Classroom NoShow Summary - Dashboard*
- ☐ *Course and Class Detail*
- ☐ *Course Status - Dashboard*
- ☐ *Course Status - Data Extract - Active and Inactive Users*
- ☐ *Course Status - Multiple Filters*
- ☐ *Course Status - My Team*
- ☐ *Course Status by Audience Type*
- ☐ *Course Status by Cost Center or HSO*
- ☐ *Course Status by Course Title or Class ID or Class Key*
- ☐ *Course Status by Date Range*
- ☐ *Course Status by Manager*
- ☐ *Course Status by Prescriptive Rule*
- ☐ *Course Status by User*
- ☐ *Curricula Learning Item Status - Dashboard*
- ☐ *Curricula Learning Item Status - Data Extract*
- ☐ *Curricula Learning Item Status - Multiple Filters*
- ☐ *Curricula Learning Item Status by Cost Center or HSO*
- ☐ *Curricula Learning Item Status by Manager*
- ☐ *Curricula Learning Item Status by User*
- ☐ *Curricula Status - Dashboard*
- ☐ *Curricula Status - Data Extract*
- ☐ *Curricula Status - Multiple Filters*
- ☐ *Curricula Status by Audience Type*
- ☐ *Curricula Status by Cost Center or HSO*
- ☐ *Curricula Status by Date Range*
- ☐ *Curricula Status by Manager*
- ☐ *Curricula Status by Prescriptive Rule*
- ☐ *Curricula Status by User*
- ☐ *Enrollment Details by Course Title or Class ID*
- ☐ *Enrollment Details by Instructor and Date*
- ☐ *Enrollment Details by Location and Date*
- ☐ *Enrollment Details by Manager*
- ☐ *Enrollment Details by User*

Removing Unneeded Columns or Rows

You can remove unneeded columns (unneeded column details) or rows (such as filter info at the top of the report) by using the Delete command. Remember using the Delete key only removes the data – not the column. Use the Hiding feature so you can temporarily remove the data but have the option to bring it back.



Deleting or Hiding Unneeded Columns

1. *Right-click the column letter heading.*
2. *Select **Delete** or **Hide** from the menu.*

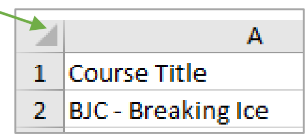
NOTE: Click and drag across multiple headings if you want to delete or hide more than one at a time.

Unhiding a Column

1. *Select the column headings surrounding the **hidden columns** by clicking and dragging across the heading letters.*
2. *Right-click and choose **Unhide**.*

Unhiding Multiple Columns

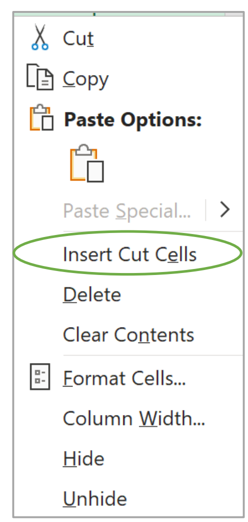
1. *Click the **Select All** button.*
2. *Right-click on the column heading area and choose **Unhide**.*



Moving Data Using Cut and Paste

If you need to move an entire column to another location within the dataset you can use **Cut** and **Paste** but remember to have a blank column where you want the data to the moved.

A quicker way is to use the **Insert Cut Cells** feature in the right-click menu.



Cutting and Pasting Columns of Data

1. *Click the **column heading** of the column you want to move.*
2. *Under the Home tab click **Cut**.*
3. *Select the column heading where you want to move the data to.*
4. *Right-click on the **column heading** and choose **Insert Cut Cells.***

Automatically moves data in the current column to the right when you choose this option which saves time

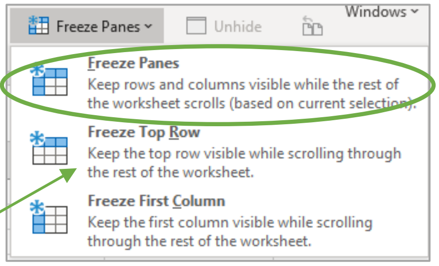
Did you know? **A quick way to jump to the bottom of your report data is to press CTRL + END and to return to the top of the report is CTRL + HOME.**

Adjusting How Excel Displays your Data

Use Excel features such as **Freeze Panes** to keep column headings in place while you scroll and **Wrap Text** to help you see all the text in the column heading. There is also a quick way to instantly widen all columns to view the text within it.

Freezing Column Headings (called Freeze Panes)

1. *Select the cell below the column heading in column A.*
2. *Under the View tab, click* ***Freeze Panes.***
3. *Choose* ***Freeze Panes****.*
4. *Scroll down your report and the headings should stay in place.*



Only works if the field headings display in Row 1

NOTE: If you want to freeze a column at the same time then you must position the selected cell so that Excel will freeze above and to the left of the cell.

Viewing All Text in a Cell (called Wrap Text)

1. *Select the cell or range you want to wrap the text.*
2. *Under the Home tab, choose* ***Wrap Text****.*

Fitting Column Size to See All Text in a Cell

1. *Place your mouse on the line that separates the* ***column headings****.*
2. *Click and drag to the right to widen the column or double-click to fit the column text.*

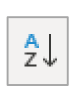
NOTE: If you want to autofit all columns at once use the Select All button first and then double-click between two column headings.

Sorting the Data You Need

Use the ***Quick Sort*** *buttons to sort your entire report by a specific column. You can also use Quick Sort to do multiple level sorts such as by department and then by manager. The secret to multiple level sorts is to sort in a backwards order.*

Quick Sorting Report Fields

1. *Select a cell within the column you want to sort by.* ***DO NOT select the entire column.***
2. *Under the Data tab, select* ***A-Z*** *or* ***Z-A*** *sort button.*



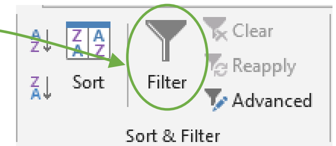
NOTE: To sort multiple levels you need to do primary sort last – for example sort by **manager** and then by **department** if you want report sorted by **department** and then **manager**.

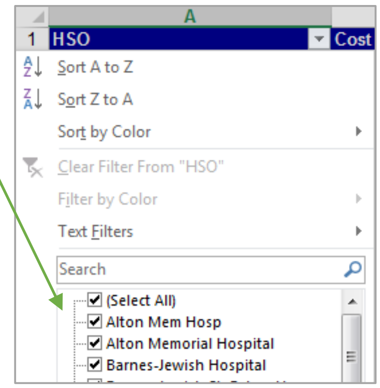
Filtering the Data You Need

Filtering is a way to temporarily hide the data you need. The benefit to using this feature is it can turned off and all the data returns. You can filter more than one column to narrow your focus and remove unneeded data.

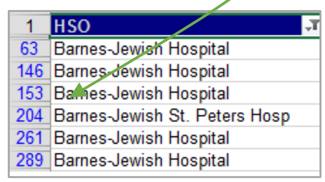
Filtering One or More Columns

1. *Under the Data tab, select* ***Filter*** *to turn on the filter arrows for each column.*
2. *Click the* ***Filter*** *drop-down arrow next to the column you want to filter.*
3. *Choose the data you want to see in the field.*
4. *Click* ***OK****.*





Notice filtered rows display in blue



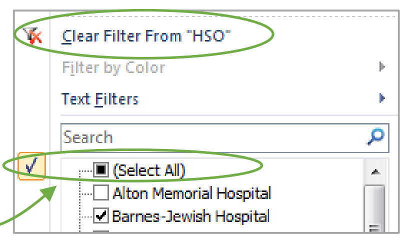
Clearing Filters from One Column

Within the Filter drop-down feature:

1. *Choose* ***Clear Filter.***

or

1. *Choose* ***Select All.***
2. *Click* ***OK****.*



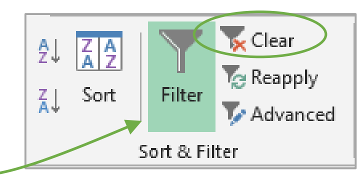
This returns the all data within this field

Clearing All Filters from Data

1. *Under the Data tab, click* ***Clear.***

or

1. *Click the* ***Filter*** *feature to turn off filtering.*

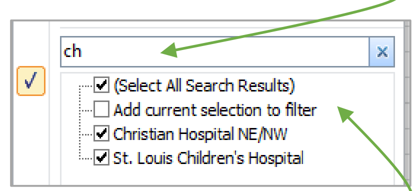


Using Search to Find an Item to Filter

If the list of filter items is long, you can use the ***Search box*** *quickly find the item.*

1. *Click the* ***Filter*** *drop-down list.*
2. *Type the keyword. Notice a list of items containing the keyword will display.*
3. *Choose the filter item and click* ***OK****.*

Type keyword or a few letters to see search results



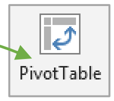
You have the option to keep adding new searches to an existing filtered list

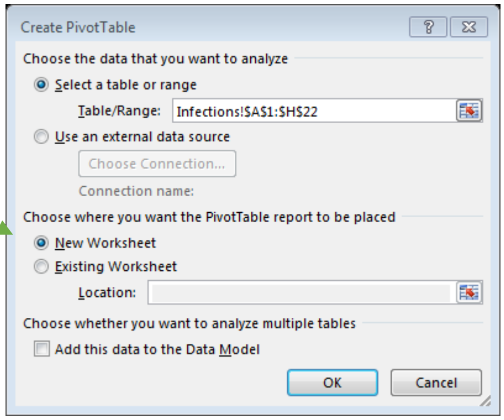
Using a Pivot Table to Summarize your Data

A **Pivot Table** is a tool built into Excel that allows you to summarize large quantities of data quickly and easily. It inserts a data summary in a separate table so it doesn't effect your original report data.

Inserting a Pivot Table

1. *Click within the report you want to analyze.*
2. *Within the **Insert** tab, select **Pivot Table**.*
3. *Confirm the selected range is correct.*
4. *Click **OK**.*

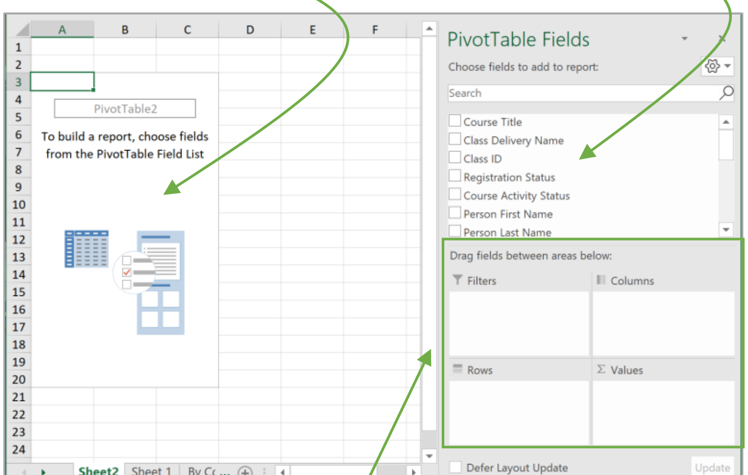




Choose where you want the new table placed (Separate sheet is preferred)

When you choose what fields you want, they will display in the Pivot Table report.

The Field list contains all the fields available in your exported report.



Choose where you want the field to display the information: rows, columns, as a value (summary) or as a field you can filter.

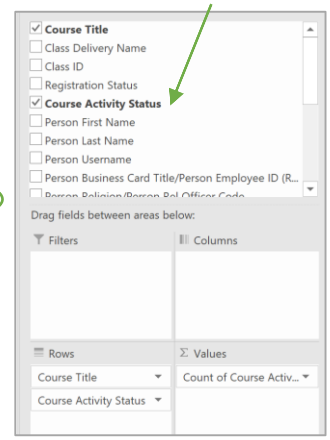
NOTE: If you select a field with text, Excel will automatically place it in the **Rows box**. If you select a field with numbers it will assume you want a summary calculation and place it in the **Values box**. It's best to click and drag the fields in the areas you want to display rather than selecting the fields and therefore allowing Excel to decide where to display the data.

Need Help? Go to **support.office.com** and click on Excel to learn more about Pivot Tables and other tools.

Choosing what Fields to Display in Rows

1. After inserting a Pivot Table structure, choose the 1st **field** you want to display.
2. Click and drag a field in the **Rows box**.
3. Choose the 2nd **field** if you want another level of detail and click and drag the field name in the **Rows box**.

If you select the field Excel will decide where to display it



Rows displays two levels of details

Row Labels	Count of Course Activity Status
BJC - Breaking Ice	79
Not Evaluated	9
Pending Registration	1
Successful	69
BJC - Everyday Bias for Healthcare	369
Not Evaluated	33
Pending Registration	21
Successful	315
BJC - Just Culture for Leaders	3
Pending Approval	1
Pending Registration	1
Successful	1
Grand Total	451

Choosing what Fields to Display in Columns

If you want fields to display horizontally across multiple columns, then click and drag the field name in the **Columns box**. Notice that if there are too many unique entries in that field the resulting table will be wider.

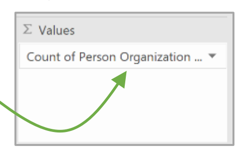
Adding Parent Organization to Columns separates the totals

Count of Course Activity Status	Barnes-Jewish Hospital	St. Louis Children's Hospital	Grand Total
BJC - Breaking Ice	51	28	79
Not Evaluated	9		9
Pending Registration		1	1
Successful	42	27	69
BJC - Everyday Bias for Healthcare	282	87	369
Not Evaluated	26	7	33
Pending Registration	21		21
Successful	235	80	315
BJC - Just Culture for Leaders	3		3
Pending Approval	1		1
Pending Registration	1		1
Successful	1		1
Grand Total	336	115	451

Since the Values field contained text (Course Activity Status) it counted how many people were in each status

Displaying Summary Results (Values)

The **Values box** is where the calculated summary displays. If you select a field that contains numbers, it will sum the results. If it contains text it will count it.



Filtering a Specific Details within Field (Filters)

By placing a field in the Filters box, it will display that field at the top of the table.

Click the drop-down next to **All** to choose what you want to filter.