

Saba Quest LMS Manager Manual

Research Education & Outreach Team Office of Sponsored Programs

Contact us with any questions: training@osp.gatech.edu

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Job Aid: Viewing My Team

Core Concepts

What is My Team?

The *My Team* page provides quick access to common tasks that summarize information about your team. It is accessible to people assigned as a manager in the system.

The actions that you can take from the My Team page include:

- Meet Now
- Leave an Impression
- Assign Learning
- Assign Goals
- Assign Review
- Assign Mentors
- Assign Skills
- Schedule a Meeting
- · Add a completed course

- Nudge
- View Mentors
- View Upcoming and Past Due Activities for Team Members
- View Team Member Certifications
- View Team Member Skills
- View Team Member Curricula
- View Team Member Enrollments
- View Team Member Goals
- View Team Member Plan Items

Process

Process flow

View My Team Page

Process steps

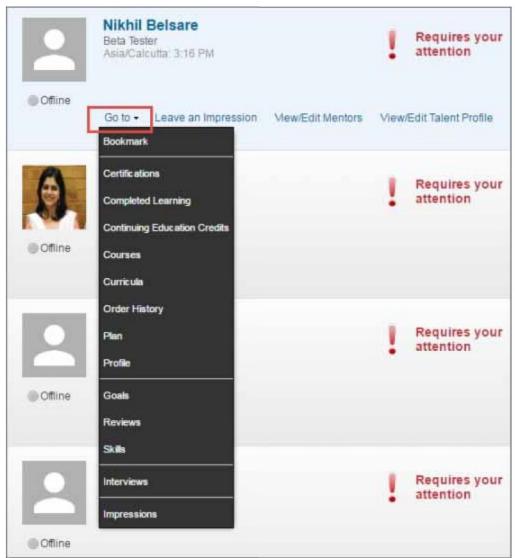
Step	Action
1. View My Team Page	Navigate to: Menu > My Team

Additional Information

The Go to dropdown menu is available next to the user's name for the following manager roles:

- Manager (Direct Team / Indirect Team)
- Alternate Manager
- Position Manager





The following actions are available under the Go to dropdown menu:

- Interviews
- Skills
- Reviews
- Goals

- Plan
- Impressions
- Profile
- Bookmarks
- Courses
- Certifications
- Curricula
- Completed Learning
- Continuing Education Credits
- Order History

The actions in this menu are grouped by functional areas such as Learning, Performance, and so on for better usability, and listed in an alphabetical order.

⇒ NOTE: The availability of certain actions is service driven.

Do position Managers have access to analytics from My Team?

Position managers can access Analytics from My Team. Clicking **My Team** > **Analytics** will list reports that are shared with them.



Note: In order to view or schedule these reports, the VIEW and SCHEDULE Report privileges have to be enabled on the Analytics Report Definition component using security roles.

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



Job Aid: Registering Team Members for a Class

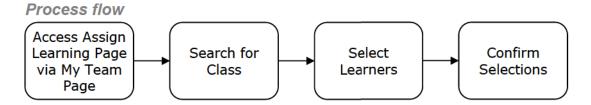
Core Concepts

As a manager, you can create an internal order for a team member for a single or multiple learning classes.

You can register your direct team, indirect team, or alternate team members to selected classes.

Note: The classes you see in the catalog search results are based on the catalog configuration. Depending on the configuration, you can view all or only a subset of classes while assigning learning to your team members through the enhanced assign learning workflow.

Process



Process steps

Step	Action
1. Access Assign Learning Page via My Team Page	 Navigate to: Menu > My Team Note: For Alternate Team Managers, an Alternate Team menu is available, displayed near the top. Click the Assign Learning button in the Team Actions box. The Assign Learning wizard displays.
2. Search for Class	 Select one of the following primary actions - Register, Add to Plan and Assign & Enroll. By default, Register is selected. Selection is indicated by blue color. Click the Next button. The Available Learning pop-up displays. Enter search criteria to search for the desired class(es). Click the Select class link next to the desired class. A drop-down menu displays. Select the desired class from the drop-down list. Click the Select button beside the class. The class is added to the Selected Learning area on the right. If enabled by your System Administrator, Saba Cloud allows learner registration for classes that have overlapping sessions simultaneously. If learners try to register for classes with overlapping sessions, then Saba Cloud displays a message alerting learners of the conflict. Learner can click the class name and see the



Step	Action
Step	conflict details. The learner can then decide to
	continue or cancel the registration.
	Note: Overlapping sessions is disabled and there are any conflicts, the Registration Errors and Warnings window will display instead:
	If it is an error, read the message and take action as needed to resolve the conflict. Once that is done, you will need to re-register.
	If it is a warning, read the message and click Enroll to proceed. Your registration will go through and the registration confirmation window will appear. Check your registration status to determine next steps:
	Confirmed: No corrective action is needed. You are enrolled.
	→ Waitlisted: When a seat opens up, you will be automatically notified. On accepting the seat, your registration will be confirmed.
	Optional. Select a due date for the activity from the Due Date column.
	Click the Next button. The People pop-up displays.
3. Select Learners	 Search for the required learning item using the Search catalog finder.
	 Select Yes in the Mandatory column for the required learning items. Selecting a learning as mandatory adds the learning to the mandatory list in user's plan.
	 Click the select icon in the Action column for the required learning item. The learning items you select are added to the Selected Learning pane. Clicking the x icon removes the learning item.
	Click Next.
	To find and select the required team members:
	 a. Click the Direct team or Alternate team link to narrow down your search results.
	 b. Click the search icon in the Search people field to search for users.
	 c. Click the Show filters link. You can search using any of the following filters:
	 Job title Organization Audience (audience type and sub-type) Job role
	 Location d. Specify your filter criteria and click Apply Filters. The list of people matching the specified criteria are displayed.



Step	Action
эсер	e. Select Yes in the Mandatory column, if required, for any of the users you want to select. The selected classes are assigned as mandatory to such users. Once the order is created, the classes in the order appear on the selected users' plans as mandatory learning items. Note: A user cannot assign mandatory learning
	f. Click the select icon in the Action column for the required users. The users you select are added to the Selected People pane. Clicking the x icon removes the user. A class may or may not require approval depending on settings by your administrator. If it requires approval, then Saba Cloud displays a warning message. If there are any errors or warnings for the person, then a Click to view Warning(s) link is displayed for the user. Clicking this link opens the Alerts popup page that displays the associated errors and warning messages. Clicking the Continue button closes the popup and removes the link from the selected learner. Clicking Cancel , keeps it as it is.
	simultaneously, click the Add All button. The order capacity is restricted to 200 items only, though. When you click Add All and if the order capacity goes beyond 200 items, then the wizard displays an error message and does not add users to the cart. You can modify your search criteria to restrict the filtered users and then try again. When you click Add All and if the order capacity is within 200 items, then the wizard adds all selected users to the cart. If the number of selected order items are large, the wizard indicates it may take some
	time to complete the processing. The cart capacity is displayed in the wizard throughout the selection steps as Cart capacity: x out of 200. The items selected in the cart is the Cartesian product of number of classes/courses and number of users selected. The counter is independent of any errors or warnings for any order. It simply displays items selected so far by the user placing the order.
	If the cart capacity of 200 items is reached for an order, then the Add All button is disabled. If one or more items are removed from the order and if the cart capacity goes below 200, then the Add All button is enabled again. g. Click the Continue button to continue with the registration; else, click Cancel .



Step	Action
	Click Next.
4. Confirm Selections	Click the Add to Plan button. The Summary step of the wizard lists the users to whom the learning has been assigned successfully. Any assignment failures are also listed with the reason for failure.
	Organizations need the facility to capture extra information during the class registration process. For example, certain organizations may need additional details such as a registration code to be entered during learner registration. This information can be used for purposes such as cross-charging and can vary with each registration. In such scenarios, your system administrator can configure Saba Cloud to prompt for additional details during class registration. For learners and managers, the application displays the Additional Information popup page during bulk registration. This page contains one or more additional fields that are configured by your system administrator. You must provide details in the requested fields and click the Save button. You can proceed with the bulk registration only after you fill-in the required additional details.
	If an enrollment contains multiple classes or courses, then Saba Cloud displays the custom fields popup page only if Enable order custom fields for Learner and Manager setting is enabled for the Orders service and the Show custom fields during registration checkbox is selected for at least one course in the enrollment.

Additional Information

Can Managers enroll Direct Reports into classes they have been registered for?

Yes. A manager can navigate to the direct team member's plan page where an **Enroll** button is available for each class from the following areas of the Plan page:

- View class button under Actions column for a course
- Click course name > Course details page > View classes button
- o Click certification name > Certification details page > View classes button
- Click curriculum name > Curriculum details page > View classes button
- Note: This enrollment functionality for managers is not available when the payment setting is enabled and applicable for an order. It is also not available for classes having zero price, if the payment workflow is enabled.

Can I assign learning using both the Assign Learning and Enhanced Assign Learning menus?



Prior to Update 47 (July 2020), a Manager could view both **Assign Learning** and **Enhanced Assign Learning** menus. The Registrar could view both **New Order** and **Enhanced New Order** menus.

A Manager can now access only the new enhanced user interface through the **Assign Learning** menu. The **Enhanced Assign Learning** is now renamed to **Assign Learning**, because the previous **Assign Learning** is renamed to **Assign Learning** (**Classic**). The **Assign Learning** (**Classic**) menu will be hidden by default because the setting **Show Assign Learning Views** for Manager is set to **Show only the new enhanced user interface**.

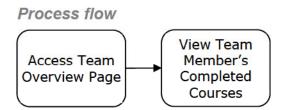
The Registrar can access only the new enhanced user interface through the **New Order** link. The **Enhanced New Order** is now renamed to **New** Order, because the previous **New Order** is renamed to **New Order (Classic)**. By default, the Menu Visibility privilege **Can access Learning** > **Registrar Desktop** > **New Order (Classic)** is disabled for all users except for the Super User. Only Super User can access both, **New Order (Classic)** and **New Order** links. The updated names are reflected in Menu privileges, Admin Home page, and Learning Home page.

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



Job Aid: Viewing My Team Member Completed Courses

Process



Process steps

	Step	Action
1.	Access Team Overview Page	Navigate to: Menu > My Team
2.	View Team Member's Completed Courses	 Click the Employee's name link of the desired team member. The employee's plan page displays. In the left navigation, click the Completed Learning menu. A list of complete learning items display. Completion Statuses are: Successful (with blue color background) Unsuccessful (with red color background) The status displayed is the status of the latest completed registration. For example, if there is a course with two classes Class1 and Class2. If a learner enrolls for Class1 first and completes it successfully, then the course status is Successful. But when the learner enrolls for Class2 and completes it unsuccessfully, the course status changes to Unsuccessful because Class2 registration is the latest completed registration. Now, even if the Class1 registration status changes, it does not affect the overall course completion status. Select the desired time frame from the Show: drop-down menu. Note: Completed learning can also be seen from the main plan page of the employee by clicking the Learning & Certifications tab and applying the appropriate filters. Note: If the score information says undisclosed, then it means the Data Privacy business rules have been configured to prevent managers from viewing score information for their team members.

Additional Information



Learners can view notes from People Administrators for completed courses.

The **Notes** icon is added to the top right corner of the class details page. Alternately, the **Notes** link is available in the following areas in the **Actions** column of the completed course for Learners:

- Me > Completed Learning
- Me > Plan > Learning & Certifications
- Home > Completed Learning portlet
- Note: Managers can go to the My Team tab and then navigate to the above pages for their team members to see notes on their completed courses.

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



Job Aid: Performing a Certification Gap Analysis

Core Concepts

What is a Certification Gap Analysis?

This feature provides users with the ability to identify which certifications are associated with other jobs. This information is helpful when planning your career and preparing to occupy a new job. Saba identifies this gap by comparing your certifications with the certifications associated with another job through any required or optional job roles assigned to the selected job.

To use this feature you must enable the Career Planning service, which is part of the *Succession* package.

Process

Process flow



Process steps

Step	Action
Access the Career Planning Page	Navigate to: Menu > Me > Career Planning
2. Create or Access Path	To create a new career path or access an existing one, click the Career box. For detailed information on this process, see the job aid: Creating or Deleting a Career Path.
	• Click the Let's get started! button. The first path i.e. <i>Path</i> 1 is created.
	Note: The Let's get started! page only displays if this is your first career path, otherwise after clicking the Career box, you'll be brought directly to your first path.
	 By default, the Current Job tab i.e. the first tab displays your current designation/job.
	Note: This information is picked from the Job field in your Profile page.
	If your current job is not identified, on mouse-hover, a popup appears that lets you choose your current job.
Perform Certification Gap Analysis	 Click one of the target tabs such as 1-3 Year Target. Click the Add Job link. The Add Job window displays.

Saba Cloud - Succession Planning



Step	Action
	 Search and select the desired target job.
	 Click the Save button. The job title is added under the current target tab and the Current vs Target Skills sub- tab is automatically selected.
	Click the Learning sub-tab.
	 Click the Certifications option beside the Show: field. A list of certifications assigned to the selected job display, broken down by job role.
	Use the drop-down menu to filter by a specific job role.
	Note: Click the More link, if present, to reveal the full list of certifications for the selected job.
	 To assign a certification to yourself through a to-do list, click the Add to List button for the desired certification.
	Note: If the to-do list has not yet been created, you'll be prompted to have Saba create one by clicking the Continue button.
	Note: Certifications that are already part of your plan will say In Plan to the right of the certification name. However, you can still assign them to yourself through the same to-do list by clicking the Include in List link.
	 To remove a certification that is already part of your plan, click the Remove link.

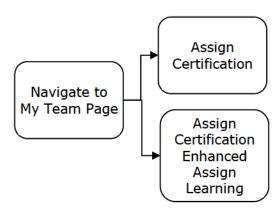
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Job Aid: Assigning a Certification to a Team Member(s)

Process

Process flow



Process steps

Step	Action
1. Access Team Plan Page	Navigate to: Menu > My Team
2a. Assign Certification	 In the Team Actions box, select the Assign learning link. The Assign Learning pop-up window opens. Select Add to Plan option. Note if you select the Add to Plan option, a due date can be set. Click the Select date link to set the due date for the certification. Enter search criteria and select the desired certification using the field picker. Use the filters to search for certifications only.
	Click the Select button for the desired certification. Result: Moves the certification(s) to the Selected Learning box.
	 Click the Next button. Choose desired team members to take the certification by clicking the Select button. Or search for a person, by entering search criteria and select the desired person using the field picker.
	 Click the Next button. A confirmation window displays. Click the Add to Plan button to finish the certification assignment.
	 Click the Close button to return to the Assign Learning window from the confirmation pop-up window that results. Click the X to close to return to the My Team page.



Step	Action
Step	Note: When you assign a certification to team members, they will get a notification informing them of the assignment.
	The certification displays in the Team member's Plan page. Certification status for each team member at the time of assignment is determined as follows:
	 Assigned: No learning elements associated with the certification were completed prior to certification assignment.
	 In progress: One or more learning element(s) associated with the certification were completed prior to certification assignment. Acquired: All required learning elements associated
	with the certification were completed prior to certification assignment.
	Note: Assignment does not automatically result in registration into the individual classes needed to acquire the certification. Each team member will need to sign up for the individual classes within the certification.
2b. Assign Certification Enhanced Assign Learning	Managers including Alternate Managers and Organization Managers use the Assign Learning link under Team Actions to assign the learning items in bulk to the selected learners. Through this link, the manager can register their team members for one or more classes, assign any learning activity to their plan, and register them for a certification or curriculum.
	A link Enhanced Assign Learning appears under the Team Actions. The manager can see both the links and either of them depending on the option selected in the Show Assign Learning Views for Manager setting under the Learning service.
	Note: If you want to show any one of the links, contact your System Administrator.

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.

What other options are available in the Assign Learning flow?

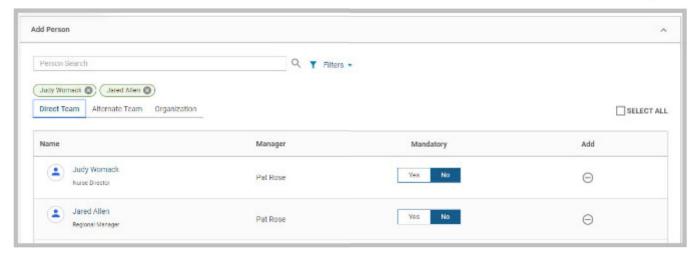
The following enhancements are made in the new Assign Learning flow for managers:

The following filters are available in the **Select Learning Item** section:

- Language
- Sort By with the following options:
 - o A-Z
 - o Z-A
 - Relevance
 - Recently Added
 - o Recently Modified
 - Rating (high to low)
 - o Rating (low to high)
 - Most Shared
 - Most Commented
- Note: These filters also appear in the Enhanced New Order page for Registrars.

Teams are now displayed as tabs in the **Add Person** section. The Organization Manager and Position Manager can now see their teams under the **Organization** and **Other Teams** tabs, respectively.





The Organization Manager can now add up to 200 items as the cart limit is increased to 200.

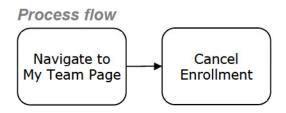
In **Overview**, if you drill down to the direct reports of your team member and click **Enhanced Assign Learning**, then the indirect team members appear in the **Add Person** section and the team member appears as a manager.

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



Job Aid: Cancelling Team Member Enrollments

Process



Process steps

Step	Action
Navigate to Team Enrollments Page	Navigate to: Menu > My Team
2. Cancel Enrollment	 Click the Employee's name link of the desired team member. Result: The Employee's plan window launches. Click the header Learning & Certifications to view learning details. To the right of the desired title, click the Drop button. The Drop Registration pop-up window for the selected enrollment displays. Click the Drop button to confirm cancellation. The enrollment is cancelled and the Confirmation pop-up displays. Click the X to return to the Employee's plan window. The course is removed from the view. Note: If there is a cancellation fee, a pop-up window will appear telling you the cost for cancellation. Click Drop or Do Not Drop as desired. Note: Managers cannot override cancellation penalties. Cancellation fees can only be overridden by registrars or catalog administrators.

References

Saba Online Help

http://sabacloud.com/support/index.php/Main Page