



Saba Quest LMS Instructor Manual

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Job Aid: Instructor Overview

Core Concepts

How are classes delivered?

The delivery type for a class determines how the class is delivered:

- Scheduled classes are delivered when instructors teach or present the content or materials to the learners registered for the class. For instructor-led and blended classes, the instructors deliver the content or materials to learners in a classroom (either at the instructor's location or remote).
- Self-paced classes are delivered when the registered learner acknowledges receipt of the file or URL that contains the content for the class.

What does class delivery mean?

Delivering a class involves delivery of content or materials for the class and the administrative tasks that are required after class delivery.

What are the post-delivery tasks for an instructor?

After a class has been delivered, instructors need to complete a series of administrative tasks. All of these tasks apply to scheduled classes (instructor-led and blended). Some of the tasks apply to self-paced classes as well.

The post-delivery tasks are described below:

Task	Description	Applies To
Mark the class delivered	Changes the status of the class from Open to Delivered. When you mark a class Delivered, it no longer appears in the Learning Catalog.	Scheduled classes only
Record learner attendance	Records attendance status (In Progress, Complete, Dropped, Incomplete, or No Show) for all learners registered for the class. Updates the transcript of every registered learner with attendance status information. Learners and their managers can view this information.	All learning classes
Record learner performance	Records performance-related information (scores and grades) for all registered students. Updates the transcripts of registered learners with any relevant performance information (scores and grades). Learners and their managers can view this information. ➤ <i>Note: This can be useful in cases where learners are reimbursed for education expenses based on the grade they obtain in a class.</i>	All learning classes

<p>Perform paper based assessments</p>	<p>Collect test papers, scan, and upload them to Saba Cloud using the Paper Based Assessment (PBA) capability. Review the automated scanned results, make corrections if needed, and submit the results. The application computes the test results and calculates the score for the test.</p> <p>➤ <i>Note: This capability is available only if your system administrator has enabled the Paper based Assessment service under the Advanced Assessment service.</i></p>	<p>Scheduled classes only</p>
<p>Record actual expenses</p>	<p>Records the actual expenses associated with delivery of a class. The actual expenses can differ from the budgeted expenses defined for the class. Knowing this information can prove useful for future planning.</p> <p>➤ <i>Note: When a learning class is marked Delivered, the system automatically creates actual expenses based on the costs for any resources associated with the class.</i></p>	<p>Scheduled classes only</p>

Can I perform post-delivery tasks for a class if I am not assigned as an instructor for the class?

Typically, instructors who are assigned as a resource for the class can perform post-delivery tasks for the class such as recording attendance and learner results.

However, instructors with special privileges of a *super-instructor* can perform instructor-related tasks for classes, even if they are not an assigned resource for a class. If your system administrator has assigned you the security privilege *Is Super Instructor*, then you can manage all classes even if you have not been assigned as an instructor for the class.

You can make changes to class details such as changing the status, sessions or location, and also perform tasks related to the roster, attendance or results.

What views are available for instructors?

The Instructor interface is broadly split into three main views:

- Instructor's desk
- Calendar view
- List view

Instructors can switch between the views by selecting the corresponding view options. All views provide easy access to the class roster.

Instructor's Desk

The Instructor's desk view provides the following capabilities to instructors:

- One-click access to roster
 - The roster provides the following capabilities:

- Add learners to the class in bulk
- Send targeted notifications in bulk either to learners on the roster or to all users
- Mark complete learners and granting them credits in bulk
- Record attendance and results of learners in bulk for session-based classes
- Access Paper Based Assessment (PBA) activities (optional)
- View class attachments
- One-click access to mark a class as delivered
- Portlets that display quick and useful statistics about Qualified Classes, Classes Taught and People Taught
- Easy access to quicklinks.

Calendar View

The Calendar view provides the following capabilities to instructors:

- One-click access to roster
- Create appointment
- Mark tasks complete

List View

The List view provides the following capabilities to instructors:

- Direct access to roster by clicking the class name
- Default view of only classes that have the "Open - Normal" status and are currently assigned to the logged-in instructor within a range of 30 days before today and 30 days after today.

References

- Saba Online Help
- http://sabacloud.com/support/index.php/Main_Page

Job Aid: Accessing a Class Roster as an Instructor

Core Concepts

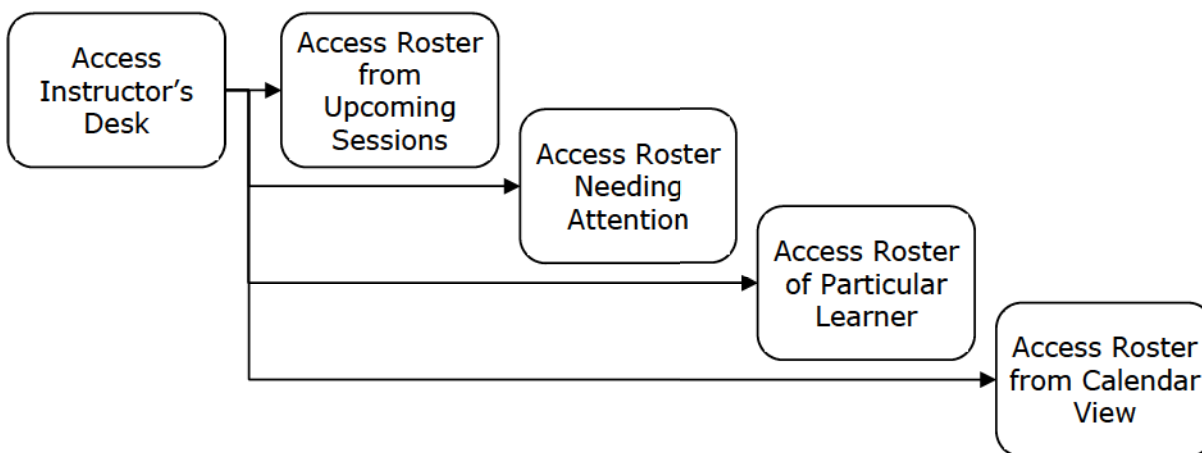
How do I access the class roster?

You can easily access the roster of a class where you are the designated instructor by using any one of the three available views under the Instructor tab from:

- Instructor’s desk view
- Calendar view
- List view

Process

Process flow



Process steps

Step	Action
1. Access Instructor’s Desk	• Navigate to: App Menu > Admin > Instructor
2a. Access Roster from Upcoming Sessions	• Click the required class name link under the Upcoming Sessions pane.
2b. Access Roster Needing Attention	• Click the required class name link under the Action Required pane.
2c. Access Roster of Particular Learner	• Click the Learner Registrations link under Quick Links . Search for the required internal or external learner and then click the required class name link in search results.
2d. Access Roster from Calendar View	• Click Calendar view and then click the required class name link on a particular day of the month. You can even change the calendar month to view classes in upcoming months.

Additional Information

Can I search a class roster for learners?

Saba Cloud displays the following search filters when instructors and learning administrators search for learners in a class roster:

- **First Name**
- **Last Name**
- **Person ID**
- **Registration date on or after**
- **Registration date on or before**
- **Order no**
- **Status**
- **Email**
- **Person Legal ID**

You can use the fields individually or in combination with one another to search for learners in the roster.

To view the search filters in the class roster:

- **Click Admin > Instructor > Edit a class > Show filters**
- **Click Admin > Learning > Manage Classes > Search and edit a class > Roster > Show filters**

What if there is an issue with the Registration Status indicated on the roster?

When learners are added to the Roster and order is payable or when the external learner cannot complete the payment for a class having price, the order is created with the **Payment Initiated** state. When the catalog admin and instructor admin look at the Roster, there is an indication that the payment is pending for registration even though the registration status is shown as Registered.

The **Registration status** column in the Roster will display warning icons indicating the current status. On hovering the icon, it will show the exact registration status of the learner.

1001 Ways to Take Initiative at Work

Advanced LMS

Class ID: 21818847
 Start date: 03/24/2016
 Language: English
 Status: Open - Normal

Delivery type: ILT
 End Date: 03/24/2016
 Location: Location1
 Duration: 01:00
 Domain: world

Confirmed **4/5**
 Waitlisted **0/0**

Description and Activities

View Attachments

Grant Credit and Mark Delivered

Manage Ad Hoc Completions

Show Filters

Edit selected for: [Icons]

Name	Attenda...	Registration stat...	Completion status	Score	Grade	Order no -	Registration Date	Actions
ZFNAM2018022912350432 ID: 00201852	00:00	Cancelled	Suspended	0		00208572	02/29/2016	View notes
Registered User ID: 00201268	00:00	Registered	Not Evaluated	0		00208632	03/11/2016	Edit
Manager approval Pending ID: 00201267	00:00	Registered	Not Evaluated	0		00208633	03/11/2016	View notes
Payment Pending ID: 00201250	00:00	Registered	Not Evaluated	0		00208634	03/11/2016	View notes
Approval pending Payne ID: 00201249	00:00	Registered	Not Evaluated	0		00208635	03/11/2016	View notes

The indications to the Registration status column are:

- **View Approval Status:** Appears only when the manager approval is pending. The warning icon is clickable and will show the approval chain.
- **Payment pending:** Appears only when the payment is pending. The warning icon is not clickable.
- **Payment pending, click to view approval status:** Appears when approval and payment is pending. The warning icon is clickable and will show the current approval status.

References

- Saba Online Help
- http://sabacloud.com/support/index.php/Main_Page

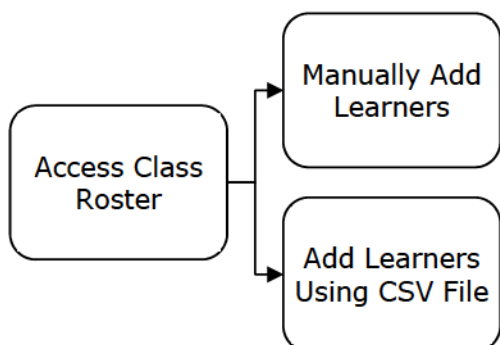
Job Aid: Adding Learners to a Class Schedule - Instructor

Core Concepts


Instructors can directly register learners who have not registered in advance for a scheduled class but want to attend the class. From the roster of any scheduled class, you can add learners to the class.

Process

Process flow

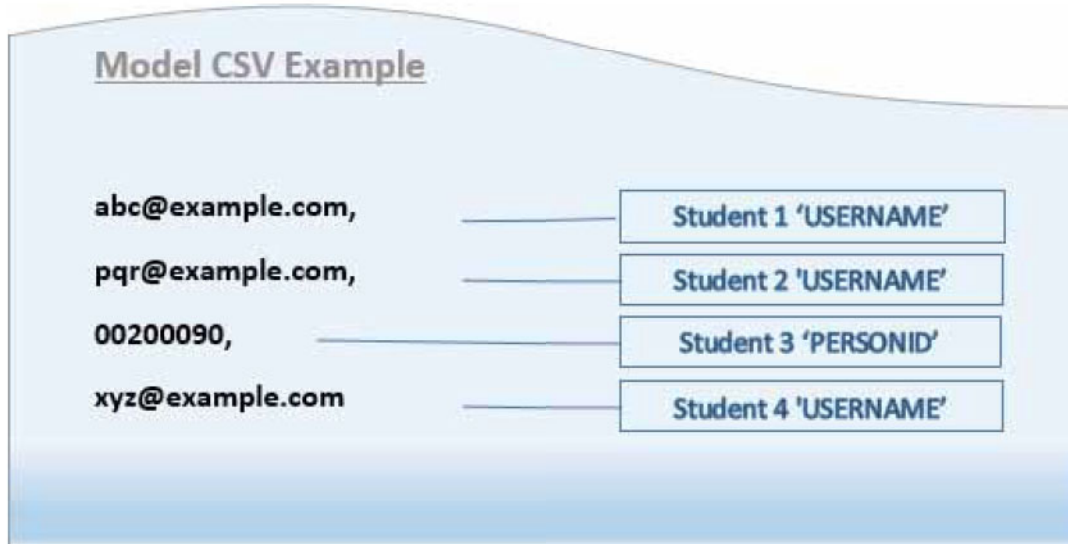


Process steps

Step	Action
1. Access Class Roster	<ul style="list-style-type: none"> Navigate to: App Menu > Admin > Instructor Click the required class name link under the Upcoming Sessions pane. Click the Add Learners icon . The Add Learners popup wizard opens.
2. Manually Add Learners	<ul style="list-style-type: none"> Search for the required learners using the finder. A list of learners matching your criteria is displayed. Select the required learners by clicking the Select button besides them. The selected learners are added to the Selected People pane. <ul style="list-style-type: none"> Note: If the class does not have any open seats, then the application prompts you to either waitlist the learner or cancel their class registration. Click the Add button. The selected learners are added to the class and displayed on the roster. They can have a registration status of either <i>Registered</i> or <i>Waitlisted</i>.
3. Add Learners Using CSV File	<ul style="list-style-type: none"> Click the Upload CSV File option. <ul style="list-style-type: none"> Browse for and select the required CSV file. Note: The CSV file must contain only a list of personIDs without a header.

Step	Action
	<ul style="list-style-type: none"> Click the Add button. The selected learners are added to the class and displayed on the roster with a registration status of either Registered or Waitlisted.

Additional Information



When working with bulk registrations, how are error/warning messages handled?

The **Select People** step of the **Assign Learning** wizard does not display the error/warning messages after clicking the select arrow icon in the **Action** column. Instead, the wizard first adds the users to the **Selected People** pane and displays a **Verifying...** message while validating the users.

If there are any errors or warnings for the person, then a **Click to view Error(s)/Warning(s)** link is displayed for the user. Clicking this link opens the Alerts popup page that displays errors and warning associated with the user, and **Continue** and **Close** buttons. If there are only errors, then you cannot take any action on them and so Saba Cloud displays only the **Close** button.

You can select or clear any of the warning messages and then click the **Continue** button, which results in to the following:

- Creates internal orders for users with selected warnings
- Removes orders for users whose warnings are not selected, and
- Removes orders for users with errors

Clicking Close just closes the popup page.

The **Selected People** pane also displays a **View all errors and warnings** link. Clicking this link opens the **Alerts** popup page that displays a combined view of all errors and warnings for all selected users. The **Continue** and **Close** buttons work similar to the way it works for individual users.

Saba Cloud make it mandatory to take action on the warnings that are displayed for selected users in the wizard, without which you cannot proceed to the next step of the wizard. So if you are

viewing error/warning of individual users, then you must ensure that you take some action on the warnings of each user and then click the **Continue** button in the popup page for each such user. Similarly, if you are viewing at the combined errors/warnings of all selected users, then you must ensure that you take some action on the warnings and then click the **Continue** button.

If any warnings are left unattended, then Saba cloud displays the same combined **Alerts** popup page when you click the **Next** button of the wizard. Take the required action on the warnings and click **Continue** to proceed to the summary step of the wizard.

References

- Saba Online Help
- http://sabacloud.com/support/index.php/Main_Page

Job Aid: Managing the Rosters and Class Completion as the Instructor

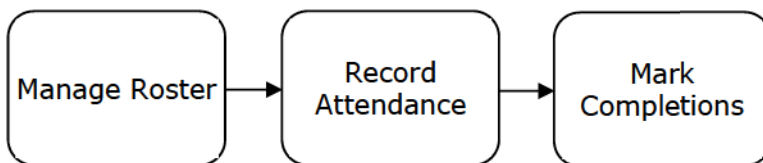
Core Concepts

What is the Instructor's Desk?

The Instructor's desk view provides instructors with quick access to the roster where they can perform single or bulk registrations, send targeted notifications and mark attendance and completions for students in their class.

Process

Process flow



Process steps

Step	Action
1. Manage Roster	<ul style="list-style-type: none"> • Navigate to: App Menu > Admin > Instructor • Click the desired upcoming class or past class that you want to manage the roster for by clicking the name link. A page displays with detailed class information and student names of who are registered. <ul style="list-style-type: none"> ☞ <i>Note: By default, the Instructor's Desk view is selected, but you can switch to the Calendar View or List View to locate your class if preferred.</i> • To register new students: <ul style="list-style-type: none"> ○ Click the +Add Learners button on the right. The Add Learners page displays. ○ Search for the desired learner(s) by entering their name information in the Search for people field. <ul style="list-style-type: none"> ☞ <i>Note: For additional filters click the Show filters button, enter the desired information and click the Apply filters button.</i> ○ Click the Select button next to each of the desired students. The students are added to the Selected People window on the right. <ul style="list-style-type: none"> ☞ <i>Note: In the event of a conflict or other restriction, you may receive a warning message with an option to Ignore Warning.</i> ○ Click the Add button when all the desired students have been selected. The students are added to the roster.

Step	Action
	<ul style="list-style-type: none"> • To cancel students: <ul style="list-style-type: none"> ○ Check the box(es) next to the student(s) to be cancelled. ○ Click the Registration button. ○ Select the appropriate drop option from the Update status field. ○ Enter a reason in the Reason field. ☞ <i>Note: Depending on your auditing rules, you may be prompted to enter additional information.</i> ○ The student(s) is removed the roster.
2. Record Attendance and Mark Completions	<ul style="list-style-type: none"> • From the Instructor's Desk page, click the desired class by clicking the name link. A page displays with detailed class information and student names of who are registered. • Check the box(es) next to the student(s) for whom you want to mark attendance. • Click the Results/Attendance button. • In the Attendance window enter the time the student(s) attended each session for using HH:MM format. ☞ <i>Note: By using the Update all sessions field, you can apply the same attendance time across all sessions by entering the time and clicking the down arrow.</i> • In the Results window select the completion status such as Successful. • Click the Save button.
3. Mark Class Delivered or Cancelled	<ul style="list-style-type: none"> • From the Instructor's Desk page, click the Mark delivered button next to the desired class. A Class Status page displays. • To change the status to delivered: <ul style="list-style-type: none"> ○ Click the Delivered radio button. ○ Enter a delivery date in the Delivery Date field. ○ If desired, check the Create Learning Request for Waitlisted Learner box to have learning request(s) submitted on their behalf. This will make it easy for a register to register all the waitlisted students into another class. • To change the status to cancelled: <ul style="list-style-type: none"> ○ Click the Cancelled radio button. ○ If desired, check the Create Learning Request for Enrolled Learner box to have learning request(s) submitted on their behalf. This will make it easy for a register to register all the waitlisted students into another class.

Additional Information

Can I search a class roster for learners?

Saba Cloud displays the following search filters when instructors and learning administrators search for learners in a class roster:

- **First Name**
- **Last Name**
- **Person ID**
- **Registration date on or after**
- **Registration date on or before**
- **Order no**
- **Status**
- **Email**
- **Person Legal ID**

You can use the fields individually or in combination with one another to search for learners in the roster.

To view the search filters in the class roster:

- **Click Admin > Instructor > Edit a class > Show filters**
- **Click Admin > Learning > Manage Classes > Search and edit a class > Roster > Show filters**

Can I select learners on the roster in bulk by registration status?

Saba Cloud provides instructors with an option to select multiple learners in a class roster based on their class registration status.

The bulk selection checkbox is enhanced to display a new dropdown list with the following class registration statuses:




- **Registered**
- **Waitlist**
- **Offered**

Saba Cloud does not allow instructors to perform any action on learners in the *Cancelled* status. Therefore, the dropdown list on the bulk selection checkbox does not include the *Cancelled* status.

For Web-based (WBT) classes, the statuses Waitlisted and Offered are not applicable. Therefore, the status dropdown list is not displayed besides the bulk selection checkbox for WBT classes.

To select all learners on a page of a class roster irrespective of their status, instructors can still click the bulk selection checkbox.

Show filters ▾

Edit selected for:   

10 registered learner(s) selected on this page. Select 30 registered learner(s) in this class.

Clear all

<input checked="" type="checkbox"/>	ID	First Name	Last Name	Attendance	Registration s...
<input checked="" type="checkbox"/>	PC12340A60	INTPC12340A60	INTPC12340A60	00:00	Registered
<input checked="" type="checkbox"/>	PC12340A60	INTPC12340A60	INTPC12340A60	00:00	Registered
<input checked="" type="checkbox"/>	INTPC12...	INTPC12340A60	INTPC12340A60	00:00	Registered

Notes:

- When instructors select a status from the status dropdown list, all learners with that status on that page of the roster are selected. Multiple statuses cannot be selected simultaneously. If instructors select another status, then the previously selected status is overridden for a page. This bulk selection by status is applicable only for a page, and not for the entire list of learners in the class roster. Saba Cloud displays a message informing instructors of the selected number of learners on a page for that status, and whether they want to select all such learners for the entire class.
- If learners on the roster span more than one page, then the status dropdown list is displayed on each page of the roster. If instructors select a status say "Registered" in the status dropdown list on one page and then select another status say "Waitlisted" in the status dropdown list on a subsequent page of the roster, then "Waitlisted" learners are selected on this page while the earlier selection of "Registered" learners is retained for the other page. However, if instructors select all learners in a particular status across pages by clicking the link in the message, and then if they navigate to another page of the roster and select another status using the status dropdown list, then the learners in the new status are selected on that page only while retaining the selection of learners in the earlier status as well.
- If search criteria are applied to filter learners in a class, then the status dropdown list works only on the filtered subset of learners, and not on the entire set of learners in the class.

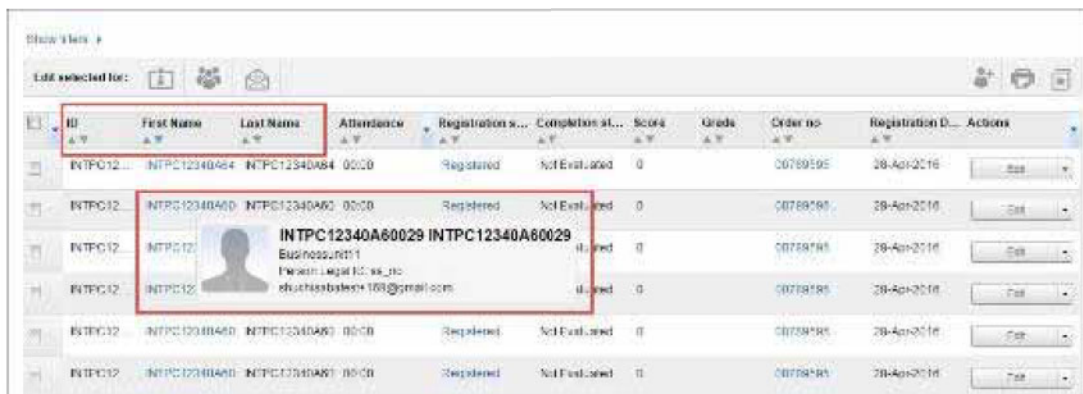
To clear any selection, click the **Clear all** link at the top of the learner table.

Can I sort learners on the roster?

The ability to sort learners by different columns on the roster makes it easier for instructors and enhances the overall usability of the class roster.

- Provides the ability to sort learners on the class roster in ascending or descending order using any column, except the **Actions** column, as follows.
 - The up and down arrow icons are always displayed if a column is sortable.

- Sorting learners by any column sorts the entire roster and not just the page where the sorting is performed.
- If learners span multiple pages on a roster, then each time they are sorted, the roster refreshes and returns the instructor to the first page.
- Any selections, bulk or otherwise, made before the sort are not retained.
- When any filter is applied in the roster and then sorting is performed, only the filtered records are sorted.
- While sorting by **Attendance** column, the sorting is performed by the selected session.
- By default, the learners are sorted by the learner last name in an ascending order.
- Splits the **Name** column into two columns, namely **First Name** and **Last Name** with their own sorting options. For locales where the learner's **Last Name** is followed by the **First Name**, the roster displays the Last Name column before the **First Name** column.
- Displays a separate **ID** column for the person ID.
- For substituting a learner, the learner's First Name is now displayed as a link and clicking that link opens the **Substitute Learner** window.
- The tooltip displaying "ss_no", "email" and person profile picture is now displayed when the instructor hovers the cursor over the learner's First Name link.



- The option to select columns now appear only by clicking the dropdown icon next to the **Actions** column.



What are the display warning messages to an instructor when closing a class?

The following warning messages are displayed in corresponding scenarios:

When Instructor clicks *Grant Credits* and *Marked Delivered* for a class and if:

- There are no Waitlisted/Offered learners
"This action will mark the class as delivered and update the completion status for all confirmed learners to Successful. This action will no longer allow updating of scores on a learner's transcript. Do you want to proceed?"
- There are Waitlisted/Offered learners
"This action will mark the class as delivered and update the completion status for all confirmed learners to Successful. This action will no longer allow updating of scores on a learner's transcript. The registration status for all {x} non-confirmed learners will change to Cancelled. Do you want to proceed?"

When Changing the Status of the Class in the following ways:

- When there are confirmed learners while cancelling a class
"Cancelling this class will move all {x} learners to Cancelled status permanently."
- When some learners are in Waitlisted/Offered state while marking the class as delivered
"Marking this class complete will move all {x} non-confirmed learners to Cancelled status permanently."

References

- Saba Online Help
- http://sabacloud.com/support/index.php/Main_Page

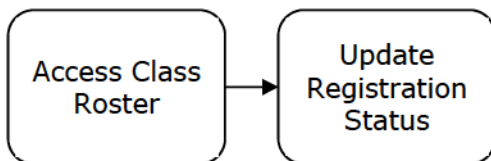
Job Aid: Updating Learner Registration Status - Instructor

Core Concepts


Instructors can update learner's class registration such as cancelling, waitlisting or marking them as *Walk in* by changing their registration status.

Process

Process flow



Process steps

Step	Action
1. Access Class Roster	<ul style="list-style-type: none"> • Navigate to: App Menu > Admin > Instructor • Click the required class name link under the Upcoming Sessions pane. The class roster displays the class details and a list of learners registered for the class.
2. Update Registration Status	<ul style="list-style-type: none"> • Select the required learners by clicking the checkboxes besides them. • Click the Registration icon . The Update Registration for popup page opens. • Select one of the following statuses from the Update status dropdown list: <ul style="list-style-type: none"> ○ Move to the waitlist with priority <ul style="list-style-type: none"> ➡ <i>Note: Optional. If selected, specify the priority number using the up and down arrows.</i> ○ Move to the waitlist and never automatically promote to the class ○ Drop this registration for these learners ○ Drop this registration without late charge ○ Move to No Show ○ Mark as Walk in • In the Reason field, you may enter a reason for changing the status of a learner. • 7. Click Save.

References

- Saba Online Help
- http://sabacloud.com/support/index.php/Main_Page