

Saba Custom Desktop Report Software Application Operations Guide

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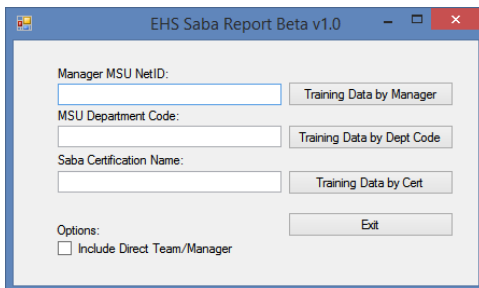
ORA developed a Saba Desktop App for EHS personnel to run reports. It compensates for the lack of report options for Alternate Teams inside Saba. More about [Direct vs Alternate Teams](#) and [General Info](#).

Run a Report

- 1) Start the EHS Saba Report software using your Start Menu shortcut. If you cannot find the shortcut, click your Start (bottom left) and enter EHS_Saba into the search box.



- 2) You will see the following window. Unlike Saba reports, you can only sort on 1 of the 3 open fields at a time.



- 3) Run 1 of 3 types of reports by entering in exactly the Manager's NetID *or* the Department Code *or* the Certification Name and clicking the related button. This takes time. Do not click again.
- 4) If you want your results to include both types of teams, just click the Include Direct Team/Manager button. This application focuses on Alternate Managers, because Saba has internal reporting capability for Direct Teams.

Three Basic Reports

Training Data by Manager: Outputs all of the training users associated with the entered alternate manager MSU NetID. Displays that manager's trainees' course and certifications records.

MSU Department Code: Outputs all managers in that department even if they are under multiple departments (in Saba custom fields 1, 2 or 3 and print their alternate team and each alternate team member's Saba course and certification records.

Saba Certification Name: Outputs all trainees with the indicated certification and groups them by the trainees' alternate managers.

If the "Include Direct Team/Manager" box is checked when you click a report processing button that report will also include direct manager information.

Output

After report processing is complete an output will display on your screen via an Internet Explorer web browser window. Please maximize the Internet Explorer window to get the correct output formatting. The report data output file will be saved in HTML format in your My Documents folder for storage, emailing and/or later viewing. Each time you run a report a new file will be generated with the date and time in the file name so that no previous report data files will be lost due to potential file overwriting.

Examples of each type of report start on page 3 of this guide.

Direct Teams versus Alternate Teams

Saba LMS primarily organizes workers/trainees under a single Direct Manager. That Manager and others under a next higher level manager and so on for a hierarchical structure. You can only have 1 Direct Manager. Saba provides *ad hoc* and managed reports for training records grouped by Direct Managers/Direct Teams.

Saba LMS also offers the ability for workers/trainees to be under unlimited number of Alternate Managers. An Alternate Manager can share subordinates with other managers. Saba does not offer reports that group training records by Alternate Manager.

Saba can store up to three different department codes for each person including for each manager. Saba ad hoc reports require running three separate reports to find The EHS Desktop application searches all three fields simultaneously.

General Information

Please take these points into consideration when using this software:

- This EHS Saba Desktop Application is only available to EHS compliance personnel.
- The EHS Saba Desktop Application must be downloaded to each computer where the application will be used. You can also connect remotely via MSU VPN to your computer with the application installed. If you get a new computer, you will need it re-installed.
- The reports could take up to several minutes to complete after you click the corresponding button depending on how much data is to be included on the report and the speed of the network between your computer and the Saba database server.
- As other training records, follow MSU's policy on data use and FERPA guidelines regarding student records. Do not forward resulting files unless you have confirmed the recipient has signed MSU policy, completed FERPA training, or is in the Saba Data Access Certification.
- Contact Dan Krull at 517-884-0379 or krull@msu.edu with any questions about the software.