

# What's New

Saba Cloud | Update 36 | Nov 2016



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Published: 10/28/2016 Part Number: G-SC-U36

# Contents

| Cha | nge log                                   |    |
|-----|---|----|
| New | v features at a glance by functional area |    |
| New | v features at a glance by audience        |    |
|     | A11                                       | 25 |
|     | Analytics Admin, Analytics User           | 25 |
|     | Approver                                  |    |
|     | Catalog Admin                             | 27 |
|     | Candidate                                 |    |
|     | Compensation Admin                        |    |
|     | Developer                                 | 29 |
|     | End User                                  |    |
|     | HR Admin & HRBP                           |    |
|     | Hiring Team, Hiring Manager, Recruiter    |    |
|     | Learning Admin                            |    |
|     | Marketplace admin                         |    |
|     | Manager                                   |    |
|     | Performance Admin                         | 40 |
|     | Pulse Admin                               | 40 |
|     | People Admin                              | 41 |
|     | Partner Admin                             | 41 |
|     | Recruiting Admin                          |    |
|     | Registrar                                 | 43 |
|     | Saba Approver                             | 43 |
|     | System Admin                              | 44 |
|     | Talent admin                              |    |

| Chapter 1: System   | 47     |
|---|--------|
| Core  |        |
| Organization Manager  |        |
| Configure Labels supports additional labels and all locales         |        |
| Control visibility of navigation links using menu visibility privil | eges52 |
| Legacy attributes deprecated  |        |
| Privilege to change own manager                                     |        |
| Support for additional locales                                      |        |
| Locale support for notification keywords                            |        |
| Enhancement to mobile branding configuration in microsites          |        |
| Protect your account with two factor authentication                 | 61     |
| Data Integration  | 65     |
| Record-level selective deletion of associations using data import   |        |
| Merge person profiles in bulk through data import                   |        |
|   |        |

| Dynamically update currency for blended classes through data import         | 67  |
|---|-----|
| Associate multiple currency prices for course and class through data import | 67  |
| Advanced data import configuration in Integration Studio                    | 68  |
| Auditing support for data import job configuration                          |     |
| Skip omitted columns from data import file                                  |     |
| New Organization Administrator association in data import                   | 73  |
| New column in Person data import  | 74  |
| Prescriptive Rule and Smart List  | 75  |
| Assign job role to person via prescriptive rule                             | 75  |
| Prompt to save member selection details when using existing criteria        | 77  |
| REST API  | 77  |
| Updated REST APIs   | 77  |
| New REST APIs   | 140 |

| Chapter | 2: Analytics   | 243 |
|---------|--|-----|
| Fran    | nework enhancements  | 244 |
|         | Add exceptions to reports  | 244 |
|         | Embed an Analytics Dashboard, Report or Chart in an external portal                      | 247 |
|         | Support Data Is Protected individually for Person and Organization fix custom dimensions | 249 |
|         | Line charts to now support sorting on dimension attributes                               | 250 |
| New     | 7 Reports  | 251 |
|         | Exception Report - Unassigned Certification  | 251 |
|         | Exception Report - Pending Course Completion   | 252 |
|         | Pulse Survey Report By Respondent  | 254 |
|         | Anonymous Pulse Survey Report  | 255 |
| New     | Attributes   | 257 |
|         | Pulse 360  | 257 |
|         | Profile  |     |
|         | Performance  |     |
|         | Compensation   |     |
|         | Learning   |     |
|         | Recruiting   | 272 |
|         | Social   | 274 |
|         | System   |     |
|         | Exceptions   |     |
|         | Additional extended custom fields  |     |
|         | New operator (Logged-in Person's Organization)   |     |
| Upd     | ated Attributes  |     |
|         | Learning   |     |
|         | Social   |     |
|         | Compensation   | 291 |
|         |  |     |

| Chapter | 3: Lear | rning | 293 |
|---------|---------|-------|-----|
|---------|---------|-------|-----|

| Assessment  | 294                  |
|---|----------------------|
| Search enhancements for tests, surveys and questions  | 294                  |
| Learning Activity   |                      |
| Add video content to courses using course wizard  |                      |
| Handle deletion of Saba Meeting event in a class session  |                      |
| Edit Is Sensitive field while updating a course   |                      |
| One click registration for external users   |                      |
| Control the display of custom course fields during bulk registration                              | 299                  |
| New named queries for learning activities   |                      |
| Create audience type/sub-type on-the-fly for certifications and curricula                         |                      |
| Hide unsuccessful completions from learner's transcript   |                      |
| Display for Learner, Display for Call Center, and Self-registration options for certifications an | d curric <b>BD</b> 4 |
| Remove discontinued courses from learner's plan   |                      |
| Enhanced View Classes popup page  |                      |
| Add lab sessions to a class activity  |                      |
| Increased default max count for VLE providers   |                      |
| Registrars and managers can enroll learners to certifications and curricula                       |                      |
| Bookmarklet for recording informal learning resources outside of Saba Cloud                       |                      |
| E-commerce  |                      |
| Add private video channel or group to subscription  |                      |
| Bulk import of states within country  |                      |
| Currency conversion for class price is dynamic  | 321                  |
| Country and State fields shown as LOV in organization details                                     |                      |
| Expand Tax API  |                      |
| Invoice Me enhancements   |                      |
| Make payments to course owner's organization  |                      |
| New notification for pay later functionality  |                      |
| Content   |                      |
| Track number of attempts for unlimited attempts on content  |                      |
| Import Panopto videos as SCORM content  |                      |
| Deployed SCORM content support for mobile   |                      |

| Chapter 4: Social   |  |
|---|--|
| Organizational Chart available under People.tab                                 |  |
| Control access to workspaces  |  |
| Display images and videos inline in group and activity stream                   |  |
| Learning Record Store for recording social resource contributions in Saba Cloud |  |

| Chapter 5: Marketplace  | 355  |
|---|------|
| Courses retired in lynda.com should not appear in Saba  | .356 |
| Saba Approver can see application details before approxal   | .356 |
| Audit option is available for marketplace configuration changes                                     | .358 |
| Partner admin can choose which view the microapp should be available in Saba home page/profile page | .360 |

| Partners can publish Micro Apps to specific tenants                    | 361 |
|--|-----|
| Enhancement to the Partner Approval Flow                               | 362 |
| API dashboard available for Micro Apps created in Extended Integration | 363 |

| Chapter 6: Performance                               |  |
|--|--|
| Add locale to Additional Info section of review form |  |
| Assign skill through PR without any goal             |  |
| Anniversary reviews update                           |  |
| Edit or delete goal progress comments                |  |
| Export and import review cycle                       |  |
| Filter skills by skill group                         |  |
| Limit access to reviews for new managers             |  |
| New policy for review owners to release review       |  |
| New question in Company category for Pulse 360       |  |

| Chapter 7: Pulse 360                           |  |
|--|--|
| New question in Company category for Pulse 360 |  |
| Pulse custom surveys                           |  |

| Chapter 8: Talent   |     |
|---|-----|
| Control display of experts in career planning   |     |
| Display Career Planning section on Talent Profile irrespective of career paths              |     |
| Display talent attributes on hovering person in N-box view                                  |     |
| Export/print n-box view to Excel and PDF  |     |
| Hover messages for potential rating and departure risk on Talent pool views                 | 401 |
| Surface job details and attachments from Job details on Profile page and in Career Planning | 402 |
| Surface Actions menu on N-box view  | 404 |

| Chapter 9: Recruiting  |     |
|--|-----|
| Auto reject candidates with incomplete profile                   |     |
| Display custom and extended custom fields on candidate's profile |     |
| Job requisition summary digest                                   | 412 |
| Multiple career sites  | 415 |
| New setting to pull job description in requisition               | 419 |
| New keywords in offer letter template                            |     |
| Smarter one click approval from email                            |     |
| Manage onboarding forms in HR admin flow                         |     |
| Reposition Terms and Conditions                                  |     |
| UI enhancements on the Hiring Team page                          |     |
|  |     |

| Chapter 10: Compensation43 | 31 |
|----------------------------|----|
|----------------------------|----|

| Send notifications when compensation letter is published                | 432 |
|---|-----|
| Journal and a most along the set of the set                             |     |
| Import and export plan cycle worksheets                                 |     |
| Freeze header row in manager's worksheet                                | 434 |
| Delete Compensation Plan Cycles   |     |
| Support for string translation in Compensation                          |     |
| I18N support for Plan Cycle names and descriptions                      |     |
| Localization support for Library Fields                                 |     |
| Translation support for compensation categories                         | 441 |
| Comment field added   |     |
| Out of the Box notifications to display text                            | 446 |
| Allow compensation managers to access compensation data on profile page |     |
| Cancelled/Deleted plan data can no longer be reported in Analytics      |     |
| Data sync between Compensation and Analytics - Plan Activation          | 451 |
| Improved data Sync between Compensation and Analytics Reporting         | 452 |
| Create Custom Manager hierarchy to distribute budget                    |     |
|   |     |

10 | TOC |

# Change log

The below table summarizes the list of changes introduced in a particular version of this document.

### Table 1: Summary of changes

| Version | Date        | Change<br>description | Functional<br>area | Feature |
|---------|-------------|-----------------------|--------------------|---------|
| 1.0     | 28-Oct-2016 | Initial version       | N/A                | N/A     |

# New features at a glance by functional area

The below table summarizes the list of features introduced in the release and their potential impact on your environment.

Note: \* Enabled by default does not necessary imply that the feature is immediately available to your users; it may require a user with an appropriate administrator role to turn on applicable functionality, business rules, etc.

#### Table 2: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience |
|--------------------|---|----------------------------|----------------------------|--|---|----------------------|
| REST APIs          | API to retrieve completion de~<br>tail of the learning event                        | V                          |                            |  |   | Developer            |
|                    | APIs to retrieve, create and<br>manage resources on the Saba<br>Activity Stream NEW | V                          |                            |  |   | Developer            |
|                    | APIs to retrieve or update de~<br>tails of job requisitions                         | V                          |                            |  |   | Developer            |
|                    | API to retrieve public/private attachments  | V                          |                            |  |   | Developer            |
|                    | APIs to retrieve social interac~<br>tions of a user NEW                             | V                          |                            |  |   | Developer            |
|                    | APIs to create, update and de~<br>lete Smartlists NEW                               | V                          |                            |  |   | Developer            |
|                    | Certification and Curriculum<br>APIs to return additional details                   | V                          |                            |  |   | Developer            |
|                    | Enrollment search APIs to sup~<br>port created_on field                             | V                          |                            |  |   | Developer            |
|                    | Held learning APIs to return additional details                                     | V                          |                            |  |   | Developer            |
|                    | APIs to create, update and find<br>Sub audience types <b>NEW</b>                    | V                          |                            |  |   | Developer            |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience   |
|--------------------|--|----------------------------|----------------------------|--|---|--|
|                    | APIs to retrieve, create, update<br>and delete countries and states                                    | ۷                          |                            |  |   | Developer  |
|                    | APIs to retrieve details of the recurring course completions   | ۷                          |                            |  |   | Developer  |
|                    | API to retrieve existing registra~<br>tion details or auto enroll user<br>and get registration details | ۷                          |                            |  |   | Developer  |
|                    | Get completion and lesson de~<br>tails of the learning event   | V                          |                            |  |   | Developer  |
|                    | API to retrieve the Audience<br>Type / Audience Sub Types<br>assigned to a Person                      | ۷                          |                            |  |   | Developer  |
|                    | New attribute added for the<br>CREATE A NEW JOB RE~<br>QUISITION API                                   | ۷                          |                            |  |   | Developer  |
|                    | User-friendly IDs and lookup support for REST APIs   | ۷                          |                            |  |   | Developer  |
|                    | New attribute added for the<br>CREATE A NEW VIRTUAL<br>CLASS API                                       | ۷                          |                            |  |   | Developer  |
|                    | API to report the content result<br>back to Saba   | V                          |                            |  |   | Developer  |
|                    | New attribute added for the Subscription APIs  | V                          |                            |  |   | Developer  |
| System             | Configure Labels supports addi~<br>tional labels and all locales                                       | V                          |                            |  |   | System admin   |
|                    | Control visibility of navigation<br>links using menu visibility<br>privileges <b>NEW</b>               | ۷                          | System ad~<br>min          |  |   | System admin<br>Social admin<br>People admin<br>Recruiting admin |

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                  |
|--------------------|---|----------------------------|----------------------------|--|---|---------------------------------------|
|                    | Legacy attributes deprecated  | ۷                          |                            |  |   | System admin<br>End user<br>Developer |
|                    | Privilege to change own man~<br>ager  |                            | System ad~<br>min          |  |   | End user                              |
|                    | Organization Manager  |                            | System ad~<br>min          |  |   | Manager<br>HR admin                   |
|                    | Record-level selective deletion<br>of associations using data im~<br>port         |                            | System ad~<br>min          |  |   | System admin                          |
|                    | Merge person profiles in bulk through data import <b>NEW</b>                      | ۷                          | System ad~<br>min          |  |   | System admin                          |
|                    | Dynamically update currency<br>for blended classes through<br>data import         | ۷                          | System ad~<br>min          |  |   | Learning admin                        |
|                    | Associate multiple currency<br>prices for course and class<br>through data import | ۷                          | System ad~<br>min          |  |   | Learning admin                        |
|                    | Advanced data import configur~<br>ation in Integration Studio                     | V                          | System ad~<br>min          |  |   | System admin                          |
|                    | Auditing support for data im~<br>port job configuration NEW                       | ۷                          |                            |  |   | System admin                          |
|                    | Skip omitted columns from data import file  |                            | System ad~<br>min          |  |   | End user                              |
|                    | New Organization Administrat~<br>or association in data import                    | ۷                          | System ad~<br>min          |  |   | HR admin                              |
|                    | New column in Person data<br>import   | V                          |                            |  |   | System admin                          |
|                    | Prompt to save member selec~<br>tion details when using existing<br>criteria      | ۷                          |                            |  |   | People admin                          |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience              |
|--------------------|--|----------------------------|----------------------------|--|---|-----------------------------------|
|                    | Assign job role to person via prescriptive rule  | Ũ                          |                            |  |   | People admin                      |
|                    | Support for additional locales   |                            |                            | ۷  |   | All<br>System admin               |
|                    | Locale support for notification keywords   | ۷                          |                            |  |   | System admin                      |
|                    | Enhancement to mobile brand~<br>ing configuration in microsites                                    | ۷                          |                            |  |   | System admin                      |
|                    | Protect your account with two factor authentication <b>NEW</b>                                     |                            |                            |  |   | System admin<br>All               |
| Analytics          | Add exceptions to reports NEW  |                            |                            | ۷  |   | Analytics admin<br>Analytics user |
|                    | New Attributes <b>NEW</b>  | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | Updated Attributes   | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | New Reports NEW  | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | New operator (Logged-in Per~<br>son's Organization)  | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | Embed an Analytics Dash~<br>board, Report or Chart in an<br>external portal NEX                    | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | Support Data Is Protected indi~<br>vidually for Person and Organ~<br>ization fix custom dimensions | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | Line charts to now support<br>sorting on dimension attributes                                      | ۷                          |                            |  |   | Analytics admin<br>Analytics user |

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience  |
|--------------------|---|----------------------------|----------------------------|--|---|-----------------------|
| Learning           | Search enhancements for tests, surveys and questions  | V                          |                            |  |   | Learning admin        |
|                    | Add video content to courses using course wizard  | V                          | System ad~<br>min          |  |   | Learning admin        |
|                    | Handle deletion of Saba Meet~<br>ing event in a class session   | V                          |                            |  |   | Learning admin        |
|                    | Edit Is Sensitive field while<br>updating a course  | V                          |                            |  |   | Learning admin        |
|                    | One click registration for extern~<br>al users  | V                          | System ad~<br>min          |  |   | End user              |
|                    | Control the display of custom<br>course fields during bulk regis~<br>tration  | ۷                          | Learning<br>admin          |  |   | End user              |
|                    | New named queries for learn~<br>ing activities  | V                          | System ad~<br>min          |  |   | End user              |
|                    | Create audience type/sub-type<br>on-the-fly for certifications and<br>curricula   |                            | System ad~<br>min          |  |   | Learning admin        |
|                    | Hide unsuccessful completions from learner's transcript   | V                          | System ad~<br>min          |  |   | End user              |
|                    | Display for Learner, Display<br>for Call Center, and Self-regis~<br>tration options for certifications<br>and curricula NEW |                            | System ad~<br>min          |  |   | End user<br>Registrar |
|                    | Remove discontinued courses from learner's plan   |                            | Learning<br>admin          |  |   | End user<br>Manager   |
|                    | Enhanced View Classes popup<br>page   | V                          |                            |  |   | End user              |
|                    | Increased default max count for VLE providers   | V                          |                            | V  |   | End user              |

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                       |
|--------------------|---|----------------------------|----------------------------|--|---|--|
|                    | Registrars and managers can<br>enroll learners to certifications<br>and curricula | ۷                          |                            |  |   | Registrar<br>Manager                       |
|                    | Track number of attempts for<br>unlimited attempts on content                     | ۷                          |                            |  |   | Learning admin                             |
|                    | Import Panopto videos as SCORM content  |                            | System ad~<br>min          |  |   | Learning admin                             |
|                    | Deployed SCORM content support for mobile   | ۷                          | Learning<br>admin          |  |   | Learning admin                             |
| E-commerce         | Bulk import of states within country  | ۵                          |                            |  |   | System admin                               |
|                    | Add private video channel or group to subscription NEW                            |                            | System ad~<br>min          | ۷  |   | System admin<br>Learning admin<br>End user |
|                    | Currency conversion for class price is dynamic                                    |                            | System ad~<br>min          |  |   | System admin<br>Learning admin             |
|                    | Country and State fields shown as LOV in organization details                     | ۷                          | System ad~<br>min          |  |   | System admin<br>HR admin                   |
|                    | Expand Tax API  | ۷                          | System ad~<br>min          |  |   | System admin                               |
|                    | Invoice Me enhancements   |                            | System ad~<br>min          |  |   | System admin<br>Registrar                  |
|                    | Make payments to course own~<br>er's organization NEW                             |                            | System ad~<br>min          |  |   | System admin<br>Catalog admin<br>End user  |
|                    | New notification for pay later functionality                                      |                            | System ad~<br>min          |  |   | End user<br>Registrar                      |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                          |
|--------------------|--|----------------------------|----------------------------|--|---|---|
| Social             | Organizational Chart available<br>under People tab   | ۷                          | System ad~<br>min          |  |   | End user                                      |
|                    | Control access to workspaces   | V                          | End user                   |  |   | End user                                      |
|                    | Display images and videos in~<br>line in group and activity<br>stream  | V                          |                            |  |   | End user                                      |
|                    | Learning Record Store for<br>tracking social resource contri~<br>butions in Saba Cloud                       |                            | System ad~<br>min          |  |   | End user<br>Learning admin                    |
|                    | Bookmarklet for tracking in~<br>formal learning resources out~<br>side of Saba Cloud                         |                            | System ad~<br>min          |  |   | End user<br>Learning admin                    |
| Marketplace        | Courses retired in lynda.com<br>should not appear in Saba  | ۷                          |                            |  |   | Marketplace Ad~<br>min<br>End User            |
|                    | Saba Approver can see applica~<br>tion details before approval   | ۷                          |                            |  |   | Marketplace Ad~<br>min, Saba Ap~<br>prover    |
|                    | Audit option is available for<br>marketplace configuration<br>changes  | ۷                          |                            |  |   | Marketplace Ad~<br>min                        |
|                    | Partner admin can choose<br>which view the microapp<br>should be available in Saba<br>home page/profile page | V                          |                            |  |   | Partner admin,<br>Marketplace ad~<br>min      |
|                    | Partners can publish Micro<br>Apps to specific tenants   | ۷                          |                            |  |   | Partner Admin,<br>Marketplace Ad~<br>min      |
|                    | Enhancement to the Partner<br>Approval Flow  | ۷                          |                            |  |   | Partner Ap~<br>prover, Market~<br>place Admin |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience  |
|--------------------|--|----------------------------|----------------------------|--|---|---|
|                    | API dashboard available for<br>Micro Apps created in Exten~<br>ded Integration | ۷                          |                            |  |   | Partner admin,<br>Saba Approvers,<br>Marketplace Ad~<br>min |
| Compensa~<br>tion  | Send notifications when com~<br>pensation letter is published                  | ۷                          |                            |  |   | Manager, Com~<br>pensation Admin,<br>Approver, HRBP         |
|                    | Import and export plan cycle<br>worksheetsNEW                                  | ۷                          |                            |  |   | Manager, Admin  |
|                    | Freeze header row in manager's worksheet                                       | 8                          |                            |  |   | Manager   |
|                    | Delete Compensation Plan<br>Cycles   | ۷                          |                            |  |   | Compensation<br>Administrator                               |
|                    | Support for string translation in Compensation                                 | ۷                          |                            |  |   | End User  |
|                    | I18N support for Plan Cycle<br>names and descriptions                          | ۷                          |                            |  |   | Compensation<br>Admin                                       |
|                    | Localization support for Lib~<br>rary Fields                                   | ۷                          |                            |  |   | Compensation<br>Admin, Manager,<br>Employees                |
|                    | Translation support for com~<br>pensation categories                           | 8                          |                            |  |   | Compensation<br>Admin                                       |
|                    | Comment field added  | ۷                          |                            |  |   | Manager, Ap~<br>prover                                      |
|                    | Out of the Box notifications to display text                                   | 8                          |                            |  |   | Compensation<br>Admin, Manager,<br>Approver, Em~<br>ployee  |
|                    | Allow compensation managers<br>to access compensation data on<br>profile page  | ۷                          |                            |  |   | Manager   |
|                    | Cancelled plan Cycle data to be removed from Analytics                         | ۷                          |                            |  |   | Compensation<br>Admin                                       |

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                        |
|--------------------|---|----------------------------|----------------------------|--|---|---|
|                    | Separate plan activation and analytics data synchronization | V                          |                            |  |   | Compensation<br>Admin                       |
|                    | Synchronize Compensation<br>data with Analytics Reporting   | ۷                          |                            |  |   | Compensation<br>Admin, Manager,<br>Approver |
|                    | Create Custom Manager hier~<br>archy to distribute budget   | ۷                          |                            |  |   | Compensation<br>Admin, Manager              |
| Performance        | New policy for review owners<br>to release review           | ۷                          | Perform~<br>ance admin     |  |   | Performance ad~<br>min<br>Manager           |
|                    | Assign skill through PR<br>without any goal                 | ۷                          |                            |  |   | People admin<br>End user                    |
|                    | Add locale to Additional Info<br>section of review form     | ۷                          | Perform~<br>ance admin     |  |   | Performance ad~<br>min                      |
|                    | Filter skills by skill group                                | ۷                          |                            |  |   | Manager<br>End user                         |
|                    | Limit access to reviews for new managers                    | ۷                          | System ad~<br>min          |  |   | System admin<br>Manager                     |
|                    | Edit or delete goal progress<br>comments                    | ۷                          | System ad~<br>min          |  |   | System admin<br>Manager<br>End user         |
|                    | Export and import review cycle                              | V                          | Perform~<br>ance admin     |  |   | Performance ad~<br>min                      |
|                    | Anniversary reviews update                                  | V                          | Perform~<br>ance admin     |  |   | Performance ad~<br>min                      |
| Pulse 360          | New question in Company cat~<br>egory for Pulse 360         | ۷                          | Pulse ad~<br>min           |  |   | Pulse admin<br>End user                     |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                            |
|--------------------|--|----------------------------|----------------------------|--|---|---|
|                    | Pulse custom surveys NEW   |                            | System ad~<br>min          |  |   | Pulse admin<br>End user                         |
| Recruiting         | New setting to pull job descrip~<br>tion in requisition NEW            | ۷                          | Recruiting admin           |  |   | Recruiting admin<br>Manager                     |
|                    | Auto reject candidates with in~<br>complete profile <b>NEW</b>         |                            | System ad~<br>min          |  |   | System admin<br>Recruiting admin<br>Hiring team |
|                    | Display custom and extended<br>custom fields on candidate's<br>profile | V                          |                            |  |   | Recruiting admin<br>Recruiter<br>Hiring manager |
|                    | Job requisition summary NEW  | ۷                          |                            |  |   | Recruiter<br>Hiring manager                     |
|                    | Multiple career sites NEW  | V                          | Recruiting admin           |  |   | Recruiting admin<br>Hiring manager              |
|                    | New keywords in offer letter<br>template                               | ۷                          |                            |  |   | Hiring manager<br>Recruiter                     |
|                    | Notification triggered when<br>new user signs up on career site        | ۷                          | System ad~<br>min          |  |   | System admin<br>Candidate                       |
|                    | Smarter one click approval from email                                  | ۷                          |                            |  |   | Approver  |
|                    | Manage onboarding forms in HR admin flow                               | ۷                          |                            |  |   | Recruiting admin                                |
|                    | Reposition Terms and Condi~<br>tions                                   | V                          |                            |  |   | Candidate                                       |
|                    | UI enhancements on the Hiring<br>Team page                             | ۷                          |                            |  |   | Hiring manager<br>Recruiter                     |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                |
|--------------------|--|----------------------------|----------------------------|--|---|-------------------------------------|
| Talent             | Display Career Planning sec~<br>tion on Talent Profile irrespect~<br>ive of career paths                       | ۷                          |                            |  |   | Talent admin<br>Manager<br>End user |
|                    | Display talent attributes on<br>hovering person in N-box view  | ۷                          |                            |  |   | Talent admin<br>Manager             |
|                    | Control display of experts in career planning NEW  | ۷                          | System ad~<br>min          |  |   | System admin<br>End user            |
|                    | Hover messages for potential<br>rating and departure risk on<br>Talent pool views                              | ۷                          |                            |  |   | Talent admin<br>Manager             |
|                    | Surface job details and attach~<br>ments from Job details on Pro~<br>file page and in Career Plan~<br>ning NEW | V                          |                            |  |   | HR admin<br>End user                |
|                    | Surface Actions menu on N-<br>box view NEW   | V                          |                            |  |   | Manager                             |
|                    | Export/print n-box view to Ex~<br>cel and PDF NEW  | ۷                          |                            |  |   | Talent admin<br>Manager             |

## New features at a glance by audience

The below tables summarize the list of features introduced in the release and their potential impact on your environment.

Note: \* Enabled by default does not necessary imply that the feature is immediately available to your users; it may require a user with an appropriate administrator role to turn on applicable functionality, business rules, etc.

**NEW** indicates a new feature introduced in this update, others are enhancements/changes to the existing functionality.

### All

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience |
|--------------------|---|----------------------------|----------------------------|--|---|----------------------|
| System             | Support for additional locales                          |                            |                            | ۷  |   | All<br>System admin  |
|                    | Protect your account with two factor authentication NEW |                            |                            |  |   | System admin<br>All  |

#### **Table 3: Summary of features**

### **Analytics Admin, Analytics User**

#### Table 4: Summary of features

| Functional<br>area | Feature                       | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience              |
|--------------------|-------------------------------|----------------------------|----------------------------|--|---|-----------------------------------|
| Analytics          | Add exceptions to reports NEW |                            |                            | ۷  |   | Analytics admin<br>Analytics user |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience              |
|--------------------|--|----------------------------|----------------------------|--|---|-----------------------------------|
|                    | New Attributes <b>NEW</b>  | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | Updated Attributes   | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | New Reports NEW  | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | New operator (Logged-in Per~<br>son's Organization)  | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | Embed an Analytics Dash~<br>board, Report or Chart in an<br>external portal NEW                    | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | Support Data Is Protected indi~<br>vidually for Person and Organ~<br>ization fix custom dimensions | ۷                          |                            |  |   | Analytics admin<br>Analytics user |
|                    | Line charts to now support<br>sorting on dimension attributes                                      | V                          |                            |  |   | Analytics admin<br>Analytics user |

### Approver

#### Table 5: Summary of features

| Functional<br>area | Feature             | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience   |
|--------------------|---------------------|----------------------------|----------------------------|--|---|------------------------|
| Compensa~<br>tion  | Comment field added | V                          |                            |  |   | Manager, Ap~<br>prover |

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                                       |
|--------------------|---|----------------------------|----------------------------|--|---|--|
|                    | Out of the Box notifications to display text              | V                          |                            |  |   | Compensation<br>Admin, Manager,<br>Approver, Em~<br>ployee |
|                    | Synchronize Compensation<br>data with Analytics Reporting | V                          |                            |  |   | Compensation<br>Admin, Manager,<br>Approver                |
| Recruiting         | Smarter one click approval from email                     | V                          |                            |  |   | Approver   |

# **Catalog Admin**

#### Table 6: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                      |
|--------------------|---|----------------------------|----------------------------|--|---|---|
| E-commerce         | Make payments to course own~<br>er's organization NEW |                            | System ad~<br>min          |  |   | System admin<br>Catalog admin<br>End user |

### Candidate

#### Table 7: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience      |
|--------------------|---|----------------------------|----------------------------|--|---|---------------------------|
| Recruiting         | Notification triggered when<br>new user signs up on career site | ۷                          | System ad~<br>min          |  |   | System admin<br>Candidate |
|                    | Reposition Terms and Condi~<br>tions                            | V                          |                            |  |   | Candidate                 |

# **Compensation Admin**

### Table 8: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                                |
|--------------------|---|----------------------------|----------------------------|--|---|---|
| Compensa~<br>tion  | Send notifications when com~<br>pensation letter is published | ۷                          |                            |  |   | Manager, Com~<br>pensation Admin,<br>Approver, HRBP |
|                    | Delete Compensation Plan<br>Cycles                            | V                          |                            |  |   | Compensation<br>Admin                               |
|                    | I18N support for Plan Cycle<br>names and descriptions         | V                          |                            |  |   | Compensation<br>Admin                               |
|                    | Localization support for Lib~<br>rary Fields                  | ۷                          |                            |  |   | Compensation<br>Admin, Manager,<br>Employees        |
|                    | Translation support for com~<br>pensation categories          | V                          |                            |  |   | Compensation<br>Admin                               |

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                                       |
|--------------------|---|----------------------------|----------------------------|--|---|--|
|                    | Out of the Box notifications to<br>display text             | V                          |                            |  |   | Compensation<br>Admin, Manager,<br>Approver, Em~<br>ployee |
|                    | Cancelled plan Cycle data to be removed from Analytics      | V                          |                            |  |   | Compensation<br>Admin                                      |
|                    | Separate plan activation and analytics data synchronization | V                          |                            |  |   | Compensation<br>Admin                                      |
|                    | Synchronize Compensation<br>data with Analytics Reporting   | ۷                          |                            |  |   | Compensation<br>Admin, Manager,<br>Approver                |
|                    | Create Custom Manager hier~<br>archy to distribute budget   | V                          |                            |  |   | Compensation<br>Admin, Manager                             |

### Developer

### Table 9: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience |
|--------------------|---|----------------------------|----------------------------|--|---|----------------------|
| REST APIs          | API to retrieve completion de~<br>tail of the learning event                        | V                          |                            |  |   | Developer            |
|                    | APIs to retrieve, create and<br>manage resources on the Saba<br>Activity Stream NEW | V                          |                            |  |   | Developer            |
|                    | APIs to retrieve or update de~<br>tails of job requisitions                         | V                          |                            |  |   | Developer            |
|                    | API to retrieve public/private attachments  | V                          |                            |  |   | Developer            |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience |
|--------------------|--|----------------------------|----------------------------|--|---|----------------------|
|                    | APIs to retrieve social interac~<br>tions of a user <b>NEW</b>   | V                          |                            |  |   | Developer            |
|                    | APIs to create, update and de~<br>lete Smartlists  | ۷                          |                            |  |   | Developer            |
|                    | Certification and Curriculum<br>APIs to return additional details                                      | ۷                          |                            |  |   | Developer            |
|                    | Enrollment search APIs to sup~<br>port created_on field  | ۷                          |                            |  |   | Developer            |
|                    | Held learning APIs to return additional details  | V                          |                            |  |   | Developer            |
|                    | APIs to create, update and find<br>Sub audience types NEW  | V                          |                            |  |   | Developer            |
|                    | APIs to retrieve, create, update<br>and delete countries and states                                    | ۷                          |                            |  |   | Developer            |
|                    | APIs to retrieve details of the recurring course completions   | V                          |                            |  |   | Developer            |
|                    | API to retrieve existing registra~<br>tion details or auto enroll user<br>and get registration details | ۷                          |                            |  |   | Developer            |
|                    | Get completion and lesson de~<br>tails of the learning event   | V                          |                            |  |   | Developer            |
|                    | API to retrieve the Audience<br>Type / Audience Sub Types<br>assigned to a Person                      | ۷                          |                            |  |   | Developer            |
|                    | New attribute added for the<br>CREATE A NEW JOB RE~<br>QUISITION API                                   | ۷                          |                            |  |   | Developer            |
|                    | User-friendly IDs and lookup support for REST APIs   | ۷                          |                            |  |   | Developer            |
|                    | New attribute added for the<br>CREATE A NEW VIRTUAL<br>CLASS API                                       | ۷                          |                            |  |   | Developer            |

| Functional<br>area | Feature                                       | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience |
|--------------------|---|----------------------------|----------------------------|--|---|----------------------|
|                    | API to report the content result back to Saba | V                          |                            |  |   | Developer            |
|                    | New attribute added for the Subscription APIs | V                          |                            |  |   | Developer            |

### **End User**

### Table 10: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience  |
|--------------------|---|----------------------------|----------------------------|--|---|-----------------------|
| System             | Privilege to change own man~<br>ager  |                            | System ad~<br>min          |  |   | End user              |
|                    | Skip omitted columns from data import file  |                            | System ad~<br>min          |  |   | End user              |
| Learning           | One click registration for extern~<br>al users  | V                          | System ad~<br>min          |  |   | End user              |
|                    | Control the display of custom course fields during bulk regis~ tration  | ۷                          | Learning<br>admin          |  |   | End user              |
|                    | New named queries for learn~<br>ing activities  | V                          | System ad~<br>min          |  |   | End user              |
|                    | Hide unsuccessful completions from learner's transcript   | V                          | System ad~<br>min          |  |   | End user              |
|                    | Display for Learner, Display<br>for Call Center, and Self-regis~<br>tration options for certifications<br>and curricula |                            | System ad~<br>min          |  |   | End user<br>Registrar |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                       |
|--------------------|--|----------------------------|----------------------------|--|---|--|
|                    | Remove discontinued courses from learner's plan NEW                                    |                            | Learning<br>admin          |  |   | End user<br>Manager                        |
|                    | Enhanced View Classes popup<br>page  | V                          |                            |  |   | End user                                   |
|                    | Increased default max count for VLE providers  | V                          |                            | V  |   | End user                                   |
| E-commerce         | Add private video channel or group to subscription NEW                                 |                            | System ad~<br>min          | ۷  |   | System admin<br>Learning admin<br>End user |
|                    | Make payments to course own~<br>er's organization NEW                                  |                            | System ad~<br>min          |  |   | System admin<br>Catalog admin<br>End user  |
|                    | New notification for pay later functionality   |                            | System ad~<br>min          |  |   | End user<br>Registrar                      |
| Social             | Organizational Chart available<br>under People tab                                     | V                          | System ad~<br>min          |  |   | End user                                   |
|                    | Control access to workspaces   | V                          | End user                   |  |   | End user                                   |
|                    | Display images and videos in~<br>line in group and activity<br>stream                  | ۷                          |                            |  |   | End user                                   |
|                    | Learning Record Store for<br>tracking social resource contri~<br>butions in Saba Cloud |                            | System ad~<br>min          |  |   | End user<br>Learning admin                 |
|                    | Bookmarklet for tracking in~<br>formal learning resources out~<br>side of Saba Cloud   |                            | System ad~<br>min          |  |   | End user<br>Learning admin                 |
| Compensa~<br>tion  | Support for string translation in Compensation   | V                          |                            |  |   | End User                                   |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                |
|--------------------|--|----------------------------|----------------------------|--|---|-------------------------------------|
| Marketplace        | Courses retired in lynda.com<br>should not appear in Saba on<br>page 356Courses retired in<br>lynda.com should not appear in<br>Saba | ۷                          |                            |  |   | End User<br>Marketplace Ad~<br>min  |
| Performance        | Assign skill through PR<br>without any goal  | ۷                          |                            |  |   | People admin<br>End user            |
|                    | Filter skills by skill group   | ۷                          |                            |  |   | Manager<br>End user                 |
|                    | Edit or delete goal progress<br>comments   | <b>v</b>                   | System ad~<br>min          |  |   | System admin<br>Manager<br>End user |
| Pulse 360          | New question in Company cat~<br>egory for Pulse 360  | ۷                          | Pulse ad~<br>min           |  |   | Pulse admin<br>End user             |
|                    | Pulse custom surveys NEW   |                            | System ad~<br>min          |  |   | Pulse admin<br>End user             |
| Talent             | Display Career Planning sec~<br>tion on Talent Profile irrespect~<br>ive of career paths   | V                          |                            |  |   | Talent admin<br>Manager<br>End user |
|                    | Control display of experts in career planning NEW  | ۷                          | System ad~<br>min          |  |   | System admin<br>End user            |
|                    | Surface job details and attach~<br>ments from Job details on Pro~<br>file page and in Career Plan~<br>ning NEW                       | ۷                          |                            |  |   | HR admin<br>End user                |

### HR Admin & HRBP

#### Table 11: Summary of features

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                                |
|--------------------|--|----------------------------|----------------------------|--|---|---|
| System             | Organization Manager   |                            | System ad~<br>min          |  |   | Manager<br>HR admin                                 |
|                    | New Organization Administrat~<br>or association in data import   | V                          | System ad~<br>min          |  |   | HR admin  |
| E-commerce         | Country and State fields shown<br>as LOV in organization details   | ۷                          | System ad~<br>min          |  |   | System admin<br>HR admin                            |
| Compensa~<br>tion  | Send notifications when com~<br>pensation letter is published  | ۷                          |                            |  |   | Manager, Com~<br>pensation Admin,<br>Approver, HRBP |
| Talent             | Surface job details and attach~<br>ments from Job details on Pro~<br>file page and in Career Plan~<br>ning NEW | ۷                          |                            |  |   | HR admin<br>End user                                |

# Hiring Team, Hiring Manager, Recruiter

#### Table 12: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience             |
|--------------------|---|----------------------------|----------------------------|--|---|----------------------------------|
| Recruiting         | Auto reject candidates with in~<br>complete profile |                            | System ad~<br>min          |  |   | System admin<br>Recruiting admin |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                            |
|--------------------|--|----------------------------|----------------------------|--|---|---|
|                    |  |                            |                            |  |   | Hiring team                                     |
|                    | Display custom and extended<br>custom fields on candidate's<br>profile | V                          |                            |  |   | Recruiting admin<br>Recruiter<br>Hiring manager |
|                    | Job requisition summary NEW  | ۷                          |                            |  |   | Recruiter<br>Hiring manager                     |
|                    | Multiple career sites NEW  | ۷                          | Recruiting admin           |  |   | Recruiting admin<br>Hiring manager              |
|                    | New keywords in offer letter template                                  | ۷                          |                            |  |   | Hiring manager<br>Recruiter                     |
|                    | UI enhancements on the Hiring<br>Team page                             | ۷                          |                            |  |   | Hiring manager<br>Recruiter                     |

# Learning Admin

#### Table 13: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience |
|--------------------|---|----------------------------|----------------------------|--|---|----------------------|
| System             | Dynamically update currency<br>for blended classes through<br>data import         | V                          | System ad~<br>min          |  |   | Learning admin       |
|                    | Associate multiple currency<br>prices for course and class<br>through data import | V                          | System ad~<br>min          |  |   | Learning admin       |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                       |
|--------------------|--|----------------------------|----------------------------|--|---|--|
| Learning           | Search enhancements for tests, surveys and questions                                   | ۷                          |                            |  |   | Learning admin                             |
|                    | Add video content to courses<br>using course wizard                                    | V                          | System ad~<br>min          |  |   | Learning admin                             |
|                    | Handle deletion of Saba Meet~<br>ing event in a class session                          | V                          |                            |  |   | Learning admin                             |
|                    | Edit Is Sensitive field while<br>updating a course                                     | V                          |                            |  |   | Learning admin                             |
|                    | New named queries for learn~<br>ing activities   | V                          | System ad~<br>min          |  |   | End user                                   |
|                    | Create audience type/sub-type<br>on-the-fly for certifications and<br>curricula        |                            | System ad~<br>min          |  |   | Learning admin                             |
|                    | Track number of attempts for<br>unlimited attempts on content                          | V                          |                            |  |   | Learning admin                             |
|                    | Import Panopto videos as<br>SCORM content  |                            | System ad~<br>min          |  |   | Learning admin                             |
|                    | Deployed SCORM content support for mobile  | V                          | Learning<br>admin          |  |   | Learning admin                             |
| E-commerce         | Add private video channel or group to subscription NEW                                 |                            | System ad~<br>min          | V  |   | System admin<br>Learning admin<br>End user |
|                    | Currency conversion for class<br>price is dynamic                                      |                            | System ad~<br>min          |  |   | System admin<br>Learning admin             |
| Social             | Learning Record Store for<br>tracking social resource contri~<br>butions in Saba Cloud |                            | System ad~<br>min          |  |   | End user<br>Learning admin                 |
|                    | Bookmarklet for tracking in~<br>formal learning resources out~<br>side of Saba Cloud   |                            | System ad~<br>min          |  |   | End user<br>Learning admin                 |
# Marketplace admin

#### Table 14: Summary of features

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                                 |
|--------------------|--|----------------------------|----------------------------|--|---|--|
| Marketplace        | Courses retired in lynda.com<br>should not appear in Saba  | V                          |                            |  |   | Marketplace Ad~<br>min                               |
|                    | Saba Approver can see applica~<br>tion details before approval   | ۷                          |                            |  |   | Marketplace Ad~<br>min, Saba Ap~<br>prover           |
|                    | Audit option is available for<br>marketplace configuration<br>changes  | V                          |                            |  |   | Marketplace Ad~<br>min                               |
|                    | Partner admin can choose<br>which view the microapp<br>should be available in Saba<br>home page/profile page | ۷                          |                            |  |   | Partner admin,<br>Marketplace ad~<br>min             |
|                    | Partners can publish Micro<br>Apps to specific tenants   | V                          |                            |  |   | Partner Admin,<br>Marketplace ad~<br>min             |
|                    | Enhancement to the Partner<br>Approval Flow  | V                          |                            |  |   | Partner Ap~<br>prover, Market~<br>place admin        |
|                    | API dashboard available for<br>Micro Apps created in Exten~<br>ded IntegrationNEW                            | Ŷ                          |                            |  |   | Partner, Saba Ap~<br>provers, Market~<br>place admin |

# Manager

#### Table 15: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                                       |
|--------------------|---|----------------------------|----------------------------|--|---|--|
| System             | Organization Manager  |                            | System ad~<br>min          |  |   | Manager<br>HR admin  |
| Learning           | Remove discontinued courses from learner's plan NEW                               |                            | Learning<br>admin          |  |   | End user<br>Manager  |
|                    | Registrars and managers can<br>enroll learners to certifications<br>and curricula | ۷                          |                            |  |   | Registrar<br>Manager                                       |
| Compensa~<br>tion  | Send notifications when com~<br>pensation letter is published                     | V                          |                            |  |   | Manager, Com~<br>pensation Admin,<br>Approver, HRBP        |
|                    | Import and export plan cycle<br>worksheets  | V                          |                            |  |   | Manager, Admin   |
|                    | Freeze header row in manager's worksheet  | V                          |                            |  |   | Manager  |
|                    | Localization support for Lib~<br>rary Fields                                      | ۷                          |                            |  |   | Compensation<br>Admin, Manager,<br>Employees               |
|                    | Comment field added   | V                          |                            |  |   | Manager, Ap~<br>prover                                     |
|                    | Out of the Box notifications to<br>display text                                   | V                          |                            |  |   | Compensation<br>Admin, Manager,<br>Approver, Em~<br>ployee |
|                    | Allow compensation managers<br>to access compensation data on<br>profile page     | V                          |                            |  |   | Manager  |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                        |
|--------------------|--|----------------------------|----------------------------|--|---|---|
|                    | Synchronize Compensation<br>data with Analytics Reporting                                | V                          |                            |  |   | Compensation<br>Admin, Manager,<br>Approver |
|                    | Create Custom Manager hier~<br>archy to distribute budgetNEW                             | V                          |                            |  |   | Compensation<br>Admin, Manager              |
| Performance        | New policy for review owners<br>to release review  | ۷                          | Perform~<br>ance admin     |  |   | Performance ad~<br>min<br>Manager           |
|                    | Filter skills by skill group   | ۷                          |                            |  |   | Manager<br>End user                         |
|                    | Limit access to reviews for new managers   | ۷                          | System ad~<br>min          |  |   | System admin<br>Manager                     |
|                    | Edit or delete goal progress comments  | ۷                          | System ad~<br>min          |  |   | System admin<br>Manager<br>End user         |
| Talent             | Display Career Planning sec~<br>tion on Talent Profile irrespect~<br>ive of career paths | ۷                          |                            |  |   | Talent admin<br>Manager<br>End user         |
|                    | Display talent attributes on<br>hovering person in N-box view                            | ۷                          |                            |  |   | Talent admin<br>Manager                     |
|                    | Hover messages for potential<br>rating and departure risk on<br>Talent pool views        | ۷                          |                            |  |   | Talent admin<br>Manager                     |
|                    | Surface Actions menu on N-<br>box view NEW   | V                          |                            |  |   | Manager                                     |
|                    | Export/print n-box view to Ex~<br>cel and PDF NEW  | ۷                          |                            |  |   | Talent admin<br>Manager                     |

# **Performance Admin**

#### Table 16: Summary of features

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience              |
|--------------------|--|----------------------------|----------------------------|--|---|-----------------------------------|
| Performance        | New policy for review owners<br>to release review    | V                          | Perform~<br>ance admin     |  |   | Performance ad~<br>min<br>Manager |
|                    | Add locale to Additional Info section of review form | V                          | Perform~<br>ance admin     |  |   | Performance ad~<br>min            |
|                    | Export and import review cycle                       | V                          | Perform~<br>ance admin     |  |   | Performance ad~<br>min            |
|                    | Anniversary reviews update                           | V                          | Perform~<br>ance admin     |  |   | Performance ad~<br>min            |

### **Pulse Admin**

#### Table 17: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience    |
|--------------------|---|----------------------------|----------------------------|--|---|-------------------------|
| Pulse 360          | New question in Company cat~<br>egory for Pulse 360 | ۷                          | Pulse ad~<br>min           |  |   | Pulse admin<br>End user |
|                    | Pulse custom surveys NEW                            |                            | System ad~<br>min          |  |   | Pulse admin<br>End user |

## **People Admin**

#### Table 18: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience   |
|--------------------|---|----------------------------|----------------------------|--|---|--|
| System             | Control visibility of navigation<br>links using menu visibility<br>privileges NEW | ۷                          | System ad~<br>min          |  |   | System admin<br>Social admin<br>People admin<br>Recruiting admin |
|                    | Prompt to save member selec~<br>tion details when using existing<br>criteria      | ۷                          |                            |  |   | People admin   |
|                    | Assign job role to person via prescriptive rule                                   | ۷                          |                            |  |   | People admin   |
| Performance        | Assign skill through PR<br>without any goal                                       | ۷                          |                            |  |   | People admin<br>End user   |

## **Partner Admin**

#### Table 19: Summary of features

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                     |
|--------------------|--|----------------------------|----------------------------|--|---|--|
| Marketplace        | Partner admin can choose<br>which view the microapp<br>should be available in Saba<br>home page/profile page | V                          |                            |  |   | Partner admin,<br>Marketplace ad~<br>min |

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience  |
|--------------------|---|----------------------------|----------------------------|--|---|---|
|                    | Partners can publish Micro<br>Apps to specific tenants                            | ۷                          |                            |  |   | Partner admin,<br>Marketplace Ad~<br>min                    |
|                    | API dashboard available for<br>Micro Apps created in Exten~<br>ded IntegrationNEW | ۷                          |                            |  |   | Partner admin,<br>Saba Approvers,<br>Marketplace Ad~<br>min |

# **Recruiting Admin**

#### Table 20: Summary of features

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                            |
|--------------------|--|----------------------------|----------------------------|--|---|---|
| Recruiting         | New setting to pull job descrip~<br>tion in requisition NEW            | ۷                          | Recruiting<br>admin        |  |   | Recruiting admin<br>Manager                     |
|                    | Auto reject candidates with in~<br>complete profile NEW                |                            | System ad~<br>min          |  |   | System admin<br>Recruiting admin<br>Hiring team |
|                    | Display custom and extended<br>custom fields on candidate's<br>profile | ۷                          |                            |  |   | Recruiting admin<br>Recruiter<br>Hiring manager |
|                    | Multiple career sites NEW  | ۷                          | Recruiting<br>admin        |  |   | Recruiting admin<br>Hiring manager              |
|                    | Manage onboarding forms in<br>HR admin flow                            | V                          |                            |  |   | Recruiting admin                                |

# Registrar

#### Table 21: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience      |
|--------------------|---|----------------------------|----------------------------|--|---|---------------------------|
| Learning           | Display for Learner, Display<br>for Call Center, and Self-regis~<br>tration options for certifications<br>and curricula NEW |                            | System ad~<br>min          |  |   | End user<br>Registrar     |
|                    | Registrars and managers can<br>enroll learners to certifications<br>and curricula   | V                          |                            |  |   | Registrar<br>Manager      |
| E-commerce         | Invoice Me enhancements   |                            | System ad~<br>min          |  |   | System admin<br>Registrar |
|                    | New notification for pay later functionality  |                            | System ad~<br>min          |  |   | End user<br>Registrar     |

# Saba Approver

#### Table 22: Summary of features

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                                 |
|--------------------|--|----------------------------|----------------------------|--|---|--|
| Marketplace        | Saba Approver can see applica~<br>tion details before approval                 | V                          |                            |  |   | Marketplace Ad~<br>min, Saba Ap~<br>prover           |
|                    | API dashboard available for<br>Micro Apps created in Exten~<br>ded Integration | V                          |                            |  |   | Partner, Saba Ap~<br>provers, Market~<br>place Admin |

# System Admin

#### Table 23: Summary of features

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience   |
|--------------------|---|----------------------------|----------------------------|--|---|--|
| System             | Configure Labels supports addi~<br>tional labels and all locales              | ۷                          |                            |  |   | System admin   |
|                    | Control visibility of navigation<br>links using menu visibility<br>privileges | V                          | System ad~<br>min          |  |   | System admin<br>Social admin<br>People admin<br>Recruiting admin |
|                    | Legacy attributes deprecated  | ۷                          |                            |  |   | System admin<br>End user<br>Developer                            |
|                    | Record-level selective deletion<br>of associations using data im~<br>port     |                            | System ad~<br>min          |  |   | System admin   |
|                    | Merge person profiles in bulk<br>through data import NEW                      | V                          | System ad~<br>min          |  |   | System admin   |
|                    | Advanced data import configur~<br>ation in Integration Studio                 | V                          | System ad~<br>min          |  |   | System admin   |
|                    | Auditing support for data im~<br>port job configuration <b>NEW</b>            | V                          |                            |  |   | System admin   |
|                    | New column in Person data import  | V                          |                            |  |   | System admin   |
|                    | Support for additional locales  |                            |                            | V  |   | All<br>System admin  |
|                    | Locale support for notification keywords                                      | V                          |                            |  |   | System admin   |

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                       |
|--------------------|--|----------------------------|----------------------------|--|---|--|
|                    | Enhancement to mobile brand~<br>ing configuration in microsites  | V                          |                            |  |   | System admin                               |
|                    | Protect your account with two factor authentication <b>NEW</b>   |                            |                            |  |   | System admin<br>All                        |
| E-commerce         | Bulk import of states within country                             | V                          |                            |  |   | System admin                               |
|                    | Add private video channel or group to subscription NEW           |                            | System ad~<br>min          | ۷  |   | System admin<br>Learning admin<br>End user |
|                    | Currency conversion for class price is dynamic                   |                            | System ad~<br>min          |  |   | System admin<br>Learning admin             |
|                    | Country and State fields shown<br>as LOV in organization details | ۷                          | System ad~<br>min          |  |   | System admin<br>HR admin                   |
|                    | Expand Tax API   | V                          | System ad~<br>min          |  |   | System admin                               |
|                    | Invoice Me enhancements  |                            | System ad~<br>min          |  |   | System admin<br>Registrar                  |
|                    | Make payments to course own~<br>er's organization NEW            |                            | System ad~<br>min          |  |   | System admin<br>Catalog admin<br>End user  |
| Performance        | Limit access to reviews for new managers                         | ۷                          | System ad~<br>min          |  |   | System admin<br>Manager                    |
|                    | Edit or delete goal progress<br>comments                         | ۷                          | System ad~<br>min          |  |   | System admin<br>Manager<br>End user        |
| Recruiting         | Auto reject candidates with in~<br>complete profile NEW          |                            | System ad~<br>min          |  |   | System admin                               |

| Functional<br>area | Feature   | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience            |
|--------------------|---|----------------------------|----------------------------|--|---|---------------------------------|
|                    |   |                            |                            |  |   | Recruiting admin<br>Hiring team |
|                    | Notification triggered when<br>new user signs up on career site | ۷                          | System ad~<br>min          |  |   | System admin<br>Candidate       |
| Talent             | Control display of experts in career planning NEW               | ۷                          | System ad~<br>min          |  |   | System admin<br>End user        |

## **Talent admin**

#### Table 24: Summary of features

| Functional<br>area | Feature  | Enabled<br>by<br>default?* | Requires<br>admin<br>setup | Submit<br>a<br>Support<br>ticket<br>to<br>enable | Affects<br>existing<br>configuration<br>or data | Affected<br>audience                |
|--------------------|--|----------------------------|----------------------------|--|---|-------------------------------------|
| Talent             | Display Career Planning sec~<br>tion on Talent Profile irrespect~<br>ive of career paths | ۷                          |                            |  |   | Talent admin<br>Manager<br>End user |
|                    | Display talent attributes on<br>hovering person in N-box view                            | ۷                          |                            |  |   | Talent admin<br>Manager             |
|                    | Hover messages for potential<br>rating and departure risk on<br>Talent pool views        | ۷                          |                            |  |   | Talent admin<br>Manager             |
|                    | Export/print n-box view to Ex~<br>cel and PDF NEW  | ۷                          |                            |  |   | Talent admin<br>Manager             |

# Chapter 1

# System

### Topics:

- Core
- Data Integration
- Prescriptive Rule and Smart List
- REST API

### Core

### **Organization Manager**

How did it work?

N/A

How does it work now?

This update introduces the new **Organizations I Manage** view under the **My Team** tab. This view enables designated users to view members belonging to organizations where they are the organization managers. Currently, organization managers can perform only learning-related actions on the members of their organization.

#### New Security Privilege and Security Role

Only users with the following new privilege on the System component can access the new organization manager view:

#### Can Access Organization Manager Role

By default, this privilege is granted only to the following roles:

- Organization Manager Basic Privileges
- Super User

#### Assigning and Removing an Organization Manager

HR administrators can designate a user as the Organization Manager for an organization. A user having home domain equivalent or parent hierarchy of the organization domain can be added as an Organization Manager for an organization. An internal user can be designated as the organization manager for an external organization and vice versa. While adding a user as an organization manager, the corresponding security role is automatically assigned to the user on the organization's domain.

To add organization managers to an organization, go to **ADMIN > HR > Manage Organizations > Internal or External** and click the **Add Organization Managers** link.

When removing an organization manager from an organization, Saba Cloud removes user as the organization manager for the particular organization. However, the **Organization Manager Basic Privileges** security role for the user is removed only if the user is not the organization manager for any other organization in same domain.

| organization Managers | Add Organization Managers Print   Export |
|-----------------------|--|
| Name                  | Actions                                  |
| Manager Learning      | ×  |

#### Figure 1: Add an Organization Manager to organization

**Organizations I Manage View** 

A user can view the **My Team > Overview > Organization I manage** view only if the user is the organization manager for at least one organization. Only learning activities that are in Pending, Overdue, and Upcoming states are displayed for organization members.

If the logged in user himself is a member of an organization where he is the organization manager, then the manager is not visible to self in this view; however, he is visible to other organization managers for that organization.

| Team Overvie | ew for:Saba Software Ltd  Direct Team Alternate Team Organizations I manageSaba Software Ltd | n : Saba Software Ltd      |                        |
|--------------|--|----------------------------|------------------------|
| Job          | Person Q   |                            |                        |
|              | nandan abhishek  |                            | Upcoming activities(4) |
| F            | Pacific/Majuro: 6:58 PM  | May require your attention | Overdue activities(0)  |
|              |  |                            | Pending approvals(2)   |
| c            | Go to 🕶  |                            |                        |
|              | Kale Bhagyshree  |                            | Upcoming activities(0) |
| A COL        | Pacific/Majuro: 6:58 PM  | 🔶 On target                | Overdue activities(0)  |
| A B          |  |                            | Pending approvals(0)   |
| 0            | Go to 🗸  |                            |                        |

#### Figure 2: Organizations I Manage view under My Team

The following learning-related team actions are available to the organization manager:

- Assign learning
  - Add learning events to plan
  - Register for classes
  - Assign and enroll for certifications and curricula

The organization manager can use these links to add up to 100 order items at a time.

#### • Add completed course

The organization manager can add completed courses for up to 100 learners at a time.

#### Assign Checklist

The organization manager can assign checklists for up to 100 learners at a time.

| Pend  | ling Approvals(10) |  |
|-------|--------------------|--|
| ٦     | eam Actions        |  |
| Assig | in learning        |  |
| Add ( | completed course   |  |
| A : - | in Checklist       |  |

**Figure 3: Team Actions** 

The following learning-related Go to actions are available to the organization manager:

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

Note: The availability of certain actions are service driven.

Clicking on these links opens the organization member's plan page with the corresponding filter already applied.

| Go to 🗸                      |  |
|------------------------------|--|
| Plan                         |  |
| Courses                      |  |
| Curricula                    |  |
| Certifications               |  |
| Order History                |  |
| Continuing Education Credits |  |
| Completed Learning           |  |
| Profile                      |  |

#### Figure 4: Go to Actions

#### Learner's Plan Page

The organization manager can view the following on a member's plan page:

- Learning & Certifications tab
- Evaluations; however, they cannot launch them.
  - Links in the left pane:
  - Plan

•

- Profile
- Completed Learning
- Order History
- Message

Clicking the **Return to My Team** link takes the organization manager back to the **Organizations I Manage View** page for the organization that was selected.

| Saba Cloud  |  |                               | Hi, jaydeep kanabar 👻 🕯  | 221 III IIII IIII IIII IIIIIIIIIIIIIIII |
|---|--|-------------------------------|--------------------------|---|
| 💮 ME MY TEAM PEOP   | PLE GROUPS                                 |                               | Browse                   | All • Search Q                          |
| Message<br>Plan<br>Profile<br>Continuing Education<br>Credits<br>Completed Learning<br>Completed Learning<br>Completed Learning | Nitish Kumar: Plan                         | itions                        |                          | Return to My Team                       |
|   | Show filters  Clear filters                | Devenue                       | Due                      | A - 41                                  |
|   | 01-Hide-Score-Content<br>Course<br>CPF: No | Progress Pending Registration | Missed by<br>04-OCT-2016 | View classes                            |

Figure 5: Organization member's plan page

#### **Pending Approvals Page**

The organization manager can view the following on the team's pending approval page:

Learning registrations

Displays pending requests for learning registrations of the organization members for the selected organization. Actions for learning requests are based on privileges. If the organization manager is an approver for the any of the learning requests pending approval, then they can see the Approve/Reject action.

• Externally completed courses

Displays pending requests for externally completed course of the organization members for the selected organization. Organization managers can approve or reject an ad hoc completed course only if they have the "Can approve/reject completed courses for others" privilege.

| Pending approvals Return to My Team   |  |                             |          |        |  |  |
|---|--|-----------------------------|----------|--------|--|--|
| Filters:     Activity type:     Activity name:     Team member :       Select activity type     Type activity name     Select team member       Apply filters     Clear filters |  |                             |          |        |  |  |
| Edit selected for: Approve s  | Edit selected for: Approve selected Reject selected Reject all |                             |          |        |  |  |
| Activity name   | Team member  | Activity type -             | Due date | Action |  |  |
| 001 Issue Fixes Course1   | Shilpa Toraskar  | Externally completed course |          | Review |  |  |
| adhoc new2  | Shilpa Toraskar  | Externally completed course |          | Review |  |  |
| approvalchaintesting  | bhavika chedda   | Registration                |          | Drop   |  |  |
| approval cycle test   | bhavika chedda   | Registration                |          | Drop   |  |  |

#### Figure 6: Organization member's plan page

Currently, the following Learning features are not available to the organization manager:

- To–Do List
- Learning Requests

Use case

Organizations need a way to manage training for a group of people who are not all managed by the same person. For example, this model is common in the retail franchise and necessary to meet their training requirement needs.

### Configure Labels supports additional labels and all locales

#### How did it work?

The following labels were not supported by System > Configure Labels > Master:

- Launch
- Acquired On

Configure Labels > Master was earlier supported only for the following locales:

- Japanese
- French Canadian
- English (UK)

#### How does it work now?

With this update, you can now configure the following additional labels using System > Configure Labels > Master:

- Launch
- Acquired On

Also the **Configure Labels > Master** is now supported for all the locales.

Use case

This enhancement will help configure new strings for these additional labels.

### Control visibility of navigation links using menu visibility privileges

#### How did it work?

The left navigation links accessible to each administrator for their respective areas were governed by privileges on the corresponding **MenuVisibility** component. For example, if **Can access > System > System Home** privilege was enabled on the **MenuVisibility-SystemAdmin** component for the system admin security role, then the **System Home** link appeared. The menu visibility privileges are available for all administrator roles in Saba Cloud.

| System Home             | Simple Security       | y Role Details: System A          | Admin                         |
|-------------------------|-----------------------|-----------------------------------|-------------------------------|
| Configure System        |                       |                                   |                               |
| Manage Search           | Security Role*        | System Admin                      |                               |
| Manage Integrations     | Description           | Grants access to all functionalit | ty in Sy:                     |
| Manage Security         | Domain*               | world                             | 9. <b>E</b>                   |
| Security Roles          | Туре                  | Domain Based<br>Criteria Based    |                               |
| Domains                 | Is Sensitive          | <ul> <li>No</li> </ul>            |                               |
| Manage Engagement Tools |                       | OYes                              |                               |
| SAML SSO Errors         |                       |                                   |                               |
| SMF                     | Components People     | •                                 |                               |
| System Statistics       |                       |                                   |                               |
| Configure Labels        | Component             | MenuVisibility-SystemAdmin        | 9, <b>6</b>                   |
| Terms & Conditions      |                       |                                   |                               |
|                         | Component Privileges  |                                   | Print   Export   Modify Table |
|                         | Grant Access Privileg | Je                                |                               |
|                         | Can ac                | cess ->System->System Home        |                               |
|                         | Can ace               | cess ->System->Configure System   |                               |

#### Figure 7: MenuVisibility component privileges

But, the links under the **Go to** dropdown list on the **Admin Home** page for each administrator area were not governed by these privileges. For example, if **Can access->System->Configure System** privilege was disabled on the **MenuVisibility-SystemAdmin** component for the system admin role, then the **Configure System** link did not appear in **Admin > System**. However, if the **Configure System** page was accessed through the **System Admin** portlet on the **Admin Home** page via **Go to > Configure System** link, then that link was visible and the page was accessible.

#### For Human Capital Admin security role

Additionally, for "Human Capital Admin" security role, the visibility of learning-related navigation links was controlled by the "Can Access HR Admin Links" privilege on the **System** component, and not by the privileges on the **MenuVisibility-PeopleAdmin** component.

#### How does it work now?

With this update, Saba Cloud now hides even the links under the **Go to** dropdown list through the **MenuVisibility** component privileges. For example, if **Can access > System > Configure System** privilege is disabled on the **MenuVisibility-SystemAdmin** component for a system admin, then the **Configure System** link does not appear in **Admin > System** and in **Go to** dropdown list.

This is applicable for the following areas:

#### Menu visibility changes for People Admin security role

The following links under **Admin Home** > **People Admin** portlet > **Go to** dropdown list are now governed by their corresponding privileges in **MenuVisibility-PeopleAdmin** component:

- Manage People
- Manage Signup Rules
- Rules Engine
- Message Center

#### Menu visibility changes for System Admin security role

The following links under **Admin Home** > **System Admin** portlet > **Go to** dropdown list are now governed by their corresponding privileges in **MenuVisibility-SystemAdmin** component:

- Configure System
- Manage Search
- Manage Integrations
- Manage Security
- Manage Engagement Tools

• System Statistics

#### Menu visibility changes for Social Admin security role

The following links under **Admin Home** > **Social Admin** portlet > **Go to** dropdown list are now governed by their corresponding privileges in **MenuVisibility-SocialAdmin** component:

- Manage Groups
- User-generated Content
- Featured Categories

#### Menu visibility changes for Recruiting Admin & Recruiter security role

The menu navigation links on the left hand side can now be hidden from the security roles. The following links under Admin Home > Recruiting Admin portlet > Go to dropdown list and recruiting-related left navigation menu links are now governed by their corresponding privileges in MenuVisibility-RecruitingAdmin component:

| Security Privilege   | Left Navigation Menu<br>Link | Go to Menu List         | Visible to   |
|--|------------------------------|-------------------------|--|
| Can access -> Recruiting -<br>>Recruiting Home   | Recruiting Home              | Recruiting Home         | <ul><li>Recruiting admin</li><li>Recruiter</li></ul> |
| Can access - >Recruiting -<br>>Manage Job Requisitions                                 | Manage Job Requisitions      | Manage Job Requisitions | <ul><li>Recruiting admin</li><li>Recruiter</li></ul> |
| Can access - >Recruiting -<br>>Manage Job Requisitions -<br>>Job Requisitions          | Job Requisitions             | -                       | <ul><li>Recruiting admin</li><li>Recruiter</li></ul> |
| Can access - >Recruiting -<br>>Manage Job Requisitions -<br>>Job Requisition Templates | Job Requisition Templates    | -                       | <ul><li>Recruiting admin</li><li>Recruiter</li></ul> |
| Can access - >Recruiting -<br>>Manage Job Offers                                       | Manage Job Offers            | Manage Job Offers       | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Job Offers - >Job<br>Offer Templates             | Job Offer Templates          | -                       | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Job Offers - >Of~<br>fer Letter Templates        | Offer Letter Templates       | -                       | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Career Sites                                     | Manage Career Sites          | Manage Career Sites     | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Career Sites -<br>>Career Sites                  | Career Sites                 | -                       | Recruiting admin                                     |

#### Table 25: Visibility of Recruiting admin links

| Security Privilege   | Left Navigation Menu<br>Link        | Go to Menu List          | Visible to   |
|--|-------------------------------------|--------------------------|--|
| Can access - >Recruiting -<br>>Manage Assessments  | Manage Assessments                  | Manage Assessments       | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Assessments -<br>>Manage Test and Survey                 | Manage Test and Survey              | -                        | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Test Question Pool  | Test Question Pool                  | -                        | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Assessments -<br>>Survey Question Pool                   | Survey Question Pool                | -                        | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Assessments -<br>>Manage Scales                          | Manage Scales                       | -                        | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Candidates   | Manage Candidates                   | Manage Candidates        | <ul><li>Recruiting admin</li><li>Recruiter</li></ul> |
| Can access - >Recruiting -<br>>Candidates  | Candidates                          | -                        | <ul><li>Recruiting admin</li><li>Recruiter</li></ul> |
| Can access - >Recruiting -<br>>Candidates - >Manage<br>Configurations                          | Manage Configurations               | -                        | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Configurations -<br>>Terms and Conditions                | Terms and Conditions                | -                        | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Configurations -<br>>Job Application Form                | Job Application Form                | -                        | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Configurations -<br>>Job Offer Configurations            | Job Offer Configurations            | -                        | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage Configurations -<br>>Job Requisition Configura~<br>tions | Job Requisition Configura~<br>tions | -                        | Recruiting admin                                     |
| Can access - >Recruiting -<br>>Manage I-9 Verifications  | Manage I-9 Verifications            | Manage I-9 Verifications | <ul><li>Recruiting admin</li><li>Recruiter</li></ul> |

| Security Privilege | Left Navigation Menu<br>Link | Go to Menu List | Visible to   |
|--------------------|------------------------------|-----------------|--|
|                    |                              |                 | Note: Ensure that<br>Can Access I-9<br>Verification Links<br>privilege at System<br>component is en~<br>abled. |

Note: If a user does not have privilege to view any of the child menus, then the parent menu is also hidden. For example, Can access - >Recruiting - >Manage Job Requisitions privilege is enabled, but Can access - >Recruiting - >Manage Job Requisitions privilege is disabled, then on the Recruiting Home page, both the links will be hidden from the user.

| Recruiting Home          |  |  |  |  |  |
|--------------------------|--|--|--|--|--|
| Manage Job Requisitions  |  |  |  |  |  |
| Manage Job Offers        |  |  |  |  |  |
| Manage Career Sites      |  |  |  |  |  |
| Manage Assessments       |  |  |  |  |  |
| Manage Candidates        |  |  |  |  |  |
| Manage Configurations    |  |  |  |  |  |
| Manage I-9 Verifications |  |  |  |  |  |

#### Figure 8: Left navigation links for Recruiting admin & Recruiter

| <b>Recruiting Admin</b><br>Manages the talent acquisition processes, including administering Job<br>Requisitions, Hiring Teams and Candidates |                             |       |  |  |  |  |
|---|-----------------------------|-------|--|--|--|--|
|   | Go to 👻 More acti           | ons 🗸 |  |  |  |  |
|   | Manage Job<br>Requisitions  |       |  |  |  |  |
|   | Manage Job Offers           | s     |  |  |  |  |
|   | Manage Career Si            | ites  |  |  |  |  |
|   | Manage Assessme             | ents  |  |  |  |  |
|   | Manage Candidate            | es    |  |  |  |  |
|   | Manage<br>Configurations    |       |  |  |  |  |
|   | Manage I-9<br>Verifications |       |  |  |  |  |
|   | Recruiting Home             |       |  |  |  |  |

Figure 9: Recruiting Admin portlet > Go to links

#### Menu visibility changes for Human Capital Admin security role

With this update, the following privileges in **MenuVisibility-PeopleAdmin** component control the visibility of the learning-related left navigation menu links as well as **Profile Quicklinks** section under **Edit Profile Information** and **Licenses and Certifications** tab under **Full Profile**. Their visibility is no more controlled by the "Can Access HR Admin Links" privilege on the **System** component,

| Security Privilege  | Left Navigation Menu Link |
|---|---------------------------|
| Can access People > Manage People > Enrollments               | Enrollments               |
| Can access People > Manage People > Completed Courses         | Completed Courses         |
| Can access People > Manage People > Certifications            | Certifications            |
| Can access People > Manage People > Curricula                 | Curricula                 |
| Can access People > Manage People > Recurring Courses         | Recurring Courses         |
| Can access People > Manage People > Continuing Educa~<br>tion | Continuing Education      |

#### Table 26: Visibility of People admin links



#### Figure 10: Left navigation links for People admin

#### Use case

The display of all navigation menus and links for administrators can now be consistently governed by the MenuVisibility component privileges for the respective security roles.

### Legacy attributes deprecated

#### How did it work?

The following were legacy attributes under the External Work History and Internal Work History components:

- External Work History > **KEY ACCOMPLISHMENTS**
- Internal Work History > ADDITIONAL RESPONSIBILITIES

#### How does it work now?

The following legacy attributes under the **External Work History** and **Internal Work History** components are now **deprecated**:

- External Work History > KEY ACCOMPLISHMENTS
- Internal Work History > ADDITIONAL RESPONSIBILITIES

These attributes will no longer be available on the UI or in the component details page.

Use case

N/A

### Privilege to change own manager

How did it work?

Saba Cloud did not permit users to modify their manager from their Profile page.

How does it work now?

With this update, Saba Cloud provides the ability for users to modify their own managers by introducing the following privilege on **Person, Internal** and **Person, External** components:

#### Can Assign-Remove Manager to Self

If this privilege is enabled, then users having this privilege can edit their own managers from their **Profile** page. Such users can search only users whose "Manager Access" is enabled.

By default, this privilege is disabled.

If you want to enable this privilege for certain users, then note that it can allow a user to change their reporting to higher or lateral managers. Thereby, the administrator must take precaution while enabling this privilege for users.

Saba Cloud supports Silent Auditing for this feature, so administrators can track users who made the updates.

Use case

To execute their business processes, certain organizations require their employees to have the ability to update their own managers.

### Support for additional locales

How did it work?

The following locales were not supported:

- Bahasa Indonesia (Indonesia) in\_ID
- Lithuanian (Lithuania) lt\_LT
- Estonian (Estonia) et\_EE
- Hindi (India) hi\_IN
- Cambodia (KH) km\_KH
- Latvian (Latvia) lv\_LV
- Romanian (Romania) ro\_RO

How does it work now?

Saba Cloud now supports the following additional locales.

- Bahasa Indonesia (Indonesia) in\_ID
- Lithuanian (Lithuania) lt\_LT
- Estonian (Estonia) et\_EE
- Hindi (India) hi\_IN
- Cambodia (KH) km\_KH
- Latvian (Latvia) lv\_LV

| System | 60

- Romanian (Romania) ro\_RO
- Note: These locales are not enabled by default. To enable a locale, submit a support request. For assistance, contact Saba Support.

#### Use case

The users can now login to Saba Cloud using these additional locales.

### Locale support for notification keywords

#### How did it work?

Saba Cloud did not display notification keywords in the logged-in user's locale. Irrespective of the locale, the keywords were displayed in English.

How does it work now?

With this update, Saba Cloud displays notification keywords and their categories in the logged in user's locale.

The keywords are displayed as follows in the dropdown:

<Localized\_category\_name : Localized\_Keyword\_name | @Group\_Keyword@>

The notification category names are translated in the dropdown list only.

Other keyword-related functions are not affected by this change. They work as before.

Use case

Administrators who configure notifications in Saba Cloud need to view keywords in the locale they are logged in to so that they can accurately define the notification.

### Enhancement to mobile branding configuration in microsites

How did it work?

While configuring the branding of a microsite, system administrators could upload the mobile assets ZIP file. When they selected the ZIP file, it took some time to upload the file but the waiting indicator was not clearly visible and so the administrators would immediately click the **Validate** button before the upload was actually complete. Resultantly, Saba Cloud would validate the old ZIP file and displayed the error accordingly.

#### How does it work now?

With this update, Saba Cloud enhances the usability of the mobile branding configuration in microsites as follows:

- Removes the Validate button.
- When the ZIP file is selected, Saba Cloud validates it first and then uploads it based on the validation.
- If file validation fails, then Saba Cloud displays an error message, does not upload the file, and does not apply the file as the mobile theme.
- If file validation is successful, then Saba Cloud uploads the file and applies the file as the mobile theme.

#### Use case

There is a need to enhance the usability of the option to upload mobile assets while configuring branding for a microsite.

### Protect your account with two factor authentication

How did it work?

Saba Cloud did not support Two factor authentication.

How does it work now?

With this update, Saba Cloud supports Two factor authentication. Two factor authentication is an extra layer of security designed to ensure that you're the only person who can access your account, even if someone knows your password. Each time you sign in to your Saba Account, you'll need your password and a Security Code that is sent to your email address.

**Note:** By default, the Two factor authentication functionality is disabled. To enable this functionality, please submit a Support request. For assistance, contact Saba support.

#### System admin: Enabling the Two factor authentication service

The system admin can enable the **Two factor authentication** service under **System > Configure System > Services**.

| wy ream Dashboards           |         |
|------------------------------|---------|
| E Archiving                  |         |
| E. Authentication            | I.      |
| E. Domains                   | A.      |
| Single Domain                |         |
| :: Two Factor Authentication |         |
| SecurityRole                 | <b></b> |
| E Benchmarks                 |         |
| E Bookmarks                  |         |
| <sup>:</sup> Calendar        |         |
| Configuration Import / Ex    |         |
| : 🖃 Data Integration         | A.      |

#### Figure 11: Two factor authentication service

The service provides the following settings:

- Mobile based two factor authentication: This requires you to install the mobile app called Google Authenticator. This app generates 2-Step Verification codes on your phone.
- Mail based two factor authentication: This will send the code to your email ID that is registered with Saba.

**Note:** The user needs to have view privilege on the user's own email ID, if mail based two factor authentication is enabled.

| Settings Descrip   | tion  |               |
|--|---|---------------|
| Domain*  | world   |               |
|  |   |               |
| Mobile based two fac   | or authentication   |               |
| Mobile based two fac<br>Enable mobile based                          | or authentication<br>two factor authentication(can't be overridden on domain basis)                   | ● On<br>○ Off |
| Mobile based two fac<br>Enable mobile based<br>Mail based two factor | or authentication<br>two factor authentication(can't be overridden on domain basis)<br>authentication | ● On<br>○ Off |

**Note:** This service is not Domain aware.

#### Figure 12: Settings under Two factor authentication service

#### People admin: Enabling the Two factor authentication for the required users

After the system admin enables the service, the people admin (or the system admin) needs to enable the Two Factor Authentication for the required users by editing the user's profile or using RDI.

| People Home                 | Search Inter       | rnal People                   |                 |                       |                 |              | Sign out         |                     |                              |
|-----------------------------|--------------------|-------------------------------|-----------------|-----------------------|-----------------|--------------|------------------|---------------------|------------------------------|
| Manage People               |                    |                               |                 |                       |                 |              |                  |                     |                              |
| Internal People             | 00                 |                               |                 |                       |                 |              |                  |                     |                              |
| External People             |                    |                               |                 |                       |                 |              |                  |                     |                              |
| Proxy Settings              | Approval Status    | -Select One-                  | •               | Audience type         |                 |              | Q. 6             |                     |                              |
| Enroliments                 | City               |                               | _               | Country               |                 |              |                  |                     |                              |
| Completed Courses           | Domain             |                               | 0.66            | Email                 |                 |              |                  |                     |                              |
| Certifications              | Einst Name         |                               |                 | Include All Robertson | instans 🗍       |              |                  |                     |                              |
| Curricula                   | Pirot Narray       |                               |                 | Last Name             |                 |              | _                |                     |                              |
| Recurring Courses           | 300                |                               | Q. (M           | j casciname           |                 |              | _                |                     |                              |
| Skills                      | Location           |                               | ् 🖉             | Manager               |                 |              | <u>्</u> 🕑       |                     |                              |
| Skill_up Assessment History | Middle Name        |                               |                 | Organization          |                 |              | 0.0              |                     |                              |
| Feedback                    | Person ID          |                               |                 | Person Type           | -Select On      | a- •         |                  |                     |                              |
| Reviews                     | Position ID        |                               |                 | Role                  |                 |              |                  |                     |                              |
| Bulk Reviews                |                    |                               | ~ ~ ~           |                       |                 |              |                  |                     |                              |
| To-Do Lists                 | Started on <=      |                               |                 | Started on >=         |                 |              |                  |                     |                              |
| Goals                       | State              |                               |                 | Status                | -Select On      | e- •         | <u> 1</u>        |                     |                              |
| ContinuingG Education       | Username           | TEST232434                    |                 | Terminated After      |                 |              |                  |                     |                              |
| Profile Merge               | Terminated Before  |                               |                 | [                     |                 |              |                  |                     |                              |
| Profile Activity History    | You have a saved ( | query                         |                 |                       |                 |              |                  |                     |                              |
| Manage Archive              | Simple Search I C  | onfours   Save Search         | Overs   Reset   | Saved Overv           |                 | Passab       | the last         |                     |                              |
| Manage Signup Rules         | ompre dearen   o   | conditione   carrie operation | i aven li mener | cares usery           |                 | Search       | poe_sext         |                     |                              |
| Rules Engine                | Search Results     |                               |                 |                       |                 |              | New Internal Per | rson   Print   Expo | rt_page text   Mod           |
| Manage To-Do Lists          | Last Name First    | t Name Username               | Middle Name     | Email                 | Person ID       | Organization | Location Job     | Approval Status     | s View                       |
| Manage Smart Lists          | test232434 test    | 232434 TEST232434             |                 | tpathrikar@saba.com   | ASASDTEST232434 | Root         |                  | Approved            | Edit Profile Infor           |
| Message Center              |                    |                               |                 |                       |                 |              |                  |                     | Profile Snapsho              |
| Manage Recommendations      |                    |                               |                 |                       |                 |              |                  |                     | Full Profile<br>Act as Proxy |
|                             |                    |                               |                 |                       |                 |              |                  |                     |                              |
|                             | <                  |                               |                 |                       |                 |              |                  |                     |                              |

#### Figure 13: Editing the user's profile

Enable the Two Factor Authentication for the required user.

| People Home                 | Edit Profile Of test2                              | 32434 test232434            |            |                     | 🖘 🖹 🗏              |   |                                      |
|-----------------------------|--|-----------------------------|------------|---------------------|--------------------|---|--------------------------------------|
| Manage People               |  |                             |            |                     | * = required       |   |                                      |
| Internal People             | Test1343_iyU459                                    |                             |            |                     |                    |   |                                      |
| External People             |  |                             |            |                     |                    |   |                                      |
| Proxy Settings              | Main Contact Information                           | Address Password Preference | es Privile | eges                |                    |   | Profile Quicklinks<br>Certifications |
| Enrollments                 |  |                             |            |                     |                    |   | Curricula                            |
| Completed Courses           |  |                             |            |                     |                    |   | Recurring Courses<br>Skills          |
| Certifications              | Title  | -Select One- •              |            | Username*           | TEST232434         |   | Enroliments                          |
| Curricula                   | First Name*  | test232434                  |            | Last Name*          | test232434         |   | Completed Course<br>ContinuingG Educ |
| Recurring Courses           | Middle Name  |                             |            | Suffix              |                    |   | Status_mstr                          |
| Skills                      | Domain*  | wwww                        | ୍ 🕼        | Status"             | Active             | • | Profile Snapshot                     |
| Skill_up Assessment History | Home Domain*                                       | wwww                        | 96         | Gender*             | Not Known •        |   | Goals                                |
| Feedback                    | Organization*                                      | Deat                        | 06         | Person No_new*      | ASASDTEST232434    |   | To-Do Lists                          |
| Reviews                     |  | Root                        |            | E-mail              |                    |   | 5                                    |
| Bulk Reviews                | Company  | Root                        | ୍ 🞯        | E-11MI              | tpatnnkangsaba.com |   |                                      |
| To-Do Lists                 | Job  | 3 <sup>11</sup> 2           | Q. 🕑       | Person Legal ID_411 |                    |   |                                      |
| Goals                       | Position   | Assign Position             |            |                     |                    |   |                                      |
| ContinuingG Education       | Manager  |                             | 9.6        | Business Card Title |                    |   | ]                                    |
| Profile Merge               | Job Level  | Select One.                 |            |                     |                    |   |                                      |
| Profile Activity History    | Location   |                             | 0.64       | Туре                | -Select One-       | • |                                      |
| Manage Archive              | Start Date   |                             | - (B)      | Date of Birth       | -oner one-         |   |                                      |
| anage Signup Rules          | Sariow   | 08/29/2016                  |            | Date of Diffi       |                    |   |                                      |
| ales Engine                 | Ethnicity  | -Select One-                |            |                     |                    |   |                                      |
| anage To-Do Lists           | Religion   | -Select One-                | • 21       |                     |                    |   |                                      |
| anage Smart Lists           | reminated on                                       | <b></b>                     |            |                     |                    |   |                                      |
| essage Center               | Manager Access<br>Enable Two Earlor Authentication |                             |            | Special User        |                    |   |                                      |
| anage Recommendations       | Chave investor Automotato                          | 1.00                        |            |                     |                    |   |                                      |
|                             | Additional Approvar by Option                      |                             | 0.66       |                     |                    |   |                                      |

Figure 14: Enable the Two Factor Authentication for the required user

#### User logging in using the two factor authentication

After this is enabled, now when the user tries to login, the user is prompted for the Security Code and the Secret key depending on the settings (**Mobile based two factor authentication** and **Mobile based two factor authentication**) that are set by the system admin.

| Two factor authentication   |  |
|---|--|
| Security Code:<br>Generate Security Code<br>Re-generate Secret Key<br>Verify Cancel |  |
|   |  |

Figure 15: The Two factor Authentication in action

For email based two factor authentication, you can click **Generate Security Code** which will send you an email with the Security Code that you need to enter here.

### Hi Sharanam,

Here's your security code:



This Security Code is valid for next 10 minutes

You are to keep this Security Code secret at all times and must not disclose it to any person.

#### Figure 16: Security Code via email

You can also choose to use the mobile based two factor authentication by clicking **Re-generate Secret Key**. This requires the mobile app called Google Authenticator which will provide the Secret key that you need to enter here.

| 8              | ≉ ⊠ 🖲 "⊯ 94% 🗖 8:33 a.m. |
|----------------|--------------------------|
| Authenticator  | :                        |
|                |                          |
| 932 192        |                          |
| sshah@saba.com | 6                        |
|                |                          |
|                |                          |
|                |                          |
|                |                          |
|                |                          |
|                |                          |
|                |                          |
|                |                          |
|                |                          |
|                |                          |
|                |                          |
|                |                          |
|                |                          |

#### Figure 17: Code via Google Authenticator app

Note: Two factor authentication is not available for the candidates who login using the Recruiting career site.

Two factor authentication is only available for the following authentication methods:

- LDAP
- Saba database based authentication

Note: SAML, CertSSO, JWT, OAUTH and REST APIs do not support Two factor authentication.

Use case

This enhancement provides an enhanced security when accessing the application from the internet than when using it from within the company network.

### **Data Integration**

### Record-level selective deletion of associations using data import

#### How did it work?

Saba Cloud provided the ability to delete object associations at record level using data import for certain objects. However, this ability was not available for certain other objects like Skill, Skill Group, Certification and Curriculum. To delete associations of these remaining objects, users required the intervention of Saba Cloud administrators, who would then configure the functional metadata of the specific association configured for that object.

#### How does it work now?

With this update, Saba Cloud allows system administrators to delete object associations at record level using data import for the following objects:

- Skill
- Skill Group
- Certification
- Curriculum

System administrators can selectively remove or remove all existing associations of records from these objects as follows:

DELETE\_ prefix (Delete specific association of a record)

To support deletion of specific association, system administrators must add association with DELETE\_<*ASSOCIATION\_COLUMN>* prefix in header and pass corresponding values in the data file. It also supports "N" number of association deletion with a number suffix.

For example, when the import encounters the following record for association, it processes deletion first, deleting uthree and ufour owners passed under DELETE\_OWNER1|DELETE\_OWNER2 and then associates uone and utwo passed under OWNER1|OWNER2 for the specific record. The sequence number for add and delete actions is independent of each other.

OWNER1 | OWNER2 | DELETE\_OWNER1 | DELETE\_OWNER2 uone | utwo | uthree | ufour

Note: For the new record-level delete feature to work, the object-level delete functionality DROP\_EXISTING\_<Association> (e.g.; DROP\_EXISTING\_OWNERS) must be OFF (add association cumulatively, which is the default setting). If this functionality is ON, then it takes precedence and all associations are deleted (current behavior).

• **DELETE\_ALL\_** prefix (Delete all existing associations of a specific type of record)

To support deletion of all existing associations of a specific type of record, system administrators must add association with DELETE\_ALL\_<*ASSOCIATION\_COLUMN>* prefix in header and pass corresponding values in the data file. When the import process encounters "yes" in this column, all associations are processed for deletion. Records with Null and other values are not affected.

For example, when the import encounters the following record for association, it processes deletion first, deleting all existing owner associations and then associates uone passed under OWNER1 for the specific record.

```
OWNER1 | DELETE_ALL_OWNER
uone | yes
```

**Note:** For this option, the numeric suffix is not required and first the association column as per template (for grouped association columns) must be placed in the file. For example, in case of security role association:

```
ADD role association to the user: SECURITY_ROLE1|DOMAIN1
DELETE role association from the user :
DELETE_SECURITY_ROLE1|DELETE_DOMAIN1
DELETE_ALL roles association for the user record : DELTE_ALL_SECURITY_ROLE
```

#### Use case

There is a need to allow users to selectively remove or remove all existing associations of records in data import objects without the need to contact Saba Cloud administrators.

### Merge person profiles in bulk through data import

#### How did it work?

Saba Cloud allowed administrators to merge person profiles from the UI and through Web Service. However, this restricted them to merging one profile at a time.

#### How does it work now?

Saba Cloud now allows system administrators to merge person profiles in bulk using the new **Profile Merge** object in data import.

The **Profile Merge** data file includes the following fields:

- PRIMARY\_PROFILE This is a mandatory field.
- SECONDARY\_PROFILE- This is a mandatory field.
- SECONDARY\_PROFILE\_MERGE\_STATUS
- MERGE\_SECURITY\_ROLES
- MERGE\_AUDIENCE\_TYPE
- MERGE\_VIRTUAL\_AND\_BLENDED\_CLASS\_TRANSCRIPT
- RECALCULATE\_COMPLETION\_STATUS\_FOR\_CERTIFICATION\_AND\_CURRICULUM
- SWAP\_PERSON\_NUMBER

To download the sample data files for the new object, navigate to **System > Manage Integrations > Integration Studio** > **Configure**, select **Profile Merge** option from the **Object Name** dropdown list, and click the **Download Sample** button.

Once the import is successful, Saba Cloud merges profiles specified in each row of the data file and generates corresponding log files.

Use case

There is a need to reduce the time required for administrators to merge large number of person profiles through bulk import.

# Dynamically update currency for blended classes through data import

How did it work?

Saba Cloud supported the ability to add dynamic currency for blended classes through data import. However, there was no support to update the currency dynamically.

How does it work now?

Saba Cloud now provides the ability to dynamically update price currency for blended classes in bulk using data import.

The **MULTICURRENCY\_PREF** column for **Blended Offering** data import object now supports the insert as well as update actions.

For insert action, this column supports the following three values:

- 1 for "DesignatedCurrency" The class is created only in the passed currency
- 2 for "DesignatedAndDefaultCurrency" The class is created in the passed currency and its value in default currency based on the exchange rate
- 3 for "AllCurrenciesInSystem" The class is created in the passed currency and all other active currencies based on the exchange rate.

For update action, this column support the following value only:

• 3 for "AllCurrenciesInSystem" - The class is created in the passed currency and all other active currencies based on the exchange rate.

All other values are ignored during an update.

To download the sample data file for the updated object, navigate to **System > Manage Integrations > Integration Studio > Configure**, select **Blended Offering** option from the **Object Name** dropdown list, and click the **Download Sample** button.

Use case

There is a need to support dynamic currency conversion for blended classes via data import.

# Associate multiple currency prices for course and class through data import

#### How did it work?

Saba Cloud supported the ability to associate a single currency price for course and class through data import. However, there was no support to associate multiple currency prices.

#### How does it work now?

Saba Cloud now supports the ability to associate multiple currency prices for course and class using data import and also provides the option to recalculate other currency price based on the base currency for the following objects:

- Offering template (Course)
- ILT Offering

• WBT Offering

Following new association columns are added to the data files of the affected objects:

- ADD\_PRICE\_CURRENCY Name of the currency to associate with the course.
- ADD\_PRICE Price to associate with the course.
- **RECAL\_PRICE\_FOR\_OTHER\_CURRENCY** Input values are 'true' or 'false'. If set to "true", then the price is calculated in all available active currencies in the system based on the exchange rate.

To import multiple price associations, multiple prices for different currencies can be provided in a row of the data file. For example, multiple fields data can be provided by adding multiple combinations of the association fields with incrementing suffix in the header and by providing values for the respective fields as given below:

.... | ADD\_PRICE\_CURRENCY1 | ADD\_PRICE1 | RECAL\_PRICE\_FOR\_OTHER\_CURRENCY1 | ADD\_PRICE\_CURRENCY2 | ADD\_PRICE2 | RECAL\_PRICE\_FOR\_OTHER\_CURRENCY2... and so on

The associations fields can be extended up to as many as required.

To download the sample data files for the updated objects, navigate to **System > Manage Integrations > Integration Studio > Configure**, select either **Offering Template**, **ILT Offering**, or **WBT Offering** option from the **Object Name** dropdown list, and click the **Download Sample** button.

Use case

There is a need to support dynamic currency conversion for course and class via data import.

### Advanced data import configuration in Integration Studio

How did it work?

System administrators did not have access to modify advanced data import configurations other than setting the Unique ID for an import object from the Saba Cloud UI. Any changes to such configurations required users to send request to Saba Cloud operations and support staff.

How does it work now?

Saba Cloud now allows system administrators to modify advanced data import configurations directly from the Saba Cloud Integration Studio UI.

To view the new import settings, navigate to **System > Manage Integrations > Integration Studio > Configure**. A new **Import Settings** section is available.

| Configuratio        | on                 |   |                 |
|---------------------|--------------------|---|-----------------|
| Sample Data Fi      | iles               |   |                 |
| Object Name         |                    | ~   | Download Sample |
| Import Settings     | 5                  |   |                 |
| Object Name         | Location           | <b>v</b>  |                 |
| Unique Id Column    | LOC_NAME           | v 🕕   |                 |
| Enable Auditing     |                    | ①   |                 |
| Skip Omitted Colur  | nns                | 🔲 🕕   |                 |
| Drop Existing Attac | hments             | 🔲 🕕   |                 |
| Drop Existing Exter | nded Custom Fields | 🔲 🕕   |                 |
| Drop Existing Own   | ers                | Image: Contract of the second seco |                 |

#### Figure 18: New import settings

The settings displayed in this section depend on the selected import object. Except for the **Unique ID Column** field, all other setting fields are checkboxes. System administrators can select the required checkbox to enable the functionality for a particular object. To disable the functionality for the object, clear the corresponding checkbox. Ensure that you click the **Save** button to save the configuration changes.

#### Auditing Support for Advanced Data Import Configuration

Saba Cloud allows administrators the ability to track changes to advanced data import settings by providing **Silent Auditing** support.

To view audit details, click the **Audit Trail** icon on the **Configuration** page. Saba Cloud displays the **Audit Trail** popup page. This page displays only the latest 200 records, though.

The Audit Trail popup page displays the following details:

- Action The advanced import setting (functionality) that was changed. The display format is Update Import Settings: <Object Name>-<Functionality>.
- **Timestamp** The date and time when the change was made.
- **Previous Value** Displays the original value of the functionality and default value, if available. The display format is <Functionality>:<Default Value>.
- New Value Displays the current value of the functionality and default value, if available. The display format is <Functionality>:<Default Value>.
- Author The full name of the user who made the change.
- Reason Currently, it only supports Silent Auditing.

| Audit Trail  |                        |                |           |                   |                    |
|--|------------------------|----------------|-----------|-------------------|--------------------|
| Note: Audit trail data is truncated. Displaying Latest                         | 200 records.           |                | Print     | Export   N        | /lodify Table      |
| Action   | Timestamp              | Previous Value | New Value | Author            | Reason             |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_EQUIVALENT_COURSES | 08/31/2016<br>09:08:00 | Y              | Ν         | Charles<br>Foster | silent<br>auditing |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_EVALUATION         | 08/31/2016<br>09:08:00 | Y              | Ν         | Charles<br>Foster | silent<br>auditing |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_EXCUSTOM           | 08/31/2016<br>09:08:00 | Y              | Ν         | Charles<br>Foster | silent<br>auditing |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_FOLDER             | 08/31/2016<br>09:08:00 | Y              | Ν         | Charles<br>Foster | silent<br>auditing |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_FOS                | 08/31/2016<br>09:08:00 | Y              | Ν         | Charles<br>Foster | silent<br>auditing |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_KEYWORDS           | 08/31/2016<br>09:08:00 | Y              | Ν         | Charles<br>Foster | silent<br>auditing |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_LANGUAGES          | 08/31/2016<br>09:08:00 | Y              | Ν         | Charles<br>Foster | silent<br>auditing |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_EQUIVALENT_COURSES | 08/31/2016<br>09:08:00 | Ν              | Y         | Charles<br>Foster | silent<br>auditing |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_CONTENTS           | 08/31/2016<br>09:08:00 | Ν              | Y         | Charles<br>Foster | silent<br>auditing |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_FOS                | 08/31/2016<br>09:08:00 | Ν              | Υ         | Charles<br>Foster | silent<br>auditing |
| Update Import Setting : Offering Template-<br>DROP_EXISTING_EVALUATION         | 08/31/2016<br>09:08:00 | Ν              | Y         | Charles<br>Foster | silent<br>auditing |

Figure 19: Audit trail for advanced import settings

#### Use case

There is a need to allow system administrators to configure advanced import settings so that the dependability of raising requests to Saba operations and support staff is reduced.

### Auditing support for data import job configuration

#### How did it work?

Prior to this update, there was no provision to track configuration changes for data import jobs.

#### How does it work now?

Saba Cloud now provides the ability to track changes to data import job configuration by introducing auditing support.

To view audit details for a data import job:

#### 1. Click System > Manage Integrations > Integration Studio,

- 2. Search for and edit the required job.
- 3. Click the Audit Details button.

| Edit Job       |      |            |                  |   |        |               |
|----------------|------|------------|------------------|---|--------|---------------|
|                |      |            |                  |   |        | Audit Details |
| Job Name       | * Da | ily Import |                  |   |        |               |
| Description    |      |            |                  |   |        |               |
| Delimiter      | * ,  |            |                  |   |        |               |
| Mapping        | ad   | hoc        |                  | ~ |        |               |
| List of Object | s    |            |                  |   |        | Add Objects   |
| Sequence 🔺     | Up   | Down       | Object Name      |   | Prefix | Action        |
| 1              |      |            | Person, External |   | Person | ×             |

#### Figure 20: Audit Details button

The Audit Details popup page displays the following details:

- Property Changed Indicates the name of the job property that changed.
- Previous value of property
- Current value of property
- Update by User name of person who made the change.
- Updated on Date when the change was made.

| AUDIT DETAILS    |   |  |            |                       |
|------------------|---|--|------------|-----------------------|
| Property Changed | Previous Value  | Current Value  | Updated By | Updated On            |
| JOBNAME          | job134  | job13456   | uone       | 09/01/2016            |
| SCHEDULE         | job DAILY 3 StDate :Wed Jan 16 00:00:00<br>EST 2013 EDate :Fri Jan 16 10:30:00 EST<br>2015 Time18:30:00 | job WEEKLY 1100001 StDate :Wed Jan 16<br>00:00:00 EST 2013 EDate :Thu Jan 15<br>13:30:00 EST 2015 Time08:00:00 | uone       | 09/01/2016            |
| OBJECT           | Person, External   prefix: Per  | Person, External   prefix: Person  | uone       | 09/01/2016            |
| CONNECTION       | Anil Import 16727 SFTP2   | CheckConnection  | uone       | 09/01/2016            |
| Page 1 of 1 1 2  |   |  |            | Displaying 1 - 4 of 4 |

#### Figure 21: Audit details for an import job

**Note:** The audit changes for import jobs are not configurable.

Currently, any changes in the mapping configuration of jobs are captured; however, any internal changes in the mapping configuration are not audited. Similarly, any SFTP changes for a job are captured; however, any change to SFTP internal configuration are not audited.

#### Notes

For Previous value of property and Current value of property columns, the following details are captured:

- For connections, only the change in connection is audited but no details of a specific connection configuration are captured.
- For objects, following is audited:
  - Object deleted
  - Object created
  - Object prefix change
  - Object sequence change

- For Schedule, the entire schedule change is displayed as a string, which is a concatenation of Frequency, Every, From Date, To Date, Time and TimeZone fields separated by a delimiter. If any of these fields are changed, then the entire schedule is audited.
- For "WEEKLY" frequency, days are audited by a weekly mask of 7 bits, with the first bit representing Monday and the last bit, Sunday.

#### Use case

Changes to data import job configuration can result into issues at times. Administrators need to know who made the change and when. Auditing the job configuration changes can help capture these details.

### Skip omitted columns from data import file

#### How did it work?

Prior to this update, when the SKIP functionality for an import object was enabled and if columns were skipped in the data import file for that object, then Saba Cloud updated all such columns with a "Null" value. This lead to loss of changes made outside of data import.

#### How does it work now?

With this update, Saba Cloud provides the ability to automatically SKIP all base columns that are omitted.

To view the new SKIP settings on UI, navigate to **System > Manage Integrations > Integration Studio > Configure**. The following setting is available under the **Import Settings** section:

#### Skip Omitted Columns

This setting determines whether base columns omitted from a data import file are skipped or not during import.

- If enabled, then non-association columns omitted from the data file are not affected.
- If disabled, then non-association columns omitted from the data file are updated with a "Null" value.

By default, this setting is disabled for all import objects.

| Object Name        | Ad Hoc Transcript     | * |   |
|--------------------|-----------------------|---|---|
| Jnique Id Column   | LEARNER,COURSE,COMPLE | * | 0 |
| Enable Auditing    |                       |   | 0 |
| Skip Omitted Colun | ns                    |   | 0 |

#### Figure 22: Skip omitted columns

The Skip Omitted Columns setting works for:

- All UI imports, and
- Scheduled import jobs that do not use data mapping.
# **Supported Objects**

Currently, the Skip Omitted Columns setting is supported only for the following objects:

- Ad hoc Transcript
- Audience Type
- Certification
- Classroom
- Curriculum
- Equipment
- Facility
- ILT Offering
- JobType
- Location
- Offering Template
- Organization, External
- Organization, Internal
- Person Profile
- Person, External
- Person, Internal
- Role
- Skill
- SkillGroup
- Transcript
- WBT Offering

## Use case

Users performing data import assume that when using the SKIP functionality, if a column is being omitted during import, then its value in the system is not affected. However, if a column is omitted (and no Data Mapping is present), then the import updates the existing values in the database to "Null". To prevent loss of existing data, there is a need to allow administrators to control the Skip behavior for such columns.

# New Organization Administrator association in data import

## How did it work?

Prior to this update, the Organization Administrator role did not exist in Saba Cloud and so there was no corresponding support to add the role in bulk to organizations using data import.

## How does it work now?

With this update, Saba Cloud provides the ability to add the Organization Administrator role to organizations in bulk using data import.

## New Object Association

To implement this, the following new association column is added to the organization data import objects:

# ORG\_ADMIN

Indicates the Organization Administrators associated with the organization. This column accepts Username or Person Number as input values.

You can add as many association columns as you want to the object, for example **ORG\_ADMIN1**, **ORG\_ADMIN2**, ... and so on.

To view the sample data files for the updated objects, navigate to **System > Manage Integrations > Integration Studio** > **Configure**, select **Organization**, **External** or **Organization**, **Internal**option from the **Object Name** dropdown list, and click the **Download Sample** button.

## New Import Setting (Functionality)

Additionally, the following new advanced import setting is introduced for the supported objects:

# • Drop Existing Organization Administrators

If enabled, then all existing Organization Administrators for each record are deleted before adding new ones. If disabled, then existing Organization Administrators are not affected.

| Import Settings                           | •                               |            |
|---|---------------------------------|------------|
| Object Name                               | Organization, External          | ~          |
| Unique Id Column                          |                                 | <b>v</b> 🕕 |
| Enable Auditing                           | · · · · · · · · ·               | <b>A 9</b> |
|   |                                 |            |
| Deep Evistica Over                        |                                 | -          |
| Drop Existing Curre                       | incles                          |            |
|   |                                 | _          |
| Drop Existing Emai                        | l Domains                       | 1          |
| Drop Existing Emai<br>Drop Existing Exter | l Domains<br>nded Custom Fields | 0<br>0     |

# Figure 23: New import setting

# **Supported Objects**

This feature is supported **only** for the following objects:

- Organization, External
- Organization, Internal

## Use case

There is a need to support association of the new Organization Administrator role with internal or external organization using data import.

# New column in Person data import

# How did it work?

Prior to this update, the **Person, Internal** and **Person, External** data import did not support the **ENABLE\_TWO\_FACTOR\_AUTH** column to support two factor authentication.

## How does it work now?

To support to support two factor authentication, this update introduces the **ENABLE\_TWO\_FACTOR\_AUTH** in the following data import objects:

- Person, External
- Person, Internal

Accepted values: True or False

Default value: False

To view the updated sample data files for these objects, navigate to **System > Manage Integrations > Integration Studio > Configure**, select **Person**, **External** or **Person**, **Internal** option from the **Object Name** dropdown list, and click the **Download Sample** button.

Use case

The Person data import needs to provide support for two factor authentication.

# **Prescriptive Rule and Smart List**

# Assign job role to person via prescriptive rule

How did it work?

Prior to this update, the people administrator could assign the following requirements to people via prescriptive rule:

- Learning event
- Skill
- Shared and Individual goals
- Class
- Continuing Education Requirements
- Security Roles
- Checklists

## How does it work now?

With this update, the people administrator can now assign job roles (required and optional) to people via the prescriptive rule.

| Prescriptive Rule Details: Assign-Documents   |                                       |      |  |
|---|---------------------------------------|------|--|
| Main Member Selection Requirements Erro   | or Log Processing History             |      |  |
| Learning Events   | Add Learning Ever                     | nt   |  |
| No items found  |                                       |      |  |
| Skills  | Add Ski                               | cill |  |
| No items found  |                                       |      |  |
| Shared Goals_66   | Add Shared Goal-Label-Chec            | :k   |  |
| No items found  |                                       |      |  |
| Individual Goals_66   | Add Individual Goal-Label-Chec        | :k   |  |
| No items found  |                                       |      |  |
| Class   | Add Clas                              | SS   |  |
| No items found  |                                       |      |  |
| <ul> <li>Check for existing registrations</li> <li>Create learning request on failure</li> <li>Apply drop charges when deleted</li> </ul> |                                       |      |  |
| Continuing Education Requirements   | Add Requiremen                        | nt   |  |
| No items found  |                                       |      |  |
| Security Roles  | Add Security Role                     | es   |  |
| No items found  |                                       |      |  |
| Job Roles   | Add Required Job Roles Print   Expo   | ort  |  |
| Name  | Status Actions                        | ;    |  |
| Customer Service Managers   | Required Delete                       |      |  |
| Job Roles   | Add Optional Job Roles   Print   Expo | ort  |  |
| Name  | Status Actions                        | ;    |  |
| Customer Service Rep  | Optional Delete                       |      |  |

# Figure 24: Add Job Roles

The people administrator must click **Add Required Job Roles** / **Add Optional Job Roles**, select the desired job roles, and then click **Add Roles** to add these roles to the prescriptive rule requirement. Save the prescriptive rule and process it. The newly added job roles will be assigned to people.

## Use case

This would allow the use of criteria in Prescriptive Rule to identify people who need roles assigned directly to them.

# Prompt to save member selection details when using existing criteria

## How did it work?

When a people administrator is selecting a smart list by using the existing criteria option and moving forward to set the requirements, the smart list selection is lost because the user did not save the data before leaving the page. This workflow is inconsistent with the Define new criteria workflow as there the user is prompt to save the selection before moving to next step.

## How does it work now?

The Use the existing criteria workflow is now in sync with the Define a new criteria flow as the people administrator will be prompted to save the current details before moving to set requirements.

As soon as admin selects **Use the existing criteria** option, selects the criteria, and clicks Step 3: Set Requirements button, a prompt appears to save the changes.

| Prescrip     | Prescriptive Rule Details: Assign-Documents       |   |  |  |  |
|--------------|---|---|--|--|--|
| 1.Rule Detai | ils   | iew … 5.Activate  |  |  |  |
| Member sele  | ection mode: Dynamic Criteria External source ()  |   |  |  |  |
| Ose the e    | existing criteria 💿 Define a new criteria         |   |  |  |  |
| Select the   | criteria: Smartlist with AT 📧 🔍 😗                 |   |  |  |  |
| Cancel       |   | Back         Preview Members         Save         Step 3: Set Requirements >> |  |  |  |
|              | ×   |   |  |  |  |
|              | Do you want to leave without saving your changes? |   |  |  |  |
|              | OK Cancel   |   |  |  |  |

# Figure 25: Prompt to save existing criteria

## Use case

The use existing criteria workflow is now consistent with the defining new critera where the administrator is prompted to save the changes before moving to next step.

# **REST API**

# **Updated REST APIs**

**Certification and Curriculum APIs to return additional details** 

How did it work?

The following REST APIs did not return details like recertifyDays, reassignTargetDays, locale, createdOn/by, updatedOn/by, expiryType (expiresOnDay, expiresOnMonth expiresOnFrequency nextExpiryStartsOnDay, nextExpiryStartsOnMonth):

- GET DETAILS OF A CERTIFICATION
- GET DETAILS OF A CURRICULUM
- FIND DETAILS OF CERTIFICATION/CURRICULUM
- FIND DETAILS OF CERTIFICATION/CURRICULUM (Using POST Range based search)

#### How does it work now?

The following REST APIs now return these additional details as part of the Response:

- GET DETAILS OF A CERTIFICATION
- GET DETAILS OF A CURRICULUM
- FIND DETAILS OF CERTIFICATION/CURRICULUM
- FIND DETAILS OF CERTIFICATION/CURRICULUM (Using POST Range based search)

## GET DETAILS OF A CERTIFICATION

#### Overview

Returns the details of a certification.

## **Requires OAuth**

No

## Method

GET

# URL

https://<hostname-api.sabacloud.com>/v1/certification/:certId

## **Calling Options**

## Table 27: Calling Options

| Name   | Description        | Sample Value             | Data Type | Required? |
|--------|--------------------|--------------------------|-----------|-----------|
| certId | Certification's ID | crt~<br>fy00000000004464 | string    | Yes       |

# **Return Values**

```
"updated_on": "2016-02-02T00:00:00.000-0500",
"created_by": "superuser",
"updated_by": "UONE",
"created_on": "2014-10-27T05:06:41.000-0400",
"keywords": [
    {
        id": "kywrd0000000006265",
        "displayName": "skill"
    },
    {
     }
}
```

```
"id": "kywrd00000000006263",
      "displayName": "course_keyword"
    },
      "id": "kywrd00000000006264",
      "displayName": "k100"
      "id": "kywrd00000000006266",
      "displayName": "java"
    }
  ],
  "reAssignedTargetDays": 0,
  "deepLinkUrls": [
"https://<hostname>/Saba/Web_spf/ATHDB1/common/learningeventdetail/crtfy0000000004464"
  ],
  "past_credit_days": null,
  "history_lookup_policy": "CheckHistoryUptoExpiredRevoked",
  "parent": null,
  "description": "description updateddasdas",
  "name": "!000111cert_content",
  "paths": [
    {
      "learningModules": [
        ł
          "is_reqd": true,
          "learningInterventions": [
            ł
              "is_reqd": false,
              "owner_id": null,
              "part_id": {
                "id": "cours00000000017197",
                "displayName": "course_con1"
              },
              "is_waiver": false,
              "sequence": 1,
              "id": "edup100000000006512"
              "is_reqd": false,
              "owner_id": null,
              "part_id": {
                "id": "cours00000000017198",
                "displayName": "course_con2"
              "is_waiver": false,
              "sequence": 2,
              "id": "edup100000000006513"
            },
              "is_reqd": false,
              "owner_id": null,
              "part_id": {
                "id": "cours00000000037404",
                "displayName": "Test for eq"
              },
              "is_waiver": false,
              "sequence": 3,
              "id": "edup100000000011680"
            }
```

```
],
        "notes": null,
        "reqd_no_of_items": 2,
        "is_waiver": true,
        "track_id": null,
        "sequence": 1,
        "name": "!000111cert_content_p1_m1",
        "id": "cegrp00000000004930"
      }
    ],
    "isrecertification_track": false,
    "is_default_path": true,
    "is_path_recalculation_done": false,
    "name": "!000111cert_content_p123",
    "id": "track000000000004850"
  }
],
"disp_learner": true,
"disp_callcenter": true,
"self_register": true,
"featured": false,
"valid_till": null,
"notify_before": null,
"vendor_id": null,
"avl_from": "2014-10-27T00:00:00.000-0400",
"disc from": null,
"createGroupPolicyVal": true,
"target_days": 0,
"learningevent_id": "00012706",
"version": null,
"group": {
  "id": "teams000000000010877",
  "displayName": "!000111cert_content"
},
"status": "INEFFECT",
"customValues": {
  "custom9": null,
  "ExCustom4": null,
  "custom3": null,
  "custom4": null,
  "custom1": null,
  "custom2": null,
  "custom7": null,
  "custom8": null,
  "custom5": null,
  "custom6": null
},
"securityDomain": {
  "id": "domin00000000059758",
  "displayName": "Domain_IndiaQE"
},
"id": "crtfy00000000004464",
"expiryType": "duration",
"locale": {
  "id": "local00000000000001",
  "displayName": null
},
"recertifyDays": 0
```

Note: The following attributes are only available when the value of 'expiryType' is 'dayOfMonth'. This is only available for cert

expiresOnDay

}

- expiresOnMonth
- expiresOnFrequency
- nextExpiryStartsOnDay
- nextExpiryStartsOnMonth

```
{
    "parent": null,
    "created_on": "2016-07-22T17:27:32.000+0530",
    "updated_by": "uone",
    "updated_on": "2016-07-22T17:27:49.000+0530",
    "created_by": "uone",
    "keywords": [],
    "validtill_type": 1,
    "reAssignedTargetDays": 12,
    "past_credit_days": 12,
    "history_lookup_policy": "CheckHistoryUptoExpiredRevoked",
    "deepLinkUrls": [
```

"http://dqathdb1.sabacloud.com/Saba/Web\_spf/ATHDB1/Social/common/learningeventdetail/c

```
],
"name": "testCertification U361",
"description": "testCertification_U361",
"paths": [
  ł
    "name": "Test1_Path1",
    "learningModules": [
      ł
        "name": "test_Module_test",
        "notes": "test_Module_test",
        "sequence": 1,
        "track_id": null,
        "is_waiver": true,
        "is_reqd": true,
        "reqd_no_of_items": 1,
        "learningInterventions": [
          ł
             "sequence": 1,
            "is_waiver": false,
            "is_reqd": false,
             "owner_id": null,
             "part_id": {
              "id": "cours000000000200486",
               "displayName": "111"
             },
            "id": "edup100000000201247"
          },
            "sequence": 2,
            "is_waiver": false,
            "is_reqd": false,
             "owner_id": null,
            "part_id": {
               "id": "cours000000000200815",
               "displayName": "#12#12"
             },
             "id": "edup1000000000201248"
          }
        ],
        "id": "cegrp000000000201045"
     }
    ],
```

```
"is_default_path": true,
    "isrecertification_track": false,
    "is_path_recalculation_done": false,
    "id": "track00000000201045"
    "name": "Test1_PathU36",
    "learningModules": [
      {
        "name": "test_Module_test1",
        "notes": "test_Module_test1",
        "sequence": 1,
        "track_id": null,
        "is_waiver": true,
        "is_reqd": true,
        "reqd_no_of_items": 1,
        "learningInterventions": [
          {
            "sequence": 1,
            "is_waiver": false,
            "is_reqd": false,
            "owner_id": null,
            "part_id": {
              "id": "cours00000000200340",
              "displayName": "aaa"
            },
            "id": "edup100000000201249"
          },
            "sequence": 2,
            "is_waiver": false,
            "is_reqd": false,
            "owner_id": null,
            "part_id": {
              "id": "cours00000000202227",
              "displayName": "aaaaaa"
            "id": "edup100000000201250"
          },
            "sequence": 3,
            "is_waiver": false,
            "is_reqd": false,
            "owner_id": null,
            "part_id": {
              "id": "cours00000000200744",
              "displayName": "aaacou_for_package_with_no_price"
            },
            "id": "edup100000000201251"
          }
        ],
        "id": "cegrp000000000201046"
      }
    ],
    "is_default_path": true,
    "isrecertification_track": true,
    "is_path_recalculation_done": false,
    "id": "track00000000201046"
 }
],
"disp_learner": true,
"disp_callcenter": true,
```

```
"self_register": true,
  "version": "1.2",
  "group": {
    "id": "teams00000000001323",
    "displayName": "testCertification_U361"
  },
  "status": "INEFFECT",
  "createGroupPolicyVal": true,
  "featured": true,
  "valid_till": null,
  "notify_before": 12,
  "vendor_id": null,
  "avl_from": "2016-07-22T00:00:00.000+0530",
  "disc_from": "2034-08-24T00:00:00.000+0530",
  "target_days": 12,
  "learningevent_id": "00201101",
  "customValues": {
    "custom9": null,
    "custom0": null,
    "custom3": null,
    "custom4": null,
    "custom1": null,
    "custom2": null,
    "custom7": null,
    "custom8": null,
    "custom5": null,
    "custom6": null
  },
  "securityDomain": {
    "id": "domin00000000000001",
    "displayName": "world"
  "id": "crtfy000000000200873",
 "expiresOnMonth": "02",
 "nextExpiryStartsOnMonth": "02",
  "expiryType": "dayOfMonth",
 "expiresOnDay": "04",
  "locale": {
    "id": "local00000000000001",
    "displayName": null
  },
 "recertifyDays": 12,
 "nextExpiryStartsOnDay": "04",
  "expiresOnFrequency": 2
}
```

# GET DETAILS OF A CURRICULUM

## Overview

Returns the details of a curriculum.

## **Requires OAuth**

No

## Method

GET

# URL

https://<hostname-api.sabacloud.com>/v1/curriculum/:currId

#### **Calling Options**

#### Table 28: Calling Options

| Name   | Description     | Sample Value        | Data Type | Required? |
|--------|-----------------|---------------------|-----------|-----------|
| currId | Curriculum's ID | curra00000000005646 | string    | Yes       |

#### **Return Values**

```
{
  "keywords": [],
  "deepLinkUrls": [
"https://<hostname>/Saba/Web_spf/ATHDB1/common/learningeventdetail/curra0000000005646"
  ],
  "description": "Test_Curriculum_123",
  "name": "Test_Curriculum_123",
  "paths": [
    {
      "learningModules": [
        ł
          "is_reqd": true,
          "learningInterventions": [
            {
              "is reqd": false,
              "owner id": null,
              "part_id": {
                "id": "cours00000000040633",
                "displayName": "@$# $ 8-updated name_3_Testingw"
              },
              "is_waiver": false,
              "sequence": 1,
              "id": "edup100000000015055"
            },
              "is_reqd": false,
              "owner_id": null,
              "part_id": {
                "id": "cours00000000040636",
                "displayName": "@$# $ 8-updated name_3_Testingw1"
              },
              "is_waiver": false,
              "sequence": 2,
              "id": "edup100000000015056"
              "is_reqd": false,
              "owner_id": null,
              "part_id": {
                "id": "cours00000000006559",
                "displayName": "!@#$%^*&()äá°°óñïéê\""
              "is_waiver": false,
              "sequence": 3,
              "id": "edup100000000015057"
```

```
}
        ],
        "notes": "Module_12",
        "reqd_no_of_items": 2,
        "is_waiver": true,
        "track_id": null,
        "sequence": 1,
        "name": "Module_12",
        "id": "cegrp000000000010789"
      }
    ],
    "isrecertification_track": false,
    "is_default_path": true,
    "is_path_recalculation_done": false,
    "name": "Test_Path_1",
    "id": "track000000000010510"
 }
],
"disp_learner": false,
"disp_callcenter": false,
"self_register": true,
"featured": false,
"vendor_id": null,
"avl_from": "2016-08-24T00:00:00.000-0400",
"disc from": null,
"createGroupPolicyVal": false,
"target_days": 12,
"learningevent_id": "00046170",
"version": null,
"group": null,
"status": "INEFFECT",
"customValues": {
  "ExCustom6": null,
  "ExCustom5": null,
  "custom0": null,
  "ExCustom8": null,
  "ExCustom9": null,
  "custom9": null,
  "custom3": false,
  "custom4": null,
  "custom1": null,
  "custom2": null,
  "custom7": null,
  "ExCustom2": null,
  "custom8": null,
  "custom5": null,
  "custom6": null
},
"securityDomain": {
  "id": "domin00000000000001",
  "displayName": "world"
"id": "curra000000000005646",
"updated_on": "2016-08-24T02:45:55.000-0400",
"created_on": "2016-08-24T02:45:48.000-0400",
"updated_by": "superuser",
"locale": {
  "id": "local00000000000001",
  "displayName": null
},
"created_by": "superuser"
```

}

# FIND DETAILS OF CERTIFICATION/CURRICULUM

# Overview

Returns the details of the Certification/Curriculum along with the ID, Name and the Deeplink URL based on the provided search criteria.

# **Requires OAuth**

No

# Method

GET

# URL

 $https://< hostname-api.sabacloud.com > /v1/:componentName?q=(:criteria_field=::field_value) \& count=:count& startPage=:$ 

# **Calling Options**

# **Table 29: Calling Options**

| Name           | Description   | Sample Value  | Data Type  | Required? |
|----------------|---|---------------|------------|-----------|
| componentName  | The name of the desired component (certification or curriculum).  | certification | enumerated | Yes       |
| criteria_field | <ul> <li>The search criteria i.e. the field name.</li> <li>You can use any field with "isSearchFilter": true.</li> <li>     Mote: To find out the fields that have "is~ SearchFilter": true, in~ voke the "Get the Meta details" REST APIs. </li> </ul> | name          | string     | Yes       |
| field_value    | The search value for the specified search criteria.   | abc           | string     | Yes       |
| count          | The number of records per page.   | 10            | string     | No        |
| startPage      | The start page number for the list of records.  | 1             | string     | No        |

## Fields covered under search criteria (criteria\_field)

| Field name | Field description          | Possible<br>values | Example             |
|------------|----------------------------|--------------------|---------------------|
| certi_name | Name of the certification. |                    | certi_name%3D%3Dabc |

| Field name               | Field description                                   | Possible<br>values                  | Example  |
|--------------------------|---|-------------------------------------|--|
| certi_target_days        | Target days of the certification.                   |                                     | certi_target_days%3D%3D                        |
| certi_valid_till         | Valid till value of the certification.              |                                     | certi_valid_till%3D%3d100                      |
| certi_disc_from          | Discountinuation date of the certification.         |                                     | certi_disc_from                                |
| certi_avl_from           | Certification available from date.                  |                                     | certi_avl_from                                 |
| certi_notify_be~<br>fore | Notify before of the certification.                 |                                     | certi_notify_before%3d%3d130                   |
| certi_custom0            | Custom 0 field of the certification.                |                                     | certi_custom0%3D%3D<br>This%20is%20custom0     |
| certi_custom1            | Custom 1 field of the certification.                |                                     | certi_custom1%3D%3D<br>This%20is%20custom1     |
| certi_custom2            | Custom 2 field of the certification.                |                                     | certi_custom2%3D%3D<br>This%20is%20custom2     |
| certi_custom3            | Custom 3 field of the certification.                |                                     | certi_custom3%3D%3D<br>This%20is%20custom3     |
| certi_custom4            | Custom 4 field of the certification.                |                                     | certi_custom4%3D%3D<br>This%20is%20custom4     |
| certi_created_by         | Created by field of the certification.              |                                     | certi_created_by%3D%3Duone                     |
| certi_created_on         | Created on field of the certification.              |                                     | certi_created_on%3D%3D 5/8/2002                |
| certi_updated_by         | Updated by field of the certification.              |                                     | certi_updated_by%3D%3Duone                     |
| certi_updated_on         | Updated on field of the certification.              |                                     | certi_updated_on%3D%3D<br>5/8/2002             |
| certi_status             | Status of the certification.                        |                                     | certi_status%3D%3D100                          |
| version                  | Version of the certification.                       |                                     | version%3D%3d1.0                               |
| certi_description        | Description of the certification.                   |                                     | certi_description%3D%3D<br>descr00000000103641 |
| base_type                | Distinguishes whether its certification.            | 0 - Certification<br>1 - Curriculum | base_type%3D%3D0                               |
| audience_type_id         | Associated Audience type id of the certific~ ation. |                                     | audience_type_id%3D%3D<br>audie00000000001021  |

| Field name                    | Field description   | Possible<br>values                               | Example  |
|-------------------------------|---|--|--|
| certi_recert_win~<br>dow      | Number of days before expiration after<br>which learner can start re-certification work<br>by pursuing a recertification path.  |  | certi_recert_window%3D%3D<br>certi_recert_window   |
| certi_past_cred~<br>it_days   | Number of days before certification assign~<br>ment, upto which, system would consider<br>completed learning element while doing<br>certification completion check. If this field<br>is null then window is infinite i.e. learning<br>elements completed any time in the past is<br>valid for this certification. If this field is 0<br>then system would not look back i.e. any<br>learning element completed before certific~<br>ation assignment is not valid for this certi~<br>fication. |  | certi_past_credit_days%3D%3D1                      |
| aud_type_out~<br>er_search    | Returns all those certification which has<br>audience type as a given value or null.  |  | aud_type_outer_search%3D%3D<br>audie00000000001021 |
| gov_owner                     | Owner id of component.  |  | gov_owner%3D%3Dem~<br>plo00000000200100            |
| learningevent_id              | Id(not internal id) of certification.   |  | learningevent_id%3D%3D 200056                      |
| name                          | Name of the certification.  |  | Name%3D%3Dabc                                      |
| student_id                    | Learner Id for whom the held certification belongs  |  | student_id%3D%3D em~<br>plo00000000200020          |
| hide_discontin~<br>ued_event  | Returns all certification except those which are discontinued.  |  | hide_discontinued_event%3D%3D<br>5/8/2002          |
| cat~<br>egory_comppick~<br>er | Parent or own category id associated with the certification   |  | category_comppicker%3D%3D<br>ddcls00000000001480   |
| category_hier~<br>archy       | Returns full hierarchy of category associ~<br>ated with the certification.  | 0 - No full hier~<br>archy<br>1 - Full hierarchy | category_hierarchy%3D%3D cat~<br>egory_hierarchy   |
| csvinput                      | Name of the certification.  |  |  |
| category_id                   | If this field is passed all those certification<br>will be returned which has category with<br>given category id.   |  | category_id%3D%3D<br>categ00000000001125           |
| category_name                 | If this field is passed all those certification<br>will be returned which has category with<br>given category name.   |  | category_id%3D%3D A10008                           |

| Field name | Field description   | Possible<br>values | Example            |
|------------|---|--------------------|--------------------|
| at_check   | Adding this condition peforms an Audience<br>Type check and only the certifications /<br>curricula matching the Audience Type of<br>the learner will be returned. | true or false      | at_check%3D%3Dtrue |

#### **Return Values**

```
"facets": [],
"startIndex": 1,
"results": [
    "updated_on": "2016-02-02T00:00:00.000-0500",
    "created_by": "superuser",
    "updated_by": "UONE",
    "created_on": "2014-10-27T05:06:41.000-0400",
    "keywords": [
        "id": "kywrd00000000006265",
        "displayName": "skill"
      }
        "id": "kywrd00000000006263",
        "displayName": "course_keyword"
        "id": "kywrd00000000006264",
        "displayName": "k100"
        "id": "kywrd00000000006266",
        "displayName": "java"
   ],
    "reAssignedTargetDays": 0,
    "deepLinkUrls": [
```

"https://<hostname>/Saba/Web\_spf/ATHDB1/common/learningeventdetail/crtfy0000000004464"

```
],
"past_credit_days": null,
"history_lookup_policy": "CheckHistoryUptoExpiredRevoked",
"parent": null,
"description": "description updateddasdas",
"name": "!000111cert_content",
"paths": [
        {
            "learningModules": [
               {
                "is_reqd": true,
                "learningInterventions": [
```

```
ł
            "is_reqd": false,
            "owner_id": null,
            "part_id": {
              "id": "cours00000000017197",
              "displayName": "course_con1"
            },
            "is_waiver": false,
            "sequence": 1,
            "id": "edup100000000006512"
          },
          ł
            "is_reqd": false,
            "owner_id": null,
            "part_id": {
              "id": "cours00000000017198",
              "displayName": "course_con2"
            },
            "is_waiver": false,
            "sequence": 2,
            "id": "edup10000000006513"
          },
            "is reqd": false,
            "owner_id": null,
            "part id": {
              "id": "cours00000000037404",
              "displayName": "Test for eq"
            },
            "is_waiver": false,
            "sequence": 3,
            "id": "edup100000000011680"
          }
        ],
        "notes": null,
        "reqd_no_of_items": 2,
        "is_waiver": true,
        "track_id": null,
        "sequence": 1,
        "name": "!000111cert_content_p1_m1",
        "id": "ceqrp000000000004930"
      }
    ],
    "isrecertification_track": false,
    "is_default_path": true,
    "is_path_recalculation_done": false,
    "name": "!000111cert_content_p123",
    "id": "track00000000004850"
  }
],
"disp_learner": true,
"disp_callcenter": true,
"self_register": true,
"featured": false,
"valid_till": null,
"notify_before": null,
"vendor_id": null,
"avl_from": "2014-10-27T00:00:00.000-0400",
"disc_from": null,
"createGroupPolicyVal": true,
"target_days": 0,
"learningevent_id": "00012706",
```

```
"version": null,
    "group": {
      "id": "teams00000000010877",
      "displayName": "!000111cert_content"
    },
    "status": "INEFFECT",
    "customValues": {
      "custom9": null,
      "ExCustom4": null,
      "custom3": null,
      "custom4": null,
      "custom1": null,
      "custom2": null,
      "custom7": null,
      "custom8": null,
      "custom5": null,
      "custom6": null
    },
    "securityDomain": {
      "id": "domin00000000059758",
      "displayName": "Domain_IndiaQE"
    },
    "id": "crtfy00000000004464",
    "expiryType": "duration",
    "locale": {
      "id": "local000000000000001",
      "displayName": null
    },
    "recertifyDays": 0
  }
],
"hasMoreResults": true,
"itemsPerPage": 1,
"totalResults": 1569
```

**Note:** The following attributes are only available when the value of 'expiryType' is 'dayOfMonth'. This is only available for certification:

- expiresOnDay
- expiresOnMonth
- expiresOnFrequency
- nextExpiryStartsOnDay
- nextExpiryStartsOnMonth

# FIND DETAILS OF CERTIFICATION/CURRICULUM (Using POST - Range based search)

## Overview

}

Returns the details of the Certification/Curriculum along with the ID, Name and the Deeplink URL based on the provided search criteria.

# **Requires OAuth**

No

# Method

POST

# URL

https://<hostname-api.sabacloud.com>/v1/:componentName/searchQuery?count=:count&startPage=:startPage&includeDetails=:include

# **Calling Options**

# Table 30: Calling Options

| Name           | Description   | Sample Value  | Data Type  | Required? |
|----------------|---|---|--|-----------|
| conditions     | <ul> <li>The search conditions.</li> <li>You can use any field with<br/>"isSearchFilter": true.</li> <li>Image: Note: To find out the<br/>fields that have "is~<br/>SearchFilter": true, in~<br/>voke the "Get the Meta<br/>details" REST APIs.</li> <li>You can use search operators<br/>such as:</li> <li>=gt=</li> <li>=ge=</li> <li>=lt=</li> <li>=le=</li> <li>=eq=</li> <li>=ne=</li> </ul> | [{"name":<br>"name","operator":<br>"==","value": "Blen~<br>dedcertveren_US"}] | string   | Yes       |
| componentName  | The name of the desired component.  | certification   | enumerated<br>[ "certification", "cur~<br>riculum" ] | Yes       |
| count          | The number of records per page.   | 10  | string   | No        |
| startPage      | The start page number for the list of records.  | 1   | string   | No        |
| includeDetails | Returns the details of the<br>Certification/Curriculum in<br>the search.  | true  | string   | No        |

# **Request Body**

```
{
"conditions": [
{
   "name": "category_name",
   "operator": "==",
   "value": "000001FeaturedCatenglish"
}]}
```

## **Return Values**

```
{
 "facets": [],
 "startIndex": 1,
 "results": [
      "updated_on": "2016-02-02T00:00:00.000-0500",
      "created_by": "superuser",
      "updated_by": "UONE",
      "created_on": "2014-10-27T05:06:41.000-0400",
      "keywords": [
        ł
          "id": "kywrd00000000006265",
          "displayName": "skill"
        },
          "id": "kywrd00000000006263",
          "displayName": "course_keyword"
        },
          "id": "kywrd00000000006264",
          "displayName": "k100"
        },
          "id": "kywrd00000000006266",
          "displayName": "java"
        }
      ],
      "reAssignedTargetDays": 0,
      "deepLinkUrls": [
```

"https://<hostname>/Saba/Web\_spf/ATHDB1/common/learningeventdetail/crtfy0000000004464"

```
],
"past_credit_days": null,
"history_lookup_policy": "CheckHistoryUptoExpiredRevoked",
"parent": null,
"description": "description updateddasdas",
"name": "!000111cert_content",
"paths": [
  {
    "learningModules": [
        "is_reqd": true,
        "learningInterventions": [
          ł
            "is reqd": false,
            "owner_id": null,
            "part_id": {
              "id": "cours00000000017197",
              "displayName": "course_con1"
            },
            "is_waiver": false,
            "sequence": 1,
            "id": "edup100000000006512"
          },
{
            "is_reqd": false,
            "owner_id": null,
            "part_id": {
              "id": "cours00000000017198",
              "displayName": "course_con2"
```

```
"is_waiver": false,
            "sequence": 2,
            "id": "edup100000000006513"
          },
            "is_reqd": false,
            "owner_id": null,
            "part_id": {
              "id": "cours00000000037404",
              "displayName": "Test for eq"
            },
            "is_waiver": false,
            "sequence": 3,
            "id": "edup100000000011680"
          }
        ],
        "notes": null,
        "reqd_no_of_items": 2,
        "is_waiver": true,
        "track_id": null,
        "sequence": 1,
        "name": "!000111cert_content_p1_m1",
        "id": "cegrp00000000004930"
      }
    ],
    "isrecertification_track": false,
    "is_default_path": true,
    "is_path_recalculation_done": false,
    "name": "!000111cert_content_p123",
    "id": "track00000000004850"
  }
],
"disp learner": true,
"disp_callcenter": true,
"self_register": true,
"featured": false,
"valid_till": null,
"notify_before": null,
"vendor_id": null,
"avl_from": "2014-10-27T00:00:00.000-0400",
"disc_from": null,
"createGroupPolicyVal": true,
"target_days": 0,
"learningevent_id": "00012706",
"version": null,
"group": {
  "id": "teams00000000010877",
  "displayName": "!000111cert_content"
},
"status": "INEFFECT",
"customValues": {
  "custom9": null,
  "ExCustom4": null,
  "custom3": null,
  "custom4": null,
  "custom1": null,
  "custom2": null,
  "custom7": null,
  "custom8": null,
  "custom5": null,
  "custom6": null
```

```
},
      "securityDomain": {
        "id": "domin000000000059758",
        "displayName": "Domain_IndiaQE"
      "id": "crtfy00000000004464",
      "expiryType": "duration",
      "locale": {
        "id": "local000000000000001",
        "displayName": null
      },
      "recertifyDays": 0
 ],
  "hasMoreResults": true,
  "itemsPerPage": 1,
  "totalResults": 1569
}
```

**Note:** The following attributes are only available when the value of 'expiryType' is 'dayOfMonth'. This is only available for certification:

- expiresOnDay
- expiresOnMonth
- expiresOnFrequency
- nextExpiryStartsOnDay
- nextExpiryStartsOnMonth

**Note:** For more details on this see **REST API Reference**.

Use case

Additional fields make the APIs more usable.

# Enrollment search APIs to support created\_on field

## How did it work?

The following REST APIs did not return the created\_on field:

- SEARCH ENROLLMENTS BASED ON GIVEN CRITERIA
- SEARCH ENROLLMENTS BASED ON GIVEN CRITERIA (USING POST RANGE BASED SEARCH)

## How does it work now?

The following REST APIs now return the created\_on field:

- SEARCH ENROLLMENTS BASED ON GIVEN CRITERIA
- SEARCH ENROLLMENTS BASED ON GIVEN CRITERIA (USING POST RANGE BASED SEARCH)

# SEARCH ENROLLMENTS BASED ON GIVEN CRITERIA

## To search enrollments with details:

https://<hostname-api.sabacloud.com>/v1/learning/enroll/search

?q=(custom0%3D%3Dcustom0Val)&count=10&startPage=1&includeDetails=true

#### **Return Values:**

```
{
    "facets": [],
    "hasMoreResults": false,
    "totalResults": 1,
    "itemsPerPage": 10,
    "startIndex": 1
    "results": [
        {
            "class_id": {
                "id": "class00000000200443",
                "displayName": "CE04ILT04"
            },
            "student_id": {
                "id": "emplo00000000200099",
                "displayName": "Ajay Tripathi"
            },
            "status": "100",
            "offering_action_id": {
                "id": "ofapr00000000001400",
                "displayName": "00001382"
            },
            "delivery_id": {
                "id": "eqcat000000000000004",
                "displayName": "Instructor-Led"
            },
            "offering_temp_id": {
                "id": "cours00000000200446",
                "displayName": "CE04"
            },
            "created_on":"2016-06-22T08:45:24.000+0000",
            "elements_to_complete": 0,
            "reg no": "00001385",
            "wlist_on": null,
            "wlist_priority": 5,
            "Max_Count": null,
            "Current_Count": null,
            "is_no_show": false,
            "is_walk_in": false,
            "customValues": {
                "custom9": null,
                "custom0": "custom0Val",
                "custom3": null,
                "custom4": null,
                "custom1": null,
                "custom2": null,
                "custom7": null,
                "custom8": null,
                "custom5": null,
                "custom6": null
            "id": "regdw00000000001340"
        }
   ]
}
```

## SEARCH ENROLLMENTS BASED ON GIVEN CRITERIA (USING POST - RANGE BASED SEARCH)

#### To search enrollments using the POST method:

https://<hostname-api.sabacloud.com>/v1/learning/enroll/search

?count=10&startPage=1&includeDetails=false

# **Request Body:**

```
{
    "conditions":[
        {
            "name":"updated_on",
            "operator":"=gt=",
            "value":"2015-08-27T16:18:35.000+0530"
        },
        {
            "name":"updated_on",
            "operator":"=le=",
            "value":"2015-09-03T17:45:46.000+0530"
        }
    ]
}
```

**Return Values:** 

{

```
"facets": [],
"hasMoreResults": false,
"totalResults": 1,
"itemsPerPage": 10,
"startIndex": 1
"results": [
    {
        "class_id": {
            "id": "class00000000200443",
            "displayName": "CE04ILT04"
        },
        "student_id": {
            "id": "emplo000000000200099",
            "displayName": "Ajay Tripathi"
        },
        "status": "100",
        "offering_action_id": {
            "id": "ofapr00000000001400",
            "displayName": "00001382"
        },
        "delivery_id": {
            "id": "eqcat000000000000004",
            "displayName": "Instructor-Led"
        },
        "offering_temp_id": {
            "id": "cours00000000200446",
            "displayName": "CE04"
        },
        "created_on":"2016-06-22T08:45:24.000+0000",
        "elements_to_complete": 0,
        "reg_no": "00001385",
        "wlist_on": null,
        "wlist_priority": 5,
        "Max_Count": null,
        "Current_Count": null,
        "is_no_show": false,
        "is_walk_in": false,
        "customValues": {
            "custom9": null,
            "custom0": "custom0Val",
            "custom3": null,
```

```
"custom4": null,
"custom1": null,
"custom2": null,
"custom7": null,
"custom8": null,
"custom5": null,
"custom6": null
},
"id": "regdw0000000001340"
}
]
```

**Note:** For more details on this see **REST API Reference**.

# Use case

N/A

# Held learning APIs to return additional details

# How did it work?

The following REST APIs did not return details like person\_no, username of the learner, createdBy, updatedBy, createdOn, updatedOn, reassign, started\_on, need\_recert\_cert:

- GET HELD CERTIFICATION/CURRICULUM DETAILS ALONG WITH ALL THE ACTIVITIES
- SEARCH CERTIFICATIONS/CURRICULA OF LOGGED IN USER
- SEARCH ALL THE CERTIFICATIONS/CURRICULA ASSIGNED TO A LEARNER BASED ON THE STATUS, TIMESTAMP

## How does it work now?

The following REST APIs now return these additional details as part of the Response:

- GET HELD CERTIFICATION/CURRICULUM DETAILS ALONG WITH ALL THE ACTIVITIES
- SEARCH CERTIFICATIONS/CURRICULA OF LOGGED IN USER
- SEARCH ALL THE CERTIFICATIONS/CURRICULA ASSIGNED TO A LEARNER BASED ON THE STATUS, TIMESTAMP

# GET HELD CERTIFICATION/CURRICULUM DETAILS ALONG WITH ALL THE ACTIVITIES

## Overview

Gets held Certification/Curriculum details along with all the activities

# **Requires OAuth**

No

# Method

GET

# URL

# **Calling Options**

## **Table 31: Calling Options**

| Name       | Description                             | Sample Value | Data Type | Required? |
|------------|---|--------------|-----------|-----------|
| heldCertId | Held Certification/Cur~<br>riculum's ID |              | string    | Yes       |

# **Return Values**

**Certification:** 

{

```
"percentcompleted": 0,
"requirers": [
  {
    "required": true,
    "assignment": {
      "id": "stuce00000000392151",
     "displayName": null
    },
    "activityContext": null,
    "assignee": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
        "id": "local00000000000001",
        "displayName": null
      "id": "persn00000000233981",
      "displayName": "client 01"
    },
    "targetDate": 1473059249000,
    "learningEvent": {
      "id": "crtfy000000000010611",
      "displayName": "Test_Certification_123"
    },
    "jobTypeId": null,
    "listIds": null,
    "assignedOn": 1472022450000,
    "source": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
       "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
        "id": "local00000000000001",
        "displayName": null
      },
      "id": "emplo000000000000000",
      "displayName": "Charles Foster"
    },
```

```
"actions": null,
    "id": "certh00000003030707"
  }
],
"basicdetail": {
  "updatedOn": 1472022451000,
  "createdBy": "superuser",
  "updatedBy": "superuser"
  "createdOn": 1472022450000,
  "person": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
      "displayName": "Person"
    },
    "locale": {
      "id": "local000000000000001",
      "displayName": null
    "id": "persn0000000233981",
    "displayName": "client 01"
  },
  "certification id": {
    "id": "crtfy000000000010611",
    "displayName": "Test_Certification_123"
  },
  "expired_on": null,
  "reassign": true,
  "inRecertification": false,
  "profileElementType": "InternalCert",
  "revoked_on": null,
  "need_recert_ot": false,
  "need_recert_eq": false,
  "recertificationType": [],
  "type": "CERTIFICATION",
  "path": {
    "id": "track000000000010508",
    "displayName": "Test Path 1"
  },
  "status": {
    "intStatus": 400,
    "description": "Assigned",
    "key": "400",
    "displayName": "Assigned"
  "id": "stuce00000000392151",
  "acquiredOn": null,
  "assignee": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
      "displayName": "Person"
    },
    "locale": {
      "id": "local000000000000001",
      "displayName": null
    "id": "persn00000000233981",
```

```
"displayName": "client 01"
    },
    "targetDate": 1473059249000,
    "need_recert": false,
    "startedOn": null,
    "assignedOnDate": 1472022450000,
    "recert_window_starts_on": null,
    "heldCertNo": "00448808 ",
    "owner": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
        "id": "local000000000000001",
        "displayName": null
      "id": "persn00000000233981",
      "displayName": "client 01"
    },
    "assigneeAdditionalDetails": {
      "person no": "00010831",
      "username": "CONE01"
    },
    "need_recert_cert": false
  "isgranted": null
}
```

#### Curriculum:

```
{
  "percentcompleted": 0,
  "requirers": [
    ł
      "required": true,
      "assignment": {
        "id": "stcur00000000043418",
        "displayName": null
      },
      "activityContext": null,
      "assignee": {
        "sourceType": "InternalPerson",
        "activitySourceType": {
          "sourceType": 0,
          "listId": "sysli00000000003037",
"key": "0",
          "displayName": "Person"
        },
        "locale": {
          "id": "local000000000000001",
          "displayName": null
        },
        "id": "emplo0000000275911",
        "displayName": "Sean O'coner"
      },
      "targetDate": null,
      "learningEvent": {
        "id": "curra000000000001941",
```

```
"displayName": "25 Curricula"
    },
    "jobTypeId": null,
    "listIds": null,
    "assignedOn": 1412037159000,
    "source": {
      "componentName": "Prescription Rule",
      "activitySourceType": {
        "sourceType": 3,
        "listId": "sysli00000000003037",
        "key": "3",
        "displayName": "Prescriptive Rule"
      },
      "primaryKey": {
        "prefix": "prule",
        "id": "prule00000000004647"
      "locale": {
        "id": "local000000000000001",
        "displayName": null
      "id": "prule00000000004647",
      "displayName": "u27"
    },
    "actions": null,
    "id": "currh00000001416138"
  }
],
"basicdetail": {
  "updatedOn": 1445816994000,
  "createdBy": "bwillis@saba.com",
  "updatedBy": "admin",
  "createdOn": 1412037159000,
  "need_recert": false,
  "curriculum": {
    "id": "curra000000000001941",
    "displayName": "25 Curricula"
  },
  "recert_window_starts_on": null,
  "revokedOn": null,
  "type": "CURRICULUM",
  "path": null,
  "status": {
    "intStatus": 400,
    "description": "Assigned",
    "displayName": "Assigned"
  },
  "acquiredOn": null,
  "assignee": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
      "displayName": "Person"
    },
    "locale": {
      "id": "local00000000000001",
      "displayName": null
    "id": "emplo00000000275911",
    "displayName": "Sean O'coner"
```

```
},
    "targetDate": null,
    "startedOn": null,
    "assignedOnDate": 1412037159000,
    "heldCertNo": "00262446 ",
    "owner": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
"locale": {
    'a": "lo
        "id": "local000000000000001",
        "displayName": null
      },
"id": "emplo00000000275911",
"id": "Coop O'coner"
      "displayName": "Sean O'coner"
    },
    "id": "stcur00000000043418",
    "assigneeAdditionalDetails": {
      "person_no": "00006160",
      "username": "O'CONER@GMAIL.COM"
  },
  "isgranted": null
}
```

# SEARCH CERTIFICATIONS/CURRICULA OF LOGGED IN USER

## Overview

Searches for Certifications/Curricula of the logged in user

## **Requires OAuth**

No

# Method

GET

# URL

http://< hostname-api.sabacloud.com > /v1/learning/heldlearningevent?type =: type & include Details = true = type = type & include Details = true = type = type & include Details = true = type & include Details = type & inclu

# **Calling Options**

# **Table 32: Calling Options**

| Name | Description  | Sample Value  | Data Type  | Required? |
|------|--|---------------|------------|-----------|
| type | The desired component i.e.<br>Certification or Curriculum. | certification | enumerated | Yes       |

#### **Return Values**

**Certification:** 

{

```
"facets": [],
"startIndex": 1,
"results": [
  ł
    "percentcompleted": 0,
    "requirers": [
      {
        "required": true,
        "assignment": {
          "id": "stuce00000000266681",
          "displayName": null
        },
        "activityContext": null,
        "assignee": {
          "sourceType": "InternalPerson",
          "activitySourceType": {
            "sourceType": 0,
            "listId": "sysli00000000003037",
            "key": "0",
            "displayName": "Person"
          },
          "locale": {
            "id": "local00000000000001",
            "displayName": null
          },
          "id": "emplo000000000001000",
          "displayName": "Charles Foster"
        },
        "targetDate": 1442376060000,
        "learningEvent": {
          "id": "crtfy00000000002908",
          "displayName": "copy of cert print 321"
        },
        "jobTypeId": null,
        "listIds": null,
        "assignedOn": 1441684901000,
        "source": {
          "sourceType": "InternalPerson",
          "activitySourceType": {
            "sourceType": 0,
            "listId": "sysli00000000003037",
"key": "0",
            "displayName": "Person"
          },
          "locale": {
            "id": "local00000000000001",
            "displayName": null
          },
          "id": "emplo00000000000000",
          "displayName": "Charles Foster"
        },
        "actions": null,
        "id": "certh00000001692593"
      }
    ],
    "basicdetail": {
      "updatedOn": 1444388162000,
      "createdBy": "admin",
```

```
"updatedBy": "admin",
"createdOn": 1441684901000,
"person": {
  "sourceType": "InternalPerson",
  "activitySourceType": {
    "sourceType": 0,
    "listId": "sysli00000000003037",
    "key": "0",
    "displayName": "Person"
  },
  "locale": {
    "id": "local000000000000001",
    "displayName": null
  "id": "emplo00000000000000",
  "displayName": "Charles Foster"
},
"certification_id": {
 "id": "crtfy00000000002908",
  "displayName": "copy of cert print 321"
},
"expired_on": null,
"reassign": true,
"inRecertification": false,
"profileElementType": "InternalCert",
"revoked on": null,
"recertificationType": [],
"need_recert_ot": false,
"need_recert_eq": false,
"type": "CERTIFICATION",
"path": {
    "id": "track00000000003397",
  "displayName": "Path1"
},
"status": {
  "intStatus": 600,
  "description": "Overdue",
  "key": "600",
  "displayName": "Overdue"
"id": "stuce00000000266681",
"acquiredOn": null,
"assignee": {
  "sourceType": "InternalPerson",
  "activitySourceType": {
    "sourceType": 0,
    "listId": "sysli00000000003037",
    "key": "0",
    "displayName": "Person"
  },
  "locale": {
    "id": "local00000000000001",
    "displayName": null
  },
 "id": "emplo00000000000000",
 "displayName": "Charles Foster"
},
"targetDate": 1442376060000,
"need_recert": false,
"startedOn": null,
"assignedOnDate": 1441684901000,
"recert_window_starts_on": null,
```

```
"heldCertNo": "00289700 ",
  "owner": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
      "displayName": "Person"
    },
    "locale": {
      "id": "local000000000000001",
      "displayName": null
    },
    "id": "emplo000000000000000",
    "displayName": "Charles Foster"
 },
  "assigneeAdditionalDetails": {
    "person_no": "00001000",
    "username": "SUPERUSER"
  },
  "need_recert_cert": false
"isgranted": null
"percentcompleted": 0,
"requirers": [
    "required": true,
    "assignment": {
      "id": "stuce00000000390011",
      "displayName": null
    },
    "activityContext": null,
    "assignee": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
        "id": "local00000000000001",
        "displayName": null
      "id": "emplo000000000001000",
      "displayName": "Charles Foster"
    },
    "targetDate": 1472045627000,
    "learningEvent": {
      "id": "crtfy00000000010331",
      "displayName": "amtest_certif_mandatoryflag"
    },
    "jobTypeId": null,
    "listIds": null,
    "assignedOn": 1469453627000,
    "source": {
      "componentName": "Prescription Rule",
      "activitySourceType": {
        "sourceType": 3,
        "listId": "sysli00000000003037",
```

```
"key": "3",
        "displayName": "Prescriptive Rule"
      "primaryKey": {
        "prefix": "prule",
        "id": "prule00000000011881"
      "locale": {
        "id": "local000000000000001",
        "displayName": null
      },
      "id": "prule00000000011881",
      "displayName": "amtest_certif_mandatoryflag"
    },
    "actions": null,
    "id": "certh00000003020410"
  }
],
"basicdetail": {
  "updatedOn": 1469453628000,
  "createdBy": "admin",
  "updatedBy": "admin",
  "createdOn": 1469453627000,
  "person": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
      "displayName": "Person"
    },
    "locale": {
    "id": "local000000000000001",
      "displayName": null
    "id": "emplo00000000000000",
    "displayName": "Charles Foster"
  },
  "certification id": {
    "id": "crtfy00000000010331",
    "displayName": "amtest certif mandatoryflag"
  },
  "expired_on": null,
  "reassign": true,
  "inRecertification": false,
  "profileElementType": "InternalCert",
  "revoked_on": null,
  "recertificationType": [],
  "need_recert_ot": false,
  "need_recert_eq": false,
  "type": "CERTIFICATION",
  "path": {
    "id": "track000000000010348",
    "displayName": "amtestpath1"
  },
  "status": {
    "intStatus": 400,
    "description": "Assigned",
    "key": "400",
    "displayName": "Assigned"
  },
  "id": "stuce00000000390011",
```

```
"acquiredOn": null,
      "assignee": {
        "sourceType": "InternalPerson",
        "activitySourceType": {
          "sourceType": 0,
          "listId": "sysli00000000003037",
          "key": "0",
          "displayName": "Person"
        "locale": {
          "id": "local000000000000001",
          "displayName": null
        },
        "id": "emplo0000000000000000",
        "displayName": "Charles Foster"
      },
      "targetDate": 1472045627000,
      "need_recert": false,
      "startedOn": null,
      "assignedOnDate": 1469453627000,
      "recert_window_starts_on": null,
      "heldCertNo": "00447468 ",
      "owner": {
        "sourceType": "InternalPerson",
        "activitySourceType": {
          "sourceType": 0,
          "listId": "sysli00000000003037",
          "key": "0",
          "displayName": "Person"
        },
        "locale": {
          "id": "local000000000000001",
          "displayName": null
        },
        "id": "emplo000000000000000",
        "displayName": "Charles Foster"
      },
      "assigneeAdditionalDetails": {
        "person_no": "00001000",
        "username": "SUPERUSER"
      },
      "need_recert_cert": false
    "isgranted": null
  }
],
"hasMoreResults": true,
"itemsPerPage": 2,
"totalResults": 115
```

Curriculum:

}

```
{
  "facets": [],
  "startIndex": 1,
  "results": [
    {
        "percentcompleted": 100,
        "requirers": [
        {
             "required": true,
        "required": true,
        "required": true,
        "required": true,
        "required": true,
    }
}
```
```
"assignment": {
      "id": "stcur00000000044164",
      "displayName": null
    },
    "activityContext": null,
    "assignee": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0"
        "displayName": "Person"
      },
      "locale": {
        "id": "local000000000000001",
        "displayName": null
      "id": "emplo000000000001000",
      "displayName": "Charles Foster"
    },
    "targetDate": 1413259200000,
    "learningEvent": {
      "id": "curra00000000002924",
      "displayName": "certemplateStory-Curriculum"
    },
    "jobTypeId": null,
    "listIds": null,
    "assignedOn": 1413270631000,
    "source": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
        "id": "local00000000000001",
        "displayName": null
      "id": "emplo00000000000000",
      "displayName": "Charles Foster"
    },
    "actions": null,
    "id": "currh00000001469537"
 }
],
"basicdetail": {
  "updatedOn": 1413270631000,
  "createdBy": "superuser",
  "updatedBy": "superuser"
  "createdOn": 1413270631000,
  "need_recert": false,
  "curriculum": {
    "id": "curra000000000002924",
    "displayName": "certemplateStory-Curriculum"
  },
  "recert_window_starts_on": null,
  "revokedOn": null,
  "type": "CURRICULUM",
  "path": {
    "id": "track00000000004746",
```

```
"displayName": "1"
 },
  "status": {
    "intStatus": 100,
    "description": "Acquired",
    "displayName": "Acquired"
  },
  "acquiredOn": 1413259200000,
  "assignee": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
      "displayName": "Person"
    },
    "locale": {
      "id": "local000000000000001",
      "displayName": null
    "id": "emplo000000000001000",
    "displayName": "Charles Foster"
  },
  "targetDate": null,
  "startedOn": 1413259200000,
  "assignedOnDate": 1413270631000,
  "heldCertNo": "00267097 ",
  "owner": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
      "displayName": "Person"
    },
    "locale": {
      "id": "local000000000000001",
      "displayName": null
    "id": "emplo000000000000000",
    "displayName": "Charles Foster"
  "id": "stcur00000000044164",
  "assigneeAdditionalDetails": {
    "person_no": "00001000",
    "username": "SUPERUSER"
"isgranted": null
"percentcompleted": 0,
"requirers": [
 {
    "required": true,
    "assignment": {
      "id": "stcur0000000028104",
      "displayName": null
    },
    "activityContext": null,
    "assignee": {
      "sourceType": "InternalPerson",
```

```
"activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
        "id": "local000000000000001",
        "displayName": null
      "id": "emplo000000000000000",
      "displayName": "Charles Foster"
    },
    "targetDate": 1409284800000,
    "learningEvent": {
      "id": "curra00000000002620",
      "displayName": "\"Curriculum - 1\""
    },
    "jobTypeId": null,
    "listIds": null,
    "assignedOn": 1407999097000,
    "source": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
        "id": "local00000000000001",
        "displayName": null
      "id": "emplo00000000000000",
      "displayName": "Charles Foster"
    },
    "actions": null,
    "id": "currh00000000855027"
 }
],
"basicdetail": {
  "updatedOn": 1415694199000,
  "createdBy": "superuser",
  "updatedBy": "admin",
  "createdOn": 1407999097000,
  "need_recert": false,
  "curriculum": {
    "id": "curra000000000002620",
    "displayName": "\"Curriculum - 1\""
  },
  "recert_window_starts_on": null,
  "revokedOn": null,
  "type": "CURRICULUM",
  "path": {
    "id": "track00000000004289",
    "displayName": "1"
  },
  "status": {
    "intStatus": 600,
    "description": "Overdue",
    "displayName": "Overdue"
  },
```

```
"acquiredOn": null,
      "assignee": {
        "sourceType": "InternalPerson",
        "activitySourceType": {
          "sourceType": 0,
          "listId": "sysli00000000003037",
          "key": "0",
          "displayName": "Person"
        },
        "locale": {
          "id": "local000000000000001",
          "displayName": null
        },
        "id": "emplo000000000001000",
        "displayName": "Charles Foster"
      },
      "targetDate": 1409284800000,
      "startedOn": null,
      "assignedOnDate": 1407999097000,
      "heldCertNo": "00206679 ",
      "owner": {
        "sourceType": "InternalPerson",
        "activitySourceType": {
          "sourceType": 0,
          "listId": "sysli00000000003037",
          "key": "0",
          "displayName": "Person"
        },
        "locale": {
          "id": "local000000000000001",
          "displayName": null
        "id": "emplo000000000000000",
        "displayName": "Charles Foster"
      "id": "stcur00000000028104",
      "assigneeAdditionalDetails": {
        "person_no": "00001000",
        "username": "SUPERUSER"
      }
    },
    "isgranted": null
  }
],
"hasMoreResults": true,
"itemsPerPage": 2,
"totalResults": 36
```

# SEARCH ALL THE CERTIFICATIONS/CURRICULA ASSIGNED TO A LEARNER BASED ON THE STATUS, TIMESTAMP

## Overview

}

Searches for all the certifications assigned to a learner based on the status or timestamps.

## **Requires OAuth**

No

## Method

GET

## URL

http://< hostname-api.sabacloud.com > /v1/learning/heldlearningevent?type=:type&q=(:criteria)&count=:count&startPage=:s

## **Calling Options**

## **Table 33: Calling Options**

| Name      | Description  | Sample Value   | Data Type  | Required? |
|-----------|--|--|------------|-----------|
| type      | The desired component i.e.<br>Certification or Curriculum.   | certification  | enumerated | Yes       |
| criteria  | The search criteria<br>For CURRICULA the fol~<br>lowing are the possible val~<br>ues for the status criteria:<br>ACQUIRED : 100<br>INPROGRESS : 200<br>ASSIGNED : 400<br>DISCONTINUED: 500<br>OVERDUE : 600<br>CANCELLED :800<br>For CERTIFICATIONS the<br>following are the possible<br>values for the status criteria:<br>ACQUIRED : 100<br>INPROGRESS : 200<br>ASSIGNED : 400<br>DISCONTINUED: 500<br>OVERDUE : 600<br>CANCELLED :800<br>EXPIRED : 300<br>REVOKED : 700 | assignee%3D%3D<br>em~<br>plo00000000001600,<br>status%3D%3D600,<br>cre~<br>ated_on%3Dge%3D2002-<br>01-29 01:29:32 AM,<br>up~<br>dated_on%3Dge%3D2002-<br>01-29 01:29:32 AM | string     | Yes       |
| count     | The number of records per page.  | 10   | string     | No        |
| startPage | The start page number for the list of records.   | 1  | string     | No        |

## Return Values

Certification:

```
{
    "facets": [],
    "startIndex": 1,
    "results": [
```

```
ł
  "percentcompleted": 0,
  "requirers": [
    {
      "required": true,
      "assignment": {
        "id": "stuce00000000266681",
        "displayName": null
      },
      "activityContext": null,
      "assignee": {
        "sourceType": "InternalPerson",
        "activitySourceType": {
          "sourceType": 0,
          "listId": "sysli00000000003037",
          "key": "0"
          "displayName": "Person"
        },
        "locale": {
          "id": "local00000000000001",
          "displayName": null
        "id": "emplo00000000000000",
        "displayName": "Charles Foster"
      },
      "targetDate": 1442376060000,
      "learningEvent": {
        "id": "crtfy00000000002908",
        "displayName": "copy of cert print 321"
      },
      "jobTypeId": null,
      "listIds": null,
      "assignedOn": 1441684901000,
      "source": {
        "sourceType": "InternalPerson",
        "activitySourceType": {
          "sourceType": 0,
          "listId": "sysli00000000003037",
          "key": "0",
          "displayName": "Person"
        },
        "locale": {
          "id": "local00000000000001",
          "displayName": null
        "id": "emplo000000000001000",
        "displayName": "Charles Foster"
      },
      "actions": null,
      "id": "certh00000001692593"
   }
 ],
  "basicdetail": {
    "updatedOn": 1444388162000,
    "createdBy": "admin",
    "updatedBy": "admin"
    "createdOn": 1441684901000,
    "person": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
```

```
"key": "0",
    "displayName": "Person"
  },
  "locale": {
    "id": "local00000000000001",
    "displayName": null
  "id": "emplo000000000001000",
  "displayName": "Charles Foster"
},
"certification_id": {
 "id": "crtfy00000000002908",
  "displayName": "copy of cert print 321"
},
"expired_on": null,
"reassign": true,
"inRecertification": false,
"profileElementType": "InternalCert",
"revoked_on": null,
"recertificationType": [],
"need_recert_ot": false,
"need_recert_eq": false,
"type": "CERTIFICATION",
"path": {
    "id": "track0000000003397",
  "displayName": "Path1"
},
"status": {
  "intStatus": 600,
  "description": "Overdue",
  "key": "600",
  "displayName": "Overdue"
"id": "stuce00000000266681",
"acquiredOn": null,
"assignee": {
  "sourceType": "InternalPerson",
  "activitySourceType": {
    "sourceType": 0,
    "listId": "sysli00000000003037",
    "key": "0",
    "displayName": "Person"
  },
  "locale": {
    "id": "local00000000000001",
    "displayName": null
  "id": "emplo00000000000000",
  "displayName": "Charles Foster"
},
"targetDate": 1442376060000,
"need_recert": false,
"startedOn": null,
"assignedOnDate": 1441684901000,
"recert_window_starts_on": null,
"heldCertNo": "00289700 ",
"owner": {
  "sourceType": "InternalPerson",
  "activitySourceType": {
    "sourceType": 0,
    "listId": "sysli00000000003037",
    "key": "0",
```

```
"displayName": "Person"
      },
      "locale": {
        "id": "local000000000000001",
        "displayName": null
      "id": "emplo000000000001000",
      "displayName": "Charles Foster"
    },
    "assigneeAdditionalDetails": {
      "person_no": "00001000",
      "username": "SUPERUSER"
    },
    "need_recert_cert": false
  },
  "isgranted": null
},
  "percentcompleted": 0,
  "requirers": [
    {
      "required": true,
      "assignment": {
        "id": "stuce00000000390011",
        "displayName": null
      },
      "activityContext": null,
      "assignee": {
        "sourceType": "InternalPerson",
        "activitySourceType": {
          "sourceType": 0,
          "listId": "sysli00000000003037",
          "key": "0",
          "displayName": "Person"
        },
        "locale": {
          "id": "local000000000000001",
          "displayName": null
        "id": "emplo00000000000000",
        "displayName": "Charles Foster"
      },
      "targetDate": 1472045627000,
      "learningEvent": {
        "id": "crtfy00000000010331",
        "displayName": "amtest_certif_mandatoryflag"
      },
      "jobTypeId": null,
      "listIds": null,
      "assignedOn": 1469453627000,
      "source": {
        "componentName": "Prescription Rule",
        "activitySourceType": {
          "sourceType": 3,
          "listId": "sysli00000000003037",
          "key": "3",
          "displayName": "Prescriptive Rule"
        },
        "primaryKey": {
          "prefix": "prule",
          "id": "prule00000000011881"
        },
```

```
"locale": {
        "id": "local000000000000001",
        "displayName": null
      "id": "prule00000000011881",
      "displayName": "amtest_certif_mandatoryflag"
    },
    "actions": null,
    "id": "certh00000003020410"
  }
],
"basicdetail": {
  "updatedOn": 1469453628000,
  "createdBy": "admin",
  "updatedBy": "admin",
  "createdOn": 1469453627000,
  "person": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
      "displayName": "Person"
    },
    "locale": {
      "id": "local000000000000001",
      "displayName": null
    "id": "emplo000000000000000",
    "displayName": "Charles Foster"
  },
  "certification id": {
    "id": "crtfy00000000010331",
    "displayName": "amtest certif mandatoryflag"
  },
  "expired_on": null,
  "reassign": true,
  "inRecertification": false,
  "profileElementType": "InternalCert",
  "revoked_on": null,
  "recertificationType": [],
  "need_recert_ot": false,
  "need_recert_eq": false,
  "type": "CERTIFICATION",
  "path": {
    "id": "track000000000010348",
    "displayName": "amtestpath1"
  },
  "status": {
    "intStatus": 400,
    "description": "Assigned",
    "key": "400",
    "displayName": "Assigned"
  },
  "id": "stuce00000000390011",
  "acquiredOn": null,
  "assignee": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
```

```
"displayName": "Person"
        "locale": {
          "id": "local000000000000001",
          "displayName": null
        "id": "emplo000000000000000",
        "displayName": "Charles Foster"
      },
      "targetDate": 1472045627000,
      "need_recert": false,
      "startedOn": null,
      "assignedOnDate": 1469453627000,
      "recert_window_starts_on": null,
      "heldCertNo": "00447468 ",
      "owner": {
        "sourceType": "InternalPerson",
        "activitySourceType": {
          "sourceType": 0,
          "listId": "sysli00000000003037",
          "key": "0",
          "displayName": "Person"
        },
        "locale": {
    "id": "local0000000000001",
          "displayName": null
        },
        "id": "emplo000000000000000",
        "displayName": "Charles Foster"
      },
      "assigneeAdditionalDetails": {
        "person_no": "00001000",
        "username": "SUPERUSER"
      },
      "need_recert_cert": false
    },
    "isgranted": null
  }
],
"hasMoreResults": true,
"itemsPerPage": 2,
"totalResults": 115
```

## **Curriculum:**

}

```
ł
 "facets": [],
 "startIndex": 1,
 "results": [
    ł
      "percentcompleted": 100,
      "requirers": [
        {
          "required": true,
          "assignment": {
            "id": "stcur00000000044164",
            "displayName": null
          },
          "activityContext": null,
          "assignee": {
            "sourceType": "InternalPerson",
```

```
"activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
        "id": "local000000000000001",
        "displayName": null
      "id": "emplo000000000001000",
      "displayName": "Charles Foster"
    },
    "targetDate": 1413259200000,
    "learningEvent": {
      "id": "curra00000000002924",
      "displayName": "certemplateStory-Curriculum"
    },
    "jobTypeId": null,
    "listIds": null,
    "assignedOn": 1413270631000,
    "source": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
        "id": "local00000000000001",
        "displayName": null
      "id": "emplo000000000001000",
      "displayName": "Charles Foster"
    },
    "actions": null,
    "id": "currh00000001469537"
 }
],
"basicdetail": {
  "updatedOn": 1413270631000,
  "createdBy": "superuser",
  "updatedBy": "superuser",
  "createdOn": 1413270631000,
  "need_recert": false,
  "curriculum": {
    "id": "curra000000000002924",
    "displayName": "certemplateStory-Curriculum"
  },
  "recert_window_starts_on": null,
  "revokedOn": null,
  "type": "CURRICULUM",
  "path": {
    "id": "track00000000004746",
    "displayName": "1"
  },
  "status": {
    "intStatus": 100,
    "description": "Acquired",
    "displayName": "Acquired"
  },
```

```
"acquiredOn": 1413259200000,
  "assignee": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
      "displayName": "Person"
    },
    "locale": {
      "id": "local00000000000001",
      "displayName": null
    },
    "id": "emplo0000000000000000",
    "displayName": "Charles Foster"
 },
  "targetDate": null,
  "startedOn": 1413259200000,
  "assignedOnDate": 1413270631000,
  "heldCertNo": "00267097 ",
  "owner": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
      "displayName": "Person"
    },
    "locale": {
      "id": "local000000000000001",
      "displayName": null
    "id": "emplo000000000000000",
    "displayName": "Charles Foster"
  "id": "stcur00000000044164",
  "assigneeAdditionalDetails": {
    "person_no": "00001000",
    "username": "SUPERUSER"
  }
},
"isgranted": null
"percentcompleted": 0,
"requirers": [
 {
    "required": true,
    "assignment": {
      "id": "stcur0000000028104",
      "displayName": null
    },
    "activityContext": null,
    "assignee": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
```

```
"id": "local000000000000001",
        "displayName": null
      "id": "emplo000000000001000",
      "displayName": "Charles Foster"
    },
    "targetDate": 1409284800000,
    "learningEvent": {
      "id": "curra00000000002620",
      "displayName": "\"Curriculum - 1\""
    },
    "jobTypeId": null,
    "listIds": null,
    "assignedOn": 1407999097000,
    "source": {
      "sourceType": "InternalPerson",
      "activitySourceType": {
        "sourceType": 0,
        "listId": "sysli00000000003037",
        "key": "0",
        "displayName": "Person"
      },
      "locale": {
        "id": "local00000000000001",
        "displayName": null
      "id": "emplo000000000000000",
      "displayName": "Charles Foster"
    },
    "actions": null,
    "id": "currh00000000855027"
  }
],
"basicdetail": {
  "updatedOn": 1415694199000,
  "createdBy": "superuser",
  "updatedBy": "admin",
  "createdOn": 1407999097000,
  "need_recert": false,
  "curriculum": {
    "id": "curra00000000002620",
    "displayName": "\"Curriculum - 1\""
  },
  "recert_window_starts_on": null,
  "revokedOn": null,
  "type": "CURRICULUM",
  "path": {
    "id": "track00000000004289",
    "displayName": "1"
  },
  "status": {
    "intStatus": 600,
    "description": "Overdue",
    "displayName": "Overdue"
  },
  "acquiredOn": null,
  "assignee": {
    "sourceType": "InternalPerson",
    "activitySourceType": {
      "sourceType": 0,
      "listId": "sysli00000000003037",
      "key": "0",
```

```
"displayName": "Person"
        },
        "locale": {
          "id": "local000000000000001",
          "displayName": null
        },
        "id": "emplo000000000001000",
        "displayName": "Charles Foster"
      },
      "targetDate": 1409284800000,
      "startedOn": null,
      "assignedOnDate": 1407999097000,
      "heldCertNo": "00206679 ",
      "owner": {
        "sourceType": "InternalPerson",
        "activitySourceType": {
          "sourceType": 0,
          "listId": "sysli00000000003037",
          "key": "0",
          "displayName": "Person"
        },
        "locale": {
          "id": "local000000000000001",
          "displayName": null
        },
        "id": "emplo000000000000000",
        "displayName": "Charles Foster"
      },
      "id": "stcur0000000028104",
      "assigneeAdditionalDetails": {
        "person_no": "00001000",
        "username": "SUPERUSER"
    },
    "isgranted": null
],
"hasMoreResults": true,
"itemsPerPage": 2,
"totalResults": 36
```

Note: For more details on this see REST API Reference.

## Use case

}

Additional fields make the APIs more usable. This also helps depicting the completion details of certifications accurately in external systems integrated with Saba.

## New attribute added for the CREATE A NEW JOB REQUISITION API

## How did it work?

The following REST API did not support capturing the regions where the job is supposed to be posted:

CREATE A NEW JOB REQUISITION

## How does it work now?

The following REST API now supports capturing the regions where the job is supposed to be posted:

## • CREATE A NEW JOB REQUISITION

## **CREATE A NEW JOB REQUISITION**

The following new attribute has been added to the API:

#### **Calling Options**

#### Table 34: Calling Options

| Name    | Description | Default Value   | Data Type | Required? |
|---------|-------------|---|-----------|-----------|
| regions | Regions     | [{ "associate": {"id":<br>"re~<br>gio000000000000001"},<br>"associateType": "RE~<br>GION"}] | string    | No        |

**Note:** For more details on this see **REST** API Reference.

#### Use case

N/A

## User-friendly IDs and lookup support for REST APIs

## How did it work?

A few REST APIs only accepted internal IDs and didn't support lookup.

## How does it work now?

The following REST APIs now provide support for user-friendly IDs and lookup.

#### **Purchase Order**

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

- GET THE DETAILS OF A PARTICULAR PURCHASE ORDER
- UPDATE THE DETAILS OF A PURCHASE ORDER
- DELETE THE DETAILS OF A PARTICULAR PURCHASE ORDER

## URL

https://<hostname-api.sabacloud.com>/v1/purchaseorder/:id

## **URL (User-friendly)**

You can use a user-friendly URL which accepts the po\_no instead of the internal PurchaseOrder's ID.

https://<hostname-api.sabacloud.com>/v1/purchaseorder/po\_no%3D<PurchaseOrderNo>

The lookup support is now available for the following REST APIs:

## **1.** CREATE A NEW PURCHASE ORDER

## 2. UPDATE THE DETAILS OF A PURCHASE ORDER

| JSON Attribute | UI Attribute | Component Name |
|----------------|--------------|----------------|
|----------------|--------------|----------------|

| organization   | Organization number / Organization name | Organization, External |
|----------------|---|------------------------|
| currency_id    | ISO code of currency                    | Currency               |
| contact_id     | Username of Person                      | Person, External       |
| securityDomain | Domain name                             | Domain                 |

## Categories

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

- GET THE DETAILS OF A PARTICULAR CATEGORY
- REMOVE A CATEGORY

## URL

https://<hostname-api.sabacloud.com>/v1/learning/category/:id

## URL (User-friendly)

You can use a user-friendly URL which accepts the name instead of the internal Category's ID.

https://<hostname-api.sabacloud.com>/v1/learning/category/name%3D<CategoryName>

The lookup support is now available for the following REST APIs:

## 1. CREATE A NEW CATEGORY

## **2.** UPDATE CATEGORY

| JSON Attribute | UI Attribute       | Component Name  |  |
|----------------|--------------------|---|--|
| language       | Language           | Language  |  |
| parentCategory | Category Name      | Category  |  |
| Owner          | Username of Person | Person, Internal/ Person, External  |  |
| split          | Domain name        | Domain  |  |
| atList         | Audience Type Name | Audience Type   |  |
| roles          | Share with         | <ul> <li>Person / Team</li> <li>Note:</li> <li>Lookup will be performed in fol-<br/>lowing priority:</li> <li>1. Person</li> <li>2. Team</li> </ul> |  |

## Certification

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

• GET DETAILS OF A CERTIFICATION

## URL

https://<hostname-api.sabacloud.com>/v1/certification/:certId

## URL (User-friendly)

You can use a user-friendly URL which accepts the name instead of the internal Certification's ID.

https://<hostname-api.sabacloud.com>/v1/certification/name%3D<CertificationName>

**Note:** If there are multiple records for the name, the following error message will indicate the same:

(120592) More than 1 record found for provided value 'SomeCertificate'

The lookup support is now available for the following REST APIs:

## 1. CREATE A NEW CERTIFICATION

#### 2. UPDATE THE DETAILS OF A CERTIFICATION

| JSON Attribute | UI Attribute  | Component Name         |
|----------------|---------------|------------------------|
| securityDomain | Domain name   | Domain                 |
| vendor_id      | Vendor        | Organization, External |
| parent         | Certification | Certification          |

## Curriculum

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

- GET DETAILS OF A CURRICULUM
- UPDATE DETAILS OF A CURRICULUM

## URL

https://<hostname-api.sabacloud.com>/v1/curriculum/:currId

## **URL (User-friendly)**

You can use a user-friendly URL which accepts the name instead of the internal Curriculum's ID.

https://<hostname-api.sabacloud.com>/v1/curriculum/name%3D<CurriculumName>

**Note:** If there are multiple records for the name, the following error message will indicate the same:

(120592) More than 1 record found for provided value 'SomeCurriculum'

The lookup support is now available for the following REST APIs:

## **1.** CREATE A NEW CURRICULUM

## 2. UPDATE DETAILS OF A CURRICULUM

| JSON Attribute | UI Attribute  | Component Name         |
|----------------|---------------|------------------------|
| securityDomain | Domain name   | Domain                 |
| vendor_id      | Vendor        | Organization, External |
| parent         | Certification | Certification          |

The lookup support is now available for the following REST APIs:

## 1. CREATE A NEW COURSE

## **2.** UPDATE DETAILS OF A COURSE

| JSON Attribute            | UI Attribute                      | Component Name         |
|---------------------------|-----------------------------------|------------------------|
| securityDomain            | Domain name                       | Domain                 |
| vendor_id                 | Vendor                            | Organization, External |
| Field_of_study            | Field Of Study                    | FieldOfStudy           |
| required_prerequisites    | Catalog Prerequisites             | Course                 |
| Csr_id                    | Customer Service Representative   | Person, Internal       |
| Recommended_prerequisites | Catalog Prerequisites             | Course                 |
| audienceType              | Audience Type / Audience Sub Type | Audience Type          |
| allPrices                 | Price                             | Currency               |

## Class

The lookup support is now available for the following REST APIs:

- 1. CREATE A NEW BLENDED CLASS
- **2.** CREATE A NEW ILT CLASS
- **3.** CREATE A NEW VIRTUAL CLASS
- 4. CREATE A NEW WBT CLASS
- 5. UPDATE A BLENDED CLASS
- 6. UPDATE A ILT CLASS
- 7. UPDATE A WBTCLASS
- 8. UPDATE A VIRTUAL CLASS

| JSON Attribute         | UI Attribute                      | Component Name         |
|------------------------|-----------------------------------|------------------------|
| securityDomain         | Domain name                       | Domain                 |
| vendor_id              | Vendor                            | Organization, External |
| Csr_id                 | Customer Service Representative   | Person, Internal       |
| audienceType           | Audience Type / Audience Sub Type | Audience Type          |
| Delivery_id            | Delivery Type                     | Category Definition    |
| Language_id / Language | Language                          | Language               |
| Location_id / Location | Location                          | Location               |
| Facility_id / Facility | Facility                          | Facility               |

| Session_template | Session Template | Session Template       |
|------------------|------------------|------------------------|
| Manufacturer_id  | Manufacturer     | Organization, External |

## **Currency Exchange Rate**

The lookup support is now available for the following REST APIs:

## 1. CREATE A NEW EXCHANGE RATE

## 2. UPDATE DETAILS OF A EXCHANGE RATE

| JSON Attribute | UI Attribute | Component Name |
|----------------|--------------|----------------|
| Src_id         | From         | Currency       |
| Dest_id        | То           | Currency       |

## **Delivery mode**

The lookup support is now available for the following REST APIs:

- **1.** CREATE A NEW DELIVERY MODE
- **2.** UPDATE DETAILS OF A DELIVERY MODE
- 3. GET DETAILS OF A PARTICULAR DELIVERY MODE

## URL

https://<hostname-api.sabacloud.com>/v1/deliverymode/:id

## URL (User-friendly)

You can use a user-friendly URL which accepts the **acronym** instead of the internal Delivery Mode's ID.

| https:// <hostname-api.sabacloud.com>/v1/deliverymode/acronym%3D<acronym></acronym></hostname-api.sabacloud.com> |
|--|
|  |

| JSON Attribute | UI Attribute                       | Component Name         | Data Type | Required |
|----------------|------------------------------------|------------------------|-----------|----------|
| securityDomain | Domain name                        | Domain                 | Object    | Yes      |
| vendor_id      | Vendor                             | Organization, External | Object    | No       |
| Csr_id         | Customer Service<br>Representative | Person, Internal       | Object    | No       |
| Delivery_id    | Delivery Type                      | Category Definition    | Object    | Yes      |
| offer_temp_id  | Course                             | Course                 | Object    | Yes      |

## Session Template

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

• GET DETAILS OF A PARTICULAR TRAINING UNIT AGREEMENT

## URL

https://< hostname-api.sabacloud.com > /v1/sessiontemplate/:id

## URL (User-friendly)

You can use a user-friendly URL which accepts the agreement\_no instead of the internal TrainingUnitAgreement's ID.

https://<hostname-api.sabacloud.com>/v1/sessiontemplate/name=<SessionTemplateName>

**Note:** The SessionTemplate API does not contain a body attribute which can hold the ID and hence lookup is not required in the Request body.

## Training Unit

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

- GET DETAILS OF A PARTICULAR TRAINING UNIT
- UPDATE DETAILS OF A TRAINING UNIT
- DELETE A PARTICULAR TRAINING UNIT

#### URL

https://<hostname-api.sabacloud.com>/v1/trainingunit/:id

#### URL (User-friendly)

You can use a user-friendly URL which accepts the name instead of the internal Training Unit's ID.

https://<hostname-api.sabacloud.com>/v1/trainingunit/name%3D<TrainingUnitsName>

The lookup support is now available for the following REST APIs:

#### **1.** CREATE A NEW TRAINING UNIT

2. UPDATE DETAILS OF A TRAINING UNIT

| JSON Attribute    | UI Attribute     | Component Name |
|-------------------|------------------|----------------|
| priceList.curr_id | Currency         | Currency       |
| securityDomain    | Sercurity Domain | Domain         |

## **Training Unit Agreement**

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

- GET DETAILS OF A PARTICULAR TRAINING UNIT AGREEMENT
- UPDATE DETAILS OF A TRAINING UNIT AGREEMENT

## URL

https://<hostname-api.sabacloud.com>/v1/tuagreement/:id

## URL (User-friendly)

You can use a user-friendly URL which accepts the agreement\_no instead of the internal TrainingUnitAgreement's ID.

https://<hostname-api.sabacloud.com>/v1/tuagreement/agreement\_no%3D<TrainingUnitAgreementsNo>

The lookup support is now available for the following REST APIs:

## 1. CREATE A NEW TRAINING UNIT AGREEMENT

## 2. UPDATE DETAILS OF A TRAINING UNIT AGREEMENT

| JSON Attribute | UI Attribute | Component Name         |
|----------------|--------------|------------------------|
| owner_Id       | Organisation | Organization, External |

| order_contact   | Order_contact | Person        |
|-----------------|---------------|---------------|
| trainingunit_id | Training Unit | Training Unit |
| currency        | Currency      | Currency      |

## Currency

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

• GET DETAILS OF A PARTICULAR CURRENCY

## URL

https://<hostname-api.sabacloud.com>/v1/currency/:id:(:searchFields)

## URL (User-friendly)

You can use a user-friendly URL which accepts the iso\_code instead of the internal Currency's ID.

https://<hostname-api.sabacloud.com>/v1/currency/iso\_code%3D<ISOCode>

## Timezone

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

• GET DETAILS OF A PARTICULAR TIMEZONE

## URL

https://<hostname-api.sabacloud.com>/v1/timezone/:id:(:searchFields)

## URL (User-friendly)

You can use a user-friendly URL which accepts the name instead of the internal Timezone's ID.

https://<hostname-api.sabacloud.com>/v1/tuagreement/name%3D<TimeZoneName>

Example: https://<hostname-api.sabacloud.com>/v1/timezone/name=(GMT-12:00)%20Eniwektok,%20Kwajalein

## **Audience Type**

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

- GET DETAILS OF A PARTICULAR AUDIENCE TYPE
- UPDATE DETAILS OF AN AUDIENCE TYPE

## URL

https://<hostname-api.sabacloud.com>/v1/audiencetype/:id

## URL (User-friendly)

You can use a user-friendly URL which accepts the name instead of the internal Audience Type's ID.

https://<hostname-api.sabacloud.com>/v1/audiencetype/name%3D<AudienceTypesName>

The lookup support is now available for the following REST APIs:

## **1.** CREATE A NEW AUDIENCE TYPE

## 2. UPDATE DETAILS OF AN AUDIENCE TYPE

| JSON Attribute | UI Attribute | Component Name |
|----------------|--------------|----------------|
|----------------|--------------|----------------|

| securityDomain | Domain name | Domain |
|----------------|-------------|--------|
|----------------|-------------|--------|

## Security Domain

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

• GET DETAILS OF A PARTICULAR SECURITY DOMAIN

## URL

https://<hostname-api.sabacloud.com>/v1/domain/:id:(:searchFields)

## URL (User-friendly)

You can use a user-friendly URL which accepts the **name** instead of the internal Domain's ID.

https://<hostname-api.sabacloud.com>/v1/domain/name%3D<DomainsName>

#### Transcripts

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

- GET DETAILS OF TRANSCRIPT
- UPDATE CUSTOM FIELDS OF A TRANSCRIPT
- DELETE A TRANSCRIPT

## URL

https://<hostname-api.sabacloud.com>/v1/transcripts/:transcriptId

#### URL (User-friendly)

You can use a user-friendly URL which accepts the action\_no instead of the internal Transcript's ID.

https://<hostname-api.sabacloud.com>/v1/transcripts/action\_no%3D<TranscriptsActionNo>

The lookup support is now available for the following REST APIs:

## 1. CREATE A NEW TRANSCRIPT

**2.** UPDATE A TRANSCRIPT

| JSON Attribute | UI Attribute   | Component Name      |
|----------------|----------------|---------------------|
| transcriptId   | Action No      | Transcript          |
| learners       | Learner        | Person ,External    |
| Location       | Location       | Location            |
| Competencies   | Competencies   | CompetencyProfile   |
| Fos            | Field Of Study | Field Of Study      |
| deliveryType   | Delivery Type  | Category Definition |

## Enrollment

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

• GET DETAILS OF AN ENROLLMENT

| System | 131

## URL

https://<hostname-api.sabacloud.com > /v1/enrollments/:id/sections:regdetail,classdetail,actions,sessionsdetail,learningAssignments,lessonDetail/or and a statements and a statement of the sta

## URL (User-friendly)

You can use a user-friendly URL which accepts the reg\_no instead of the internal Registration's ID.

https://<hostname-api.sabacloud.com>/v1/enrollments/reg\_no%3D<RegistrationNo>

/sections:regdetail,classdetail,actions,sessionsdetail,learningAssignments,lessonDetail

The lookup support is now available for the following REST APIs:

- 1. CREATE A NEW ENROLLMENT (Self registration)
- 2. ENROLL FOR OTHER USERS/SELF
- 3. ENROLL FOR OTHER USERS/SELF WITH PAYMENT
- 4. MARK AN ENROLLMENT COMPLETE

| JSON Attribute | UI Attribute    | Component Name      |
|----------------|-----------------|---------------------|
| learnerId      | Learner         | Person              |
| deliveryId     | Delivery Type   | Category Definition |
| offeringId     | Offering        | Offering            |
| currencyId     | Currency        | Currency            |
| orderContact   | Order Contact   | Person              |
| regId          | Registration No | Registration Item   |

## Attachment

These REST APIs now also accept user-friendly IDs in addition to the internal IDs.

- FIND ALL PUBLIC/PRIVATE ATTACHMENTS
- FIND ALL ATTACHMENTS

## URL

https://<hostname-api.sabacloud.com>/v1/attachments?ownerId=:ownerId

## URL (User-friendly)

You can use a user-friendly URL which accepts the location instead of the internal Owner's ID.

https://<hostname-api.sabacloud.com>/v1/attachments/?ownerName=location&ownerId=:ownerId

The lookup support is now available for the following REST APIs:

- 1. CREATE A NEW ATTACHMENT (FILE)
- 2. CREATE A NEW ATTACHMENT (URL)
- **3.** UPDATE AN ATTACHMENT

Lookup is supported for following type of owners:

- location
- facility
- room

- equipment
- inventory
- purchaseOrder
- package
- deliveryMode

Note: When using a lookup value in a URL, any special characters must be URL-encoded.

Multiple records for the same lookup will result in an error.

**Note:** For more details on this see **REST API Reference**.

## Use case

Many attributes are identified by internal IDs. The developer first needs to GET the internal ID before using it as an attribute. This enhancement makes the REST APIs more user friendly by now accepting user-friendly IDs in addition to the internal IDs.

## New attribute added for the CREATE A NEW VIRTUAL CLASS API

How did it work?

The following REST API did not return the VLE information:

CREATE A NEW VIRTUAL CLASS

How does it work now?

The following REST API now returns the VLE information as part of the **Return Values** in a new attribute called **vleInfoDetail**:

• CREATE A NEW VIRTUAL CLASS

## **CREATE A NEW VIRTUAL CLASS**

#### Overview

Creates a new Virtual Class Class.

## **Requires OAuth**

No

## Method

POST

## URL

https://<hostname-api.sabacloud.com>/v1/offering

## **Return Values**

{

```
"@type": "com.saba.learning.services.offering.OfferingDetail",
"abstract": "",
"endDate": {
   "@type": "com.saba.customtypes.DateWithLocale",
    "timeInLocale": "5:00 AM",
    "dateInUserTimeZone": "11/15/13",
    "timeInUserTimeZone": "3:30 PM",
    "date": 1384509600000,
    "locale": "11/15/13"
},
"startDate": {
    "@type": "com.saba.customtypes.DateWithLocale",
    "timeInLocale": "5:00 AM",
    "dateInUserTimeZone": "11/15/13",
    "timeInUserTimeZone": "3:30 PM",
    "date": 1384509600000,
    "locale": "11/15/13"
},
"customValues": [
   "list",
   []
],
"securityDomain": {
    "@type": "ServiceObjectReference",
    "id": "domin00000000000001",
    "displayName": "world"
},
"price": {
    "@type": "com.saba.learning.services.common.Money",
    "amount": [
        "java.math.BigDecimal",
        0
    ],
    "isocode": "USD",
    "amountString": "0 USD",
    "currency": {
        "@type": "ServiceObjectReference",
        "id": "crncy00000000000167",
        "displayName": null
    }
},
"baseDeliveryType": 100,
"deliveryType": {
    "@type": "ServiceObjectReference",
    "id": "eqcat000000000000008",
    "displayName": "Virtual Classroom"
},
"offeringTemplate": {
    "@type": "ServiceObjectReference",
    "id": "cours00000000006618",
    "displayName": "testCouse"
},
"availableSeats": -1,
"offeringNumber": "VVVVVVV",
"sessionTemplate": "ses 222",
"trainingUnits": 25,
"locationDetail": {
    "@type": "com.saba.learning.services.resource.LocationDetail",
    "addressInfo": {
        "@type": "com.saba.learning.services.common.AddressDetail",
```

```
"addressLine2": "abc",
            "addressLine3": null,
            "addressLine1": "",
            "city": "",
            "zipCode": "",
            "state": "",
            "country": "India"
        },
        "locationContact": null,
        "timezone": {
    "@type": "ServiceObjectReference",
            "id": "tzone00000000000012",
            "displayName": "(GMT-05:00) Eastern Time (US & Canada)"
        },
        "attachments": [
            "list",
            []
        ],
        "contactInfo": {
            "@type": "com.saba.learning.services.common.ContactDetail",
            "primaryPhone": "",
            "secondaryPhone": "",
            "email": "",
            "fax": ""
        },
        "locationId": "LOCANUMBER",
        "locationName": "Locationname",
        "organization": null
    },
    "dif": false,
    "availabilityDetails": {
        "@type":
"com.saba.learning.services.offering.OfferingDetail$OfferingRegistrationAvailabilityDetailsSection",
        "offeringPrice": {
             "@type": "com.saba.learning.services.common.Money",
             "amount": [
                 "java.math.BigDecimal",
                 0
            ],
            "isocode": "USD",
            "amountString": "0 USD",
            "currency": {
    "@type": "ServiceObjectReference",
                 "id": "crncy00000000000167",
                 "displayName": null
            }
        },
        "offeringPriceDisplay": "0 USD",
        "availableSeats": -1
    },
    "offeringlocked": false,
    "delivery_id": {
        "@type": "ServiceObjectReference",
        "id": "eqcat00000000000008",
        "displayName": "Virtual Classroom"
    },
    "location_id": {
        "@type": "ServiceObjectReference",
        "id": "locat00000000001202",
        "displayName": "Locationname"
    },
```

```
"max ct": 20,
   "max_book": 20,
   "min_ct": 5,
   "csr_id": null,
   "session_template": "ses_222",
   "language_id": {
       "@type": "ServiceObjectReference",
       "id": "lange000000000000001",
       "displayName": "English"
   "disp_for_web": true,
   "disp_for_call_center": false,
   "facility_id": null,
   "vendor_id": null,
   "open_enroll": null,
   "open_enroll_for_all": null,
   "enroll_close": null,
   "post_order": null,
   "post_completion": null,
   "stop_auto_promotion": null,
   "vleInfo": null,
   "vleInfoDetail": {
       "@type": "map",
       "vleProvider": {
        "@type": "map",
"displayname": "Saba Classroom",
        "id": "vlesp0000000000000000"
       },
      "audioOptions": "voipAndTelephone",
      "teleconfCallNumber": "1800100200",
      "isLiveVideo":true,
      "isRecordVideo":true,
      "alternateTeleConfCallNumber":"1800100201",
      "teleConfHostCode":"123456",
      "teleconfAccessCode":"8324567",
      "welcomeUrl":"www.sabacloud.com",
      "logoutUrl":"www.saba.com"
      "meetingTemplate":"test adobe template",
      "additionalSeats":0,
      "guestAttendUrl":"www.google.com"
},
   "do_not_drop_post": null,
   "start_date": {
       "@type": "com.saba.customtypes.DateWithLocale",
       "timeInLocale": "5:00 AM",
       "dateInUserTimeZone": "11/15/13",
       "timeInUserTimeZone": "3:30 PM",
       "date": 1384509600000,
       "locale": "11/15/13"
   },
   "avail_from": null,
   "disc_from": null,
   "skip_days_map": "0000000",
   "learningAssignments": null,
   "offering_temp_id": {
       "@type": "ServiceObjectReference",
       "id": "cours0000000006618",
       "displayName": "testCouse"
   },
   "wbt_no": "VVVVVVV",
   "class_no": "VVVVVVV",
   "diffHours": 0,
```

```
"endDateI18n": "11/15/13"
    "startDateI18n": "11/15/13"
    "priceDisplayString": "0 USD",
    "dropPolicyInfo": {
        "@type": "com.saba.learning.services.catalog.DropPolicyInfo",
        "trainingUnitDropPolicyInfo": null,
        "allEffectivePolicies": [
            "list",
            [
                    "@type":
"com.saba.learning.services.catalog.DropPolicyDetail",
                    "chargeType": 1,
                    "daysTo": 22,
                    "daysFrom": 18,
                    "charge": 25,
                    "displayString": "Cancellation charge of 25.0 % if dropped
between 10/24/13 and 10/28/13.",
                    "currency":
                         "@type": "ServiceObjectReference",
                         "id": "crncy00000000000167",
                         "displayName": null
                    }
                },
                    "@type":
"com.saba.learning.services.catalog.DropPolicyDetail",
                    "chargeType": 1,
                    "daysTo": 17,
                    "daysFrom": 13,
                    "charge": 20,
                    "displayString": "Cancellation charge of 20.0 % if dropped
between 10/29/13 and 11/02/13.",
                    "currency": {
                         "@type": "ServiceObjectReference",
                         "id": "crncy00000000000167",
                         "displayName": null
                },
{
                    "@type":
"com.saba.learning.services.catalog.DropPolicyDetail",
                    "chargeType": 1,
                    "daysTo": 12,
                    "daysFrom": 8,
                    "charge": 15,
                    "displayString": "Cancellation charge of 15.0 % if dropped
between 11/03/13 and 11/07/13.",
                    "currency": {
                         "@type": "ServiceObjectReference",
                         "id": "crncy00000000000167",
                         "displayName": null
                    }
                    "@type":
"com.saba.learning.services.catalog.DropPolicyDetail",
                    "chargeType": 1,
                    "daysTo": 7,
                    "daysFrom": 3,
                    "charge": 10,
                    "displayString": "Cancellation charge of 10.0 % if dropped
```

```
between 11/08/13 and 11/12/13.",
                     "currency": {
                          "@type": "ServiceObjectReference",
                          "id": "crncy00000000000167",
                          "displayName": null
                     }
                 },
{
                     "@type":
"com.saba.learning.services.catalog.DropPolicyDetail",
                     "chargeType": 1,
                     "daysTo": 2,
                     "daysFrom": 0,
                     "charge": 5,
                     "displayString": "Cancellation charge of 5.0 % if dropped
between 11/13/13 and 11/15/13.",
                     "currency": {
    "@type": "ServiceObjectReference",
                          "id": "crncy00000000000167",
                          "displayName": null
                     }
                 },
                     "@type":
"com.saba.learning.services.catalog.DropPolicyDetail",
                     "chargeType": 1,
                     "daysTo": 99999,
                     "daysFrom": -99999,
                     "charge": 45.5,
                     "displayString": "Cancellation charge of 45.5 % for all
other days.",
                     "currency": {
    "@type": "ServiceObjectReference",
                          "id": "crncy00000000000167",
                          "displayName": null
                     }
                 }
            ]
        ],
        "lastDateToDropWithoutCharge": null
    },
    "courseVersion": null,
    "customFields": {
        "@type": "map"
    },
    "durationString": "00:00",
    "offering_temp_no": null,
    "publishStartDate": null,
    "publishEndDate": null,
    "publishStatus": null,
    "publishStatusMessage": null,
    "name": "testCouse",
    "language": {
    "@type": "ServiceObjectReference",
        "id": "lange00000000000001",
        "displayName": "English"
    },
    "location": {
    "@type": "ServiceObjectReference",
        "id": "locat00000000001202",
        "displayName": "Locationname"
    },
```

```
"resources": [
    "list",
    []
],
"id": "virtc00000000002908",
"description": "desc",
"duration": 0
}
```

**Note:** For more details on this see **REST API Reference**.

Use case

N/A

## New attribute added for the Subscription APIs

How did it work?

The following REST API did not support capturing the group creation flag:

• CREATE A NEW SUBSCRIPTION

How does it work now?

The following REST API now supports capturing the group creation flag:

• CREATE A NEW SUBSCRIPTION

## **CREATE A NEW SUBSCRIPTION**

The following new attribute has been added to the API:

## **Calling Options**

#### **Table 35: Calling Options**

| Name         | Description                                       | Sample Value | Data Type | Required? |
|--------------|---|--------------|-----------|-----------|
| create_group | Whether to create a group.<br>Accepts: true/false |              | string    | No        |

The GET DETAILS OF A PARTICULAR SUBSCRIPTION API now returns this new attribute as part of the Return Values.

## GET DETAILS OF A PARTICULAR SUBSCRIPTION

## **Return Values**

```
{
    description:null,
    avail_from:"2014-12-26T00:00:00.000+0530",
    disc_from:null,
    title:"Subscription 8",
    avail_web:true,
    allPrices:[
```

```
{
      amount:10,
      curr_id:{
         id: "crncy00000000000001",
         displayName:"US Dollars"
      },
      displayValue:null,
      id:"plent00000000203956"
   },
{
      amount:12.3,
      curr_id:{
         id: "crncy000000000001005",
         displayName: "Currency1"
      },
      displayValue:null,
      id:"plent00000000203957"
   },
   ł
      amount:8.2,
      curr_id:{
         id: "crncy000000000001006",
         displayName: "Currency2"
      },
      displayValue:null,
      id: "plent00000000203958"
   },
      amount:20,
      curr_id:{
         id:"crncy00000000200968",
         displayName: "Rupees"
      },
      displayValue:null,
      id:"plent00000000203959"
],
training_units:0,
updated_by:"uone",
updated_on:"2014-12-26T17:10:28.000+0530",
created_by:"uone",
avail_call_center:true,
grace_period:null,
cost_limit:0,
before_expiry:0,
is_featured:true,
allAudienceTypes:[
],
reg_limit:null,
subscription_no:"00001025",
entire_catalog:false,
allSubscriptionItems:[
   {
      type:{
         value:300
      },
      subscription:{
         id: "sbscr00000000001045",
         displayName: "Subscription 8"
      },
      criteria:false,
```

```
componentName: "SubscriptionItemChoice",
         subscriptionItem:{
            id: "dowbt0000000001591",
            displayName:"#12"
         }
      },
{
         type:{
            value:300
         },
         subscription:{
            id: "sbscr00000000001045",
            displayName: "Subscription 8"
         },
         criteria:false,
         componentName:"SubscriptionItemChoice",
         subscriptionItem:{
            id: "dowbt0000000001592",
            displayName: #12#12"
         }
      }
   ],
   allCostLimits:[
   ],
  days_limit:0,
  create_group:false,
  id: "sbscr00000000001045",
  customValues:{
     custom9:null,
     custom0:null,
     custom3:null,
     custom4:null,
     custom1:null,
     custom2:null,
     custom7:null,
     custom8:null,
     custom5:null,
     custom6:null
   },
   securityDomain:{
      id:"domin0000000000001",
      displayName: "world"
   }
}
```

## **Note:** For more details on this see **REST API Reference**.

## Use case

N/A

## **New REST APIs**

## API to retrieve completion detail of the learning event

How did it work?

Using REST API there was no way to determine whether elements of a certification were completed directly or by completing an equivalent.

How does it work now?

The following new REST API will now allow retrieving completion details of the learning event:

## GET COMPLETION DETAILS OF THE LEARNING EVENT

#### Overview

Gets completion details of the learning event.

**Note:** This API is applicable for both certification as well as curriculum.

#### **Requires OAuth**

No

## Method

GET

## URL

http://<hostname-api.sabacloud.com>/v1/learning/heldlearningevent/:heldCertId/:pathId/sections:(:searchFields)

## **Calling Options**

## **Table 36: Calling Options**

| Name         | Description                                    | Sample Value         | Data Type | Required? |
|--------------|--|----------------------|-----------|-----------|
| heldCertId   | Held Certification/Cur~<br>riculum activity ID | stuce00000000202608  | string    | Yes       |
| pathId       | Path ID  | track000000000201083 | string    | Yes       |
| searchFields | Completion Detail of the learning event        | completiondetail     | string    | Yes       |

## **Return Values**

```
"owner": {
    "id": "emplo0000000201487",
    "displayName": "smu 11"
},
"percentCompleted": 100,
"acquiredOn": "2016/07/31T18:30:00UTC",
"revoked_on": null,
"assignedOnDate": "2016/08/01T08:17:05UTC",
"type": "CERTIFICATION",
"certification": {
    "id": "crtfy00000000200920",
    "displayName": "Certification_U36_1"
},
"path": {
```

```
"percentCompleted": 100,
"learningModules": [
  {
    "is_reqd": true,
    "sequence": 1,
    "learningInterventions": [
      ł
        "sequence": 1,
        "id": "edup100000000201332",
        "part_id": {
          "id": "cours00000000200810",
          "displayName": "lab"
        },
        "type": "COURSE",
        "is_completion_by_equivalent": true,
        "is_completed": true
      },
        "sequence": 2,
        "id": "edup100000000201333",
        "part_id": {
          "id": "cours00000000200811",
          "displayName": "21ab"
        },
        "type": "COURSE",
        "is_completion_by_equivalent": false,
        "is_completed": false
      },
        "sequence": 3,
        "id": "edup100000000201334",
        "part_id": {
          "id": "cours00000000202186",
          "displayName": "a2"
        },
        "type": "COURSE",
        "is_completion_by_equivalent": false,
        "is_completed": false
        "sequence": 4,
        "id": "edup100000000201335",
        "part_id": {
          "id": "crtfy000000000200492",
          "displayName": "bd33"
        },
        "type": "CERTIFICATION",
        "status": {
          "intStatus": 100,
          "description": "Acquired"
        "sequence": 5,
        "id": "edup100000000201336",
        "part_id": {
          "id": "crtfy00000000200494",
          "displayName": "bd35"
        },
        "type": "CERTIFICATION",
        "status": {
          "intStatus": null,
```

```
"description": "Not Assigned"
      }
   },
      "sequence": 6,
      "id": "edup100000000201337",
      "part_id": {
        "id": "crtfy00000000200465",
        "displayName": "bd6"
      },
      "type": "CERTIFICATION",
      "status": {
        "intStatus": null,
        "description": "Not Assigned"
   }
 ],
  "displayName": "module_u36_1",
  "no_of_total_items": 6,
  "no_of_reqd_items": 2,
  "no_of_total_items_completed": 2,
  "id": "cegrp00000000201086"
},
  "is_reqd": false,
  "sequence": 2,
  "learningInterventions": [
    ł
      "sequence": 1,
      "id": "edup100000000201338",
      "part_id": {
        "id": "cours000000000200704",
        "displayName": "¿¿¿"
      },
      "type": "COURSE",
      "is_completion_by_equivalent": false,
      "is_completed": false
    },
      "sequence": 2,
      "id": "edup100000000201339",
      "part_id": {
        "id": "cours00000000201386",
        "displayName": "¿¿¿¿¿¿
      },
      "type": "COURSE",
      "is_completion_by_equivalent": false,
      "is_completed": false
   }
 ],
  "displayName": "module_u36_2",
 "no_of_total_items": 2,
 "no_of_reqd_items": 1,
 "no_of_total_items_completed": 0,
 "id": "cegrp00000000201087"
 "is_reqd": false,
  "sequence": 3,
  "learningInterventions": [
    {
      "sequence": 1,
```

```
"id": "edup100000000201340",
          "part_id": {
            "id": "crtfy000000000200492",
            "displayName": "bd33"
          },
          "type": "CERTIFICATION",
          "status": {
            "intStatus": 100,
            "description": "Acquired"
        },
          "sequence": 2,
          "id": "edup1000000000201341",
          "part_id": {
            "id": "crtfy000000000200494",
            "displayName": "bd35"
          },
          "type": "CERTIFICATION",
          "status": {
            "intStatus": null,
            "description": "Not Assigned"
          "sequence": 3,
          "id": "edup100000000201342",
          "part_id": {
            "id": "crtfy00000000200465",
            "displayName": "bd6"
          },
          "type": "CERTIFICATION",
          "status": {
            "intStatus": null,
            "description": "Not Assigned"
        }
      ],
      "displayName": "module_u36_3",
      "no_of_total_items": 3,
      "no_of_reqd_items": 2,
      "no_of_total_items_completed": 1,
      "id": "cegrp000000000201088"
    }
  ],
  "is_default_path": true,
  "is_acquisition_path": true,
  "no_of_reqd_modules": 1,
  "displayName": "path_u36_1",
  "no_of_total_modules": 3,
  "id": "track00000000201083",
  "is_recert_path": false
},
"inRecertification": true,
"recert_window_starts_on": "2018/05/21T18:30:00UTC",
"id": "stuce00000000202608",
"expired_on": "2018/06/13T18:30:00UTC",
"status": {
  "description": "Acquired",
  "status": "100"
}
```

}
**Note:** For more details on this see **REST API Reference**.

#### Use case

This enhancement provides a REST API that represents the UI behavior for when a user clicks on **View Certification History** > **Main** tab for a Student-certification.

# APIs to retrieve or update details of job requisitions

## How did it work?

There were no REST APIs that would allow retrieving or updating the details of job requisitions.

How does it work now?

The following new REST APIs will now allow retrieving and updating the details of job requisitions:

- 1. GET DETAILS OF A PARTICULAR JOB REQUISITIONS
- 2. GET DETAILS OF ALL JOB REQUISITIONS
- 3. FIND THE DETAILS OF THE JOB REQUISITION
- 4. FIND THE DETAILS OF THE JOB REQUISITION (Using POST Range based search)
- 5. UPDATE JOB REQUISITION

# GET DETAILS OF A PARTICULAR JOB REQUISITION

#### Overview

Returns the details of a particular job requisition.

#### **Requires OAuth**

No

# Method

GET

# URL

https://<hostname-api.sabacloud.com>/v1/job-requisition/:id:(:searchFields)

# **Calling Options**

# Table 37: Calling Options

| Name         | Description   | Default Value        | Data Type | Required? |
|--------------|---|----------------------|-----------|-----------|
| id           | The ID of the desired job re~<br>quisition  | jobrq000000000001020 | string    | Yes       |
| searchFields | Indicate what additional de~<br>tails need to be returned in<br>the output. Acceptable val~<br>ues are (case-sensitive) |                      | string    | No        |

| Name | Description   | Default Value | Data Type | Required? |
|------|---|---------------|-----------|-----------|
|      | You can use any field with<br>"isSearchFilter": true. |               |           |           |

#### **Return Values**

```
{
  "location": {
    "id": "locat000000000000000",
    "displayName": "Location1"
  },
  "description": "recruting test 01 job",
  "source": null,
  "requisitionTemplate": {
    "id": "reqtp00000000000001",
    "displayName": "System Default Template"
  },
  "employmentType": "Permanent",
  "requisitionStage": [],
  "requiresTravel": false,
  "requiresResume": true,
  "requiresCoverLetter": false,
  "companyDescription": "Company Description for the Requisition
Template",
  "requiresPreAssessment": false,
  "organization": {
    "id": "bisut000000000001000",
    "displayName": "BusinessUnit1"
  },
  "status": "DRAFT",
  "sourceType": null,
  "jobFamily": {
    "id": "jfmly000000000000000",
    "displayName": "Position job family"
  },
  "title": "HPEngineer3",
  "approvedOn": null,
  "targetDate": null,
  "googleMapWidget": null,
  "publishedOn": null,
  "jobType": null,
  "notes": "Perfect",
  "submittedOn": null,
  "minExperience": 2,
  "maxExperience": 5,
  "interviewers": [],
  "recruiter": [
      "stakeholderType": "RECRUITER",
      "requisition": {
        "id": "jobrq00000000001045",
        "displayName": "HPEngineer3"
      },
```

```
"stakeholder": {
      "id": "persn000000000201414",
      "displayName": "fname lname"
    },
    "id": "rsthd0000000000001059"
  }
],
"industry": "Computer Software",
"applicantType": "INTERNAL-ONLY",
"closedDate": null,
"hrPartner": {
  "id": "emplo00000000001043",
  "displayName": "User3 Four3"
},
"hiringManager": {
  "id": "emplo000000000000000",
  "displayName": "User One"
},
"minimumSalary": 20000,
"maximumSalary": 500000,
"requisitionNo": "1043",
"qualification": "everything",
"salaryType": "YEARLY",
"jobAdStyle": "Cool",
"noOfOpenings": 1,
"isEEOCReq": true,
"unpublishType": "NONE",
"unpublishDays": 30,
"endOfMonth": false,
"marketAverage": null,
"referralBonus": null,
"unpublishDate": null,
"plainTextSM": null,
"pieChartSM": null,
"barChartSM": {
  "type": "BAR-CHART",
  "owner": {
    "id": "jobrq00000000001045",
    "displayName": "HPEngineer3"
  "identifier": "barChartSM",
  "smartWidgetValues": [
    {
      "name": "Developer",
      "value": "2",
      "parent": {
        "id": "smtwd000000000001042",
        "displayName": "Experience"
      },
      "id": "smtvl000000000001089"
    }
  ],
  "smartWidget_visibility": "ANYONE",
  "title": "Experience",
  "id": "smtwd000000000001042"
},
"progressBarSM": null,
"midSalary": 260000,
"midBudget": 260000,
"maxBudget": 500000,
"salaryCurrency": null,
"category": "Professionals",
```

```
"compensation": "Nothing",
  "costCenter": "Everything",
  "isFeaturedJobExternal": false,
  "referralBonusCurr": null,
  "educationQualification": null,
  "id": "jobrq00000000001045",
  "customValues": {
    "custom9": null,
    "custom0": null,
    "custom3": null,
    "custom4": null,
    "custom1": null,
    "custom2": null,
    "custom7": null,
    "custom8": null,
    "custom5": null,
    "custom6": null
 },
  "securityDomain": {
    "id": "domin00000000000001",
    "displayName": "world"
  },
  "jobboards": [],
  "regions": [
    {
      "associateType": "REGION",
      "requisition": {
        "id": "jobrq00000000001045",
        "displayName": "HPEngineer3"
      },
      "associate": {
        "id": "regio00000000002000",
        "displayName": "New1"
      },
      "id": "jrass000000000001023"
    }
 ]
}
```

# **GET ALL JOB REQUISITIONS**

#### Overview

Returns all job requisitions.

#### **Requires OAuth**

No

# Method

GET

# URL

https://<hostname-api.sabacloud.com>/v1/job-requisition?count=:count&startPage=:startPage

#### **Calling Options**

#### **Table 38: Calling Options**

| Name      | Description                                    | Default Value | Data Type | Required? |
|-----------|--|---------------|-----------|-----------|
| count     | The number of records per page.                | 10            | string    | No        |
| startPage | The start page number for the list of records. | 1             | string    | No        |

## **Return Values**

{

```
"facets": [],
"startIndex": 1,
"hasMoreResults": true,
"totalResults": 84,
"itemsPerPage": 10,
"results": [
  ł
   "id": "jobrq00000000001040",
   "href": "http://<host_name>/v1/job-requisition/jobrq00000000001040"
   "id": "jobrq00000000001044",
   "href": "http://<host_name>/v1/job-requisition/jobrq00000000001044"
  },
   "id": "jobrq00000000001045",
   "href": "http://<host_name>/v1/job-requisition/jobrq00000000001045"
   "id": "jobrq00000000001046",
   "href": "http://<host_name>/v1/job-requisition/jobrq000000000001046"
   "id": "jobrq00000000001047",
   "href": "http://<host_name>/v1/job-requisition/jobrq00000000001047"
  ł,
   "id": "jobrq000000000001050",
   "href": "http://<host_name>/v1/job-requisition/jobrq000000000001050"
  },
  ł
   "id": "jobrq00000000001060",
   },
  ł
   "id": "jobrq000000000001080",
   "href": "http://<host_name>/v1/job-requisition/jobrq000000000001080"
  },
   "id": "jobrq000000000001081",
   "href": "http://<host_name>/v1/job-requisition/jobrq000000000001081"
  ł,
  ł
   "id": "jobrq000000000001082",
   "href": "http://<host_name>/v1/job-requisition/jobrq000000000001082"
```

} ] }

# FIND DETAILS OF JOB REQUISITION

# Overview

Finds the details of the job requisitions.

# **Requires OAuth**

No

### Method

GET

# URL

https://< hostname-api.sabacloud.com > /v1/job-requisition?q = (:criteria) & count = :count & startPage = :startPage = :

# **Calling Options**

# Table 39: Calling Options

| Name           | Description  | Sample Value  | Data<br>Type | Requict? |
|----------------|--|---|--------------|----------|
| criteria       | The search criteria i.e. the<br>criteria field name with<br>search value.<br>You can use the following<br>fields:<br>JobRequisitionStatus<br>Location<br>requisitionNo<br>category<br>employmentType<br>costCenter<br>Domain<br>Id | <ul> <li>JobRequisitionStatus%3D%3DDRAFT</li> <li>Location%3D%3Dlocat 00000000001000</li> <li>requisitionNo%3D%3D1001</li> <li>category%3D%3DNot Specified</li> <li>employmentType%3D%3DTemporary</li> <li>costCenter%3D%3DSaba</li> <li>Domain%3D%3Ddomin 00000000000001</li> <li>Id%3D%3Djobrq 0000000001001</li> </ul> | string       | Yes      |
| count          | The number of records per page.  | 10  | string       | No       |
| start~<br>Page | The start page number for the list of records.   | 1   | string       | No       |

#### **Return Values**

```
{
    "facets": [],
    "startIndex": 1,
    "results": [
        ł
            "id": "jobrq000000000001017",
          "href": "http://<host_name>/v1/job-requisition/jobrq00000000001017"
        },
{
            "id": "jobrq000000000001020",
          "href": "http://<host_name>/v1/job-requisition/jobrq000000000001020"
        },
{
            "id": "jobrq00000000001182",
          "href": "http://<host name>/v1/job-requisition/jobrq0000000001182"
        },
            "id": "jobrq00000000001189",
          "href": "http://<host_name>/v1/job-requisition/jobrq0000000001189"
        },
            "id": "jobrq00000000001251",
          "href": "http://<host_name>/v1/job-requisition/jobrq0000000001251"
        },
            "id": "jobrq0000000001387",
          "href": "http://<host name>/v1/job-requisition/jobrq0000000001387"
        },
            "id": "jobrq0000000001380",
          "href": "http://<host_name>/v1/job-requisition/jobrq0000000001380"
        },
{
            "id": "jobrq0000000001383",
          "href": "http://<host_name>/v1/job-requisition/jobrq0000000001383"
        },
            "id": "jobrq0000000001430",
          "href": "http://<host_name>/v1/job-requisition/jobrq0000000001430"
        },
            "id": "jobrq00000000001542",
          "href": "http://<host_name>/v1/job-requisition/jobrq0000000001542"
        }
   ],
    "hasMoreResults": true,
    "itemsPerPage": 10,
    "totalResults": 0
}
```

# FIND DETAILS OF JOB REQUISITION (Using POST - Range based search)

## Overview

Returns the details of the job requisitions along with the ID, Name and the Deeplink URL based on the provided range based search criteria.

#### **Requires OAuth**

No

## Method

POST

# URL

https://< hostname-api.sabacloud.com > /v1/job-requisition/searchQuery?count=:count&startPage=:st

# **Calling Options**

# **Table 40: Calling Options**

| Name       | Description   | Sample Value  | Data<br>Type | Required? |
|------------|---|---|--------------|-----------|
| conditions | The search conditions.<br>You can use the follow~<br>ing fields:<br>JobRequisitionStatus<br>Location<br>requisitionNo<br>category<br>employmentType<br>costCenter<br>Domain<br>Id<br>You can use search oper~<br>ators such as:<br>=gt=<br>=ge=<br>=lt=<br>=lt=<br>=eq=<br>=ne= | <ul> <li>{ [{"name": "JobRequisitionStatus","operator":<br/>"==","value": "DRAFT"}] }</li> <li>{ [{"name": "Location","operator": "==","value":<br/>"locat 0000000001000"}] }</li> <li>{ [{"name": "requisitionNo","operator":<br/>"==","value": "1001"}] }</li> <li>{ [{"name": "category","operator": "==","value":<br/>"Not Specified"}] }</li> <li>{ [{"name": "category","operator": "==","value":<br/>"Not Specified"}] }</li> <li>{ [{"name": "employmentType","operator":<br/>"==","value": "Temporary"}] }</li> <li>{ [{"name": "costCenter","operator": "==","value":<br/>"Saba"}] }</li> <li>{ [{"name": "Domain","operator": "==","value":<br/>"domin 0000000000001"}] }</li> <li>{ [{"name": "Id","operator": "==","value": "jobrq<br/>000000000001001"}] }</li> </ul> | string       | Yes       |
| count      | The number of records per page.   | 10  | string       | No        |
| startPage  | The start page number for the list of records.  | 1   | string       | No        |

```
{
    [{"name": "title","operator": "==","value": "job 1"}]
}
```

#### **Return Values**

{

}

```
"facets": [],
"startIndex": 1,
"hasMoreResults": true,
"totalResults": 84,
"itemsPerPage": 10,
"results": [
    "id": "jobrq00000000001040",
    "href": "http://<host_name>/v1/job-requisition/jobrq00000000001040"
  },
    "id": "jobrq000000000001044",
    "href": "http://<host_name>/v1/job-requisition/jobrq00000000001044"
  },
    "id": "jobrq000000000001045",
    "href": "http://<host_name>/v1/job-requisition/jobrq000000000001045"
    "id": "jobrq000000000001046",
    "href": "http://<host_name>/v1/job-requisition/jobrq000000000001046"
  },
    "id": "jobrq00000000001047",
    "href": "http://<host_name>/v1/job-requisition/jobrq000000000001047"
    "id": "jobrq00000000001050",
    "href": "http://<host name>/v1/job-requisition/jobrg000000000001050"
    "id": "jobrq000000000001060",
    "id": "jobrq000000000001080",
    "href": "http://<host name>/v1/job-requisition/jobrq0000000000001080"
    "id": "jobrq00000000001081",
    "href": "http://<host_name>/v1/job-requisition/jobrq000000000001081"
    "id": "jobrq000000000001082",
    "href": "http://<host_name>/v1/job-requisition/jobrq000000000001082"
]
```

# UPDATE JOB REQUISITION

# Overview

Updates job requisition based on the job requisition's ID that is passed as the parameter.

# **Requires OAuth**

No

# Method

PUT

# URL

http://<hostname-api.sabacloud.com>/v1/job-requisition/:id

# **Calling Options**

# **Table 41: Calling Options**

| Name                | Description                             | Default Value   | Data Type | Required? |
|---------------------|---|---|-----------|-----------|
| id                  | The id of job requisition to be updated | jobrq000000000001020  | string    | Yes       |
| location            | Location                                | { "id":<br>"locat0000000000001000",<br>"displayName": "Loca~<br>tion1" }  | string    | No        |
| description         | Job Description                         | recruting test 01<br>job  | string    | No        |
| organization        | Organization                            | {" <b>id</b> ": <b>'bisu00000000000000000',</b><br>"displayName":"Busi~<br>nessUnit1"}  | string    | No        |
| requisitionTemplate | Job Requisition Template                | {"id":"re~<br>qtp000000000000001",<br>"displayName":null}   | string    | No        |
| employmentType      | Type of Employment                      | Contractor  | string    | No        |
| requisitionStage    | Requisition Stage                       | [{"isRequired": false,<br>"assessment": {"id":<br>"cninv00000000057714",<br>"displayName": "Job<br>0129-0131-<br>034520631472023431041"},<br>"stageName": "Pre as~<br>sessment", "se~<br>quence": 1, "type":<br>"PRE-ASSESS~<br>MENT"}] | string    | No        |

| Name                       | Description                       | Default Value   | Data Type | Required? |
|----------------------------|-----------------------------------|---|-----------|-----------|
| requiresTravel             | Requires Travel                   | false   | string    | No        |
| requiresResume             | Requires Resume                   | false   | string    | No        |
| requiresCoverLetter        | Allow Cover Letter                | false   | string    | No        |
| companyDescription         | Company Description               | Company Description<br>for the Requisition<br>Template  | string    | No        |
| businessJustification      | Business Justification            | Business justification  | string    | No        |
| requiresPreAssess~<br>ment | Requires Pre-Assessment           | false   | string    | No        |
| status                     | Status                            | DRAFT   | string    | No        |
| unpublishDays              | Unpublish Days                    | 30  | string    | No        |
| endOfMonth                 | End Of Month                      | false   | string    | No        |
| unpublishDate              | Unpublish Date                    | 2016-08-<br>16T00:00:00.000+0530  | string    | No        |
| pieChartSM                 | Pie Chart Type Smart Wid~<br>gets | <pre>{"type": "PIE-<br/>CHART", "identifier":<br/>"pieChartSM",<br/>"smartWidgetValues":<br/>[{"name": "java",<br/>"value": "kI18nSWIn~<br/>termediate", "parent":<br/>{"id": "smt~<br/>wd00000000001000",<br/>"displayName":<br/>"Skills"}}, {"name":<br/>"Js", "value":<br/>"kI18nSWExpert",<br/>"parent": {"id": "smt~<br/>wd00000000001000",<br/>"displayName":<br/>"Skills"}}],<br/>"smartWidget_visibil~<br/>ity": "ANYONE",<br/>"title": "Skills"}</pre> | string    | No        |
| barChartSM                 | Bar Chart Type Smart Wid~<br>gets | {"type": "BAR-<br>CHART", "identifier":<br>"barChartSM",<br>"smartWidgetValues":<br>[{"name": "java1",<br>"value": "2", "parent":<br>{"id": "smt~<br>wd00000000002034",   | string    | No        |

| Name          | Description        | Default Value  | Data Type | Required? |
|---------------|--------------------|--|-----------|-----------|
|               |                    | "displayName": "Ex~<br>perience"}}, {"name":<br>"Advanced Java1",<br>"value": "1", "parent":<br>{"id": "smt~<br>wd00000000002034",<br>"displayName": "Ex~<br>perience"}}],<br>"smartWidget_visibil~<br>ity": "ANYONE",<br>"title": "Experience"} |           |           |
| minExperience | Minimum Experience | 1  | string    | No        |
| maxExperience | Maximum Experience | 3  | string    | No        |
| interviewers  | Interviewers       | [{"stakeholder": {"id":<br>"em~<br>plo00000000201187",<br>"displayName": "cus~<br>tome_menu uone"},<br>"stakeholderType":<br>"INTERVIEWER"}]   | string    | No        |
| recruiter     | Recruiter          | [{"stakeholder": {"id":<br>"em~<br>plo000000000201187",<br>"displayName": "cus~<br>tome_menu uone"},<br>"stakeholderType":<br>"RECRUITER"}]  | string    | No        |
| industry      | Industry           | Software   | string    | No        |
| applicantType | Publish to         | INTERNAL-ONLY  | string    | No        |
| closedDate    | Close date         | 2016-08-<br>16T15:20:48.000+0530   | string    | No        |
| hrPartner     | HR Partner         | {"id": "em~<br>plo00000000001043",<br>"displayName":<br>"User3 Four3"}   | string    | No        |
| hiringManager | Hiring Manager     | {"id": "em~<br>plo00000000001000",<br>"displayName": "User<br>One"}  | string    | No        |
| minimumSalary | Minimum Salary     | 20000  | string    | No        |
| maximumSalary | Maximum Salary     | 50000  | string    | No        |

| Name                          | Description                                      | Default Value   | Data Type  | Required? |
|-------------------------------|--|---|------------|-----------|
| qualification                 | Qualifications                                   | BE  | string     | No        |
| salaryType                    | Salary Type                                      | YEARLY  | string     | No        |
| jobAdStyle                    | Job Advertisement Style                          | Cool  | string     | No        |
| noOfOpenings                  | Number of Hires                                  | 2   | strig      | No        |
| hireType                      | Hire Type  | NEW-HIRE  | enumerated | No        |
| employmentClassifica~<br>tion | Employment Classification                        | NOT-MENTIONED   | enumerated | No        |
| isEEOCReq                     | Is EEOC Required                                 | false   | string     | No        |
| unpublishType                 | Auto-Unpublish                                   | UNPUBLISH-DATE  | string     | No        |
| category                      | EEO Job Category                                 | Not Specified   | string     | No        |
| compensation                  | Compensation Displayed to<br>Candidates (Public) | 50000   | string     | No        |
| costCenter                    | Cost Center                                      | center1   | string     | No        |
| salaryCurrency                | Salary Currency                                  | {"irl":'ancy00000000000000167',<br>"displayName":"US<br>Dollars"} | string     | No        |
| publishedOn                   | Published On                                     | 2016-08-<br>16T04:00:32.000+0530                                  | string     | No        |
| јоbТуре                       | Job  | {"id": "job~<br>tp0000000200200"}                                 | string     | No        |
| notes                         | Notes  | Notes   | string     | No        |
| title                         | Job Title  | HPEngineer3   | string     | No        |
| submittedOn                   | Submitted On                                     | 2016-08-<br>15T15:00:32.000+0530                                  | string     | No        |
| approvedOn                    | Approved On                                      | 2016-08-<br>16T15:00:32.000+0530                                  | string     | No        |
| educationQualification        | Education Qualification                          | Qualification details   | string     | No        |
| isFeaturedJobExternal         | Mark the external job post~<br>ing featured      | true  | string     | No        |
| customValues                  | Custom Values                                    | {"custom9": "1", "cus~<br>tom0": "2", "cus~<br>tom3": "3", "cus~  | string     | No        |

| Name           | Description | Default Value   | Data Type | Required? |
|----------------|-------------|---|-----------|-----------|
|                |             | tom4": "4", "cus~<br>tom1": "5", "cus~<br>tom2": "6", "cus~<br>tom7": "7", "cus~<br>tom8": "8", "cus~<br>tom5": "9", "cus~<br>tom6": "10" } |           |           |
| securityDomain | Domain      | {"id": "dom~<br>in0000000000000001",<br>"displayName":<br>"world"}  | string    | No        |
| regions        | Regions     | [{ "associate": {"id":<br>"re~<br>gio00000000000001"},<br>"associateType": "RE~<br>GION"}]  | string    | No        |

```
{
   "location": {
      "id": "locat0000000000000000",
      "displayName": "Location1"
   },
   "description": "recruting test 01 job<\/p>",
   "organization": {
      "id": "bisut000000000000000",
      "displayName": "BusinessUnit1"
  },
   "requisitionTemplate": {
      "id": "reqtp00000000000001",
      "displayName": null
   },
   "employmentType": "Contractor",
   "requisitionStage": [
      {
         "isRequired": false,
         "assessment": {
            "id": "cninv00000000057714",
            "displayName": "Job 0129-0131-034520631472023431041"
         },
         "stageName": "Pre assessment",
         "sequence": 1,
         "type": "PRE-ASSESSMENT"
      }
   ],
   "requiresTravel": false,
   "requiresResume": false,
   "requiresCoverLetter": false,
   "companyDescription": "Company Description for the Requisition Template",
   "businessJustification": "Business justification",
   "requiresPreAssessment": false,
   "status": "DRAFT",
   "unpublishDays": 30,
   "endOfMonth": false,
```

```
"unpublishDate": "2016-08-16T00:00:00.000+0530",
"pieChartSM": {
   "type": "PIE-CHART",
   "identifier": "pieChartSM",
   "smartWidgetValues": [
      {
         "name": "java",
"value": "kI18nSWIntermediate",
         "parent": {
            "id": "smtwd000000000000000",
             "displayName": "Skills"
         }
      },
{
         "name": "Js",
         "value": "kI18nSWExpert",
         "parent": {
            "id": "smtwd000000000000000",
             "displayName": "Skills"
      }
   ],
   "smartWidget_visibility": "ANYONE",
   "title": "Skills"
},
"barChartSM": {
   "type": "BAR-CHART",
   "identifier": "barChartSM",
   "smartWidgetValues": [
      {
         "name": "javal",
"value": "2",
         "parent": {
             "id": "smtwd000000000002034",
             "displayName": "Experience"
      } ,
         "name": "Advanced Javal",
         "value": "1",
         "parent": {
             "id": "smtwd000000000002034",
             "displayName": "Experience"
      }
  ],
   "smartWidget_visibility": "ANYONE",
   "title": "Experience"
},
"minExperience": 1,
"maxExperience": 3,
"interviewers": [
   {
      "stakeholder": {
         "id": "emplo00000000201187",
         "displayName": "custome_menu uone"
      },
      "stakeholderType": "INTERVIEWER"
   }
],
"recruiter": [
   {
```

```
"stakeholder": {
         "id": "emplo00000000201187",
         "displayName": "custome_menu uone"
      },
      "stakeholderType": "RECRUITER"
   }
],
"industry": "Software",
"applicantType": "INTERNAL-ONLY",
"closedDate": "2016-08-16T15:20:48.000+0530",
"hrPartner": {
   "id": "emplo00000000001043",
   "displayName": "User3 Four3"
"hiringManager": {
   "id": "emplo000000000000000",
   "displayName": "User One"
},
"minimumSalary": 20000,
"maximumSalary": 50000,
"qualification": "BE<\/p>",
"salaryType": "YEARLY",
"jobAdStyle": "Cool",
"noOfOpenings": 2,
"hireType": "NEW-HIRE",
"employmentClassification": "NOT-MENTIONED",
"isEEOCReq": false,
"unpublishType": "UNPUBLISH-DATE",
"category": "Not Specified",
"compensation": 50000,
"costCenter": "center1",
"salaryCurrency": {
   "id": "crncy00000000000167",
   "displayName": "US Dollars"
},
"publishedOn": "2016-08-16T04:00:32.000+0530",
"jobType": {
   "id": "jobtp0000000200200"
},
"notes": "Notes",
"title": "HPEngineer3",
"submittedOn": "2016-08-15T15:00:32.000+0530",
"approvedOn": "2016-08-16T15:00:32.000+0530",
"educationQualification": "Qualification details",
"isFeaturedJobExternal": true,
"customValues": {
   "custom9": "1",
   "custom0": "2",
   "custom3": "3",
  "custom4": "4",
   "custom1": "5",
   "custom2": "6",
   "custom7": "7",
   "custom8": "8",
   "custom5": "9",
   "custom6": "10"
},
"securityDomain": {
   "id": "domin00000000000001",
   "displayName": "world"
}
```

}



**Note:** For more details on this see **REST** API Reference.

#### Use case

This enhancement provides a REST API that allows retrieving as well as updating the job details that were created in the Saba application for integration with downstream systems.

# API to retrieve public/private attachments

## How did it work?

There were no REST APIs that would allow retrieving public/private attachments.

#### How does it work now?

The following new REST API will now allow retrieving public/private attachments:

## FIND ALL PUBLIC/PRIVATE ATTACHMENTS

#### **Overview**

Returns all public/private attachments for a given owner ID.

## **Requires OAuth**

No

#### Method

GET

#### URL

https://<hostname-api.sabacloud.com>/v1/attachments?ownerId=:ownerId&isPrivate=:isPrivate

#### **Calling Options**

## **Table 42: Calling Options**

| Name      | Description  | Sample Value         | Data Type  | Required? |
|-----------|--|----------------------|------------|-----------|
| ownerId   | Owner's ID of the attach~<br>ment  | locat000000000200040 | string     | Yes       |
| isPrivate | Flag to get public/private at~ tachments.  | false                | enumerated | No        |
|           | "EnumeratedList": [ "true",<br>"false" ]   |                      |            |           |
|           | If a value is not provided for<br>this parameter, the API will<br>fetch all (public and private)<br>the attachments for the given<br>owner ID. |                      |            |           |

#### **Return Values**

```
Γ
  "list",
  [
    {
      "@type": "com.saba.rest.dto.AttachmentDTO",
      "id": "notdc00000000224745",
      "file-name": "Penguins",
      "locale": {
        "@type": "com.saba.rest.dto.LocaleDTO",
        "name": "English",
        "id": "local000000000000001"
      },
      "createdBy": "emplo000000000000000",
      "createdId": "uone",
      "owner-id": "locat00000000200040",
      "mime-type": "image/jpeg",
      "attachment-name": "Publicattachment",
      "fileExtension": ".jpg",
      "url": "http://<hostname>/Saba/Web/Main?ssp=pageIsIgnored
            &doIt=showAttachment&showbinary=true&attachId
            =.-.CB7D9D9C6E847507EE9693C641297AD88E23482C4B65A40527E479
            56338840ED-.-&mimeType=image/jpeg&deepLinkCertificate=3135363
            6386337653832345E235E756F6E655E235E53616261536974655E235E656E
            5F55535E235E536162615E235E24414240302C02146974AD81F8144FBEDD9
            905420AE3DD07BB2FECBE02145670EEA450861BB6C9AE67AB3FB6C56E9B4A163B
            &isAttachment=true",
      "category": "Map",
      "is-url": false,
      "audit-reason": null,
      "is-private": false
    }
  ]
]
```

**Note:** For more details on this see **REST API Reference**.

#### Use case

This enhancement provides a REST API that allows retrieving attachments from the job object that can be shown on the Profile page and under Career Planning.

# APIs to retrieve social interactions of a user

#### How did it work?

There were no REST APIs that would allow retrieving social interactions of a user.

How does it work now?

The following new REST APIs will now allow retrieving social interactions of a user:

1. GET SOCIAL INTERACTIONS OF A USER

# **GET SOCIAL INTERACTIONS OF A USER**

## Overview

Retrieves the social interactions such as clicks, likes, comments and shares of a user.

# **Requires OAuth**

No

# Method

GET

# URL

https://<hostname-api.sabacloud.com>/v1/social/metrics/:personId?resource=(:resources)&from\_date=:from\_date&to\_date=:to\_date

# URL (using lookup)

https://<hostname-api.sabacloud.com>/v1/social/metrics/usemame=<usemame>?resource=(:resources)&from\_date=:from\_date&to\_date=:to\_date

# **Calling Options**

# **Table 43: Calling Options**

| Name      | Description  | Default Value | Data Type | Required? |
|-----------|--|---------------|-----------|-----------|
| personId  | ID of the user   |               | string    | Yes       |
| resources | List of resources:<br>idea<br>file<br>url<br>blog<br>contributions<br>discussions<br>feedback<br>workspace<br>connections<br>views<br>videos |               | string    | Yes       |
| from_date | From date<br>Note: The supported<br>date format: YYYY-<br>MM-DD.   |               | string    | Yes       |
| to_date   | To date<br>Note: The supported<br>date format: YYYY-<br>MM-DD.   |               | string    | Yes       |

#### Detail of metrics fields for each resource type in output

The following are the fields for each resource type in output:

- 1. Connections
  - a. Total followers
  - b. Total followed
  - c. Grand total of followers (regardless of date range)
  - **d.** Grand total of followed (regardless of date range)
- 2. Contributions
  - a. Total ideas contributed
  - b. Total bookmarks contributed
  - c. Total discussion initiated
  - **d.** Total file contributed
  - e. Total url contributed
  - f. Total blog contributed
  - g. Total video contributed
- 3. Discussions
  - a. Total votes for discussion
  - **b.** Total number of replies on discussion
  - c. Total number of tags on discussion
- 4. Ideas
  - a. Total number of tags on ideas
  - b. Total number of Votes for idea
    - Note: If a user gives two positive votes and two negative votes, then this value appears as 0. It is also 0, if the user does not have any votes.
  - c. Total number of Views for idea
  - d. Total number of comments for idea
- 5. File
  - a. Number of tags on file
  - b. Count of Ratings for File
  - c. Total comments for File
- 6. URL
  - a. Number of tags on URL
  - b. Count of Ratings for URL
  - c. Total comments for URL
- 7. Blogs
  - a. Number of tags on Blogs
  - b. Number of Ratings for Blog
  - c. Total comments for Blog
- 8. Video
  - a. Number of Tags on Video
  - b. Count of Ratings for Video
  - **c.** Total comments for Video

- 9. Workspace
  - a. Number of Tags on Workspaces
  - b. Count of Ratings for Workspaces

#### 10. Feedback

- a. Positive votes by person
- b. Negative votes by person

#### 11. Views

a. Number of Views by person for videos, page and blogpost.

#### **Return Values**

```
{
   "followers":10,
   "followed":5,
   "total_followers":20,
   "total_followed":15,
   "total_ideas_contributed":2,
   "total_bookmarks_contributed":5,
   "total_discussion_initiated":2,
   "total_files_contributed":2,
   "total_urls_contributed":2,
   "total_blogs_contributed":3,
   "total_videos_contributed":5,
   "total_issues_contributed":7,
   "total_votes_for_discussion":7,
   "total_replies_on_discussion":9,
   "count_tags_on_discussion":5,
   "total_votes_for_idea":5,
   "total_comment_for_idea":4,
   "total_tags_for_idea":8,
   "total_views_on_idea":10,
   "number_of_tags_on_file":0,
   "count_of_ratings_for_file":0,
   "file_comment_count":0,
   "number_of_tags_on_url":0,
   "count_of_ratings_for_url":0,
   "url_comment_count":0,
   "number_of_tags_on_blogs":0,
   "count_of_blog_ratings":0,
   "blog_count_of_comments":0,
   "number_of_tags_on_videos":0,
   "count_of_video_ratings":0,
   "video_count_of_comments":0,
   "count_tags_on_workspaces":0,
   "count_of_workspace_ratings":0,
   "count_positivevotes_by_psn":30,
   "count_negativevotes_by_psn":10,
   "total_views":25
}
```

**Note:** For more details on this see **REST** API Reference.

#### Use case

Customers can now measure how closely their learners are interacting with Saba Cloud and possibly give them badges and other rewards.

# APIs to retrieve, create and manage resources on the Saba Activity Stream

#### How did it work?

There were no REST APIs that would allow retrieving, creating and managing the resources on the Saba Activity Stream.

## How does it work now?

The following new REST APIs will now allow retrieving, creating and managing the resources on the Saba Activity Stream:

- 1. POST IDEA TO SABA ACTIVITY STREAM
- 2. POST ISSUE TO SABA ACTIVITY STREAM
- 3. POST LINK TO SABA ACTIVITY STREAM
- 4. POST FILE TO SABA ACTIVITY STREAM
- 5. UPDATE IDEA POSTED ON SABA ACTIVITY STREAM
- 6. UPDATE ISSUE POSTED ON SABA ACTIVITY STREAM
- 7. UPDATE LINK POSTED ON SABA ACTIVITY STREAM
- 8. UPDATE FILE POSTED ON SABA ACTIVITY STREAM
- 9. DELETE IDEA POSTED ON SABA ACTIVITY STREAM

10. DELETE ISSUE POSTED ON SABA ACTIVITY STREAM

11. DELETE LINK POSTED ON SABA ACTIVITY STREAM

12. DELETE FILE POSTED ON SABA ACTIVITY STREAM

# POST IDEA TO SABA ACTIVITY STREAM

#### Overview

Posts an idea to the Saba Activity Stream.

#### **Requires OAuth**

No

# Method

POST

# URL

https://<hostname-api.sabacloud.com>/v1/social/resource

# **Calling Options**

# **Table 44: Calling Options**

| Name        | Description              | Default Value | Data Type | Required? |
|-------------|--------------------------|---------------|-----------|-----------|
| name        | Idea title               |               | string    | Yes       |
| owner       | Owner of the Idea.       |               | string    | No        |
| description | Description of the Idea. |               | string    | Yes       |

| Name           | Description   | Default Value | Data Type  | Required? |
|----------------|---|---------------|------------|-----------|
| disableSharing | Disable users to share this idea.   | false         | Boolean    | No        |
| shareWith      | List of entity with whom idea is to be shared. It could be person and/or group.                               |               | string     | No        |
| language       | Language of the idea.   |               | string     | No        |
| notify         | Whom to notify, it's value could be person, group or peopleandgroup.  |               | enumerated | No        |
| tag            | ag Tags on the idea.  |               | string     | No        |
| resourceType   | <b>resourceType</b> is mandatory<br>for idea, issue and link re~<br>source. This is not required<br>for file. |               | string     | Yes       |

```
"name":"Idea_test_07_29_005",
 "description":"Idea_test_07_29_005",
 "owner":{
  "id":"emplo000000000000000",
  "displayName":"Uone"
 },
 "language":{
  "id":"lange000000000000001",
  "displayName":"English"
 },
 "disableSharing":true,
 "shareWith":[
   {
   "id":"persn000000000001000",
   "displayName":"CSINDHAV1",
   "type":"person",
   "role":"viewer"
  }
],
 "notify":"people",
 "tag":[
   "mytag3",
   "mytag4"
 ]
}
```

#### **Return Values**

{

```
"id": "idear00000000001170",
```

```
"displayName": "Idea_test_08_01_010"
```

# POST ISSUE TO SABA ACTIVITY STREAM

## Overview

}

Posts an issue to the Saba Activity Stream.

# **Requires OAuth**

No

#### Method

POST

# URL

https://< hostname-api.sabacloud.com > /v1/social/resource

## **Calling Options**

## Table 45: Calling Options

| Name           | Description   | Default Value | Data Type  | Required? |
|----------------|---|---------------|------------|-----------|
| name           | Issue title   |               | string     | Yes       |
| owner          | Owner of the Issue.   |               | string     | No        |
| description    | Description of the Issue.   |               | string     | Yes       |
| disableSharing | Disable users to share this issue.  | false         | Boolean    | No        |
| shareWith      | List of entity with whom is~<br>sue is to be shared. It could<br>be person and/or group.                      |               | string     | No        |
| language       | Language of the issue.  |               | string     | No        |
| notify         | Whom to notify, it's value<br>could be person, group or<br>peopleandgroup.                                    |               | enumerated | No        |
| tag            | Tags on the issue.  |               | string     | No        |
| resourceType   | <b>resourceType</b> is mandatory<br>for idea, issue and link re~<br>source. This is not required<br>for file. |               | string     | Yes       |

```
{
"resourceType": "issue",
"name":"Issue_test_07_29_005",
 "description":"Issue_test_07_29_005",
 "owner":{
 "id": "emplo000000000000000",
 "displayName":"Uone"
 },
 "language":{
 "id":"lange000000000000001",
 "displayName":"English"
 },
 "disableSharing":true,
 "shareWith":[
   {
    "id":"persn00000000001000",
    "displayName":"CSINDHAV1",
   "type": "person",
    "role": "viewer"
  }
],
"notify":"people",
"tag":[
  "mytag3",
   "mytag4"
]
}
```

#### **Return Values**

```
{
   "id": "issue000000000001044",
   "displayName": "Issue_test_07_29_005"
}
```

# POST LINK TO SABA ACTIVITY STREAM

#### Overview

Posts a link to the Saba Activity Stream.

#### **Requires OAuth**

No

#### Method

POST

#### URL

https://<hostname-api.sabacloud.com>/v1/social/resource

## **Calling Options**

### **Table 46: Calling Options**

| Name           | Description   | Default Value | Data Type  | Required? |
|----------------|---|---------------|------------|-----------|
| name           | Link title  |               | string     | Yes       |
| url            | URL of the link.  |               | string     | Yes       |
| owner          | Owner of the link.  |               | string     | No        |
| description    | Description of the Link.  |               | string     | Yes       |
| disableSharing | Disable users to share this link.   | false         | Boolean    | No        |
| language       | Language of the link.   |               | string     | No        |
| shareWith      | List of entity with whom<br>link is to be shared. It could<br>be person and/or group.                         |               | string     | No        |
| notify         | Whom to notify, it's value<br>could be person, group or<br>peopleandgroup.                                    |               | enumerated | No        |
| tag            | Tags on the link.   |               | string     | No        |
| resourceType   | <b>resourceType</b> is mandatory<br>for idea, issue and link re~<br>source. This is not required<br>for file. |               | string     | Yes       |

#### **Request Body**

```
"name":"link_test_07_29_005",
 "description":"link_test_07_29_005",
 "owner":{
 "id":"emplo0000000000000000",
 "displayName":"Uone"
 },
 "language":{
 "id":"lange000000000000001",
 "displayName":"English"
{
   "id":"persn00000000001000",
   "displayName":"CSINDHAV1",
   "type":"person",
"role":"viewer"
  }
 ],
```

```
"notify":"people",
"tag":[
    "mytag3",
    "mytag4"
]
}
```

#### **Return Values**

```
{
    "id": "simrs000000000001042",
    "displayName": "link_test_07_29_005"
}
```

#### POST FILE TO SABA ACTIVITY STREAM

Posts a file to the Saba Activity Stream.

Note: For the file resource, the file must be added as form data of type file. Only one file as attachment will be accepted. In case more than one file is passed in the input then only the first file will be considered, remaining files will be ignored.

Text details for the file should not have any new line character or any special character in between two different attributes.

Though there is no limit set for the size of the file that you post, a file exceeding 3 MB may get timed out.

#### **Requires OAuth**

No

#### **Content Type**

Consumes: Multipart-form-data, Produces: application/json

#### Method

POST

#### URL

https://<hostname-api.sabacloud.com>/v1/social/file

#### **Calling Options**

#### Table 47: Calling Options

| Name           | Description                       | Default Value | Data Type | Required? |
|----------------|-----------------------------------|---------------|-----------|-----------|
| name           | Link title                        |               | string    | Yes       |
| owner          | Owner of the file.                |               | string    | No        |
| description    | Description of the file.          |               | string    | Yes       |
| disableSharing | Disable users to share this file. | false         | Boolean   | No        |

| Name      | Description   | Default Value | Data Type | Required? |
|-----------|---|---------------|-----------|-----------|
| shareWith | List of entity with whom file<br>is to be shared. It could be<br>person and/or group. |               | string    | No        |
| language  | Language of the file.   |               | string    | No        |
| notify    | Whom to notify, it's value<br>could be person, group or<br>peopleandgroup.            |               | string    | No        |
| tag       | Tags on the file.   |               | string    | No        |

```
{
 "name":"file_test_07_29_005",
 "description":"file_test_07_29_005",
 "owner":{
  "id":"emplo0000000000000000",
  "displayName": "Uone"
},
"language":{
    language":
  "id":"lange000000000000001",
  "displayName":"English"
 },
 "disableSharing":true,
 "shareWith":[
   {
    "id":"persn000000000001000",
    "displayName":"CSINDHAV1",
    "type":"person",
"role":"viewer"
   }
 ],
 "notify": "people",
 "tag":[
   "mytag3",
   "mytag4"
 ]
}
```

#### **Return Values**

```
{
    "id": "simrs000000000001042",
    "displayName": "link_test_07_29_005"
}
```

## UPDATE IDEA POSTED ON SABA ACTIVITY STREAM

#### Overview

Updates an issue posted on the Saba Activity Stream.

# **Requires OAuth**

No

# Method

PUT

# URL

https://<hostname-api.sabacloud.com>/v1/social/resource/:resourceId

# **Calling Options**

# Table 48: Calling Options

| Name               | Description          |                   | Default Value                      | Data Type | Required?  |    |
|--------------------|----------------------|-------------------|------------------------------------|-----------|------------|----|
| name               | Idea title           |                   |                                    |           | string     | No |
| owner              | Owner of             | f the Idea        | 1.                                 |           | string     | No |
| description        | Descripti            | ion of the        | e Idea.                            |           | string     | No |
| implementationLead | Impleme<br>the Idea. | ntation L         | eader of                           |           | string     | No |
| state              | State of i           | dea.              |                                    | New       | enumerated | No |
|                    | Possible             | status:           |                                    |           |            |    |
|                    | State Value          | Descrip~<br>tion  |                                    |           |            |    |
|                    | New                  | lew 1<br>Open 101 | New                                |           |            |    |
|                    | Open                 |                   | Being<br>Re~<br>viewed             |           |            |    |
|                    |                      | 102               | Re~<br>viewed                      |           |            |    |
|                    |                      | 103               | Accep~<br>ted                      |           |            |    |
|                    |                      | 104<br>105        | In Pro~<br>gress                   |           |            |    |
|                    |                      |                   | Par~<br>tially<br>Imple~<br>mented |           |            |    |
|                    | Onhold               | 201               | On<br>Hold                         |           |            |    |

| Name           | Description  |                   |  | Default Value | Data Type  | Required? |
|----------------|--|-------------------|--|---------------|------------|-----------|
|                | closed   | 301<br>302<br>303 | Fully<br>Imple~<br>mentedClosedRejec~<br>ted |               |            |           |
| status         | Status of idea. Though its validity depends on the status selected for the idea. |                   |  | 1             | enumerated | No        |
| disableSharing | Disable users to share this idea.  |                   |  | false         | Boolean    | No        |
| notify         | Whom to notify, it's value<br>could be person, group or<br>peopleandgroup.       |                   |  |               | enumerated | No        |
| language       | Language of the idea.  |                   |  |               | string     | No        |
| resourceId     | resourceId is the ID of idea<br>id   |                   |  |               | string     | Yes       |

```
"description":"Idea_test_08_01_010 updated4",
 "owner":{
"id":"emplo00000000000000000",
  "displayName":"Uone"
 },
"language":{
  "id":"lange000000000000001",
  "displayName":"English"
 },
 "shareWith":[
 {
"id":"",
   "displayName": "cone",
   "type":"person",
   "role":"co-owner"
  }
 ],
 "state": "open",
 "status":"201",
 "implementationLead":{
  "id":"persn000000000001005",
  "displayName":"csindhav6"
 },
 "disableSharing":false,
```

```
"notify":"people"
}
```

# UPDATE ISSUE POSTED ON SABA ACTIVITY STREAM

## Overview

Updates an issue posted on Saba Activity Stream.

# **Requires OAuth**

No

#### Method

PUT

# URL

https://< hostname-api.sabacloud.com > /v1/social/resource/:resourceId

# **Calling Options**

# Table 49: Calling Options

| Name               | Description                         |                  |                        | Default Value | Data Type | Required? |
|--------------------|-------------------------------------|------------------|------------------------|---------------|-----------|-----------|
| name               | Issue tit                           | le               |                        |               | string    | No        |
| owner              | Owner of                            | of the Issu      | e.                     |               | string    | No        |
| description        | Descript                            | tion of the      | e Issue.               |               | string    | No        |
| implementationLead | Impleme<br>the Issue                | entation L<br>e. | eader of               |               | string    | No        |
| state              | State of issue.<br>Possible status: |                  | New                    | enumerated    | No        |           |
|                    | State                               | Value            | Descrip~<br>tion       |               |           |           |
|                    | New                                 | 1                | New                    |               |           |           |
|                    | Open                                | 101              | Being<br>Re~<br>viewed |               |           |           |
|                    |                                     | 102              | Re~<br>viewed          |               |           |           |
|                    |                                     | 103              | Accep~<br>ted          |               |           |           |

| Name           | Description   |             | Default Value                      | Data Type  | Required?  |     |
|----------------|---|-------------|------------------------------------|------------|------------|-----|
|                |   | 104         | In Pro~<br>gress                   |            |            |     |
|                |   | 105         | Par~<br>tially<br>Imple~<br>mented |            |            |     |
|                | Onhold  | 201         | On<br>Hold                         |            |            |     |
|                | closed  | 301         | Fully<br>Imple~<br>mented          |            |            |     |
|                |   | 302         | Closed                             |            |            |     |
|                |   | 303         | Rejec~<br>ted                      |            |            |     |
| status         | Status of issue. Though its validity depends on the status selected for the issue . |             |                                    | 1          | enumerated | No  |
| disableSharing | Disable u<br>issue.   | isers to s  | hare this                          | false      | Boolean    | No  |
| notify         | Whom to notify, it's value<br>could be person, group or<br>peopleandgroup.          |             |                                    | enumerated | No         |     |
| language       | Languag   | e of the i  | ssue.                              |            | string     | No  |
| resourceId     | resourcel   | ld is the l | D of issue                         |            | string     | Yes |

```
"id":"",
"displayName":"cone",
"type":"person",
"role":"co-owner"
}
],
"state":"open",
"status":"201",
"implementationLead":{
"id":"persn00000000001005",
"displayName":"csindhav6"
},
"disableSharing":false,
"notify":"people"
}
```

# UPDATE LINK POSTED ON SABA ACTIVITY STREAM

#### Overview

Updates a link posted on the Saba Activity Stream.

## **Requires OAuth**

No

#### Method

PUT

## URL

https://<hostname-api.sabacloud.com>/v1/social/resource/:resourceId

#### **Calling Options**

#### **Table 50: Calling Options**

| Name           | Description   | Default Value | Data Type | Required? |
|----------------|---|---------------|-----------|-----------|
| name           | Link title  |               | string    | No        |
| url            | URL of the link.  |               | string    | No        |
| owner          | Owner of the link.  |               | string    | No        |
| description    | Description of the link.  |               | string    | No        |
| shareWith      | List of entity with whom<br>link is to be shared. It could<br>be person and/or group. |               | string    | No        |
| disableSharing | Disable users to share this link.   | false         | Boolean   | No        |

| Name       | Description  | Default Value | Data Type  | Required? |
|------------|--|---------------|------------|-----------|
| notify     | Whom to notify, it's value<br>could be person, group or<br>peopleandgroup. |               | enumerated | No        |
| language   | Language of the link.  |               | string     | No        |
| tag        | Tags on the link.  |               | string     | No        |
| resourceId | resourceId is the ID of link id  |               | string     | Yes       |

```
{
"name":"link_test_08_01_010",
 "description":"link_test_08_01_010 updated4",
 "url":"https://dqlearning.sabacloud.com",
 "owner":{
 "id": "emplo000000000000000",
  "displayName":"Uone"
},
 "language":{
 "id":"lange000000000000001",
  "displayName":"English"
 },
 "shareWith":[
 {
"id":"",
   "displayName": "cone",
   "type":"person",
   "role": "co-owner"
 }
],
 "disableSharing":false,
 "notify":"people",
                                        "tag":[
   "mytag3",
   "mytag4"
]
}
```

# UPDATE FILE POSTED ON SABA ACTIVITY STREAM

#### Overview

Updates a file posted on the Saba Activity Stream.

Note: For the file resource, the file must be added as form data of type file. Only one file as attachment will be accepted. In case more than one file is passed in the input then only the first file will be considered, remaining files will be ignored.

Text details for the file should not have any new line character or any special character in between two different attributes.

Though there is no limit set for the size of the file that you post, a file exceeding 3 MB may get timed out.

## **Requires OAuth**

No

# **Content Type**

Consumes: Multipart-form-data, Produces: application/json

# Method

PUT

# URL

https://<hostname-api.sabacloud.com>/v1/social/file/:fileId

# **Calling Options**

# **Table 51: Calling Options**

| Name           | Description   | Default Value | Data Type  | Required? |
|----------------|---|---------------|------------|-----------|
| fileId         | File Id   |               | string     | Yes       |
| name           | File title  |               | string     | No        |
| owner          | Owner of the file.  |               | string     | No        |
| description    | Description of the file.  |               | string     | No        |
| shareWith      | List of entity with whom file<br>is to be shared. It could be<br>person and/or group. |               | string     | No        |
| disableSharing | Disable users to share this file.   | false         | Boolean    | No        |
| notify         | Whom to notify, it's value<br>could be person, group or<br>peopleandgroup.            |               | enumerated | No        |
| language       | Language of the file.   |               | string     | No        |
| tag            | Tags on the file.   |               | string     | No        |

# **Request Body**

```
{
    "name":"file_test_08_01_010",
    "description":"file_test_08_01_010 updated4",
    "owner":{
        "id":"emplo00000000000000",
        "displayName":"Uone"
    },
    "language":{
        "id":"lange0000000000001",
        "
}
```

```
"displayName":"English"
},
"shareWith":[
{
    "id":"",
    "displayName":"cone",
    "type":"person",
    "role":"co-owner"
    }
],
"disableSharing":false,
"notify":"people",
    "mytag3",
    "mytag4"
]
}
```

"tag":[

# DELETE IDEA POSTED ON SABA ACTIVITY STREAM

#### Overview

Deletes an issue posted on the Saba Activity Stream.

#### **Requires OAuth**

No

#### Method

DELETE

## URL

https://<hostname-api.sabacloud.com>/v1/social/resource/:resourceId

#### **Calling Options**

## **Table 52: Calling Options**

| Name       | Description                      | Default Value        | Data Type | Required? |
|------------|----------------------------------|----------------------|-----------|-----------|
| resourceId | resourceId is the ID of the idea | idear000000000001107 | string    | Yes       |

## DELETE ISSUE POSTED ON SABA ACTIVITY STREAM

#### Overview

Deletes an issue posted on Saba Activity Stream.

#### **Requires OAuth**

No

#### Method

DELETE
# URL

https://<hostname-api.sabacloud.com>/v1/social/resource/:resourceId

### **Calling Options**

# Table 53: Calling Options

| Name       | Description                       | Default Value            | Data Type | Required? |
|------------|-----------------------------------|--------------------------|-----------|-----------|
| resourceId | resourceId is the ID of the issue | is~<br>sue00000000001046 | string    | Yes       |

# DELETE LINK POSTED ON SABA ACTIVITY STREAM

### Overview

Deletes a link posted on the Saba Activity Stream.

### **Requires OAuth**

No

### Method

DELETE

### URL

https://<hostname-api.sabacloud.com>/v1/social/resource/:resourceId

# **Calling Options**

### Table 54: Calling Options

| Name       | Description                      | Default Value | Data Type | Required? |
|------------|----------------------------------|---------------|-----------|-----------|
| resourceId | resourceId is the ID of the link |               | string    | Yes       |

# DELETE FILE POSTED ON SABA ACTIVITY STREAM

### Overview

Deletes a file posted on the Saba Activity Stream.

### **Requires OAuth**

No

### Method

DELETE

### URL

https://<hostname-api.sabacloud.com>/v1/social/file/:fileId

#### **Calling Options**

#### **Table 55: Calling Options**

| Name   | Description | Default Value | Data Type | Required? |
|--------|-------------|---------------|-----------|-----------|
| fileId | File Id     |               | string    | Yes       |

**Note:** For more details on this see **REST API Reference**.

Use case

This enhancement provides a REST API that allows creating and managing the resources that were created in the Saba application.

# APIs to create, update and delete Smartlists

#### How did it work?

There were no REST APIs that would allow creating, updating and deleting Smartlists.

How does it work now?

The following new REST APIs will now allow creating, updating and deleting Smartlists:

- 1. CREATE A NEW SMARTLIST
- **2.** UPDATE DETAILS OF A SMARTLIST
- **3.** DELETE A SMARTLIST

Note: Only users with the People admin privilege will be able to create, update or delete Smarlists using these APIs.

### **CREATE A NEW SMARTLIST**

#### Overview

Allows creating a new smart list.

#### Method

POST

### **Requires OAuth**

No

### URL

https://<hostname-api.sabacloud.com>/v1/smartlists

#### **Calling Options**

#### **Table 56: Calling Options**

| Name        | Description   | Sample Value  | Data Type | Required? |
|-------------|---|---|-----------|-----------|
| name        | The name of the Smartlist                                 | Test Smartlist  | string    | Yes       |
| description | The short description about the Smartlist                 |   | string    | No        |
| split       | The domain for the Smartlist<br>Supports lookup (Domain). | {<br>"id": "dom~<br>in000000000001",<br>"name":<br>"world"<br>} | string    | Yes       |
| criteria    | Criteria of Smartlist                                     |   | string    | No        |

### **Request Body**

```
{
"name": "test SL",
"description": "Test smartlist creation using API",
"split": {
 "id": "domin000000000000001",
 "displayName":"world"
},
"criteria": {
 "segments": [{
  "entity": "Group 1",
  "segments": [{
   "excluded": false,
   "key": "language",
   "operator": {
    "key": "in"
   },
    "value": ["lange00000000000001"]
  }, {
"key": "OR"
   }, {
   "excluded": false,
   "key": "curricula_id",
    "operator": {
    "key": "in"
   },
"value": ["curra0000000001141"]
  }]
 }, {
  "key": "AND"
 }, {
    "entity": "Group 2",
   "segments": [{
   "excluded": false,
    "key": "Location_custom2",
    "operator": {
    "key": "eq"
```

|          | },<br>"value": | "test" |
|----------|----------------|--------|
| }<br>} ] | ]              | 0020   |
| }        |                |        |

# UI representation of the Request Body

|                 |   |                   |                       |              | * = required   |
|-----------------|---|-------------------|-----------------------|--------------|----------------|
| Name*           | test sL                                     |                   |                       |              |                |
| Description     | Test smartlist creation                     | on using API      |                       |              |                |
|                 | Character Limit : 500<br>Remaining characte | )<br>r count: 467 |                       |              |                |
| Domain*         | world                                       | ٩, ۵              | £                     |              |                |
|                 |   |                   |                       |              | Collapse all 👻 |
| 👻 Group 1 🧪     |   |                   |                       |              | ۹ 🗄 🗙          |
| Include -       | Language 👻                                  | Language 👻        | Any of 🔹              | English ×    | o×             |
| OR AND          |   |                   |                       |              |                |
| Include •       | Curriculum                                  | Curriculum        | Any of 🔹              | CleanCurr1 × | 0×             |
| + Add Statement |   |                   |                       |              |                |
| OR AND          |   |                   |                       |              |                |
| 👻 Group 2 🧪     |   |                   |                       |              | ۹ 🛛 🗙          |
| Include -       | Address/Location •                          | Custom2           | Exactly •<br>matching | test         |                |
| + Add Statement |   |                   |                       |              |                |

# Figure 26: UI representation of the Request Body

# Supported Operator Key

The following table lists the operator keys that this API supports.

| Кеу | Description (UI Label) |
|-----|------------------------|
| AND | AND                    |
| OR  | OR                     |
| NOT | NOT                    |
| eq  | MATCHES                |
| neq | NOT_MATCHES            |
| all | ALL_OF                 |
| in  | ANY_OF                 |

| Кеу        | Description (UI Label) |
|------------|------------------------|
| nin        | NOT_ANY_OF             |
| bef        | BEFORE                 |
| onbefore   | ON_OR_BEFORE           |
| aft        | AFTER                  |
| onafter    | ON_OR_AFTER            |
| lt         | LESS_THAN              |
| lte        | LESS_THAN_EQUALS       |
| gt         | GREATER_THAN           |
| gte        | GREATER_THAN_EQUALS    |
| betnext    | WITHIN_NEXT            |
| betlast    | WITHIN_LAST            |
| startswith | STARTS_WITH            |
| befdays    | BEFORE_DAYS            |
| aftdays    | AFTER_DAYS             |

# Supported Segment Key

The following table lists the segment keys that this API supports.

| Component | Кеу               | Description (UI Label) |
|-----------|-------------------|------------------------|
| Profile   | per_id            | Person                 |
|           | person_domain_id  | Domain                 |
|           | person_manager_id | Manager                |
|           | person_start_date | Start Date             |
|           | prsn_status       | Status                 |
|           | prsn_gender       | Gender                 |
|           | prsn_dob          | Date of Birth          |
|           | prsn_ethnicity    | Ethnicity              |
|           | prsn_religion     | Religion               |

| Component              | Кеу                      | Description (UI Label)         |
|------------------------|--------------------------|--------------------------------|
|                        | prsn_pq                  | PQ Score                       |
|                        | prsn_prof_compl          | Percent Profile Completed      |
|                        | prsn_alt_mgr             | Alternate Manager              |
|                        | person_emp_type          | Employee Type                  |
|                        | person_locale            | Locale                         |
|                        | person_type              | Person Type                    |
|                        | person_mgr               | Manager Access                 |
|                        | per_city                 | City                           |
|                        | per_state                | State                          |
|                        | per_country              | Country                        |
|                        | per_zip_code             | Zip / Postal code              |
|                        | Person, Internal_custom0 | Custom 0                       |
| Language               | language                 | Language                       |
| External Certification | ext_cert_name            | Name                           |
|                        | ext_cert_inst            | Accrediting Institution        |
|                        | ext_cert_acqon           | Acquired on Date               |
|                        | ext_cert_expon           | Expired on Date                |
| Internal Certification | int_cert_id              | Certification                  |
| Job / Career           | job_current_id           | Current Jobtype                |
|                        | job_desired_id           | Next Jobtype                   |
|                        | job_family_id            | Job Family                     |
|                        | job_potential_id         | Potential Job                  |
|                        | int_wrkhis_job_id        | Internal Work History          |
|                        | int_wrkhis_org_id        | Previous Internal Organization |
|                        | int_wrkhis_loc           | Previous work location         |

| Component           | Кеу                                 | Description (UI Label)       |
|---------------------|-------------------------------------|------------------------------|
|                     | ext_wrkhis_employer                 | External work history        |
|                     | JobType_custom0                     | Custom 0                     |
| Role                | Role_custom0                        | Custom 0                     |
|                     | Job_role_id                         | Role                         |
| Skill / Experties   | skill_id                            | Skill                        |
|                     | Competency_custom0                  | Custom 0                     |
| Performance         | pot_rating                          | Potential rating             |
|                     | ret_risk                            | Retirement Risk              |
|                     | flt_risk                            | Flight Risk                  |
| Organization        | org_id                              | Organization                 |
|                     | org_zip_code                        | Zip / Postal Code            |
|                     | org_number                          | Internal Organization Number |
|                     | org_type                            | Organization Type            |
|                     | Organization, Internal_cus~<br>tom0 | Custom 0                     |
| Inprogress learning | inp_cours_id                        | Course                       |
| Group / Audience    | aud_typ                             | Audience Type                |
|                     | Audience Type_custom0               | Custom 0                     |
| Education           | degree                              | Degree                       |
|                     | major                               | Major                        |
|                     | edu_institute                       | Institution                  |
|                     | edu_institute_type                  | Institute Type               |

| Component                         | Кеу                                  | Description (UI Label)  |
|-----------------------------------|--------------------------------------|-------------------------|
|                                   | edu_comp_date                        | Completion Date         |
|                                   | edu_pc_completion                    | Percent Completed       |
| Curriculam                        | curricula_id                         | Curriculam              |
| Competed Learning                 | cmpl_cours_id                        | Course                  |
|                                   | Offering Action Pro~<br>file_custom0 | Custom 0                |
| Address / Location                | location_id                          | Location                |
|                                   | relocate                             | Will Relocate           |
|                                   | Location_custom0                     | Custom 0                |
| CustomSection1 to CustomSection20 | CustomSection1_custom0               | Custom 0                |
| TalentPool                        | tp_candidate_status                  | Candidate Status        |
|                                   | readiness_id                         | Candidate Readiness     |
|                                   | pool_owner                           | Pool Owner              |
|                                   | pool_domain                          | Pool Domain             |
|                                   | percent_match                        | Candidate percent match |
|                                   | candidate_rank                       | Candidate Rank          |
|                                   | talent_pool_name                     | Pool Name               |

### **Return Values**

# UPDATE DETAILS OF A SMARTLIST

### Overview

Allows updating an existing smartlist based on the Smartlist ID.

### **Requires OAuth**

No

### Method

PUT

# URL

https://<hostname-api.sabacloud.com>/v1/smartlists/:id

### Table 57: Calling Options

| Name        | Description   | Sample Value   | Data Type | Required? |
|-------------|---|--|-----------|-----------|
| id          | Smartlist's ID  | st1st00000000001000  | string    | Yes       |
| name        | The name of the Smartlist                                 | Test Smartlist   | string    | No        |
| description | The short description about the Smartlist                 |  | string    | No        |
| split       | The domain for the Smartlist<br>Supports lookup (Domain). | {<br>"id": "dom~<br>in0000000000001",<br>"name":<br>"world"<br>} | string    | Yes       |
| criteria    | Criteria of Smartlist                                     |  | string    | No        |

# Request Body

```
{
    "name": "test SL",
    "name": "Test
    "Tes
        "description": "Test smartlist creation using API",
        "split": {
             "id": "domin000000000000001",
               "displayName":"world"
        },
        "criteria": {
   "segments": [{
    "entity": "Group 1",
                      "segments": [{
                            "excluded": false,
                            "key": "language",
                             "operator": {
    "key": "in"
                             },
                              "value": ["lange00000000000001"]
                      }, {
                             "key": "OR"
                       }, {
                             "excluded": false,
                              "key": "curricula_id",
                              "operator": {
```

```
"key": "in"
},
"value": ["curra00000000001141"]
}]
}, {
"key": "AND"
}, {
"entity": "Group 2",
"segments": [{
"excluded": false,
"key": "Location_custom2",
"operator": {
"key": "eq"
},
"value": "test"
}]
}]
```

# **UI representation of the Request Body**

|                               |                             |                                  |  |            | * = required   |
|-------------------------------|-----------------------------|----------------------------------|--|------------|----------------|
| Name*                         | test sL.                    |                                  |  |            |                |
| Description                   | Test smartlis               | t creation using API             |  |            |                |
|                               | Character Li<br>Remaining c | mit : 500<br>haracter count: 467 |  |            |                |
| Domain*                       | world                       |                                  | 9, <b>(6</b> )                           |            |                |
|                               |                             |                                  |  |            | Collapse all 👻 |
| 🔻 Group 1 🧪                   |                             |                                  |  |            | ۹ 🖻 🗙          |
| Include 👻                     | Language                    | • Language                       | ▼ Any of                                 | • English  | <b>*** **</b>  |
| OR AND                        |                             |                                  |  |            |                |
| Include 👻                     | Curriculum                  | Curriculum                       | <ul> <li>Any of</li> </ul>               | CleanCurr1 | <u> </u>       |
| + Add Statement               |                             |                                  |  |            |                |
| OR AND                        |                             |                                  |  |            |                |
| <ul> <li>Group 2 🧪</li> </ul> |                             |                                  |  |            | Q, 🖸 🗙         |
| Include •                     | Address/Location            | ▼ Custom2                        | <ul> <li>Exactly<br/>matching</li> </ul> | ▼ test     |                |
| + Add Statement               |                             |                                  |  |            |                |

### Figure 27: UI representation of the Request Body

### Supported Operator Key

The following table lists the operator keys that this API supports.

| Кеу | Description (UI Label) |
|-----|------------------------|
| AND | AND                    |

| Кеу        | Description (UI Label) |
|------------|------------------------|
| OR         | OR                     |
| NOT        | NOT                    |
| eq         | MATCHES                |
| neq        | NOT_MATCHES            |
| all        | ALL_OF                 |
| in         | ANY_OF                 |
| nin        | NOT_ANY_OF             |
| bef        | BEFORE                 |
| onbefore   | ON_OR_BEFORE           |
| aft        | AFTER                  |
| onafter    | ON_OR_AFTER            |
| lt         | LESS_THAN              |
| lte        | LESS_THAN_EQUALS       |
| gt         | GREATER_THAN           |
| gte        | GREATER_THAN_EQUALS    |
| betnext    | WITHIN_NEXT            |
| betlast    | WITHIN_LAST            |
| startswith | STARTS_WITH            |
| befdays    | BEFORE_DAYS            |
| aftdays    | AFTER_DAYS             |

# Supported Segment Key

The following table lists the segment keys that this API supports.

| Component | Кеу               | Description (UI Label) |
|-----------|-------------------|------------------------|
| Profile   | per_id            | Person                 |
|           | person_domain_id  | Domain                 |
|           | person_manager_id | Manager                |

| Component              | Кеу                      | Description (UI Label)    |
|------------------------|--------------------------|---------------------------|
|                        | person_start_date        | Start Date                |
|                        | prsn_status              | Status                    |
|                        | prsn_gender              | Gender                    |
|                        | prsn_dob                 | Date of Birth             |
|                        | prsn_ethnicity           | Ethnicity                 |
|                        | prsn_religion            | Religion                  |
|                        | prsn_pq                  | PQ Score                  |
|                        | prsn_prof_compl          | Percent Profile Completed |
|                        | prsn_alt_mgr             | Alternate Manager         |
|                        | person_emp_type          | Employee Type             |
|                        | person_locale            | Locale                    |
|                        | person_type              | Person Type               |
|                        | person_mgr               | Manager Access            |
|                        | per_city                 | City                      |
|                        | per_state                | State                     |
|                        | per_country              | Country                   |
|                        | per_zip_code             | Zip / Postal code         |
|                        | Person, Internal_custom0 | Custom 0                  |
| Language               | language                 | Language                  |
| External Certification | ext_cert_name            | Name                      |
|                        | ext_cert_inst            | Accrediting Institution   |
|                        | ext_cert_acqon           | Acquired on Date          |
|                        | ext_cert_expon           | Expired on Date           |
| Internal Certification | int_cert_id              | Certification             |
| Job / Career           | job_current_id           | Current Jobtype           |

| Component           | Кеу                                 | Description (UI Label)         |
|---------------------|-------------------------------------|--------------------------------|
|                     | job_desired_id                      | Next Jobtype                   |
|                     | job_family_id                       | Job Family                     |
|                     | job_potential_id                    | Potential Job                  |
|                     | int_wrkhis_job_id                   | Internal Work History          |
|                     | int_wrkhis_org_id                   | Previous Internal Organization |
|                     | int_wrkhis_loc                      | Previous work location         |
|                     | ext_wrkhis_employer                 | External work history          |
|                     | JobType_custom0                     | Custom 0                       |
| Role                | Role_custom0                        | Custom 0                       |
|                     | Job_role_id                         | Role                           |
| Skill / Experties   | skill_id                            | Skill                          |
|                     | Competency_custom0                  | Custom 0                       |
| Performance         | pot_rating                          | Potential rating               |
|                     | ret_risk                            | Retirement Risk                |
|                     | flt_risk                            | Flight Risk                    |
| Organization        | org_id                              | Organization                   |
|                     | org_zip_code                        | Zip / Postal Code              |
|                     | org_number                          | Internal Organization Number   |
|                     | org_type                            | Organization Type              |
|                     | Organization, Internal_cus~<br>tom0 | Custom 0                       |
| Inprograss logrning | inn cours id                        | Course                         |
|                     |                                     |                                |
| Group / Audience    | aud_typ                             | Audience Type                  |

| Component                         | Кеу                                  | Description (UI Label)  |
|-----------------------------------|--------------------------------------|-------------------------|
|                                   | Audience Type_custom0                | Custom 0                |
| Education                         | degree                               | Degree                  |
|                                   | major                                | Major                   |
|                                   | edu_institute                        | Institution             |
|                                   | edu_institute_type                   | Institute Type          |
|                                   | edu_comp_date                        | Completion Date         |
|                                   | edu_pc_completion                    | Percent Completed       |
| Curriculam                        | curricula_id                         | Curriculam              |
| Competed Learning                 | cmpl_cours_id                        | Course                  |
|                                   | Offering Action Pro~<br>file_custom0 | Custom 0                |
| Address / Location                | location_id                          | Location                |
|                                   | relocate                             | Will Relocate           |
|                                   | Location_custom0                     | Custom 0                |
| CustomSection1 to CustomSection20 | CustomSection1_custom0               | Custom 0                |
| TalentPool                        | tp_candidate_status                  | Candidate Status        |
|                                   | readiness_id                         | Candidate Readiness     |
|                                   | pool_owner                           | Pool Owner              |
|                                   | pool_domain                          | Pool Domain             |
|                                   | percent_match                        | Candidate percent match |
|                                   | candidate_rank                       | Candidate Rank          |
|                                   | talent_pool_name                     | Pool Name               |

#### **Return Values**

```
{
  "id": "stlst0000000001410",
  "displayName": "test SL 7",
        "href":
  "https://<hostname-api.sabacloud.com>/v1/smartlists/stlst0000000001080"
}
```

### DELETE A SMARTLIST

#### Overview

Allows deleting an existing smartlist that is not associated to other objects based on the Smartlist ID.

#### **Requires OAuth**

No

#### Method

DELETE

### URL

https://<hostname-api.sabacloud.com>/v1/smartlists/:id

### Table 58: Calling Options

| Name | Description    | Sample Value        | Data Type | Required? |
|------|----------------|---------------------|-----------|-----------|
| id   | Smartlist's ID | stlst00000000001000 | string    | Yes       |

**Note:** For more details on this see **REST API Reference**.

#### Use case

Criteria based security roles could be assigned using APIs, but only if you had manually created the smart list. This API removes the manual step.

# APIs to create, update and find Sub audience types

#### How did it work?

There were no REST APIs that would allow creating, updating and finding sub audience types.

How does it work now?

The following new REST APIs will now allow creating, updating and finding sub audience types:

- 1. FIND DETAILS OF SUB AUDIENCE TYPES
- 2. FIND META DETAILS OF SUB AUDIENCE TYPES
- 3. GET ALL SUB AUDIENCE TYPES
- 4. GET DETAILS OF A PARTICULAR SUB AUDIENCE TYPE
- 5. CREATE A NEW SUB AUDIENCE TYPE
- 6. FIND THE DETAILS OF SUB AUDIENCE TYPE (USING POST RANGE BASED SEARCH)

### 7. UPDATE DETAILS OF A SUB AUDIENCE TYPE

### FIND DETAILS OF SUB AUDIENCE TYPES

### Overview

Returns the details of the Sub Audience Types based on the provided search criteria.

### **Requires OAuth**

No

### Method

GET

# URL

 $https://<hostname-api.sabacloud.com > /v1/subaudiencetype?q=(:criteria_field%3D%3D:field_value) & count=:count & startPage=:startP$ 

### **Calling Options**

### **Table 59: Calling Options**

| Name           | Description   | Default Value | Data Type | Required? |
|----------------|---|---------------|-----------|-----------|
| criteria_field | The search criteria i.e. the field name.            | name          | string    | Yes       |
| field_value    | The search value for the specified search criteria. | abc           | string    | Yes       |
| count          | The number of records per page.                     | 10            | string    | No        |
| startPage      | The start page number for the list of records.      | 1             | string    | No        |

### FIND META DETAILS OF SUB AUDIENCE TYPES

### Overview

Returns the meta details of the sub audience type.

#### **Requires OAuth**

No

### Method

GET

# URL

https://<hostname-api.sabacloud.com>/v1/subaudiencetype/meta:(:searchFields)

### **Calling Options**

### **Table 60: Calling Options**

| Name         | Description   | Default Value | Data Type | Required? |
|--------------|---|---------------|-----------|-----------|
| searchFields | Indicate what additional de~<br>tails needs to be returned.<br>Acceptable values are (case-<br>sensitive) |               | string    | No        |

```
{
 "sampleData": {
 "parent_id": null,
  "flags": "010000000",
"name": "",
  "description": "",
  "customValues": {
  "custom9": null,
   "custom0": null,
   "custom3": null,
   "custom4": null,
   "custom1": null,
   "custom2": null,
   "custom7": null,
   "custom8": null,
   "custom5": null,
   "custom6": null
  },
  "securityDomain": {
  "id": "domin000000000000001",
   "displayName": null
  },
  "id": null,
  "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000000000"
 },
 "name": "Audience Sub Type",
```

```
"displayName": "Audience Sub Type",
"attributes": [{
 "name": "created_by",
 "displayName": "created_by",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "created on",
 "displayName": "created_on",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "date",
"isReference": false,
 "isProtected": false,
 "display": true,
 "isSearchFilter": true
}, {
 "name": "description",
 "displayName": "Description",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "flags",
 "displayName": "Flags",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 10,
 "maximumLength": 10,
 "isSearchFilter": false
}, {
 "name": "id",
 "displayName": "id",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "isSearchFilter": false
```

```
}, {
 "name": "isretained",
 "displayName": "Available to Others",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "boolean",
 "isReference": false,
 "isProtected": false,
 "display": false,
 "isSearchFilter": false
}, {
"name": "name",
"displayName": "Name",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 80,
 "maximumLength": 80,
 "isSearchFilter": true
}, {
 "name": "owner",
 "displayName": "Owner",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": false,
 "isSearchFilter": false
}, {
 "name": "parent_id",
 "displayName": "Parent",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "object",
 "isReference": true,
 "isProtected": false,
 "display": true,
 "isSearchFilter": true
}, {
 "name": "securityDomain",
 "displayName": "Domain",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "isSearchFilter": false
}, {
 "name": "updated_by",
 "displayName": "updated_by",
 "description": null,
 "isRequired": false,
```

```
"isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "updated_on",
 "displayName": "updated_on",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "date",
"isReference": false,
 "isProtected": false,
 "display": true,
 "isSearchFilter": true
}, {
 "name": "custom0",
 "displayName": "Custom0",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "custom1",
 "displayName": "Custom1",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "custom2",
 "displayName": "Custom2",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "custom3",
 "displayName": "Custom3",
 "description": null,
```

```
"isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "custom4",
 "displayName": "Custom4",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "custom5",
 "displayName": "Custom5",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "custom6",
 "displayName": "Custom6",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "custom7",
 "displayName": "Custom7",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
 "length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
```

```
"name": "custom8",
 "displayName": "Custom8",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
"length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}, {
 "name": "custom9",
 "displayName": "Custom9",
 "description": null,
 "isRequired": false,
 "isAutoGenerated": false,
 "type": "string",
 "isReference": false,
 "isProtected": false,
 "display": true,
"length": 255,
 "maximumLength": 255,
 "isSearchFilter": true
}]
```

### **GET ALL SUB AUDIENCE TYPES**

#### Overview

}

Returns all Sub Audience Types for which the user has access.

#### **Requires OAuth**

No

#### Method

GET

#### URL

https://<hostname-api.sabacloud.com>/v1/subaudiencetype?count=:count&startPage=:startPage

#### **Calling Options**

#### **Table 61: Calling Options**

| Name      | Description                                    | Default Value | Data Type | Required? |
|-----------|--|---------------|-----------|-----------|
| count     | The number of records per page.                | 10            | string    | No        |
| startPage | The start page number for the list of records. | 1             | string    | No        |

```
{
 "facets": [],
 "results": [{
 "name": "aud_11",
 "id": "seatc000000000001020",
 "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc00000000001020"
}, {
  "name": "child AT 1",
 "id": "seatc000000000001100",
 "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000001100"
}, {
 "name": "child AT 12",
 "id": "seatc00000000001120",
 "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000001120"
 }, {
 "name": "child AT 2",
 "id": "seatc000000000001101",
 "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000001101"
 }, {
 "name": "child AT 21",
 "id": "seatc00000000001124",
 "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000001124"
 }, {
 "name": "Child AT21",
 "id": "seatc00000000001121",
  "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000001121"
 }, {
  "name": "Child AT211",
 "id": "seatc00000000001122",
  "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000001122"
}, {
  "name": "Child AT212",
 "id": "seatc00000000001123",
 "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000001123"
}, {
  "name": "child AT 22",
 "id": "seatc00000000001125",
  "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000001125"
}, {
  "name": "child AT 221",
  "id": "seatc000000000001126",
  "href":
"https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000001126"
```

```
}],
"totalResults": 29,
"hasMoreResults": true,
"itemsPerPage": 10,
"startIndex": 1
}
```

# GET DETAILS OF A PARTICULAR SUB AUDIENCE TYPE

#### Overview

Returns complete information about a sub audience type based on the sub audience type's ID that is passed as a parameter value.

### **Requires OAuth**

No

#### Method

GET

### URL

https://<hostname-api.sabacloud.com>/v1/subaudiencetype/:id:(:searchFields)

### **Calling Options**

#### **Table 62: Calling Options**

| Name         | Description   | Default Value | Data Type | Required? |
|--------------|---|---------------|-----------|-----------|
| id           | Sub audience type's ID  |               | string    | Yes       |
| searchFields | Indicate what additional de~<br>tails needs to be returned.<br>Acceptable values are (case-<br>sensitive) |               | string    | No        |

```
{
    "parent_id": {
        "id": "audie000000000001021",
        "displayName": "aud_1"
    },
    "flags": "00000 ",
    "name": "aud_11",
    "description": "",
    "customValues": {
        "custom9": null,
        "custom0": null,
        "custom1": null,
        "custom1": null,
        "custom1": null,
        "custom2": null,
```

# CREATE A NEW SUB AUDIENCE TYPE

#### Overview

Allows creating a new sub audience type.

#### **Requires OAuth**

No

### Method

POST

### URL

https://<hostname-api.sabacloud.com>/v1/subaudiencetype

### **Calling Options**

### **Table 63: Calling Options**

| Name         | Description                                       | Default Value                                       | Data Type | Required? |
|--------------|---|---|-----------|-----------|
| name         | The name of the sub audi~<br>ence type            | sub audience type<br>Create                         | string    | Yes       |
| description  | The short description about the sub audience type | desc  | string    | No        |
| parent_id    | Parent of sub audience type                       | {"id":<br>"audie000000000001021",<br>"name": "AT1"} | string    | Yes       |
| customValues | Custom Values                                     |   | string    | No        |

### **Request Body**

```
{
  "name": "sbu aud_1",
  "description": "test sub AT",
  "parent_id": {
  "id": "audie000000000001021",
  "displayName": "aud_1"
```

```
},
"customValues": {
    "custom9": null,
    "custom0": null,
    "custom3": null,
    "custom4": null,
    "custom1": null,
    "custom2": null,
    "custom7": null,
    "custom8": null,
    "custom5": null,
    "custom6": null
}
```

# **Return Values**

```
{
   "id": "seatc0000000000000",
   "displayName": "sub aud_1",
   "href":
   "https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc00000000000000"
}
```

### FIND THE DETAILS OF SUB AUDIENCE TYPE (USING POST - RANGE BASED SEARCH)

#### Overview

Returns the details of the sub audience type.

### **Requires OAuth**

No

### Method

POST

### URL

https://<hostname-api.sabacloud.com>/v1/subaudiencetype/searchQuery?count=:count&startPage=:startPage

### **Calling Options**

#### **Table 64: Calling Options**

| Name       | Description | Default Value   | Data Type | Required? |
|------------|-------------|---|-----------|-----------|
| conditions | Conditions  | [{"name":"name",<br>"operator":"==",<br>"value":"sub at1"}] | string    | Yes       |
| count      |             | 10  | string    | No        |
| startPage  |             | 1   | string    | No        |

### **Request Body**

```
{
"conditions" :[{
"name": "name",
"operator": "==",
"value": "aud_11"}]
}
```

### **Return Values**

```
{
  "startIndex": 1,
  "totalResults": 1,
  "hasMoreResults": false,
  "itemsPerPage": 10,
  "facets": [],
  "results": [{
    "id": "seatc0000000001020","name":"aud_11",
    "href":
    "https://<hostname-api.sabacloud.com>/v1/subaudiencetype/seatc0000000001020"
  }]
}
```

### UPDATE DETAILS OF A SUB AUDIENCE TYPE

#### Overview

Allows updating an existing sub audience type based on the Sub audience type's ID.

### **Requires OAuth**

No

#### Method

PUT

#### URL

https://<hostname-api.sabacloud.com>/v1/subaudiencetype/:id

#### **Calling Options**

#### **Table 65: Calling Options**

| Name        | Description                                       | Default Value               | Data Type | Required? |
|-------------|---|-----------------------------|-----------|-----------|
| id          | Sub audience type's ID                            |                             | string    | Yes       |
| name        | The name of the sub audi~<br>ence type            | sub audience type<br>Create | string    | Yes       |
| description | The short description about the sub audience type | desc                        | string    | No        |

| Name         | Description   | Default Value | Data Type | Required? |
|--------------|---------------|---------------|-----------|-----------|
| customValues | Custom Values |               | string    | No        |

#### Request Body

```
{
 "id": "seatc000000000000000",
 "name": "sbu aud_1",
 "description": "test sub AT",
   "customValues": {
  "custom9": null,
  "custom0": null,
  "custom3": null,
  "custom4": null,
  "custom1": null,
  "custom2": null,
  "custom7": null,
  "custom8": null,
  "custom5": null,
  "custom6": null
}
}
```

**Note:** parent\_id update is not supported. In case a different parent\_id is passed in input then that will be ignored by the API.

Domain cannot be set for Audience subtype. It is always the same as the parent's domain.

**Note:** For more details on this see **REST** API Reference.

Use case

N/A

# APIs to retrieve, create, update and delete countries and states

#### How did it work?

There were no REST APIs that would allow retrieving, creating, updating and deleting countries and states.

How does it work now?

The following new REST APIs will now allow retrieving, creating, updating and deleting countries and states:

- 1. FIND DETAILS OF COUNTRY
- 2. GET ALL COUNTRIES
- 3. GET DETAILS OF A PARTICULAR COUNTRY
- 4. GET META DETAILS OF COUNTRY
- 5. CREATE A NEW COUNTRY
- 6. UPDATE DETAILS OF A COUNTRY
- 7. DELETE COUNTRY
- **8.** FIND DETAILS OF STATE
- 9. GET ALL STATES
- **10.** GET DETAILS OF A PARTICULAR STATE
- 11. GET META DETAILS OF STATE

# FIND DETAILS OF COUNTRY

#### Overview

Returns the details of the Country along with the ID, Name and the Deeplink URL based on the provided search criteria.

#### **Requires OAuth**

No

### Method

GET

### URL

https://<hostname-api.sabacloud.com>/v1/country?q=(:criteria\_field%3D%3D:field\_value)&count=:count&startPage=:startPage

### **Calling Options**

#### Table 66: Calling Options

| Name           | Description   | Default Value | Data Type | Required? |
|----------------|---|---------------|-----------|-----------|
| criteria_field | The search criteria i.e. the field name.            | name          | string    | Yes       |
| field_value    | The search value for the specified search criteria. | abc           | string    | Yes       |
| count          | The number of records per page.                     | 10            | string    | No        |
| startPage      | The start page number for the list of records.      | 1             | string    | No        |

### **GET ALL COUNTRIES**

### Overview

Returns all Countries for which the user has access.

### **Requires OAuth**

No

### Method

GET

# URL

https://< hostname-api.sabacloud.com > /v1/country?count=:count&startPage=:startPage

### **Calling Options**

### **Table 67: Calling Options**

| Name      | Description                                    | Default Value | Data Type | Required? |
|-----------|--|---------------|-----------|-----------|
| count     | The number of records per page.                | 10            | string    | No        |
| startPage | The start page number for the list of records. | 1             | string    | No        |

```
{
    "facets": [],
    "totalResults": 239,
    "hasMoreResults": true,
    "itemsPerPage": 10,
    "results": [
        {
            "id": "cntry000000000000000",
            "href": "http://<host_name>/v1/country/cntry0000000000000000"
        },
        ł
            "id": "cntry000000000001010",
            "href": "http://<host_name>/v1/country/cntry00000000001010"
        },
            "id": "cntry00000000001100",
            "href": "http://<host_name>/v1/country/cntry0000000001100"
        },
            "id": "cntry00000000001110",
            "href": "http://<host_name>/v1/country/cntry0000000001110"
        },
            "id": "cntry000000000001120",
            "href": "http://<host_name>/v1/country/cntry0000000001120"
        },
{
```

```
"id": "cntry00000000001130",
            "href": "http://<host_name>/v1/country/cntry0000000001130"
        },
           "id": "cntry00000000001140",
            "href": "http://<host_name>/v1/country/cntry0000000001140"
        },
           "id": "cntry00000000001150",
            "href": "http://<host_name>/v1/country/cntry0000000001150"
        },
            "id": "cntry00000000001160",
            "href": "http://<host_name>/v1/country/cntry0000000001160"
        },
            "id": "cntry000000000001170",
            "href": "http://<host_name>/v1/country/cntry0000000001170"
        }
   ],
    "startIndex": 1
}
```

# GET DETAILS OF A PARTICULAR COUNTRY

### Overview

Returns complete information about a country based on the Country's ID that is passed as a parameter value.

#### **Requires OAuth**

No

#### Method

GET

# URL

https://<hostname-api.sabacloud.com>/v1/country/:id

### **Calling Options**

### **Table 68: Calling Options**

| Name | Description  | Default Value | Data Type | Required? |
|------|--------------|---------------|-----------|-----------|
| id   | Country's Id |               | string    | Yes       |

```
{
    "name": "new23",
    "shortName": "USA",
    "isoCode": "NM",
    "active": false,
    "id": "cntry000000000000000"
}
```

### **GET META DETAILS OF COUNTRY**

#### Overview

Returns the meta details of the country

#### **Requires OAuth**

No

### Method

GET

# URL

https://<hostname-api.sabacloud.com>/v1/country/meta:(:searchFields)

### **Calling Options**

### **Table 69: Calling Options**

| Name         | Description   | Default Value | Data Type | Required? |
|--------------|---|---------------|-----------|-----------|
| searchFields | Indicate what additional de~<br>tails needs to be returned.<br>Acceptable values are (case-<br>sensitive) |               | string    | No        |

```
{
  "sampleData": {
   "name": null,
    "shortName": null,
   "active": false,
    "isoCode": null,
    "id": null,
    "href": "http://<host_name>/v1/country/cntry00000000000001"
 },
 "name": "Country",
 "displayName": "Country",
 "attributes": [
    ł
      "name": "active",
      "displayName": "Active",
      "description": "Status of the country",
      "isRequired": false,
      "isAutoGenerated": false,
      "type": "boolean",
      "isReference": false,
      "isProtected": false,
      "display": true,
      "isSearchFilter": true
    },
      "name": "id",
      "displayName": "kI18nALCountry_id(Missing resource)",
      "description": "Saba internal id",
```

```
"isRequired": true,
      "isAutoGenerated": true,
      "type": "string",
      "isReference": false,
      "isProtected": false,
      "display": true,
      "isSearchFilter": false
    },
    {
      "name": "isoCode",
      "displayName": "ISO Code",
      "description": "ISO code of the country",
      "isRequired": true,
      "isAutoGenerated": false,
      "type": "string",
      "isReference": false,
      "isProtected": false,
      "display": true,
      "length": 2,
      "maximumLength": 2,
      "isSearchFilter": true
      "name": "name",
"displayName": "Name",
      "description": "Name of the country",
      "isRequired": true,
      "isAutoGenerated": false,
      "type": "string",
      "isReference": false,
      "isProtected": false,
      "display": true,
      "length": 255,
      "maximumLength": 255,
      "isI18n": true,
      "isSearchFilter": true
      "name": "shortName",
      "displayName": "Short name",
      "description": "Short name of the country",
      "isRequired": false,
      "isAutoGenerated": false,
      "type": "string",
      "isReference": false,
      "isProtected": false,
      "display": true,
      "maximumLength": 10,
      "isSearchFilter": true
    }
  ]
}
```

# **CREATE A NEW COUNTRY**

#### Overview

Allows creating a new Country.

### **Requires OAuth**

No

### Method

POST

# URL

https://<hostname-api.sabacloud.com>/v1/country

### **Calling Options**

### **Table 70: Calling Options**

| Name      | Description                    | Default Value | Data Type | Required? |
|-----------|--------------------------------|---------------|-----------|-----------|
| name      | The name of the Country        | Country1      | string    | Yes       |
| isoCode   | The ISO code for the country   | IS            | string    | Yes       |
| shortName | The short name for the country |               | string    | No        |
| active    | Is active                      | false         | string    | No        |

# **Request Body**

```
{
   "name": "India",
   "isoCode":"IN",
   "shortName":"IND",
   "active":true
}
```

# **Return Values**

```
{
    "id": "cntry0000000004630",
    "displayName": null,
    "href": "http://<host_name>/v1/country/cntry000000004630"
}
```

# UPDATE DETAILS OF A COUNTRY

### Overview

Allows updating an existing country based on the Role ID.

### **Requires OAuth**

No

## Method

PUT

# URL

https://<hostname-api.sabacloud.com>/v1/country/:id

# **Calling Options**

# Table 71: Calling Options

| Name      | Description             | Default Value | Data Type | Required? |
|-----------|-------------------------|---------------|-----------|-----------|
| id        | Country's Id            |               | string    | Yes       |
| name      | The name of the country | new23         | string    | No        |
| isoCode   | The ISO code of country | nm            | string    | No        |
| shortName | shortName               |               | string    | No        |
| active    | Is active               | false         | string    | No        |

# **Request Body**

{
 "active":true
}

### **DELETE COUNTRY**

### Overview

Deletes Country

# **Requires OAuth**

No

### URL

https://<hostname-api.sabacloud.com>/v1/country/:id

# **Calling Options**

# Table 72: Calling Options

| Name | Description  | Default Value       | Data Type | Required? |
|------|--------------|---------------------|-----------|-----------|
| id   | Country's ID | cntry00000000003520 | string    | Yes       |

### FIND DETAILS OF STATE

### Overview

Returns the details of the State along with the ID, Name and the Deeplink URL based on the provided search criteria.

### **Requires OAuth**

No

### Method

GET

# URL

 $https://< hostname-api.sabacloud.com > /v1/state?q = (:criteria_field % 3D \% 3D:field_value) \& count = :count \& startPage = :startPage = :startPag$ 

### **Calling Options**

# **Table 73: Calling Options**

| Name           | Description   | Default Value | Data Type | Required? |
|----------------|---|---------------|-----------|-----------|
| criteria_field | The search criteria i.e. the field name.            | name          | string    | Yes       |
| field_value    | The search value for the specified search criteria. | abc           | string    | Yes       |
| count          | The number of records per page.                     | 10            | string    | No        |
| startPage      | The start page number for the list of records.      | 1             | string    | No        |

# **Return Values**

# **GET ALL STATES**

#### Overview

Returns all States for which the user has access.
### **Requires OAuth**

No

### Method

GET

### URL

https://<hostname-api.sabacloud.com>/v1/state?count=:count&startPage=:startPage

### **Calling Options**

### **Table 74: Calling Options**

| Name      | Description                                    | Default Value | Data Type | Required? |
|-----------|--|---------------|-----------|-----------|
| count     | The number of records per page.                | 10            | string    | No        |
| startPage | The start page number for the list of records. | 1             | string    | No        |

```
{
    "facets": [],
    "totalResults": 158,
    "hasMoreResults": true,
    "itemsPerPage": 10,
    "results": [
        ł
            "id": "state000000000001640",
           "href": "http://<host_name>/v1/state/state0000000001640"
        },
           "id": "state00000000001650",
            "href": "http://<host_name>/v1/state/state00000000001650"
        },
           "id": "state00000000001670",
            "href": "http://<host_name>/v1/state/state0000000001670"
        },
           "id": "state00000000002410",
            "href": "http://<host_name>/v1/state/state0000000002410"
        },
           "id": "state00000000002420",
            "href": "http://<host_name>/v1/state/state000000002420"
        },
           "id": "state00000000002430",
            "href": "http://<host_name>/v1/state/state000000002430"
        },
            "id": "state00000000002930",
            "href": "http://<host_name>/v1/state/state00000000002930"
        },
```

```
{
    "id": "state000000002140",
    "href": "http://<host_name>/vl/state/state0000000002140"
    "id": "state0000000002110",
    "href": "http://<host_name>/vl/state/state0000000002110"
    "id": "state0000000002120",
    "href": "http://<host_name>/vl/state/state000000002120"
    }
],
"startIndex": 1
}
```

### **GET DETAILS OF A PARTICULAR STATE**

### Overview

Returns complete information about a state based on the State's ID that is passed as a parameter value.

### **Requires OAuth**

No

### Method

GET

### URL

https://<hostname-api.sabacloud.com>/v1/state/:id

### **Calling Options**

### **Table 75: Calling Options**

| Name | Description | Default Value | Data Type | Required? |
|------|-------------|---------------|-----------|-----------|
| id   | State's Id  |               | string    | Yes       |

```
{
    "name": "Maharastra",
    "country": {
        "id": "cntry000000000000000",
        "displayName": "new23"
    },
    "shortName": "Mah",
    "isoCode": "MH",
    "id": "state0000000001650"
}
```

### GET META DETAILS OF STATE

### Overview

Returns the meta details of the state

### **Requires OAuth**

No

### Method

GET

### URL

https://<hostname-api.sabacloud.com>/v1/state/meta:(:searchFields)

### **Calling Options**

### **Table 76: Calling Options**

| Name         | Description   | Default Value | Data Type | Required? |
|--------------|---|---------------|-----------|-----------|
| searchFields | Indicate what additional de~<br>tails needs to be returned.<br>Acceptable values are (case-<br>sensitive) |               | string    | No        |

```
{
  "sampleData": {
   "name": null,
    "country": null,
    "shortName": null,
    "isoCode": null,
    "id": null,
    "href": "http://<host_name>/v1/state/state00000000000001"
 },
 "name": "CountryState",
 "displayName": "State",
 "attributes": [
    ł
      "name": "country",
      "displayName": "Country",
      "description": "Country of the state",
      "isRequired": true,
      "isAutoGenerated": false,
      "type": "object",
      "isReference": true,
      "isProtected": false,
      "display": true,
      "isSearchFilter": true
    },
      "name": "id",
      "displayName": "kI18nALCountryState_id(Missing resource)",
      "description": "Saba internal id",
```

```
"isRequired": true,
      "isAutoGenerated": true,
      "type": "string",
      "isReference": false,
      "isProtected": false,
      "display": true,
      "isSearchFilter": false
    },
    {
      "name": "isoCode",
      "displayName": "ISO Code",
      "description": "ISO code of the state",
      "isRequired": true,
      "isAutoGenerated": false,
      "type": "string",
      "isReference": false,
      "isProtected": false,
      "display": true,
      "length": 2,
      "maximumLength": 2,
      "isSearchFilter": true
      "name": "name",
"displayName": "Name",
      "description": "Name of the state",
      "isRequired": true,
      "isAutoGenerated": false,
      "type": "string",
      "isReference": false,
      "isProtected": false,
      "display": true,
      "length": 255,
      "maximumLength": 255,
      "isI18n": true,
      "isSearchFilter": true
      "name": "shortName",
      "displayName": "Short name",
      "description": "Short name of the state",
      "isRequired": false,
      "isAutoGenerated": false,
      "type": "string",
      "isReference": false,
      "isProtected": false,
      "display": true,
      "maximumLength": 10,
      "isSearchFilter": true
    }
  ]
}
```

### **CREATE A NEW STATE**

### Overview

Allows creating a new State.

### **Requires OAuth**

No

### Method

POST

### URL

https://<hostname-api.sabacloud.com>/v1/state

### **Calling Options**

### **Table 77: Calling Options**

| Name      | Description                  | Default Value   | Data Type | Required? |
|-----------|------------------------------|---|-----------|-----------|
| name      | The name of the State        | State1  | string    | Yes       |
| isoCode   | The ISO code for the state   | IS  | string    | Yes       |
| shortName | The short name for the state |   | string    | No        |
| country   | The country for the state    | {\"id\":<br>\"cntry000000000001000\",<br>\"display~<br>Name\":\"new1\"} | string    | Yes       |

### **Request Body**

### **Return Values**

```
{
    "id": "state0000000003490",
    "displayName": null,
    "href": "http://<host_name>/v1/state/state000000003490"
}
```

### UPDATE DETAILS OF A STATE

### Overview

Allows updating an existing state based on the Role ID.

### **Requires OAuth**

No

### Method

PUT

### URL

https://<hostname-api.sabacloud.com>/v1/state/:id

### **Calling Options**

### **Table 78: Calling Options**

| Name      | Description             | Default Value  | Data Type | Required? |
|-----------|-------------------------|--|-----------|-----------|
| id        | Country's Id            |  | string    | Yes       |
| name      | The name of the country | new23  | string    | No        |
| isoCode   | The ISO code of country | nm   | string    | No        |
| shortName | shortName               |  | string    | No        |
| country   | Country                 | {\"id\":<br>\"cntry00000000000000000000\",<br>\"display~<br>Name\":\"new1\"} | string    | No        |

### **Request Body**

```
{
"isoCode":"mh"
}
```

### DELETE STATE

### Overview

Deletes State

### **Requires OAuth**

No

### URL

https://<hostname-api.sabacloud.com>/v1/state/:id

### **Calling Options**

### Table 79: Calling Options

| Name | Description | Default Value        | Data Type | Required? |
|------|-------------|----------------------|-----------|-----------|
| id   | State's ID  | state000000000001000 | string    | Yes       |

**Note:** For more details on this see **REST** API Reference.

### Use case

This enhancement provides customers more control of security role assignments and also reduces the load on Support, Operations and Services in meeting ad hoc requests.

### APIs to retrieve details of the recurring course completions

### How did it work?

Using REST API there was no way to retrieve details of the recurring course completions.

How does it work now?

The following new REST APIs will now allow retrieving the details of the recurring course completions:

1. FIND DETAILS OF RECURRING COURSE COMPLETIONS

2. FIND DETAILS OF RECURRING COURSE COMPLETIONS (Using POST - Range based search)

### FIND DETAILS OF RECURRING COURSE COMPLETIONS

### Overview

Returns the details of the recurring course completions along with the ID, Name and the Deeplink URL based on the provided search criteria.

**Note:** When a recurring course is assigned to a user, the corresponding enrollment entry is not created. Only when the course is completed, the transcript entry is created, due to this the API will not return detail URL as href for in-complete course in output JSON.

### **Requires OAuth**

No

### Method

GET

### URL

https://<hostname-api.sabacloud.com>/v1/recurringcompletions ?q=(:criteria\_field%3D%3D;field\_value)&count=:count&startPage=:startPage&f=(:csvAttributesValue)&includeDetails=:includeDetails

### **Calling Options**

### Table 80: Calling Options

| Name           | Description   | Sample Value | Data Type | Required? |
|----------------|---|--------------|-----------|-----------|
| criteria_field | The search criteria e.g. per~<br>son Id.            | person_id    |           | No        |
| field_value    | The search value for the specified search criteria. |              | string    | Yes       |

| Name               | Description   | Sample Value | Data Type | Required? |
|--------------------|---|--------------|-----------|-----------|
| count              | The number of records per page.   | 10           | string    | No        |
| startPage          | The start page number for the list of records.                                | 1            | string    | No        |
| csvAttributesValue | Indicate the field(s) that you intend to extract.                             |              | string    | No        |
| includeDetails     | Returns the details of the re~<br>curring course completions<br>in the search | false        | string    | No        |

The following are the supported search criteria and display attributes:

| Field name           | Field description  | Example  |
|----------------------|--|--|
| person_id            | Will return all recurring course completions of a specified person.  | Person_id%3D%3Demplo000000000000000000000000000000000000 |
| Person_no            | This search criteria will return all recurring course completions of given person.   | person_no%3D%3D001000                                    |
| Person_user~<br>name | This search criteria will return all recurring course completions of given person.   | Person_username%3D%3Duone                                |
| status               | This will return all recurring course completions of a specified status.   | status%3D%3D400  |
|                      | Below are the possible status values:  |  |
|                      | For Recurring Completions (Completed):   |  |
|                      | <ul> <li>100 - Not evaluated</li> <li>200 - Successful</li> <li>300 - Suspended</li> <li>400 - Unsuccessful</li> <li>600 - Pending Registration</li> <li>700 - Pending Approval</li> </ul> |  |
|                      | For Recurring Completions (Not Completed):   |  |
|                      | <ul> <li>100 - Completed</li> <li>200 - In progress</li> <li>300 - Expired</li> <li>400 - Assigned</li> <li>600 - Pending Registration</li> <li>700 - Pending Approval</li> </ul>          |  |
| updated_on           | This will return result based on updated date of a recurring course completion.  | updated_on%3Dge%3D2010-01-29 01:29:32                    |

| assigned_on          | This search criteria will return all recurring course completions based on its assigned date value.   | assigned_on%3Dge%3D2010-01-29 01:29:32     |
|----------------------|---|--|
| course_no            | This search criteria will return recurring course completion of a given course.                       | course_no%3D%3d00201084                    |
| Course_id            | This search criteria will return recurring course completion of a given course.                       | Course_id%3D%3D cours00000000203226        |
| com~<br>pleted_on    | This search criteria will return all recurring course completions based on its comepleted date value. | completed_on%3Dge%3D2010-01-29 01:29:32    |
| due_date             | This search criteria will return all recurring course completions based on its due date value.        | due_date%3Dge%3D2010-01-29 01:29:32        |
| expira~<br>tion_date | This search criteria will return all recurring course completions based on its expiration date value. | expiration_date%3Dge%3D2010-01-29 01:29:32 |
| assigned~<br>Status  | This search criteria will return all recurring course completions based on its assigned status.       |  |

The JSON ouput structure for not-yet-completed items is quite different from completed items. This is because the not-yet-completed recurring courses are treated similar to held certifications and completed recurring courses are treated as Transcripts. This is in line with how these are interpreted on the UI.

### Return Values (Completed recurring courses using includeDetails=false)

```
{
   "status_description":"Not Evaluated",
   "person":{
      "id":"emplo000000000019079",
      "username": "UONE"
   },
   "course":{
      "id": cours0000000036549",
      "course_no":"00016460",
      "title": "test-recurring1",
      "version":null
   },
   "id": "ofapr00000000121389",
   "status":"100",
"href": "https://dqlearning-api.sabacloud.com/v1/transcripts/ofapr00000000121389"
}
```

### Return Values (Not-yet-completed recurring courses using includeDetails=false)

```
{
    "assignedStatusDescription":"Assigned",
    "person":{
        "id":"emplo00000000019079",
        "username":"UONE"
    },
    "course":{
        "id":"cours0000000013889",
        "course_no":"00010274",
```

```
"title":"RecurCoursePR",
    "version":"12345"
},
    "assignedStatus":"400"
}
```

Note: assignedStatus / assignedStatusDescription either of these fields in the output JSON indicate a Not-yet-completed recurring course.

### Return Values (Completed recurring courses using includeDetails=true)

```
{
   "updated_by":"uone",
   "updated_on":"2016-07-29T04:14:14.000+0000",
   "created_on":"2016-07-29T04:14:14.000+0000",
   "created_by":"uone",
   "end_date":null,
   "start_date":"2016-07-29T04:14:13.000+0000",
   "time_interval":0,
   "offering_temp_id":{
      "id":"cours0000000036549",
      "displayName":"test-recurring1"
   },
   "delivery":null,
   "delivery_type":"eqcat00000000000000",
   "action_no":"00105488",
   "completion_date":null,
   "action_status":"100",
   "grade":"",
   "delivered by":null,
   "target date": "2016-07-29T06:14:13.000+0000",
   "flags":2,
   "registration":null,
   "added_to_profile_on":"2016-07-29T04:14:13.000+0000",
   "offrng_start_date":null,
   "archived":0,
   "completionMode":0,
   "learner_id":null,
   "credits":null,
   "location":null,
   "party_id":{
      "id":"emplo000000000019079",
      "displayName": "One User"
   },
   "start time":null,
   "end_time":null,
   "status":100,
   "score":0,
   "id": "ofapr00000000121389",
   "customValues":{
      "custom0":null,
      "custom1":null,
      "custom2":null
   }
}
```

### Return Values (Not-yet-completed recurring courses using includeDetails=true)

```
"assignedBy":"One User",
```

```
"assigned on":"2016-09-02T05:51:19UTC",
   "assignedStatusDescription":"Assigned",
   "completed_on":null,
   "person":{
      "id":"emplo00000000019079",
      "username": "UONE"
   },
   "due_date":"2016-09-02T00:00:00UTC",
   "course":{
      "id": "cours0000000013889",
      "course_no":"00010274",
      "title": "RecurCoursePR",
      "version":"12345"
   },
   "expiration_date":null,
   "assignedStatus":"400"
}
```

### FIND DETAILS OF RECURRING COURSE COMPLETIONS (Using POST - Range based search)

### Overview

Returns the details of the recurring course completions along with the ID, Name and the Deeplink URL based on the provided range based search criteria.

Note: When a recurring course is assigned to a user, the corresponding enrollment entry is not created. Only when the course is completed, the transcript entry is created, due to this the API will not return detail URL as href for in-complete course in output JSON.

### **Requires OAuth**

No

### Method

POST

### URL

https://< hostname-api.sabacloud.com > /v1/recurring completions/searchQuery?count=:count&startPage=:startPage & f=(:csvAttributesValue)&includeDetails=:includeDetails

### **Calling Options**

### Table 81: Calling Options

| Name              | Description  | Sample Value   | Data Type | Required? |
|-------------------|--|--|-----------|-----------|
| conditions > name | The search conditions.<br>You can use search operators<br>such as:<br>• =gt= - Greater than<br>• =ge= - Greater or Equal<br>• =lt= - Less than<br>• =le= - Less or Equal<br>• == - Equal | [{"name": "per~<br>son_id", "operator":<br>"==", "value": "em~<br>plo0000000000001000"}] | string    | Yes       |

| Name               | Description   | Sample Value | Data Type | Required? |
|--------------------|---|--------------|-----------|-----------|
|                    | <ul> <li>!= - Not Equal</li> <li>; - AND</li> <li>, - OR</li> </ul>           |              |           |           |
| count              | The number of records per page.   | 10           | string    | No        |
| startPage          | The start page number for the list of records.                                | 1            | string    | No        |
| csvAttributesValue | Indicate the field(s) that you intend to extract.                             |              | string    | No        |
| includeDetails     | Returns the details of the re~<br>curring course completions<br>in the search | false        | string    | No        |

The following are the supported search criteria and display attributes:

| Field name           | Field description  | Example                             |
|----------------------|--|-------------------------------------|
| person_id            | Will return all recurring course completions of a specified person.  | Person_id%3D%3Demplo000000000001000 |
| Person_no            | This search criteria will return all recurring course completions of given person.   | person_no%3D%3D001000               |
| Person_user~<br>name | This search criteria will return all recurring course completions of given person.   | Person_username%3D%3Duone           |
| status               | This will return all recurring course completions of a specified status.   | status%3D%3D400                     |
|                      | Below are the possible status values:  |                                     |
|                      | For Recurring Completions (Completed):   |                                     |
|                      | <ul> <li>100 - Not evaluated</li> <li>200 - Successful</li> <li>300 - Suspended</li> <li>400 - Unsuccessful</li> <li>600 - Pending Registration</li> <li>700 - Pending Approval</li> </ul> |                                     |
|                      | For Recurring Completions (Not Completed):   |                                     |
|                      | <ul> <li>100 - Completed</li> <li>200 - In progress</li> <li>300 - Expired</li> <li>400 - Assigned</li> <li>600 - Pending Registration</li> <li>700 - Pending Approval</li> </ul>          |                                     |

| updated_on           | This will return result based on updated date of a recurring course completion.                       | updated_on%3Dge%3D2010-01-29 01:29:32      |  |  |
|----------------------|---|--|--|--|
| assigned_on          | This search criteria will return all recurring course completions based on its assigned date value.   | assigned_on%3Dge%3D2010-01-29 01:29:32     |  |  |
| course_no            | This search criteria will return recurring course completion of a given course.                       | course_no%3D%3d00201084                    |  |  |
| Course_id            | This search criteria will return recurring course completion of a given course.                       | Course_id%3D%3D cours00000000203226        |  |  |
| com~<br>pleted_on    | This search criteria will return all recurring course completions based on its comepleted date value. | completed_on%3Dge%3D2010-01-29 01:29:32    |  |  |
| due_date             | This search criteria will return all recurring course completions based on its due date value.        | due_date%3Dge%3D2010-01-29 01:29:32        |  |  |
| expira~<br>tion_date | This search criteria will return all recurring course completions based on its expiration date value. | expiration_date%3Dge%3D2010-01-29 01:29:32 |  |  |
| assigned~<br>Status  | This search criteria will return all recurring course completions based on its assigned status.       |  |  |  |

### **Request Body**

```
{
    "conditions" :[
        {
        "name": "person_id",
        "operator": "==",
        "value": "emplo000000000000000"
     }
]
```

The output for not-yet-completed recurring courses will be very different from the output of completed recurring courses.

Return Values (Completed recurring courses using includeDetails=false)

```
{
    "status_description":"Not Evaluated",
    "person":{
        "id":"emplo00000000019079",
        "username":"UONE"
    },
    "course":{
        "id":"cours0000000036549",
        "course_no":"00016460",
        "title":"test-recurring1",
        "version":null
    },
    "id":"ofapr00000000121389",
    "status":"100",
```

```
"href":"https://dqlearning-api.sabacloud.com/v1/transcripts/ofapr00000000121389" }
```

### Return Values (Not-yet-completed recurring courses using includeDetails=false)

```
{
    "assignedStatusDescription":"Assigned",
    "person":{
        "id":"emplo0000000019079",
        "username":"UONE"
    },
    "course":{
        "id":"cours0000000013889",
        "course_no":"00010274",
        "title":"RecurCoursePR",
        "version":"12345"
    },
    "assignedStatus":"400"
}
```

Note: assignedStatus / assignedStatusDescription either of these fields in the output JSON indicate a Not-yet-completed recurring course.

#### Return Values (Completed recurring courses using includeDetails=true)

```
{
   "updated_by":"uone",
   "updated_on":"2016-07-29T04:14:14.000+0000",
   "created_on":"2016-07-29T04:14:14.000+0000",
   "created_by":"uone",
   "end_date":null,
   "start_date":"2016-07-29T04:14:13.000+0000",
   "time_interval":0,
   "offering_temp_id":{
      "id": cours0000000036549",
      "displayName": "test-recurring1"
   },
   "delivery":null,
   "delivery_type":"eqcat00000000000000",
   "action_no":"00105488",
   "completion_date":null,
   "action_status":"100",
   "grade":"",
   "delivered_by":null,
   "target_date":"2016-07-29T06:14:13.000+0000",
   "flags":2,
   "registration":null,
   "added to profile on":"2016-07-29T04:14:13.000+0000",
   "offrng start date":null,
   "archived":0,
   "completionMode":0,
   "learner_id":null,
   "credits":null,
   "location":null,
   "party_id":{
      "id": "emplo00000000019079",
      "displayName": "One User"
   },
   "start_time":null,
   "end time":null,
```

```
"status":100,
"score":0,
"id":"ofapr00000000121389",
"customValues":{
    "custom0":null,
    "custom1":null,
    "custom2":null
}
```

Return Values (Not-yet-completed recurring courses using includeDetails=true)

```
{
   "assignedBy": "One User",
   "assigned_on":"2016-09-02T05:51:19UTC",
   "assignedStatusDescription": "Assigned",
   "completed_on":null,
   "person":{
      "id": "emplo00000000019079",
      "username": "UONE"
   },
   "due_date":"2016-09-02T00:00:00UTC",
   "course":{
      "id": "cours0000000013889",
      "course_no":"00010274",
      "title": "RecurCoursePR",
      "version":"12345"
   },
   "expiration date":null,
   "assignedStatus":"400"
}
```

Note: assignedStatus / assignedStatusDescription either of these fields in the output JSON indicate a Not-yet-completed recurring course.

**Note:** For more details on this see **REST** API Reference.

### Use case

The Transcript API did not return completions based on recurring courses which provided an incomplete view of the Transcript. A separate endpoint has been created for retrieving recurring course completions.

# API to retrieve existing registration details or auto enroll user and get registration details

How did it work?

It was not possible to retrieve the existing registration details or auto enroll the user and then get the registration details using a single API.

How does it work now?

The following new REST API will now allow retrieving the existing registration details or auto enroll the user and then get the registration details:

# GET EXISTING REGISTRATION DETAILS OR AUTO ENROLL USER AND GET REGISTRATION DETAILS

### Overview

Returns the existing details of the registration. If the enrollment does not exist, then the learner **will be enrolled** to the class. If the enrollment already exists or the learner has already completed the class then the enrollment record ID will be returned.

Note: When custom fields on the 'Order' component are marked as required then the auto enroll API will not work i.e. the learner will not be auto enrolled to the class.

The Base learner (i.e. the Order contact) will be the logged in learner, Bill to depends on the BR settings "Billing Party" (Bill to learner itself instead of learners organization). In case of Non-zero price and payment is required for the learner, the order will be created in "Payment Initiated" state.

This API also returns context\_id and subscription\_id for any associated content, enabling external systems to form a launch URL without any additional API calls.

### **Requires OAuth**

No

### Method

POST

### URL

https://<hostname-api.sabacloud.com>/v1/learning/enroll/:learner/:offering/autoenroll

### Examples

https://< hostname-api.sabacloud.com > /v1/learning/enroll/uone/wbtclass001/autoenroll/with the state of th

### **Calling Options**

### **Table 82: Calling Options**

| Name     | Description                                 | Sample Value             | Data Type | Required? |
|----------|---|--------------------------|-----------|-----------|
| learner  | Person's ID or Username or<br>Person_No     | em~<br>plo00000000001000 | string    | Yes       |
| offering | Offering's ID or the unique offering number | dowbt00000000002644      | string    | Yes       |

### **Request Body**

{ "deliveryType": "web-based" }

```
[
    {
        "registrationStatus":100,
        "orderNo":"00160364",
        "completionStatusDesciption":"Not Evaluated",
        "orderId":"intor00000003517540",
```

```
"registrationStatusDesciption": "Registered",
      "orderStatus":100,
      "regId": "regdw00000000127324",
      "completionDate":null,
      "completionStatus":100,
      "orderStatusDesciption": "Confirmed",
      "createdOn":"2016/09/23T04:49:56UTC",
      "learningAssignments":[
         {
            "regModuleId": "regmd00000000092880",
            "subscriptionId":null,
            "contentContextId":"ctctx00000000157910"
         },
            "regModuleId":"regmd00000000092880",
            "subscriptionId":null,
            "contentContextId":"ctctx00000000157910"
         }
      ]
   }
]
```

**Note:** For more details on this see **REST** API Reference.

Use case

This enhancement provides a single REST API and thus helps reduce the number of API calls to Saba.

# API to retrieve the Audience Type / Audience Sub Types assigned to a Person

How did it work?

The existing REST API (GET AUDIENCE TYPE / AUDIENCE SUB TYPES ASSIGNED TO A PERSON) didn't retrieve accurate data. There was a mismatch between the records that it retrieved and the records shown on the product UI.

How does it work now?

The existing REST API is now deprecated and will be discontinued in the next few updates.

The following new REST API will now allow retrieving the Audience Type / Audience Sub Types assigned to a Person:

GET AUDIENCE TYPE / AUDIENCE SUB TYPES ASSIGNED TO A PERSON

### Overview

Gets the Audience Type / Audience Sub Types assigned to a Person

### **Requires OAuth**

No

Method

GET

### URL

https://<hostname-api.sabacloud.com>/v1/common/profile/:personId/audiencetype

**Note:** The following is a deprecated URL for this REST Web service and will be discontinued in the next few updates:

https://<hostname-api.sabacloud.com>/v1/people/:personId/audiencetypes/search

### **Calling Options**

### Table 83: Calling Options

| Name     | Description                        | Sample Value             | Data Type | Required? |
|----------|------------------------------------|--------------------------|-----------|-----------|
| personid | Person / Employee ID /<br>username | per~<br>sn00000000001000 | string    | Yes       |

### **Return Values**

**Note:** For more details on this see **REST API Reference**.

### Use case

This enhancement provides a REST API that represents the UI behavior for when a user clicks on **View Certification History** > **Main** tab for a Student-certification.

### API to report the content result back to Saba

How did it work?

There was no API that would report the content result back to Saba.

How does it work now?

The following new REST API will now allow reporting the content result back to Saba:

### REPORT RESULT

### Overview

Report the content result back to Saba.

**Note:** This API only supports the COIN and LAB content formats.

### **Requires OAuth**

No

### Method

POST

### URL

http://<hostname-api.sabacloud.com>/v1/partner/reportResult

### **Calling Options**

### **Table 84: Calling Options**

| Name   | Description  | Default Value  | Data Type | Required? |
|--|--|--|-----------|-----------|
| track~<br>ingKey This will be sent by Saba dur~<br>ing content launch/entitle~<br>ment(250 characters key lim~<br>it).   |  | 68FEC7ECB9C3B84E405E890B138<br>43E27D1D8F3D8E60CF90C75A9877F<br>19865DFAABFB886758529CD796DC<br>8A295D33C81E | string    | Yes       |
| completion~Possible values: incomplete,<br>completed, passed, failed.  |  | incomplete   | string    | Yes       |
| score Optional, if Completion Status<br>is Incomplete/Completed.<br>Mandatory, if completion<br>status is passed/failed. |  |  | string    | No        |
| minScore   | Minimum score  |  | string    | No        |
| maxScore   | Maximum score  |  | string    | No        |
| timeSpent  | Time spent on the content.<br>Specify the value in the follow~<br>ing format: hh:mm:ss For ex~<br>ample: 00:10:00  |  | string    | No        |
| complete~<br>dOn   | Optional date when the learner<br>completed the content item.<br>The date should be in yyyy-<br>MM-dd HH:mm:ss or<br>dd/MM/yyyy or dd/MM/yyyy<br>HH:mm:ss. |  | string    | No        |

### **Request Body**

{

```
"trackingKey":".-.A4207E711067D0FC61B3FA5F6029D0FB8E8A12748EF930B
CC47D4638131197DDEEC6548C949747CDE1E4C1AAA94245F0-.-",
"completionStatus":"completed",
```

```
"score":"24",
"minScore":"35",
"maxScore":"100",
"timeSpent":"00:24:10",
"completedOn":"27/09/2016"
}
```

**Return Values** 

```
{
    "trackingKey": ".-.A4207E711067D0FC61B3FA5F6029D0FB8E8A12748EF930B
        CC47D4638131197DDEEC6548C949747CDE1E4C1AAA94245F0-.-",
    "errorMessage": "",
    "status": "Success"
}
```

Note: For more details on this see REST API Reference.

Use case

N/A

### Get completion and lesson details of the learning event

How did it work?

The following REST API did not return the details for each registration ID that are currently returned by the /v1/enrollments/:id/sections API:

• GET COMPLETION DETAILS OF THE LEARNING EVENT

How does it work now?

The following REST APIs now return these additional details as part of the Response:

### • GET COMPLETION AND LESSON DETAILS OF THE LEARNING EVENT

### GET COMPLETION AND LESSON DETAILS OF THE LEARNING EVENT

### Overview

Gets completion and lesson details of the learning event. This API helps determine whether the elements of a certification were completed directly or by completing an equivalent.

It can also return the lesson details (sections:(completiondetail,lessondetail)) i.e. the HeldCertification/HeldCurriculum details along with the path, learning modules and learning interventions and the **lesson details** with the information regarding the courses that are completed and whether they are completed by equivalence.

Note: If the learner has not registered for a course or if the learner has registered but never launched it, the lesson information will not be returned.

### **Requires OAuth**

No

### Method

GET

### URL

http://< hostname-api.sabacloud.com > /v1/learning/heldlearningevent/:heldCertId/:pathId/sections:(:searchFields) = (interval and interval and int

### **Calling Options**

### **Table 85: Calling Options**

| Name         | Description   | Sample Value                     | Data Type | Required? |
|--------------|---|----------------------------------|-----------|-----------|
| heldCertId   | Held Certification/Cur~<br>riculum activity ID              | stuce00000000202608              | string    | Yes       |
| pathId       | Path ID   | track00000000201083              | string    | Yes       |
| searchFields | Completion Detail / Lesson<br>Details of the learning event | completiondetail<br>lessondetail | string    | Yes       |

# Example (Get Completion Details and Lesson Details for a specific path within a specific held certification/curriculum)

To get the completion details and lesson details for a specific path within a specific held certification:

https://<hosname-api.sabacloud.com

>/v1/learning/heldlearningevent/stuce00000000389597/track0000000010049/sections:(completiondetail,lessondetail)

### **Return Values:**

{

```
"id":"stuce00000000389597",
"type": "CERTIFICATION",
"certification":{
   "id":"crtfy00000000009911",
   "displayName": "Test_Certification_001"
},
"owner":{
   "id": "emplo0000000285703",
   "displayName": "uone17 uone17"
},
"acquiredOn": "2008-03-11T00:00:00.000+0530",
"assignedOnDate": "2008-03-11T11:07:07.000+0530",
"expired on": "2008-03-13T00:00:00.000+0530",
"recert window starts on":"2008-03-15T00:00:00.000+0530",
"revoked_on":null,
"inRecertification":false,
"status":{
   "intStatus":100,
   "description": "Acquired"
},
"path":{
   "id":"track000000000010049",
   "displayName": "Recertification Path",
   "is_default_path":false,
   "is acquisition path":false,
   "percentcompleted":100,
   "is recert path":true,
   "no of total modules":1,
   "no of read modules":1,
   "learningModules":[
```

```
{
   "sequence":1,
   "name":"Java"
   "id":"cegrp00000000200201",
   "is_reqd":true,
   "no_of_total_items":2,
   "no_of_reqd_items":2,
   "no_of_total_items_completed":2,
   "learningInterventions":[
      ł
         "sequence":1,
         "type": "COURSE",
         "part_id":{
            "id": "cours00000000200706",
            "course_no":"00004149",
            "displayName": "nc0508-1"
         },
         "is_completed":true,
         "is_completion_by_equivalent":false,
         "id": "edup100000000200340",
         "lessonDetails":{
            "class_id":"dowbt00000000039112",
            "registration_id":"regdw00000000310120",
            "class no":"00016147",
            "contentDetails":[
               {
                  "lessonStatus":"N",
                  "lessonLocation":"",
                  "contextId":"ctctx00000001258979",
                  "contentTitle":"A001",
                  "subscriptionId":"ctnsr00000000751124"
               },
{
                  "lessonStatus":"N",
                  "lessonLocation":"",
                  "contextId":"ctctx00000001258979",
                  "contentTitle":"A001",
                  "subscriptionId":"ctnsr00000000751125"
               },
{
                  "lessonStatus":"f",
                  "lessonLocation":"a001_end.html",
                  "contextId":"ctctx00000001258979",
                  "contentTitle":"Assessment",
                  "subscriptionId":"ctnsr00000000751126"
               },
{
                  "lessonStatus":"f",
                  "lessonLocation":"a001_end.html",
                  "contextId":"ctctx00000001258979",
                  "contentTitle":"Assessment",
                  "subscriptionId":"ctnsr00000000751127"
               }
            1
         },
         "completionStatus":{
            "key":100,
            "desc": "Not Evaluated"
         }
      }
  ]
},
```

To get the completion details and lesson details for a specific path within a specific held curriculum:

### https://<

{

hostname-api.sabacloud.com>/v1/learning/heldlearningevent/stcur0000000001744/track00000000201068/sections:(completiondetail,lessondetail)

```
"id":"stcur00000000001744",
"type": "CURRICULUM",
"curriculum":{
   "id":"curra000000000001028",
   "displayName":"Curriculum1"
},
"owner":{
   "id": "emplo00000000285703",
   "displayName": "uone17 uone17"
},
"acquiredOn": "2008-03-11T00:00:00.000+0530",
"assignedOnDate": "2008-03-11T11:07:07.000+0530",
"expired_on":"2008-03-13T00:00:00.000+0530",
"status":{
   "intStatus":400,
   "description": "Assigned"
},
"path":{
   "id":"track000000000010049",
   "displayName": "Recertification Path",
   "is_default_path":false,
   "is acquisition path":false,
   "percentcompleted":100,
   "is_recert_path":false,
   "no_of_total_modules":1,
   "no_of_reqd_modules":1,
   "learningModules":[
      {
         "sequence":1,
         "name":"Java"
         "id": "cegrp000000000200201",
         "is_reqd":true,
         "no_of_total_items":1,
         "no_of_reqd_items":1,
         "no_of_total_items_completed":1,
         "learningInterventions":[
             ł
```

```
"sequence":1,
                   "type": "COURSE",
                   "part_id":{
                      "id":"cours00000000200709",
                      "course_no":"00005678",
                      "displayName": "Course_for_Curriculum"
                  },
"is_completed":true,
"is_by_eq
                   "is_completion_by_equivalent":false,
                   "id":"edup100000000200342",
                   "lessonDetails":{
                      "class_id": "dowbt00000000039122",
                      "registration_id":"regdw00000000311120",
                      "class_no":"00016148",
                      "contentDetails":[
                         {
                            "lessonStatus": "N",
                            "lessonLocation":""
                            "contextId": "ctctx00000011258979",
                            "contentTitle": "A001",
                            "subscriptionId":"ctnsr00000001751124"
                         },
                            "lessonStatus": "N",
                            "lessonLocation":""
                            "contextId":"ctctx000000011258979",
                            "contentTitle": "A001",
                            "subscriptionId":"ctnsr00000001751125"
                         },
                            "lessonStatus":"f",
                            "lessonLocation": "a001 end.html",
                            "contextId":"ctctx000000011258979",
                            "contentTitle": "Assessment",
                            "subscriptionId":"ctnsr00000001751126"
                         },
                            "lessonStatus":"f",
                            "lessonLocation": "a001 end.html",
                            "contextId":"ctctx000000011258979",
                            "contentTitle": "Assessment",
                            "subscriptionId":"ctnsr00000001751127"
                         }
                      ]
                   },
                   "completionStatus":{
                      "key":100,
                      "desc": "Not Evaluated"
                   }
               }
            ]
         }
     ]
   }
}
```

**Note:** For more details on this see **REST API Reference**.

Use case

Customers often use the Enrollment API (/v1/people/:id/enrollments or /v1/enrollment). These high-level Enrollment APIs do provide good amount of detail when using includeDetails=true, but certain things are still missing. To get these, they have to call the Enrollment Detail API for each enrollment i.e. /v1/enrollments/:id/sections:regdetail.

This enhancement helps reduce the number of API calls, which return all the details returned by the current Enrollment Detail API for each Registration ID.

# Chapter

# **Analytics**

### Topics:

- Framework enhancements
- New Reports
- New Attributes
- Updated Attributes

# **Framework enhancements**

## Add exceptions to reports

### How did it work?

"Converse" or "Exception" reporting was not supported.

### How does it work now?

This update now allows "Converse" or "Exception" reporting where you have the ability to report on data facts that are NOT EXISTING in the recorded storage.

**Note:** By default, this feature will be disabled. To enable this feature, submit a support request. For assistance, contact Saba support.

To enable this feature, the Saba "admin" user must enable the following property under **Analytics Site** > **Configuration** > **Functionality**:

• Exceptions

| _   |            | -      |             |     |  |
|-----|------------|--------|-------------|-----|--|
| - X | <u>e o</u> | - niti | 00          | - C |  |
|     | ~ ~        | P. 10  | <b>U</b> 11 |     |  |

Enable/disable exceptions

### Figure 28: Exceptions property

While creating a new report, you will now be able to add exceptions to that report.

| Build a Flat List Report                  |          |                                |          |   | ? 🖻 Seve 🙂 Close     |
|---|----------|--------------------------------|----------|---|----------------------|
| Courses                                   | *        | Flat List report               | requires | at least 1 Dimension and 1 Filter. Metrics are optional. $\textbf{X}$ |                      |
| Fields                                    |          | Filters                        |          |   | \$                   |
| search                                    | ٥        |                                |          |   | Configure exceptions |
| Al O Metr                                 | ics      |                                |          | Drag and drop filters here.   | -                    |
| Courses                                   | <b>^</b> |                                |          |   |                      |
| Course Title                              | C        |                                |          |   |                      |
| Course Course ID                          | C        |                                |          |   |                      |
| Course Description                        | e        |                                |          |   |                      |
| Course Version                            | e        | Dimensions                     | +        | Preview Report  | Preview              |
| Course Available From                     | ¢        |                                |          |   |                      |
| Course Discontinued<br>From               | ¢        |                                |          |   |                      |
| Course Owner                              | ¢        | Drag and drog dimensions bere  |          |   |                      |
| Course Owner's<br>Organization            | ¢        | chay and drop dimensions mere. |          |   |                      |
| Course Owner Status                       | ¢        |                                |          |   |                      |
| Course Customer Service<br>Representative | ¢        |                                |          |   |                      |

### Figure 29: Configure exceptions

Clicking **Configure exceptions** brings up the **Configure exceptions** page.

| Configure exceptions       |                                       |                         |       |                        |       | ? ×              |
|----------------------------|---------------------------------------|-------------------------|-------|------------------------|-------|------------------|
| Available Exceptions       | Exception filters                     |                         |       |                        |       | Remove Exception |
| Unassigned Certification + | Exception group: Unassigned Certifica | tion - Operator Applies | : AND |                        |       |                  |
|                            | Certification Name*                   |                         | ~     | Type to search         | ۹     |                  |
|                            | Student Certification Status*         |                         | ~     | Acquired, In Progress, | - 4   |                  |
|                            |                                       |                         |       |                        |       |                  |
|                            |                                       |                         |       |                        |       |                  |
|                            |                                       |                         |       |                        |       |                  |
|                            |                                       |                         |       |                        |       |                  |
|                            |                                       |                         |       |                        |       |                  |
|                            |                                       |                         |       |                        |       |                  |
|                            |                                       |                         |       |                        |       |                  |
|                            |                                       |                         |       |                        |       | Resolve          |
|                            |                                       |                         |       |                        | Cance | l Save           |

### Figure 30: Configure exceptions page

To add an exception group from the Available Exceptions section click +.

**Note:** Available Exceptions section holds the pre-defined exceptions which can be added to a report.

To remove an already added exception group click Remove Exception. Click Save after making the required changes.

### Mote:

- You can only add one exception group per report.
- An exception group is not allowed when a report is created with "ALL" grouping.
- An exception group will be added to a report using the AND logical operator only.
- Exception grouping and Filter grouping are not allowed together.
- Exception filters are not counted as part of the main filter.

| Configure exceptions             |   |   |   |         |                |     | ? ×              |  |  |
|----------------------------------|---|---|---|---------|----------------|-----|------------------|--|--|
| Available Exceptions             |   | Exception filters                         |   |         |                |     | Remove Exception |  |  |
| Pending Completion for Course    | + |   | antine array Dendine Completion for Courses, Coursely, Institute 1910 |         |                |     |                  |  |  |
| Pending Registrations for Class  | + | Exception group: Pending Completion for C | ourse - Operator A  | oplied: | AND            |     |                  |  |  |
| Pending Registrations for Course | + | Course Title*                             |   | ~       | Type to search | ۹ 🕈 |                  |  |  |
|                                  |   | Completed Courses (Transcript) Status*    | Not Equal   | ~       |                | ~   |                  |  |  |
|                                  |   | Completion Status*                        | In  | ~       | Successful     | ~ 🌣 |                  |  |  |
|                                  |   |   |   |         |                |     |                  |  |  |

### Figure 31: Exceptions added

The exceptions that you add to a report can be seen at the time of executing that report by hovering your mouse over the filters.

Resolve button assists the admin to remove incompatible dimensions that may have been added along with.

| Available Exceptions     |   | Exception filters                     |                        |            |                              | Remove Exception |
|--------------------------|---|---------------------------------------|------------------------|------------|------------------------------|------------------|
| Unassigned Certification | + | Exception group: Unassigned Certifica | tion - Operator Applie | d: AND     |                              |                  |
|                          |   | Certification Name*                   | Equal                  | ~          | Type to search Q 🖨           |                  |
|                          |   | Student Certification Status*         |                        | Y          | Acquired, In Progress, / 💌 🚔 |                  |
|                          |   | In dimensions                         | exceptions used in th  | iis report |                              |                  |

### Figure 32: Resolving incompatibilities

The message bar recommends certain attributes that are taken out of the added dimension/metric/filters to ensure the exception report produces the relevant results for the featured exceptions. On hovering over the yellow bar, a larger "Important" message box shows up. The Resolve button removes the dimensions, metrics and filters that are identified as incompatible for this report.

**Note:** Saba only recommends and the user is free to retain them ignoring the recommendation.

| Pe  | iding registration for | course                           |                               |      |                    |            |             |       | Edit Report ? X |
|-----|------------------------|----------------------------------|-------------------------------|------|--------------------|------------|-------------|-------|-----------------|
| Rep | ort Date: 25-JUL-2016  | 1:09 PM                          |                               |      |                    |            |             | C     | Download        |
| ,   | Filters Manager F      | ul Name Is Logged In AND         | Is Terminated Equal No AN     | D Pe | m                  |            |             |       |                 |
|     | Grouping Manager F     | ull Name is Logged in AND        |                               |      |                    |            |             |       |                 |
| 12  | Is Terminat            | ed Equal No AND                  |                               | -    | accordingly filter | the report | data        |       | ~               |
| -   | Pending R              | egistrations for Course          |                               |      |                    |            |             |       | *               |
|     | Cou                    | urse Title new 234 Equal aaacou_ | for_package_with_no_price ANE | D    | ion Organization   | Name       |             |       |                 |
|     | Person Fu Rec          | gistration Status in Registered  |                               | - 1  | EssUnit3           | Bu         | sinessUnit4 | Total |                 |
|     | mgr01 mgr              |                                  |                               |      |                    |            |             | 1     |                 |
|     | User5 One5             | 1                                |                               |      |                    |            |             | 1     |                 |
|     | User4 One4             | 1                                |                               |      |                    |            |             | 1     |                 |
|     | User3 One3             | 1                                |                               |      |                    |            |             | 1     |                 |
|     | User2 One2             | 1                                |                               |      |                    |            |             | 1     |                 |
|     | User1 One1             | 1                                |                               |      |                    |            |             | 1     |                 |
|     | User Two               |                                  | 1                             |      |                    |            |             | 1     |                 |
| <   | User Three             |                                  |                               | 1    |                    |            |             | 1     | )               |
|     | User Four              |                                  |                               |      |                    | 1          |             | 1     |                 |
|     | System Administrator   | 1                                |                               |      |                    |            |             | 1     |                 |
|     | Learning Registrar     | 1                                |                               |      |                    |            |             | 1     |                 |
|     | Learning Instructor    | 1                                |                               |      |                    |            |             | 1     |                 |
|     | Human Administrator    | 1                                |                               |      |                    |            |             | 1     |                 |
|     | Catalog Builder        | 1                                |                               |      |                    |            |             | 1     |                 |
|     | B~^ O'poo              | 1                                |                               |      |                    |            |             | 1     |                 |
|     | Total                  | 12                               | 1                             | 1    |                    | 1          |             | 15    |                 |
|     |                        |                                  |                               |      | ۲                  |            |             |       |                 |
| P   | rson Organization Name | •                                | Manager Full Name             |      |                    |            | Head Count  |       |                 |
|     | BusinessUnit1          |                                  |                               |      |                    |            | 12          |       |                 |
|     | BusinessUnit2          |                                  |                               |      |                    |            | 1           |       |                 |

### Figure 33: View the added exceptions

The following OOB exception reports have also been introduced:

- Exception Report Pending Course Completion
- Exception Report Unassigned Certification

### Use case

Businesses require easy access to data that are NOT directly recorded facts (like unassigned courses, certifications, goals) in the application. This enhancement makes it possible to report on data facts that are NOT EXISTING in the recorded storage, for example:

• There are 10,000 users in the system. 7348 have been assigned the "Health and Safety Guidelines" certification. You want to report on those who are out of the assignment bracket.

# Embed an Analytics Dashboard, Report or Chart in an external portal

How did it work?

It was not possible to embed Analytics Dashboards, Reports or Charts in an external portal. This is a new functionality.

How does it work now?

This update now allows embedding Analytics Dashboards, Reports or Charts in an external portal. This will allow enterprises to display dashboard reports, charts or even reporting data in their in house portal space.

While viewing reports, you now have Embed as an action for a dashboard or a report.

| Reports Subscriptions                                    |  |                              |                   |  |
|--|--|------------------------------|-------------------|--|
| All 185 Recently Viewed                                  | 60 Favorite 0 My Reports                   | 59 Built-in Reports 126      |                   |  |
| Category: All  | *  |                              | D. New search     | ٥  |
| Name   |  |                              | Last Run Date     | Actions                                  |
| TML<br>Created By: User One                              |  |                              | 06-14-16 5:09 AM  | Edit V                                   |
| testSimpleReport1<br>Created By: User One                |  |                              | 06-13-16 5:18 AM  | Copy<br>Schedule                         |
| Survey Summary Re<br>This report provides a<br>summaries | port<br>summary of the chosen survey inclu | usive of overall and section | 06-10-16 5:19 AM  | Embed     Alterna      History     Theme |
| newd1<br>Created By: User One                            |  |                              | 06-09-16 11:10 PM | Net Hide                                 |
| newDash<br>Created By: User One                          |  |                              | 06-09-16 11:10 PM | 🖍 Edit 🔻                                 |

### Figure 34: Embed option

Clicking Embed brings up the Embed pop up.

| Certifications Usage Dashboard : Embed Dashboard X |                                   |  |
|--|-----------------------------------|--|
| Embed Type:  | Dashboard                         |  |
| Execution context type:                            | 💿 Admin 💿 Manager                 |  |
|  |                                   |  |
|  |                                   |  |
|  | Click save to generate embed code |  |
|  | once save to generate embed code. |  |

Save

Cancel

×

### Figure 35: Embed pop up for dashboards

| Unique Person List : Embed Report |                              |  |  |
|-----------------------------------|------------------------------|--|--|
| Embed Type:                       | Report Chart                 |  |  |
| Execution context type:           | 💿 Admin 🔘 Manager 🔘 Employee |  |  |

| Click save to generate embed code | ŀ.         |   |
|-----------------------------------|------------|---|
|                                   | Save Cance | 1 |

### Figure 36: Embed pop up for reports

For reports, you can choose to embed the entire report or just the chart using the following options:

- Report
- Chart

You also need to select the context type (such as Admin, Manager or Employee) for that particular embed. The Manager or Employee contexts will be available based on whether that particular report or dashboard is shared with managers or employees.

After you select the embed type and the context, click **Save** to generate the embed code.

| Unique Person List : Embed Report |                              |  |  |
|-----------------------------------|------------------------------|--|--|
| Embed Type:                       | 🖲 Report 🔘 Chart             |  |  |
| Execution context type:           | 🖲 Admin 🔘 Manager 🔘 Employee |  |  |
|                                   |                              |  |  |

| <iframe<br>src="https://dqathdb1.sabacloud.com/s<br/>mbed0000004affcbec0156693c6d290<br/></iframe<br> | Saba/Web/ATHDB1/goto/embedAnalytics/e<br>07dda" width="1076px" height="500px"> |
|---|--|
|   |  |
|   | Save Cancel  |

### Figure 37: Embed code

You can now use this code in any external portals as a part of the HTML code.

### Mote:

This feature honors the security process and associated privileges. Features like Terms and Conditions, Customer Onboarding are not honored in the embed feature. The Analytics admin is forewarned about this at the time of embed code generation.

The report presentation follows execution context as set for the report.

You can practically embed in any location that allows html code

Use case

Such embedding allows the dashboard to be presented even within the system canvas of Saba Cloud.

# Support Data Is Protected individually for Person and Organization fix custom dimensions

### How did it work?

Before the update, when any custom attribute such as **Person Custom 0** was used in a report, and if this attribute is flagged as **Data Is Protected** in any one of the component such as **External** (which is a component of Person custom), then the application used to return an error indicating: 'You do not have access to attribute 'Person Custom 0'' even though the user was trying to view the data of the **Internal** component.

### How does it work now?

After this update, if the user wants to see the data of the **Internal** component, then the user can simply use the **Person Type** filter and select the operator as **Equals/In** and the value as **Internal**. Now since the user has access to the Internal component's data, the report will run successfully. If the user selects External as the filter value, the report will return an error indicating: 'You do not have access to attribute 'Person Custom 0''.

Note: If the user does not select a filter, then the report will continue to work like before. That is it will consider both the components, and if the user does not have access on any one component, the report execution will fail with an error.

The same is applicable for the Organization fix custom dimensions.

Use case

N/A

## Line charts to now support sorting on dimension attributes

How did it work?

For (single dimension) line chart types, data was chronologically sorted on the basis of the date column, if it was available and if a date column was not available then data was sorted on the basis of metric count.

### How does it work now?

For (single dimension) line chart types, this update now allows defining sorting (ASCENDING or DESCENDING) on dimension values instead of the date column or metric count.

| Course Activity Summary: Organization > Manager   | ? 3            |
|---|----------------|
| Report Date: 06-SEP-2016 11:32 AM   | C 🔳 🛓 Download |
| Filters Registration Date Greater Equal 2500 Days before current date AND Pers  |                |
| Grouping options  |                |
| Configure Chart   |                |
| Name: score   |                |
| Chart Attributes Dimensions: Manager Full Name with Metric* Completed Courses (Ti w CR Count of: Ascending Completed Courses (Ti w CR Count of: | Cancel Save    |

### Figure 38: Sorting for dimension attributes

Note: If you set the sorting to None, data is chronologically sorted on the basis of the date column, if it is available and if a date column is not available then data is sorted on the basis of metric count.

### Use case

This enhancement makes it possible for the Performance admin to create and share dashboards to managers on performance rating distribution.

# **New Reports**

## **Exception Report - Unassigned Certification**

### How did it work?

This is a new report.

How does it work now?

This report provides a list of people who have not been assigned the selected certification.

This report needs the following services:

Certification

| Exception Report - Unassigned Certification ? ×         |                     |              |  |
|---|---------------------|--------------|--|
| Report Date: 26-SEP-2016 11:15 AM                       | A Important         | C 🛓 Download |  |
| + Filters Is Terminated Equal No AND Person Location Na | me Equal AND Manage |              |  |
|   |                     |              |  |
|   |                     |              |  |
| Person Organization<br>Name                             | Head Count          | Actions      |  |
| 123   | 13                  |              |  |
| 12344   | 12                  |              |  |
| 1jhjg/666666  | 6                   |              |  |
| 234   | 2                   |              |  |
| 4   | 4                   |              |  |
| 435345345   | 1                   |              |  |
| 75423   | 1                   |              |  |
| 878   | 1                   |              |  |
| 🖸 A   | 23                  |              |  |
| 🔛 AA - Central Africa                                   | 32                  |              |  |
| AA - Northern Africa                                    | 6                   |              |  |
| AA - Southern Africa                                    | 6                   |              |  |
| ABAS  | 4                   |              |  |
| AJ GE Org   | 2                   |              |  |
| AKSA_Ecomm1   | 4                   |              |  |
| 🔛 APA - Australia                                       | 1                   |              |  |
| APA - New Zealand                                       | 2                   |              |  |
| APAC Organization                                       | 1                   |              |  |

### Figure 39: Exception Report - Unassigned Certification Example

### **Report Details**

This section provides high-level details of the Exception Report - Unassigned Certification report.

### Filters

This report uses the following mandatory filters:

- 1. Is Terminated (Equal "No")
- 2. Certification Name (Equal)

3. Student Certification Status (In "Acquired, In Progress, Assigned, Overdue")

This report uses the following optional filters:

- 1. Manager Full Name (Equal)
- 2. Person Location Name (Equal)
- 3. Person Organization Name (Equal)

### **Exception Groups**

This report uses the following exception groups:

1. Unassigned Certification

### Dimensions

This report uses the following dimensions:

- 1. Person Organization Name
- 2. Person Full Name
- 3. Person Username
- **4.** Person Job Type Name
- 5. Manager Full Name
- 6. Person E-Mail
- 7. Person Location Name

### Metrics

This report uses the following metrics:

1. Head Count

Use case

N/A

## **Exception Report - Pending Course Completion**

How did it work?

This is a new report.

How does it work now?

This report provides the combined list of people who have not completed the course successfully post registration and those who have not been enrolled in the same course.

This report needs the following services:

- Courses
- Learning
| Exception Report - Pending Course Completion | a                                     | ? ×          |
|--|---------------------------------------|--------------|
| Report Date: 26-SEP-2016 11:18 AM            | A Important                           | C 🛓 Download |
| + Filters Is Terminated Equal No AND         | Person Location Name Equal AND Manage |              |
|  |                                       |              |
|  | × •                                   |              |
| Person Organization<br>Name                  | Head Count                            | Actions      |
| 123  | 13                                    |              |
| 12344  | 12                                    |              |
| 1jnjgj666666                                 | 6                                     |              |
| 234  | 2                                     |              |
| 4  | 4                                     |              |
| 435345345                                    | 1                                     |              |
| 75423  | 1                                     |              |
| 878  | 1                                     |              |
| A  | 23                                    |              |
| AA - Central Africa                          | 32                                    |              |
| AA - Northern Africa                         | 6                                     |              |
| 🔛 AA - Southern Africa                       | 6                                     |              |
| ABAS   | 4                                     |              |
| AJ GE Org                                    | 2                                     |              |
| AKSA_Ecomm1                                  | 4                                     |              |
| APA - Australia                              | 1                                     |              |

#### Figure 40: Exception Report - Pending Course Completion Example

#### **Report Details**

This section provides high-level details of the Exception Report - Pending Course Completion report.

#### Filters

This report uses the following mandatory filters:

- 1. Is Terminated (Equal "No")
- **2.** Course Course Title (Equal)
- 3. Completion Status (Equal "Successful")

This report uses the following optional filters:

- 1. Manager Full Name (Equal)
- 2. Person Location Name (Equal)
- 3. Person Organization Name (Equal)

#### **Exception Groups**

This report uses the following exception groups:

1. Pending Completion for Course

#### Dimensions

This report uses the following dimensions:

- 1. Person Organization Name
- 2. Person Full Name
- 3. Person Username
- 4. Person Job Type Name
- 5. Manager Full Name
- 6. Person E-Mail
- 7. Person Location Name

#### Metrics

This report uses the following metrics:

1. Head Count

Use case

N/A

## **Pulse Survey Report By Respondent**

How did it work?

This is a new report.

How does it work now?

This report provides the Pulse Survey details for each respondent.

This report needs the following services:

Custom Surveys



Figure 41: Pulse Survey Report By Respondent Example

#### **Report Details**

This section provides high-level details of the Pulse Survey Report By Respondent Report.

#### Filters

This report uses the following mandatory filters:

- **1.** Is Terminated (Equal "No")
- **2.** Survey Name (Equal)

This report uses the following optional filters:

- **1.** Survey Submitted On within a defined range
- 2. Person Location Name (In)
- 3. Person Organization Name (In)
- 4. Manager Full Name (In)
- 5. Person Full Name (In)

#### Dimensions

This report uses the following dimensions:

- 1. Person Organization Name
- 2. Person Full Name
- 3. Person Username
- 4. Person Job Type Name
- 5. Manager Full Name
- **6.** Person Location Name
- 7. Survey Section Title
- 8. Survey Question Text
- 9. Survey Question Response
- 10. Survey Question Comments
- **11.** Survey Participant Score

Use case

N/A

### **Anonymous Pulse Survey Report**

How did it work?

This is a new report.

How does it work now?

This report provides the details of the Anonymous Pulse Survey.

Note: This report will show data only when at least three or more people have completed the Anonymous Pulse survey.

This report needs the following services:

Custom Surveys

| Anonymous Pulse Survey Repo          | ort                           |                       |                                       | ? ×            |
|--------------------------------------|-------------------------------|-----------------------|---------------------------------------|----------------|
| Report Date: 30-SEP-2016 9:28 A      | M                             |                       |                                       | C 🔳 🛓 Download |
| Filters Survey Name Is               | Not Empty AND Survey Submitte | d On Greater Equal AN |                                       |                |
| <ul> <li>Grouping options</li> </ul> |                               |                       |                                       |                |
|                                      |                               |                       |                                       |                |
|                                      |                               |                       |                                       |                |
| Survey Name                          | Survey Section Title          | Survey Response Count | Average Points for<br>Survey Question | Actions        |
| 639 build survey                     |                               | 0                     |                                       |                |
| AutomationTesting                    |                               | 0                     |                                       |                |
| BasicTesting                         |                               | 0                     |                                       |                |
| CustomSurvey12                       |                               | 0                     |                                       |                |
| DnyaneshwarSurvey                    |                               | 0                     |                                       |                |
| Hello                                |                               | 0                     |                                       |                |
| HelloSurvey                          |                               | 0                     |                                       |                |
| MonaliSurvey                         |                               | 0                     |                                       |                |
| MySurvey                             |                               | 0                     |                                       |                |
| NewSurveyLaunch10                    |                               | 0                     |                                       |                |
| SABA TRAINING<br>SURVEY              |                               | 0                     |                                       |                |
| SM-Saba Training<br>Survey           |                               | 0                     |                                       |                |
| ShraddhaSUrvey2                      |                               | 0                     |                                       |                |
| ShraddhaSurvey                       |                               | 0                     |                                       |                |
| ShraddhaSurveyTesti                  |                               | 0                     |                                       |                |

#### Figure 42: Anonymous Pulse Survey Report Example

#### **Report Details**

This section provides high-level details of the Anonymous Pulse Survey Report.

#### Filters

This report uses the following mandatory filters:

1. Survey Name

This report uses the following optional filters:

1. Survey Submitted On within a defined range

#### Dimensions

This report uses the following dimensions:

- 1. Survey Name
- 2. Survey Section Title
- **3.** Survey Question Text
- 4. Survey Question Response
- 5. Survey Question Comments
- 6. Survey Participant Score

#### Metrics

This report uses the following metrics:

- 1. Survey Response Count
- 2. Average Points for Survey Question

Use case

## **New Attributes**

### Pulse 360

How did it work?

These are new attributes.

How does it work now?

This section describes the attributes that have been added under the Pulse 360 reports model in the Saba application.

Note: The Available in Dashboard column indicates if that entity is available in the dashboards.

#### Table 86: Pulse 360 Details

| Entity Name             | Attribute<br>Name       | Attribute<br>Type | Available in<br>Dashboard | Description         |
|-------------------------|-------------------------|-------------------|---------------------------|---------------------|
| Pulse 360 Feed~<br>back | Pulse 360 Cat~<br>egory | Dimension         | Yes                       | Pulse 360 Category  |
| Pulse 360 Feed~<br>back | Location Num~<br>ber    | Dimension         | Yes                       | Location Number     |
| Pulse 360 Feed~<br>back | Location Name           | Dimension         | Yes                       | Location Name       |
| Pulse 360 Feed~<br>back | Organization<br>Number  | Dimension         | Yes                       | Organization Number |
| Pulse 360 Feed~<br>back | Organization<br>Name    | Dimension         | Yes                       | Organization Name   |
| Pulse 360 Feed~<br>back | Job Name                | Dimension         | Yes                       | Job Name            |
| Pulse 360 Feed~<br>back | Country                 | Dimension         | Yes                       | Country             |

| Entity Name             | Attribute<br>Name                                       | Attribute<br>Type | Available in<br>Dashboard | Description                                  |
|-------------------------|---|-------------------|---------------------------|--|
| Pulse 360 Feed~<br>back | Created On  | Dimension         | Yes                       | Created On                                   |
| Pulse 360 Feed~<br>back | Updated On  | Dimension         | Yes                       | Updated On                                   |
| Pulse 360 Feed~<br>back | Pulse 360<br>Question                                   | Dimension         | Yes                       | Pulse 360 Question                           |
| Pulse 360 Feed~<br>back | Pulse 360 Re~<br>sponse                                 | Dimension         | Yes                       | Pulse 360 Response                           |
| Pulse 360 Feed~<br>back | Pulse 360<br>Question Type                              | Dimension         | Yes                       | Pulse 360 Question Type                      |
| Pulse 360 Feed~<br>back | Positive Re~<br>sponse Count                            | Metric            | Yes                       | Positive Response Count                      |
| Pulse 360 Feed~<br>back | Negative Re~<br>sponse Count                            | Metric            | Yes                       | Negative Response Count                      |
| Pulse 360 Feed~<br>back | Keyword Re~<br>sponse Count                             | Metric            | Yes                       | Keyword Response Count                       |
| Pulse 360 Feed~<br>back | Positive Re~<br>sponse Percent<br>for YesNo<br>Question | Metric            | Yes                       | Positive Response Percent for YesNo Question |
| Pulse 360 Feed~<br>back | Negative Re~<br>sponse Percent<br>for YesNo<br>Question | Metric            | Yes                       | Negative Response Percent for YesNo Question |

Note: Analytics will calculate the pulse score for the historical feedback data based on the feedback received for the selected date/date-range for the report. This will not essentially match the pulse score shown on the UI for that particular date since the pulse score on the application considers all the latest feedback up to the selected date (which could be outside of date range selected).

Use case

The Pulse 360 Feedback attributes allow the performance admin to extract responses from Pulse 360 question and also provide the historical context to how the score has changed over a period of time.

## Profile

How did it work?

These are new attributes.

How does it work now?

This section describes the attributes that have been added under the Profile reports model in the Saba application.

**Note:** The **Available in Dashboard** column indicates if that entity is available in the dashboards.

#### Table 87: Profile Details

| Entity Name              | Attribute<br>Name                            | Attribute<br>Type | Available in<br>Dashboard | Description   |
|--------------------------|--|-------------------|---------------------------|---|
| Person Skills            | Assessment<br>Comment                        | Dimension         | No                        | Assessment Comment  |
| Person Skills            | Assessment<br>Comment Ad~<br>ded By          | Dimension         | No                        | Assessment Comment Added By   |
| Person Skills            | Assessment<br>Comment Ad~<br>ded On          | Dimension         | No                        | Assessment Comment Added On   |
| Person Skills            | Assessment<br>Comment<br>Source              | Dimension         | No                        | Assessment Comment Source   |
| Person Details           | Plan Summary<br>Email Digest<br>Preference   | Dimension         | No                        | User's preference about receiving Plan Summary<br>Email Digest which can be No Mail, Weekly<br>Mail or Monthly Mail |
| Person Organiz~<br>ation | Person Organiz~<br>ation Type of<br>Business | Dimension         | No                        | Type of business of an external organization  |
| Person JobType           | Person Job<br>Type Job Code                  | Dimension         | No                        | Job Code defined for Job assigned to a Person   |

Customers can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports.

## Performance

How did it work?

These are new attributes.

How does it work now?

This section describes the attributes that have been added under the Performance reports model in the Saba application.

Note: The Available in Dashboard column indicates if that entity is available in the dashboards.

#### **Table 88: Performance Details**

| Entity Name                    | Attribute<br>Name                                       | Attribute<br>Type | Available in<br>Dashboard | Description                                       |
|--------------------------------|---|-------------------|---------------------------|---|
| Goal Progress<br>Audit Details | Goal Progress<br>Audit Compon~<br>ent                   | Dimension         | No                        | Goal Progress Audit Component Name                |
| Goal Progress<br>Audit Details | Goal Progress<br>Audit Reason                           | Dimension         | No                        | Goal Progress Audit Reason for Audit entry        |
| Goal Progress<br>Audit Details | Goal Progress<br>Audit Old<br>Value                     | Dimension         | No                        | Old Value of Goal Progress attribute              |
| Goal Progress<br>Audit Details | Goal Progress<br>Audit New<br>Value                     | Dimension         | No                        | New Value of Goal Progress attribute              |
| Goal Progress<br>Audit Details | Goal Progress<br>Audit Created<br>Date                  | Dimension         | No                        | Date on which Goal Progress audit was done        |
| Goal Progress<br>Audit Details | Goal Progress<br>Audited On<br>(MM/DD/YYYY<br>HH:MI:SS) | Dimension         | No                        | Date and Time for Goal Progress Audit entry       |
| Goal Progress<br>Audit Details | Goal Progress<br>Audit Attribute                        | Dimension         | No                        | Name of Goal Progress attribute which was audited |

| Entity Name                    | Attribute<br>Name                                | Attribute<br>Type | Available in<br>Dashboard | Description   |
|--------------------------------|--|-------------------|---------------------------|---|
| Goal Progress<br>Audit Details | Goal Progress<br>Audit Created<br>By (Full Name) | Dimension         | No                        | Full name of the person who changed value of<br>Goal Progress attribute |
| Goal Progress<br>Audit Details | Goal Progress<br>Audit Descrip~<br>tion          | Dimension         | No                        | Audit action for which audit entry was added                            |
| Goal Progress<br>Audit Details | Goal Progress<br>Audit Created<br>By (Username)  | Dimension         | No                        | Username of the person who changed value of<br>Goal Progress attribute  |
| Goal Progress<br>Audit Details | Goal Progress<br>Audit Proxy<br>Full Name        | Dimension         | No                        | Fullname of the Proxy user who changed value of Goal Progress attribute |
| Goal Progress<br>Audit Details | Goal Progress<br>Audit Proxy<br>User Name        | Dimension         | No                        | Username of the Proxy user who changed value of Goal Progress attribute |

Customers can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports.

## Compensation

How did it work?

These are new attributes.

How does it work now?

This section describes the attributes that have been added under the Compensation reports model in the Saba application.

Note: The Available in Dashboard column indicates if that entity is available in the dashboards.

#### **Table 89: Compensation Details**

| Entity Name                 | Attribute<br>Name                  | Attribute<br>Type | Available in<br>Dashboard | Description                     |
|-----------------------------|------------------------------------|-------------------|---------------------------|---------------------------------|
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit Compon~<br>ent | Dimension         | No                        | Plan Cycle Audit Component Name |

| Entity Name                 | Attribute<br>Name                                    | Attribute<br>Type | Available in<br>Dashboard | Description  |
|-----------------------------|--|-------------------|---------------------------|--|
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit Reason                           | Dimension         | No                        | Plan Cycle Audit Reason for Audit entry                              |
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit Old<br>Value                     | Dimension         | No                        | Old Value of Plan Cycle attribute                                    |
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit New<br>Value                     | Dimension         | No                        | New Value of Plan Cycle attribute                                    |
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit Created<br>Date                  | Dimension         | No                        | Date on which Plan Cycle audit was done                              |
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audited On<br>(MM/DD/YYYY<br>HH:MI:SS) | Dimension         | No                        | Date and Time for Plan Cycle Audit entry                             |
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit Attribute                        | Dimension         | No                        | Name of Plan Cycle attribute which was audited                       |
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit Created<br>By (Full Name)        | Dimension         | No                        | Full name of the person who changed value of<br>Plan Cycle attribute |
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit Descrip~<br>tion                 | Dimension         | No                        | Audit action for which audit entry was added                         |
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit Created<br>By (Username)         | Dimension         | No                        | Username of the person who changed value of Plan Cycle attribute     |
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit Proxy<br>Full Name               | Dimension         | No                        | Fullname of the Proxy user who changed value of Plan Cycle attribute |

| Entity Name                 | Attribute<br>Name                      | Attribute<br>Type | Available in<br>Dashboard | Description  |
|-----------------------------|--|-------------------|---------------------------|--|
| Plan Cycle<br>Audit Details | Plan Cycle<br>Audit Proxy<br>User Name | Dimension         | No                        | Username of the Proxy user who changed value of Plan Cycle attribute |

Customers can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports.

Using the **Plan Cycle Audit Details** attributes, the Compensation admin will now be able to create and run audit reports for any compensation plan.

### Learning

How did it work?

These are new attributes.

How does it work now?

This section describes the attributes that have been added under the Learning reports model in the Saba application.

**Note:** The **Available in Dashboard** column indicates if that entity is available in the dashboards.

| Table | 90: | Learning | Details |
|-------|-----|----------|---------|
|-------|-----|----------|---------|

| Entity Name               | Attribute<br>Name                          | Attribute<br>Type | Available in<br>Dashboard | Description  |
|---------------------------|--|-------------------|---------------------------|--|
| Assessment<br>Results     | Assessment<br>Question Re~<br>sponse Essay | Dimension         | No                        | Assessment Question Response Essay<br>Note: Supports the full essay response<br>while being exported as a CSV file (in case<br>of data extract report only) and the first 999<br>characters on the UI. |
| Survey And<br>Evaluations | Question Re~<br>sponse Essay               | Dimension         | No                        | Question Response Essay<br>Note: Supports the full essay response<br>while being exported as a CSV file (in case<br>of data extract report only) and the first 999<br>characters on the UI.            |
| Anonymous<br>Survey       | Question Re~<br>sponse Essay               | Dimension         | No                        | Question Response Essay<br>Note: Supports the full essay response<br>while being exported as a CSV file (in case<br>of data extract report only) and the first 999<br>characters on the UI.            |

| Entity Name                         | Attribute<br>Name            | Attribute<br>Type | Available in<br>Dashboard | Description  |
|-------------------------------------|------------------------------|-------------------|---------------------------|--|
| Anonymous<br>Survey as Con~<br>tent | Question Re~<br>sponse Essay | Dimension         | No                        | Question Response Essay      Note: Supports the full essay response     while being exported as a CSV file (in case     of data extract report only) and the first 999     characters on the UI. |
| Courses                             | Is Course in<br>Role         | Dimension         | No                        | Is current course part of any Job Role   |
| Courses                             | Course Job<br>Role Name      | Dimension         | No                        | Name of the Job Role in which current course is added  |
| Classes                             | Class Owner<br>Custom0       | Dimension         | No                        | Custom0 field of Class Owner Person  |
| Classes                             | Class Owner<br>Custom1       | Dimension         | No                        | Custom1 field of Class Owner Person  |
| Classes                             | Class Owner<br>Custom2       | Dimension         | No                        | Custom2 field of Class Owner Person  |
| Classes                             | Class Owner<br>Custom3       | Dimension         | No                        | Custom3 field of Class Owner Person  |
| Classes                             | Class Owner<br>Custom4       | Dimension         | No                        | Custom4 field of Class Owner Person  |
| Classes                             | Class Owner<br>Custom5       | Dimension         | No                        | Custom5 field of Class Owner Person  |
| Classes                             | Class Owner<br>Custom6       | Dimension         | No                        | Custom6 field of Class Owner Person  |
| Classes                             | Class Owner<br>Custom7       | Dimension         | No                        | Custom7 field of Class Owner Person  |
| Classes                             | Class Owner<br>Custom8       | Dimension         | No                        | Custom8 field of Class Owner Person  |

| Entity Name              | Attribute<br>Name                             | Attribute<br>Type | Available in<br>Dashboard | Description   |
|--------------------------|---|-------------------|---------------------------|---|
| Classes                  | Class Owner<br>Custom9                        | Dimension         | No                        | Custom9 field of Class Owner Person   |
| Classes                  | Class Owner<br>Person Type                    | Dimension         | No                        | Person Type field of Class Owner Person. It will have values Internal and External. |
| Curricula De~<br>tails   | Curricula<br>Display for<br>Learner           | Dimension         | No                        | Display this curricula to Learner   |
| Curricula De~<br>tails   | Curricula<br>Display for<br>Call Center       | Dimension         | No                        | Display this curricula to Call Center   |
| Curricula De~<br>tails   | Curricula Al~<br>low self regis~<br>tration   | Dimension         | No                        | Allow self registration on this curricula   |
| Certification<br>Details | Certification<br>Display for<br>Learner       | Dimension         | No                        | Display this certification to Learner   |
| Certification<br>Details | Certification<br>Display for<br>Call Center   | Dimension         | No                        | Display this certification to Call Center   |
| Certification<br>Details | Certification<br>Allow self re~<br>gistration | Dimension         | No                        | Allow self registration on this Certification                                       |
| Courses Catalog          | Is Course in<br>Role                          | Dimension         | No                        | Is current course part of any Job Role  |
| Courses Catalog          | Course Job<br>Role Name                       | Dimension         | No                        | Name of the Job Role in which current course is added                               |
| Certification<br>Details | Is Certifica~<br>tion in<br>JobRole           | Dimension         | No                        | Is current certification part of any Job Role                                       |

| Entity Name              | Attribute<br>Name                 | Attribute<br>Type | Available in<br>Dashboard | Description   |
|--------------------------|-----------------------------------|-------------------|---------------------------|---|
| Certification<br>Details | Certification<br>Job Role<br>Name | Dimension         | No                        | Name of the Job Role in which current certifica~<br>tion is added |
| Curricula De~<br>tails   | Is Curricula<br>in JobRole        | Dimension         | No                        | Is current Curricula part of any Job Role                         |
| Curricula De~<br>tails   | Curricula Job<br>Role Name        | Dimension         | No                        | Name of the Job Role in which current curricula is added          |
| Classes Catalog          | Class Owner<br>Custom0            | Dimension         | No                        | Custom0 field of Class Owner Person                               |
| Classes Catalog          | Class Owner<br>Custom1            | Dimension         | No                        | Custom1 field of Class Owner Person                               |
| Classes Catalog          | Class Owner<br>Custom2            | Dimension         | No                        | Custom2 field of Class Owner Person                               |
| Classes Catalog          | Class Owner<br>Custom3            | Dimension         | No                        | Custom3 field of Class Owner Person                               |
| Classes Catalog          | Class Owner<br>Custom4            | Dimension         | No                        | Custom4 field of Class Owner Person                               |
| Classes Catalog          | Class Owner<br>Custom5            | Dimension         | No                        | Custom5 field of Class Owner Person                               |
| Classes Catalog          | Class Owner<br>Custom6            | Dimension         | No                        | Custom6 field of Class Owner Person                               |
| Classes Catalog          | Class Owner<br>Custom7            | Dimension         | No                        | Custom7 field of Class Owner Person                               |
| Classes Catalog          | Class Owner<br>Custom8            | Dimension         | No                        | Custom8 field of Class Owner Person                               |
| Classes Catalog          | Class Owner<br>Custom9            | Dimension         | No                        | Custom9 field of Class Owner Person                               |

| Entity Name     | Attribute<br>Name   | Attribute<br>Type | Available in<br>Dashboard | Description   |
|-----------------|---|-------------------|---------------------------|---|
| Classes Catalog | Class Owner<br>Person Type  | Dimension         | No                        | Person Type field of Class Owner Person. It will have values Internal and External. |
| Classes Catalog | Blended<br>Class De~<br>scription / In~<br>structor-Led<br>Class De~<br>scription /<br>Remote Lab<br>Class De~<br>scription /<br>Simulation<br>Class De~<br>scription /<br>VoD Class<br>Description /<br>Web Based<br>Class De~<br>scription /<br>Virtual<br>Classroom<br>Description | Dimension         | No                        | Description for the Class   |
| Content Details | Content<br>Owner Cus~<br>tom0   | Dimension         | No                        | Custom0 field of Content Owner Person   |
| Content Details | Content<br>Owner Cus~<br>tom1   | Dimension         | No                        | Custom1 field of Content Owner Person   |
| Content Details | Content<br>Owner Cus~<br>tom2   | Dimension         | No                        | Custom2 field of Content Owner Person   |
| Content Details | Content<br>Owner Cus~<br>tom3   | Dimension         | No                        | Custom3 field of Content Owner Person   |
| Content Details | Content<br>Owner Cus~<br>tom4   | Dimension         | No                        | Custom4 field of Content Owner Person   |

| Entity Name     | Attribute<br>Name                 | Attribute<br>Type | Available in<br>Dashboard | Description   |
|-----------------|-----------------------------------|-------------------|---------------------------|---|
| Content Details | Content<br>Owner Cus~<br>tom5     | Dimension         | No                        | Custom5 field of Content Owner Person   |
| Content Details | Content<br>Owner Cus~<br>tom6     | Dimension         | No                        | Custom6 field of Content Owner Person   |
| Content Details | Content<br>Owner Cus~<br>tom7     | Dimension         | No                        | Custom7 field of Content Owner Person   |
| Content Details | Content<br>Owner Cus~<br>tom8     | Dimension         | No                        | Custom8 field of Content Owner Person   |
| Content Details | Content<br>Owner Cus~<br>tom9     | Dimension         | No                        | Custom9 field of Content Owner Person   |
| Content Details | Content<br>Owner Per~<br>son Type | Dimension         | No                        | Person Type field of Content Owner Person. It will have values Internal and External. |
| Content Details | Video file<br>Name                | Dimension         | Yes                       | Name of the Video file  |
| Content Details | Video file<br>Size                | Dimension         | Yes                       | Size of the Video file  |
| Content Details | Video Up~<br>loaded on<br>Date    | Dimension         | Yes                       | Date on which video was uploaded  |
| Content Details | Video Up~<br>loaded on<br>Time    | Dimension         | Yes                       | Time on which video was uploaded  |
| Content Details | Video Up~<br>loaded By            | Dimension         | Yes                       | Full Name of the person who uploaded the video  |

| Entity Name                | Attribute<br>Name                    | Attribute<br>Type | Available in<br>Dashboard | Description   |
|----------------------------|--------------------------------------|-------------------|---------------------------|---|
| Content Details            | Video Up~<br>loaded By<br>(Username) | Dimension         | Yes                       | Username of the person who uploaded the video         |
| Content Details<br>Catalog | Is Evaluation                        | Dimension         | No                        | Indicates whether the is content is evaluation or not |
| Content Details<br>Catalog | Video file<br>Name                   | Dimension         | Yes                       | Name of the Video file                                |
| Content Details<br>Catalog | Video file<br>Size                   | Dimension         | Yes                       | Size of the Video file                                |
| Content Details<br>Catalog | Video Up~<br>loaded on<br>Date       | Dimension         | Yes                       | Date on which video was uploaded                      |
| Content Details<br>Catalog | Video Up~<br>loaded on<br>Time       | Dimension         | Yes                       | Time on which video was uploaded                      |
| Content Details<br>Catalog | Video Up~<br>loaded By               | Dimension         | Yes                       | Full Name of the person who uploaded the video        |
| Content Details<br>Catalog | Video Up~<br>loaded By<br>(Username) | Dimension         | Yes                       | Username of the person who uploaded the video         |
| Content Details<br>Catalog | Content<br>Owner Cus~<br>tom0        | Dimension         | No                        | Custom0 field of Content Owner Person                 |
| Content Details<br>Catalog | Content<br>Owner Cus~<br>tom1        | Dimension         | No                        | Custom1 field of Content Owner Person                 |
| Content Details<br>Catalog | Content<br>Owner Cus~<br>tom2        | Dimension         | No                        | Custom2 field of Content Owner Person                 |

| Entity Name                        | Attribute<br>Name                       | Attribute<br>Type | Available in<br>Dashboard | Description   |
|------------------------------------|---|-------------------|---------------------------|---|
| Content Details<br>Catalog         | Content<br>Owner Cus~<br>tom3           | Dimension         | No                        | Custom3 field of Content Owner Person   |
| Content Details<br>Catalog         | Content<br>Owner Cus~<br>tom4           | Dimension         | No                        | Custom4 field of Content Owner Person   |
| Content Details<br>Catalog         | Content<br>Owner Cus~<br>tom5           | Dimension         | No                        | Custom5 field of Content Owner Person   |
| Content Details<br>Catalog         | Content<br>Owner Cus~<br>tom6           | Dimension         | No                        | Custom6 field of Content Owner Person   |
| Content Details<br>Catalog         | Content<br>Owner Cus~<br>tom7           | Dimension         | No                        | Custom7 field of Content Owner Person   |
| Content Details<br>Catalog         | Content<br>Owner Cus~<br>tom8           | Dimension         | No                        | Custom8 field of Content Owner Person   |
| Content Details<br>Catalog         | Content<br>Owner Cus~<br>tom9           | Dimension         | No                        | Custom9 field of Content Owner Person   |
| Content Details<br>Catalog         | Content<br>Owner Per~<br>son Type       | Dimension         | No                        | Person Type field of Content Owner Person. It will have values Internal and External.   |
| Module Details                     | Content<br>Question Re~<br>sponse Essay | Dimension         | No                        | Content Question Response Essay<br>Note: Supports the full essay response<br>while being exported as a CSV file (in case<br>of data extract report only) and the first 999<br>characters on the UI. |
| Learner Certific~<br>ation Details | Certification<br>Learning<br>Item Tran~ | Dimension         | No                        | Fullname of the Person who has updated the transcript entry for Certification Learning Item   |

| Entity Name                        | Attribute<br>Name   | Attribute<br>Type | Available in<br>Dashboard | Description   |
|------------------------------------|---|-------------------|---------------------------|---|
|                                    | script Up~<br>dated By<br>(Fullname)  |                   |                           |   |
| Learner Certific~<br>ation Details | Certification<br>Learning<br>Item Tran~<br>script Up~<br>dated By           | Dimension         | No                        | Username of the Person who has updated the transcript entry for Certification Learning Item                     |
| Learner Certific~<br>ation Details | Certification<br>Progress Tar~<br>get Date                                  | Dimension         | No                        | Target Date for Certification Progress History.<br>This will be available for records created post<br>Update 36 |
| Learner Cur~<br>ricula Details     | Curricula<br>Progress Tar~<br>get Date                                      | Dimension         | No                        | Target Date for Curricula Progress History. This<br>will be available for records created post Update<br>36     |
| Learner Cur~<br>ricula Details     | Curricula<br>Learning<br>Item Tran~<br>script Up~<br>dated By<br>(Fullname) | Dimension         | No                        | Fullname of the Person who has updated the transcript entry for Curricula Learning Item                         |
| Learner Cur~<br>ricula Details     | Curricula<br>Learning<br>Item Tran~<br>script Up~<br>dated By               | Dimension         | No                        | Username of the Person who has updated the transcript entry for Curricula Learning Item                         |
| Learner Cur~<br>ricula Details     | Curricula<br>Compliance<br>Percentage                                       | Metric            | No                        | Percentage of Curricula completed by learner  |
| Orders and Or~<br>derItems         | Order Item<br>Total Cost  | Dimension         | No                        | Total Cost for each order item in the order   |
| Orders and Or~<br>derItems         | Purchase Or~<br>der Purchase<br>Order<br>Amount                             | Dimension         | No                        | Purchase Order amount   |

| Entity Name                | Attribute<br>Name                    | Attribute<br>Type | Available in<br>Dashboard | Description  |
|----------------------------|--------------------------------------|-------------------|---------------------------|--|
| Orders and Or~<br>derItems | Purchase Or~<br>der Amount<br>Booked | Dimension         | No                        | Amount booked for a Purchase Order                                     |
| Orders and Or~<br>derItems | Order Pay~<br>ment<br>Amount         | Dimension         | No                        | Amount paid for the order under a given payment mode                   |
| Registration               | Pending Re~<br>gistrations           | Dimension         | No                        | Count of Courses which are currently in Pending<br>Registration Status |

Customers can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports.

## Recruiting

How did it work?

These are new attributes.

How does it work now?

This section describes the attributes that have been added under the Recruiting reports model in the Saba application.

**Note:** The **Available in Dashboard** column indicates if that entity is available in the dashboards.

#### Table 91: Recruiting Details

| Entity Name            | Attribute<br>Name               | Attribute<br>Type | Available in<br>Dashboard | Description   |
|------------------------|---------------------------------|-------------------|---------------------------|---|
| Job Offer              | Job Offer Posi~<br>tion         | Dimension         | No                        | Position associated with Job Offer                                      |
| Candidate De~<br>tails | Candidate Cre~<br>ated On       | Dimension         | No                        | Date on which Candidate was added to system                             |
| Candidate De~<br>tails | External Can~<br>didate Custom0 | Dimension         | No                        | Custom0 field for Candidate defined on Extern~<br>alCandidate Component |
| Candidate De~<br>tails | External Can~<br>didate Custom1 | Dimension         | No                        | Custom1 field for Candidate defined on External<br>Candidate Component  |

| Entity Name            | Attribute<br>Name                     | Attribute<br>Type | Available in<br>Dashboard | Description  |
|------------------------|---------------------------------------|-------------------|---------------------------|--|
| Candidate De~<br>tails | External Can~<br>didate Custom2       | Dimension         | No                        | Custom2 field for Candidate defined on External<br>Candidate Component     |
| Candidate De~<br>tails | External Can~<br>didate Custom3       | Dimension         | No                        | Custom3 field for Candidate defined on External<br>Candidate Component     |
| Candidate De~<br>tails | External Can~<br>didate Custom4       | Dimension         | No                        | Custom4 field for Candidate defined on External<br>Candidate Component     |
| Candidate De~<br>tails | External Can~<br>didate Custom5       | Dimension         | No                        | Custom5 field for Candidate defined on External<br>Candidate Component     |
| Candidate De~<br>tails | External Can~<br>didate Custom6       | Dimension         | No                        | Custom6 field for Candidate defined on External<br>Candidate Component     |
| Candidate De~<br>tails | External Can~<br>didate Custom7       | Dimension         | No                        | Custom7 field for Candidate defined on External<br>Candidate Component     |
| Candidate De~<br>tails | External Can~<br>didate Custom8       | Dimension         | No                        | Custom8 field for Candidate defined on External<br>Candidate Component     |
| Candidate De~<br>tails | External Can~<br>didate Custom9       | Dimension         | No                        | Custom9 field for Candidate defined on External<br>Candidate Component     |
| Candidate De~<br>tails | External Can~<br>didate Cus~<br>tom10 | Dimension         | No                        | Custom 10 field for Candidate defined on Extern~<br>al Candidate Component |
| Candidate De~<br>tails | External Can~<br>didate Cus~<br>tom11 | Dimension         | No                        | Custom11 field for Candidate defined on Extern~<br>al Candidate Component  |
| Candidate De~<br>tails | External Can~<br>didate Cus~<br>tom12 | Dimension         | No                        | Custom12 field for Candidate defined on Extern~<br>al Candidate Component  |
| Candidate De~<br>tails | External Can~<br>didate Cus~<br>tom13 | Dimension         | No                        | Custom13 field for Candidate defined on Extern~<br>al Candidate Component  |

| Entity Name                | Attribute<br>Name                     | Attribute<br>Type | Available in<br>Dashboard | Description   |
|----------------------------|---------------------------------------|-------------------|---------------------------|---|
| Candidate De~<br>tails     | External Can~<br>didate Cus~<br>tom14 | Dimension         | No                        | Custom14 field for Candidate defined on Extern~<br>al Candidate Component |
| Candidate De~<br>tails     | External Can~<br>didate Cus~<br>tom15 | Dimension         | No                        | Custom15 field for Candidate defined on Extern~<br>al Candidate Component |
| Candidate De~<br>tails     | External Can~<br>didate Cus~<br>tom16 | Dimension         | No                        | Custom16 field for Candidate defined on Extern~<br>al Candidate Component |
| Candidate De~<br>tails     | External Can~<br>didate Cus~<br>tom17 | Dimension         | No                        | Custom17 field for Candidate defined on Extern~<br>al Candidate Component |
| Candidate De~<br>tails     | External Can~<br>didate Cus~<br>tom18 | Dimension         | No                        | Custom18 field for Candidate defined on Extern~<br>al Candidate Component |
| Candidate De~<br>tails     | External Can~<br>didate Cus~<br>tom19 | Dimension         | No                        | Custom19 field for Candidate defined on Extern~<br>al Candidate Component |
| Candidate De~<br>tails     | Candidate Ca~<br>reer Site            | Dimension         | No                        | Region of Candidate   |
| Job Requisition<br>Details | Job Requisition<br>Career Sites       | Dimension         | No                        | Region of Job Requisition   |

Customers can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports.

## Social

How did it work?

These are new attributes.

How does it work now?

This section describes the attributes that have been added under the Social reports model in the Saba application.

Note: The Available in Dashboard column indicates if that entity is available in the dashboards.

| Entity Name    | Attribute<br>Name                    | Attribute<br>Type | Available in<br>Dashboard | Description  |
|----------------|--------------------------------------|-------------------|---------------------------|--|
| Idea           | Idea Voter<br>Company<br>Name        | Dimension         | No                        | Name of the external Organization to which the<br>learner who voted for idea belongs |
| Idea           | Idea Voter Or~<br>ganization<br>Name | Dimension         | No                        | Name of the internal Organization to which the learner who voted for idea belongs    |
| File/URL/Video | Video Title                          | Dimension         | Yes                       | Title of the Video   |
| File/URL/Video | Number of tags<br>on Video           | Metric            | Yes                       | Number of tags on Video  |
| File/URL/Video | Count of Rat~<br>ings for Video      | Metric            | Yes                       | Count of Ratings for Video   |
| File/URL/Video | Average Rating for Video             | Metric            | Yes                       | Average Rating for Video   |
| File/URL/Video | Total views for<br>Video             | Metric            | Yes                       | Total views for Video  |
| File/URL/Video | Total Video<br>comments              | Metric            | Yes                       | Total Video comments   |
| File/URL/Video | Video file<br>Name                   | Dimension         | Yes                       | Name of the Video file   |
| File/URL/Video | Video file Size                      | Dimension         | Yes                       | Size of the Video file   |
| File/URL/Video | Video Up~<br>loaded on Date          | Dimension         | Yes                       | Date on which video was uploaded   |
| File/URL/Video | Video Up~<br>loaded on Time          | Dimension         | Yes                       | Time on which video was uploaded   |

| Entity Name                            | Attribute<br>Name                    | Attribute<br>Type | Available in<br>Dashboard | Description                                    |
|--|--------------------------------------|-------------------|---------------------------|--|
| File/URL/Video                         | Video Up~<br>loaded By               | Dimension         | Yes                       | Full Name of the person who uploaded the video |
| File/URL/Video                         | Video Up~<br>loaded By<br>(Username) | Dimension         | Yes                       | Username of the person who uploaded the video  |
| Blogs/Work~<br>space/Chan~<br>nelVideo | Video file<br>Name                   | Dimension         | Yes                       | Name of the Video file                         |
| Blogs/Work~<br>space/Chan~<br>nelVideo | Video file Size                      | Dimension         | Yes                       | Size of the Video file                         |
| Blogs/Work~<br>space/Chan~<br>nelVideo | Video Up~<br>loaded on Date          | Dimension         | Yes                       | Date on which video was uploaded               |
| Blogs/Work~<br>space/Chan~<br>nelVideo | Video Up~<br>loaded on Time          | Dimension         | Yes                       | Time on which video was uploaded               |
| Blogs/Work~<br>space/Chan~<br>nelVideo | Video Up~<br>loaded By               | Dimension         | Yes                       | Full Name of the person who uploaded the video |
| Blogs/Work~<br>space/Chan~<br>nelVideo | Video Up~<br>loaded By<br>(Username) | Dimension         | Yes                       | Username of the person who uploaded the video  |

Customers can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports and reporting on video meta-data.

## System

How did it work?

These are new attributes.

#### How does it work now?

This section describes the attributes that have been added under the System reports model in the Saba application.

**Note:** The **Available in Dashboard** column indicates if that entity is available in the dashboards.

#### Table 93: System Details

| Entity Name                         | Attribute<br>Name                         | Attribute<br>Type | Available in<br>Dashboard | Description                                     |
|-------------------------------------|---|-------------------|---------------------------|---|
| Anonymous<br>Pulse Custom<br>Survey | Survey Author                             | Dimension         | No                        | Full name of the person who created survey      |
| Anonymous<br>Pulse Custom<br>Survey | Survey Closes<br>On                       | Dimension         | No                        | Date on which Survey closes                     |
| Anonymous<br>Pulse Custom<br>Survey | Survey Com~<br>pleted On                  | Dimension         | No                        | Date on which person completed survey           |
| Anonymous<br>Pulse Custom<br>Survey | Survey Content<br>Name                    | Dimension         | No                        | Name of the content used in Survey              |
| Anonymous<br>Pulse Custom<br>Survey | Survey Descrip~<br>tion                   | Dimension         | No                        | Description of Survey                           |
| Anonymous<br>Pulse Custom<br>Survey | Survey Essay<br>Type Question<br>Response | Dimension         | No                        | Full response for Essay Type Question in Survey |
| Anonymous<br>Pulse Custom<br>Survey | Survey Exam<br>ID                         | Dimension         | No                        | Exam ID for Content used in the Survey          |
| Anonymous<br>Pulse Custom<br>Survey | Survey Expired<br>On                      | Dimension         | No                        | Date on which Survey Expired                    |
| Anonymous<br>Pulse Custom<br>Survey | Survey ID                                 | Dimension         | No                        | Survey ID for Pulse Custom Survey               |

| Entity Name                         | Attribute<br>Name                         | Attribute<br>Type | Available in<br>Dashboard | Description   |
|-------------------------------------|---|-------------------|---------------------------|---|
| Anonymous<br>Pulse Custom<br>Survey | Survey Name                               | Dimension         | No                        | Name of the Pulse Custom survey                                       |
| Anonymous<br>Pulse Custom<br>Survey | Survey Parti~<br>cipant Score             | Dimension         | No                        | Score of the participant in Pulse custom survey                       |
| Anonymous<br>Pulse Custom<br>Survey | Survey Parti~<br>cipant Status            | Dimension         | No                        | Completion Status of Participant in Pulse Custom<br>Survey            |
| Anonymous<br>Pulse Custom<br>Survey | Survey Ques~<br>tion Comments             | Dimension         | No                        | Comments added for questions in Pulse Custom<br>Survey                |
| Anonymous<br>Pulse Custom<br>Survey | Survey Ques~<br>tion ID                   | Dimension         | No                        | Question ID for Pulse Custom Survey Questions                         |
| Anonymous<br>Pulse Custom<br>Survey | Survey Ques~<br>tion Response             | Dimension         | No                        | Response of Participant for Question in Pulse<br>Custom Survey        |
| Anonymous<br>Pulse Custom<br>Survey | Survey Ques~<br>tion Response<br>Sequence | Dimension         | No                        | Sequence in which the participant responded to questions              |
| Anonymous<br>Pulse Custom<br>Survey | Survey Ques~<br>tion Response<br>Time     | Dimension         | No                        | Time take to respond question in Pulse Custom<br>Survey (in HH:MI:SS) |
| Anonymous<br>Pulse Custom<br>Survey | Survey Ques~<br>tion Text                 | Dimension         | No                        | Question Text for Pulse Custom Survey                                 |
| Anonymous<br>Pulse Custom<br>Survey | Survey Ques~<br>tion Type                 | Dimension         | No                        | Type of Question in Pulse Custom Survey                               |

| Entity Name                         | Attribute<br>Name                            | Attribute<br>Type | Available in<br>Dashboard | Description   |
|-------------------------------------|--|-------------------|---------------------------|---|
| Anonymous<br>Pulse Custom<br>Survey | Survey Ques~<br>tion Weight                  | Dimension         | No                        | Question weight for question in Pulse Custom<br>Survey          |
| Anonymous<br>Pulse Custom<br>Survey | Survey Rating<br>for Scale Type<br>Questions | Dimension         | No                        | Rating given for Scale Type Questions in Pulse<br>Custom Survey |
| Anonymous<br>Pulse Custom<br>Survey | Survey Section<br>Score Summary<br>Rating    | Dimension         | No                        | Section score summary rating for Pulse Custom<br>Survey         |
| Anonymous<br>Pulse Custom<br>Survey | Survey Section<br>Title                      | Dimension         | No                        | Section title for Pulse Custom Survey                           |
| Anonymous<br>Pulse Custom<br>Survey | Survey Start<br>Date                         | Dimension         | No                        | Date on which survey will be available                          |
| Anonymous<br>Pulse Custom<br>Survey | Survey Status                                | Dimension         | No                        | Status of the Pulse Custom Survey                               |
| Anonymous<br>Pulse Custom<br>Survey | Survey Submit~<br>ted On                     | Dimension         | No                        | Date on which Survey was assigned to parti~<br>cipant           |
| Anonymous<br>Pulse Custom<br>Survey | Survey Sum~<br>mary Score<br>Rating          | Dimension         | No                        | Summary Score rating for Pulse Custom Survey                    |
| Anonymous<br>Pulse Custom<br>Survey | Average Points<br>for Survey<br>Question     | Metric            | No                        |   |
| Anonymous<br>Pulse Custom<br>Survey | Average Sur~<br>vey Score                    | Metric            | No                        |   |

| Entity Name                         | Attribute<br>Name                                      | Attribute<br>Type | Available in<br>Dashboard | Description |
|-------------------------------------|--|-------------------|---------------------------|-------------|
| Anonymous<br>Pulse Custom<br>Survey | Average Sur~<br>vey Section<br>Score                   | Metric            | No                        |             |
| Anonymous<br>Pulse Custom<br>Survey | Highest Survey<br>Score                                | Metric            | No                        |             |
| Anonymous<br>Pulse Custom<br>Survey | Highest Survey<br>Section Score                        | Metric            | No                        |             |
| Anonymous<br>Pulse Custom<br>Survey | Lowest Survey<br>Score                                 | Metric            | No                        |             |
| Anonymous<br>Pulse Custom<br>Survey | Lowest Survey<br>Section Score                         | Metric            | No                        |             |
| Anonymous<br>Pulse Custom<br>Survey | Survey % Re~<br>sponse                                 | Metric            | No                        |             |
| Anonymous<br>Pulse Custom<br>Survey | Survey Aver~<br>age Rating For<br>Scale                | Metric            | No                        |             |
| Anonymous<br>Pulse Custom<br>Survey | Survey Re~<br>sponse Count                             | Metric            | No                        |             |
| Anonymous<br>Pulse Custom<br>Survey | Survey Section<br>Score Summary<br>Rating              | Metric            | No                        |             |
| Anonymous<br>Pulse Custom<br>Survey | Survey Sum~<br>mary Rating<br>Scale Maxim~<br>um Score | Metric            | No                        |             |

| Entity Name                         | Attribute<br>Name                                    | Attribute<br>Type | Available in<br>Dashboard | Description                                     |
|-------------------------------------|--|-------------------|---------------------------|---|
| Anonymous<br>Pulse Custom<br>Survey | Survey Sum~<br>mary Rating<br>Scale Minimum<br>Score | Metric            | No                        |   |
| Anonymous<br>Pulse Custom<br>Survey | Survey Sum~<br>mary Score<br>Rating                  | Metric            | No                        |   |
| Anonymous<br>Pulse Custom<br>Survey | Survey Total<br>Participants                         | Metric            | No                        |   |
| Anonymous<br>Pulse Custom<br>Survey | Survey Total<br>Students Re~<br>sponded              | Metric            | No                        |   |
| Pulse Custom<br>Survey              | Survey Author  | Dimension         | No                        | Full name of the person who created survey      |
| Pulse Custom<br>Survey              | Survey Closes<br>On                                  | Dimension         | No                        | Date on which Survey closes                     |
| Pulse Custom<br>Survey              | Survey Com~<br>pleted On                             | Dimension         | No                        | Date on which person completed survey           |
| Pulse Custom<br>Survey              | Survey Content<br>Name                               | Dimension         | No                        | Name of the content used in Survey              |
| Pulse Custom<br>Survey              | Survey Descrip~<br>tion                              | Dimension         | No                        | Description of Survey                           |
| Pulse Custom<br>Survey              | Survey Essay<br>Type Question<br>Response            | Dimension         | No                        | Full response for Essay Type Question in Survey |
| Pulse Custom<br>Survey              | Survey Exam<br>ID                                    | Dimension         | No                        | Exam ID for Content used in the Survey          |

| Entity Name            | Attribute<br>Name                         | Attribute<br>Type | Available in<br>Dashboard | Description   |
|------------------------|---|-------------------|---------------------------|---|
| Pulse Custom<br>Survey | Survey Expired<br>On                      | Dimension         | No                        | Date on which Survey Expired  |
| Pulse Custom<br>Survey | Survey ID                                 | Dimension         | No                        | Survey ID for Pulse Custom Survey                                     |
| Pulse Custom<br>Survey | Survey Name                               | Dimension         | No                        | Name of the Pulse Custom survey                                       |
| Pulse Custom<br>Survey | Survey Parti~<br>cipant Score             | Dimension         | No                        | Score of the participant in Pulse custom survey                       |
| Pulse Custom<br>Survey | Survey Parti~<br>cipant Status            | Dimension         | No                        | Completion Status of Participant in Pulse Custom<br>Survey            |
| Pulse Custom<br>Survey | Survey Ques~<br>tion Comments             | Dimension         | No                        | Comments added for questions in Pulse Custom<br>Survey                |
| Pulse Custom<br>Survey | Survey Ques~<br>tion ID                   | Dimension         | No                        | Question ID for Pulse Custom Survey Questions                         |
| Pulse Custom<br>Survey | Survey Ques~<br>tion Response             | Dimension         | No                        | Response of Participant for Question in Pulse<br>Custom Survey        |
| Pulse Custom<br>Survey | Survey Ques~<br>tion Response<br>Sequence | Dimension         | No                        | Sequence in which the participant responded to questions              |
| Pulse Custom<br>Survey | Survey Ques~<br>tion Response<br>Time     | Dimension         | No                        | Time take to respond question in Pulse Custom<br>Survey (in HH:MI:SS) |
| Pulse Custom<br>Survey | Survey Ques~<br>tion Text                 | Dimension         | No                        | Question Text for Pulse Custom Survey                                 |
| Pulse Custom<br>Survey | Survey Ques~<br>tion Type                 | Dimension         | No                        | Type of Question in Pulse Custom Survey                               |

| Entity Name            | Attribute<br>Name                            | Attribute<br>Type | Available in<br>Dashboard | Description   |
|------------------------|--|-------------------|---------------------------|---|
| Pulse Custom<br>Survey | Survey Ques~<br>tion Weight                  | Dimension         | No                        | Question weight for question in Pulse Custom<br>Survey          |
| Pulse Custom<br>Survey | Survey Rating<br>for Scale Type<br>Questions | Dimension         | No                        | Rating given for Scale Type Questions in Pulse<br>Custom Survey |
| Pulse Custom<br>Survey | Survey Section<br>Score Summary<br>Rating    | Dimension         | No                        | Section score summary rating for Pulse Custom<br>Survey         |
| Pulse Custom<br>Survey | Survey Section<br>Title                      | Dimension         | No                        | Section title for Pulse Custom Survey                           |
| Pulse Custom<br>Survey | Survey Start<br>Date                         | Dimension         | No                        | Date on which survey will be available                          |
| Pulse Custom<br>Survey | Survey Status                                | Dimension         | No                        | Status of the Pulse Custom Survey                               |
| Pulse Custom<br>Survey | Survey Submit~<br>ted On                     | Dimension         | No                        | Date on which Survey was assigned to parti~<br>cipant           |
| Pulse Custom<br>Survey | Survey Sum~<br>mary Score<br>Rating          | Dimension         | No                        | Summary Score rating for Pulse Custom Survey                    |
| Pulse Custom<br>Survey | Average Points<br>for Survey<br>Question     | Metric            | No                        |   |
| Pulse Custom<br>Survey | Average Sur~<br>vey Score                    | Metric            | No                        |   |
| Pulse Custom<br>Survey | Average Sur~<br>vey Section<br>Score         | Metric            | No                        |   |
| Pulse Custom<br>Survey | Highest Survey<br>Score                      | Metric            | No                        |   |

| Entity Name            | Attribute<br>Name                                      | Attribute<br>Type | Available in<br>Dashboard | Description |
|------------------------|--|-------------------|---------------------------|-------------|
| Pulse Custom<br>Survey | Highest Survey<br>Section Score                        | Metric            | No                        |             |
| Pulse Custom<br>Survey | Lowest Survey<br>Score                                 | Metric            | No                        |             |
| Pulse Custom<br>Survey | Lowest Survey<br>Section Score                         | Metric            | No                        |             |
| Pulse Custom<br>Survey | Survey % Re~<br>sponse                                 | Metric            | No                        |             |
| Pulse Custom<br>Survey | Survey Aver~<br>age Rating For<br>Scale                | Metric            | No                        |             |
| Pulse Custom<br>Survey | Survey Re~<br>sponse Count                             | Metric            | No                        |             |
| Pulse Custom<br>Survey | Survey Section<br>Score Summary<br>Rating              | Metric            | No                        |             |
| Pulse Custom<br>Survey | Survey Sum~<br>mary Rating<br>Scale Maxim~<br>um Score | Metric            | No                        |             |
| Pulse Custom<br>Survey | Survey Sum~<br>mary Rating<br>Scale Minimum<br>Score   | Metric            | No                        |             |
| Pulse Custom<br>Survey | Survey Sum~<br>mary Score<br>Rating                    | Metric            | No                        |             |
| Pulse Custom<br>Survey | Survey Total<br>Participants                           | Metric            | No                        |             |

| Entity Name            | Attribute<br>Name                       | Attribute<br>Type | Available in<br>Dashboard | Description                           |
|------------------------|---|-------------------|---------------------------|---------------------------------------|
| Pulse Custom<br>Survey | Survey Total<br>Students Re~<br>sponded | Metric            | No                        |                                       |
| Prescription<br>Rules  | Prescriptive<br>Rule Owner              | Dimension         | No                        | Owner name for the Prescriptive Rule. |

Note: Reports created using the attributes from the Anonymous Pulse Custom Survey entity will show data only when at least three or more people have completed the Anonymous Pulse survey.

#### Use case

Customers can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports and reporting on video meta-data.

### **Exceptions**

How did it work?

These are new exceptions.

How does it work now?

This section lists the exceptions that you can add to reports using the Configure exceptions page.

#### **Table 94: Exception Details**

| Group<br>Name     | Exception<br>Name                        | Description  | Filters<br>Attributes<br>Used | Operator | Filter Default Values   |
|-------------------|--|--|-------------------------------|----------|-------------------------|
| Goal De~<br>tails | Not As~<br>signed Any<br>Goals           | This report displays the users who have not been assigned any goals                    | Status Type<br>Description    | In       | Open, Closed, Cancelled |
| Goal De~<br>tails | Not As~<br>signed a<br>Goal              | This report displays the users who<br>have not been assigned a selected<br>goal        | Goal Title                    | Equal    |                         |
| Goal De~<br>tails | Not As~<br>signed a<br>Goal              | This report displays the users who<br>have not been assigned a selected<br>goal        | Status Type<br>Description    | In       | Open, Closed, Cancelled |
| Courses           | Pending re~<br>gistrations<br>for Course | Adding this exception group gives<br>all those who have not registered<br>for a course |                               |          |                         |

| Group<br>Name       | Exception<br>Name                       | Description  | Filters<br>Attributes<br>Used | Operator | Filter Default Values |
|---------------------|---|--|-------------------------------|----------|-----------------------|
| Courses             | Pending re~<br>gistrations<br>for Class | Adding this gives all those who have not registered for a class  |                               |          |                       |
| Courses             | Pending<br>completion<br>by Course      | Adding this gives all those who<br>have not completed despite regis~<br>tration for the course AND all<br>those who have completed since<br>they haven't been registered for the<br>course   |                               |          |                       |
| Certifica~<br>tions | Unassigned<br>Certification             | The certificate title and the selected<br>certification statuses are used as<br>exclusion criteria to present the<br>data representing those who have<br>not been assigned this certificate. |                               |          |                       |
| Curricula           | Unassigned<br>Curricula                 | The curricula title and the selected<br>curricula statuses are used as exclu~<br>sion criteria to present the data<br>representing those who have not<br>been assigned this certificate.     |                               |          |                       |

You can now use these exceptions while creating reports where you have the ability to report on data facts that are NOT EXISTING in the recorded storage.

### Additional extended custom fields

#### How did it work?

These are new extended custom fields.

#### How does it work now?

The section indicates where you can find the extended custom fields listed. They will appear just above the Metrics towards the bottom of the attribute list in the respective entity. These fields will show the data as per the UI Configuration i.e. if the extended custom field is configured as Date, it will show the date data in current user's date format.

Note: Extended custom fields cannot be used as filters.

Analytics provide rich text support for extended custom fields.

#### **Table 95: Component Details**

| Component Name    | Entity Name       |
|-------------------|-------------------|
| ExternalCandidate | Candidate Details |

Use case

N/A

## New operator (Logged-in Person's Organization)

|  | How | did | it | work? |
|--|-----|-----|----|-------|
|--|-----|-----|----|-------|

This is a new operator.

How does it work now?

The following operator has been added for the Organization Name filter:

Logged-in Person's Organization

| Filters                        |       |   |   |                |   |     |
|--------------------------------|-------|---|---|----------------|---|-----|
| Person Organization Name       |       | Equal   | ~ | Type to search | 9 | . * |
|                                |       | Equal<br>Not Equal<br>Starts With<br>Contains<br>Not Contains |   |                |   |     |
| Dimensions +                   | Previ | Not In  |   |                |   |     |
|                                |       | Is Empty<br>Is Not Empty                                      |   |                |   |     |
| Drag and drop dimensions here. |       | Logged-in<br>Person's<br>Organization                         |   |                |   |     |

#### Figure 43: Logged-in Person's Organization

#### Use case

You do not need to explicitly add a person's organization name. You can now use this new operator. Selecting this operator will use the Logged-in Person's Organization name as the filter value.

# **Updated Attributes**

## Learning

How did it work?

N/A

How does it work now?

This section describes the updated attributes under the Learning reports model in the Saba application.

#### Attributes that support full description

This section lists the attributes that show first 1000 characters in Flatlist, Grouped or Crosstab report. When they are added to Data Extract report and CSV is exported from that report, you can get all the data entered into these fields from the UI.

#### Table 96: Attributes Details

| Parent Entity<br>Name | Entity Name            | Attribute Name   |
|-----------------------|------------------------|--|
| Learning              | Courses                | Prerequisite Course Description  |
| Learning              | Courses Catalog        | Course Description   |
| Learning              | Orders and Order Items | Subscription Description   |
| Learning              | Certification Details  | Certification Description  |
| Learning              | Certification Details  | Certification Learning Item Description  |
| Learning              | Curricula Details      | Curricula Description  |
| Learning              | Curricula Details      | Curricula learning item description  |
| Learning              | Classes Catalog        | Blended Class Description / Instructor-Led Class Description / Remote Lab<br>Class Description / Simulation Class Description / VoD Class Description<br>/ Web Based Class Description / Virtual Classroom Description |
#### Attributes that do not support full description

This section lists the attributes that will continue to show the same data as they are showing currently. If user wants to see the full data, then the user can use the attributes with same name present under Catalog group entities i.e. Courses Catalog and Classes Catalog respectively.

#### **Table 97: Attributes Details**

| Parent Entity<br>Name | Entity Name | Attribute Name   |
|-----------------------|-------------|--|
| Learning              | Courses     | Course Description   |
| Learning              | Classes     | Blended Class Description / Instructor-Led Class Description / Remote Lab<br>Class Description / Simulation Class Description / VoD Class Description<br>/ Web Based Class Description / Virtual Classroom Description |

#### Use case

Customers can pull these new attributes while creating or updating the Analytics reports.

## Social

#### How did it work?

The following entity names / attributes are renamed:

#### **Entity name:**

• File/URL

#### Attributes:

| File or URL Description        |
|--------------------------------|
| File or URL Domain             |
| File/URL flagged by            |
| File/URL flagged on            |
| Reason for flagging File/URL   |
| Is File/URL flagged            |
| File/URL certified by          |
| File/URL certified on          |
| Is File/URL certified          |
| Social resource state File/URL |

| File/URL Viewed By       |
|--------------------------|
| File Version Number      |
| File Version Created By  |
| File Version Status      |
| Is File Version Current  |
| File/URL Created On Date |
| File/URL Updated On Date |
| File Comment Text        |
| File Commented By        |

#### How does it work now?

This section describes the updated attributes under the Social reports model in the Saba application.

| Parent Entity | Entity Name                            | Current Attribute Name            | Updated Attribute Name                  |
|---------------|--|-----------------------------------|---|
| Social        | File/URL/Video                         | File or URL Description           | File/URL/Video Description              |
| Social        | File/URL/Video                         | File or URL Domain                | File/URL/Video Domain                   |
| Social        | File/URL/Video                         | File/URL flagged by               | File/URL/Video flagged by               |
| Social        | File/URL/Video                         | File/URL flagged on               | File/URL/Video flagged on               |
| Social        | ocial File/URL/Video Reason<br>File/UR |                                   | Reason for flagging<br>File/URL/Video   |
| Social        | File/URL/Video                         | Is File/URL flagged               | Is File/URL/Video flagged               |
| Social        | File/URL/Video                         | File/URL certified by             | File/URL/Video certified by             |
| Social        | File/URL/Video                         | File/URL certified on             | File/URL/Video certified on             |
| Social        | File/URL/Video                         | Is File/URL certified             | Is File/URL/Video certified             |
| Social        | File/URL/Video                         | Social resource state<br>File/URL | Social resource state<br>File/URL/Video |
| Social        | File/URL/Video                         | File/URL Viewed By                | File/URL/Video Viewed By                |
| Social        | File/URL/Video                         | File Version Number               | File/Video Version Number               |
| Social        | File/URL/Video                         | File Version Created By           | File/Video Version Created<br>By        |

| Parent Entity | Entity Name    | Current Attribute Name   | Updated Attribute Name             |
|---------------|----------------|--------------------------|------------------------------------|
| Social        | File/URL/Video | File Version Status      | File/Video Version Status          |
| Social        | File/URL/Video | Is File Version Current  | Is File/Video Version Cur~<br>rent |
| Social        | File/URL/Video | File/URL Created On Date | File/URL/Video Created On<br>Date  |
| Social        | File/URL/Video | File/URL Updated On Date | File/URL/Video Updated On<br>Date  |
| Social        | File/URL/Video | File Comment Text        | File/Video Comment Text            |
| Social        | File/URL/Video | File Commented By        | File/Video Commented By            |

N/A

## Compensation

#### How did it work?

The following attributes used to display data in the English locale only:

- Compensation Code
- Plan Name
- Compensation Category
- Dimension Modified
- List of Dimensions Modified

How does it work now?

The following attributes now display localized data:

| Parent Entity | Entity Name                       | Attribute Name              |
|---------------|-----------------------------------|-----------------------------|
| Compensation  | Compensation Cycle Details        | Compensation Code           |
| Compensation  | Compensation Cycle Details        | Plan Name                   |
| Compensation  | Person Compensation Cycle Details | Compensation Category       |
| Compensation  | Person Compensation Cycle Details | Dimension Modified          |
| Compensation  | Person Compensation Cycle Details | List of Dimensions Modified |

#### Use case

Compensation admin will be able to add locale for their different regions.

## Chapter

# 3

## Learning

### Topics:

- Assessment
- Learning Activity
- E-commerce
- Content

## Assessment

## Search enhancements for tests, surveys and questions

#### How did it work?

Searching for questions with **Question** field as the only criteria in a test or survey question pools took a long time when the number of questions in the pool were large. Additionally, the test/survey search experience in **Manage Test & Survey** was not consistent with question search in assessments.

#### How does it work now?

This update enhances the test and survey question search to provide a consistent search experience for all assessment types as follows:

#### Enhancements to search in Test/Survey Question Pool

Saba Cloud provides the following enhancements to search in Test/Survey Question Pool:

- Displays the selected question folder by default in the **Folder Name** dropdown list. You can select a different folder anytime later.
- Introduces the **Include questions from sub-folders** checkbox as a question search criteria. If this checkbox is selected during the question search, then Saba Cloud searches for the matching test or survey questions even in all sub-folders of the selected folder. By default, this checkbox is not selected.
- If the search is performed using **Question** field as the only criteria, then Saba Cloud now displays the following warning message:

In addition to specifying question text, select a folder from the search criteria to narrow down your search results and speed up search. Click OK to proceed, else click Cancel.

Clicking the **OK** button proceeds the search based on the specified criteria. However, clicking the **Cancel** button lets you change the search criteria and perform a fresh search.

If there are a large number of questions in the test or survey question pool, then performing a search with only Question as the criteria slows down the search. Therefore, it is recommended that you select a folder as well to narrow down your search results and speed up search.

- Adds a new Note search filter, which allows searching test or survey questions by notes.
- Hides the Author column in the search results table by default.

| Test Question Pool                                    |   |                |                   |   |                  |                     |                    |
|---|---|----------------|-------------------|---|------------------|---------------------|--------------------|
| Question Pool   | ~ | 25-QTI test    |                   |   |                  |                     |                    |
| Add Root Level Folder                                 |   | Question:      |                   |   | Answer:          |                     |                    |
| 2 2 Juned_quest     2 3 Import     2 2 Update Sprint1 | • | Question ID:   |                   | 0 | Tags:            |                     |                    |
| 24old 24WorldTestQP                                   |   | Question Type: | All               | • | Question Status: | All                 | ~                  |
| 24WorldTestQP Folder                                  |   | Author:        | Enter author name | ~ | Folder Name:     | 25-QTI test         | *                  |
| 25-Gintest  |   | Note:          |                   |   |                  | Include questions f | rom sub-folders    |
| 250 Sprint 2 Demo                                     | 1 |                |                   |   |                  |                     | Search Close       |
|   |   |                |                   |   |                  | New Que             | estion - Actions - |

#### Figure 44: Question search enhancements in Test/Survey Question Pool

#### Enhancements to search in Manage Test & Survey

Saba Cloud provides the following enhancements to search in Manage Test & Survey:

- Adds the following new search filters to the Advanced Search:
  - Folder
  - Type
  - Status
  - Description
  - Author
- Adds the following new columns in the search results table:
  - ID
  - Folder This column is hidden by default.
  - Updated On
- Hides the Author column in the search results table by default.
- Adds the **Include questions from sub-folders** checkbox as a question search criteria. If this checkbox is selected during the question search, then Saba Cloud searches for the matching test or survey questions in all sub-folders of the selected folder. By default, this checkbox is not selected.

| Manage Test & Surv  | ey       |                    |        |        |         |           |          |            |              |             |
|---|----------|--------------------|--------|--------|---------|-----------|----------|------------|--------------|-------------|
| Assessment Library  | <b>«</b> |                    |        |        |         |           |          |            |              |             |
| Add Root Level Folder   |          | Test/Survey Title: |        |        | PI      | aymode Te | mplate:  | Search     |              | ~           |
| 1_IE8     1_scorm 2004 content  | *        | Test/Survey ID:    |        |        | 🚺 Fo    | older:    | All      |            | ~            |             |
| 22-10-2013  |          | Туре:              | All    | ~      | St      | atus:     | All      | *          |              |             |
| - 22-11-2013<br>- 22-Update-PreDemo<br>- 22ndUpdate<br>- 23<br>- 23<br>- 23<br>- 22 PCS |          | Description:       |        |        | A       | ithor:    | Enter au | ithor name | <b>v</b>     | earch Close |
| ⊕ 🛄 23 RC3  | 1.1      | Test Name          |        | Туре   | Version | ld        | Status   | Folder     | Updated On 🔻 | Actions     |
| 🛄 23PMDemo<br>🛅 24<br>🔁 24-Cust-Iower doma  |          | sups CI survey     |        | Survey | 1       | 3520      | Publish. |            | 17-AUG-2016  | Actions -   |
| 24-Dec<br>24-Recruitment  |          | 🔲 demo test        |        | Test   | 3       | 3001      | Draft    | . 00supri  | 17-AUG-2016  | Actions -   |
| 24_Scorm_Run_QE<br>25 MR1   |          | Saba Test With a   | II Mis | Test   | 2       | 3500      | Draft    | 7_Aru      | 16-AUG-2016  | Actions -   |

Figure 45: Search enhancements in Manage Test & Survey

|   |              | Search Questions | Browse Question Pool               |
|---|--------------|------------------|------------------------------------|
|   | Question:    | Answ             | swer:                              |
|   | Question ID: | Autho            | thor: Enter author name            |
| 2 | Туре:        | Diffic           | ficulty:                           |
|   | Tags:        | Folde            | Ider Name: All                     |
|   |              |                  | Include questions from sub-folders |
|   |              |                  | Search                             |

#### Figure 46: Question search enhancements in Manage Test & Survey

**Note:** These search enhancements are applicable to both Learning and Recruiting tests, surveys, or questions.

#### Use case

The test, survey and question search in assessments needs to be enhanced so that it provides better usability and performance.

## **Learning Activity**

## Add video content to courses using course wizard

#### How did it work?

Prior to this update, videos hosted by content providers such as Panopto could not be added as formal learning to courses through the quick online course creation wizard. They could be added to course as activities only through the **Activities** tab during standard course creation steps.

#### How does it work now?

With this update, Saba Cloud provides support to import video content of content providers such as Panopto to courses through the quick online course creation wizard so that learners can access such videos as formal learning.

#### Prerequisite

For this functionality to work, the relevant content provider must be already configured and enabled.

#### Adding a video as an activity to a quick online course:

To add a video as an activity through the quick online course wizard, learning administrators must:

- 1. Go to Learning > Manage Learning Catalog > Learning Catalog.
- 2. Either search for an existing course or create a new course.
- 3. If you are adding the video to a new course, then:
  - a. Click the New Catalog Item link.
  - b. Click the Online Course link. The course wizard appears.
  - c. Add course information and class information and proceed to add activities.
- 4. On the Activities page, select Content from the Add Activity field.

- 5. Select the New Content option.
- 6. Select the Video Content option.
- 7. Select the required content provider from the Content Provider dropdown list.

| Class Information | Add Activity:                    | Content       | +                          |                            |            |
|-------------------|----------------------------------|---------------|----------------------------|----------------------------|------------|
|                   |                                  | New Content   | Search existing<br>content | Virtual Class<br>Recording |            |
| Activities        | Name.*                           | O Upload File | O URI                      | Video Content              |            |
| Assign Course     | Content Provider:<br>Add Video:* | * Panopto     | v                          | Choose File 1              |            |
|                   |                                  |               |                            |                            | Cancel Add |

Figure 47: Add video content as an activity using course wizard

- 8. Click the Choose file button to add the required video. The Select Video popup page opens.
- 9. Either click Upload tab to upload a new video or click Choose tab to select an existing video.
- 10. Click Upload.
- **11.** On the **Activities** page, click the **Add** button. If the upload is successful, then the **Activity Details** popup page appears; else, the wizard displays an error message.
- 12. Add the required activity details and click Save. The selected video content is added as an activity to the course.

The quick online course creation wizard needs to be enhanced so that learning administrators can quickly to add videos while creating a course.

### Handle deletion of Saba Meeting event in a class session

#### How did it work?

If a Saba Meeting administrator deleted a Saba Meeting event for a past, ongoing or future virtual session of a class or a recording for a past event, and if users tried to access the details page for the class, then Saba Cloud did not display the activity section to users.

#### How does it work now?

With this update, if a Saba Meeting event for a past, ongoing or future virtual session of a class or a recording for a past event is deleted, then users can still view the activity section of the class details page. However, the **Attend** or **Playback** link is not displayed to users for such a session whose event or even recording is deleted.

Learning administrators can also access the **Activities** tab of the class whose virtual session's Saba Meeting event is deleted.

Additionally, this update fixes the behavior of the **View Summary** popup page from the following workflows:

- My Plan
- My Plan > Calendar View > Click on deleted events > Activities Popup
- My Plan > To Do List View
- My Plan > Completed Learnings
- Home tab > My Learning portlet
- Course Details Page
- Certification/Curriculum Details page
- Global Search

There is a need to modify the integration of Saba Meeting with Saba Cloud such that even if a Saba Meeting event or an event recording is deleted, then learners can still view the activity section for the class and download documents and WBT content.

### Edit Is Sensitive field while updating a course

#### How did it work?

Prior to this update, the **Is Sensitive** field in a course became non-editable once a course was created, thereby preventing learning administrators from changing its value post creation.

#### How does it work now?

With this update, Saba Cloud makes the **Is Sensitive** field editable even after course creation. That is, learning administrators can change the value of the field while updating the course.

Changing a course from sensitive to insensitive and vice-versa after course creation has the following effects:

- Changing a course from sensitive to insensitive:
  - Cannot create a group, although course is not sensitive now.
  - Notifications, which were not available for sensitive course, are now made available.
  - The course now appears in all workflows where it was earlier hidden.
- Changing a course from insensitive to sensitive:
  - If the course or its classes have associated groups, then all such groups are made inactive.

Note: However, such inactive groups are visible and members can be added to them.

- Sensitive notifications are hidden for the course and its associated classes.
- The course is hidden in all workflows where it was earlier available.

#### Use case

Learning administrators often find the need to mark a course as sensitive and vice-versa after the course is created.

## One click registration for external users

#### How did it work?

Saba Cloud did not support one-click registration of certification/curriculum for external users even when the total price of order was zero but when pricing was enabled. Instead, users were redirected to the normal registration flow.

#### How does it work now?

With this update, Saba Cloud supports one-click registration of certification/curriculum for external users when the total price of order is zero, even when pricing is enabled.

So, if the final price of an order after discount is zero, then external users are not redirected to the normal registration flow; rather, they are directly registered for the certification/curriculum and shown the confirmation window.

**Note:** Only implicitly calculated discounts are considered for the final price of an order. Promotion codes that require a coupon code to be explicitly provided by the user, are not considered.

External users were not able to realize the full benefits of the application as one-click registration was not available to them while registering for certifications and curricula.

## Control the display of custom course fields during bulk registration

#### How did it work?

Prior to this update, Saba Cloud allowed learning administrators to determine if custom fields must be displayed to users during registration of a particular course using the course-level setting **Show custom fields during registration**.. However, bulk registration workflows did not support this ability. For all bulk order workflows for learner and manager, the custom fields popup page was displayed only if the **Enable order custom fields for Learner and Manager** setting was enabled for **Orders** service. It was not dependent on the course-level setting though.

For Registrars creating bulk orders, the custom fields popup page was displayed only if the custom fields were enabled at the component level; this was governed neither by a course-level setting nor a system level setting.

#### How does it work now?

With this update, for all bulk order workflows for learner and manager, the course custom fields popup page is now dependent on both the course-level setting and system-level setting.

- For learner and managers:
  - If an enrollment contains a single class or course, then Saba Cloud displays the custom fields popup page only if **Enable order custom fields for Learner and Manager** setting is enabled and the **Show custom fields during registration** checkbox is selected for the course in the enrollment.
  - 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 and the **Show custom fields during registration** checkbox is selected for at least one course in the enrollment.
- For Registrars:
  - If an order contains a single class or course, then Saba Cloud displays the custom fields popup page only if the **Show custom fields during registration** checkbox is selected for the course in the order.
  - If an order contains a multiple classes or courses, then Saba Cloud displays the custom fields popup page only if the **Show custom fields during registration** checkbox is selected for at least one course in the order.
- For certifications or curricula:
  - If a certification or curriculum contains only certifications or curricula and no courses or classes, then Saba Cloud displays the custom fields popup page only if the **Enable order custom fields for Learner and Manager** setting is enabled.
  - If a certification or curriculum contains only courses or classes, then Saba Cloud displays the custom fields popup page only if the **Enable order custom fields for Learner and Manager** setting is enabled and the **Show custom fields during registration** checkbox is selected for at least one course that is selected in the certification or curriculum.
  - If a certification or curriculum contains certifications or curricula and courses or classes, then Saba Cloud displays the custom fields popup page only if the **Enable order custom fields for Learner and Manager** setting is enabled and the **Show custom fields during registration** checkbox is selected for at least one course that is selected in the certification or curriculum.

The following bulk registration workflows are affected by this change:

- Placing an order from bulk enrollment (Me, My Team and Registrar)
- Registration for certification or curriculum
- Enrolling for a package

- Adding to a cart
- One-click registration for certification or curriculum

Learning administrators are forced to enable the custom fields during registration on every course based on the current parameters of the system. However, users would like the ability to determine which courses trigger the behavior versus providing an all or nothing solution. This flexibility in turn provides a better workflow and ease of use for those learners who do not need to fill in the custom fields during registration.

## New named queries for learning activities

#### How did it work?

Prior to this update, Saba Cloud sent notification emails to learners when a completed learning activity on their plan was reassigned to them.

#### How does it work now?

With this update, Saba Cloud introduces the following named queries for learning activities including courses, recurring courses, certifications and curricula:

#### Table 98: New named queries

| Named Query  | Description   | Applicable Notifications  |  |  |
|--|---|---|--|--|
| Learner whose learning activity is complete/acquired | <ul> <li>Considers certification, curriculum, and recurring course that are in the <i>Acquired</i> status and are not already added to learner's plan Or Granting Cert / Curr / Recurring Course."</li> <li>Considers courses that are added to learner's plan with <i>Successful</i> completion status OR courses that are self registered and completed successfully OR courses that are self registered and completed and later archived.</li> </ul> | <ul> <li>Course added to profile</li> <li>Recurring course added to profile</li> <li>Certification added to profile</li> <li>Curriculum added to profile</li> </ul> |  |  |
| Learner whose learning activity is not acquired      | <ul> <li>Considers certification, curriculum, and recurring course that are either in <i>Assigned</i> or <i>In-progress</i> status.</li> <li>Considers courses that are assigned to the learner for the first time through a source other than self.</li> <li>Considers recurring courses that are either in <i>Expired-Reassigned</i> or <i>Acquired-Recertification Re~quired</i> status.</li> </ul>  |   |  |  |

So, administrators can now select the required named query based on the learning activity status and notify learners accordingly. Saba Cloud triggers the notifications when the learning items are added to a learner's profile for the first

time. When same learning item is added to a learner's profile again through another source, the notifications are not triggered and emails are not sent to learners.

#### Notes

- If a learner is directly registered for a course and the course is completed unsuccessfully and later, if the learner is assigned the same course through another source, then the "Course added to profile" notification is triggered for the "Learner whose learning activity is not acquired" named query.
- If a learner directly registered for a class and completed it successfully and later, if the course is added to the learner's profile, then the notification "Course added to profile" is triggered for successful completion for the "Learner whose learning activity is complete/acquired" named query.
- If a learner is registered for a course but the course is not added to plan, and later if the learner is assigned the same course through another source, then the "Course added to profile" notification is triggered for the "Learner whose learning activity is not acquired" named query.
- If a learner is assigned a certification/curriculum through one source and the certification/curriculum is already on a learner's plan, and later if the learner is assigned the same certification/curriculum through another source, then the "Certification added to profile" or "Curriculum added to profile" notification is not triggered for the "Learner whose learning activity is not acquired" named query.
- If a learner registers for a recurring course and acquires it OR if a learner creates an ad hoc transcript for a recurring course and later, if the recurring course moves to the *Acquired-Recertification Required* status, then the "Recurring course added to profile" notification is triggered for "Learner whose learning activity is complete/acquired" named query.

#### Use case

There is a need to stop notifying learners when completed learning activities on plan are reassigned.

## Create audience type/sub-type on-the-fly for certifications and curricula

#### How did it work?

Saba Cloud did not provide the ability to create and retain audience type or audience sub-type on-the-fly while creating a certification or curriculum.

#### How does it work now?

With this update, Saba Cloud allows learning administrators to create and retain audience type or audience sub-type on-the-fly while creating a certification or curriculum.

#### Creating a new audience type or sub type from within a certification or curriculum

To create a new audience type or audience sub-type from within a certification/curriculum:

- 1. Click Admin > Learning > Manage Learning Catalog > Learning Catalog.
- 2. Search for the required certification/curriculum.
- **3.** Click the link for the certification/curriculum in the search results. The **Certification or Curriculum Details** or page opens.
- In the Main tab, click the Add Audience Type / Sub Audience Type link. The Select Audience Type / Audience Sub Type popup page opens.
- 5. Click either the New Audience Type or New Audience Sub Type link.
- 6. Specify the required details for the audience type or sub-type.
- 7. Click the **Save** button.
- **8.** Define the criteria and save them.
- 9. Click the Add to the source button. The audience type of sub-type is added to the certification/curriculum.

| Audience Type / Sub Audience Type | Add Audience Type / Sub Audience Type Print   Export |
|-----------------------------------|--|
| Audience Type / Sub Audience Type | Actions  |
| NewAT1                            | Edit<br>Remove                                       |
|                                   | Konoro   |

#### Figure 48: Add an audience type or sub type

#### Retaining an audience type or sub type for future usage

Saba Cloud also provides the **Available to Others** checkbox while creating an audience type or sub-type in a certification or curriculum. Enabling this checkbox allows learning administrators to retain the audience type or sub-type for usage in other certifications or curricula. If disabled, then the audience type or sub-type is not available for use in future and learning administrators cannot edit it. The default value of this checkbox depends on its related component attribute default value.

| New Audience Type   |                       |      |     |            |
|---------------------|-----------------------|------|-----|------------|
|                     |                       |      |     |            |
| Audience Type       |                       |      |     |            |
|                     | 1.M                   | lain | ~~> | 2.Criteria |
| Name*               | NewAT1                |      |     |            |
| Description         |                       |      |     |            |
|                     | Character Limit : 100 |      |     |            |
| Pricing Precedence  |                       |      |     |            |
| Available to Others |                       |      |     |            |
| Domain              | world                 |      | 4   |            |

#### Figure 49: Add an audience type or sub type

Saba Cloud displays the **Available to Others** checkbox only if your system administrator has enabled the **isretained** attribute for the **Audience Type** or **Audience Sub Type** component. To enable this attribute, navigate to **Admin** > **System** > **Configure System** > **Services** > **Audience Type** > **Components** > **Audience Type**/Audience Sub Type > **Attributes** > **isretained**, and select the **Display** checkbox. By default, the **Display** checkbox is disabled, which means that the **Available to Others** checkbox is not displayed to learning administrators.

#### Use case

There is a need to create audience type and sub-types while creating a certification or curriculum and retain them for future usage in other certifications or curricula.

## Hide unsuccessful completions from learner's transcript

#### How did it work?

The **My Completed Learning** page of learners displayed all of their learning completions, irrespective of they being successful or unsuccessful and learners did not have the ability to filter out the unsuccessful ones.

#### How does it work now?

Saba Cloud now provides learners with the option to filter their completed learnings on the **My Completed Learning** page based on the learning's completion status.

Learners can view their completed learning by navigating to **Me > Completed Learning**. They can select one of the following options:

- Successful
- Unsuccessful
- All

For example, to view only successful completions, select the **Successful** option from the **Status** dropdown list. The page refreshes to display only successful completions. The default selected value of the **Status** dropdown list depends on the system configuration, though.

| My Co     | mpleted Learning  |   |                     | _                   |   |
|-----------|---|---|---------------------|---------------------|---|
| Date      | Past 12 months  | Status                                    | All V<br>Successful |                     |   |
|           |   |   | Unsuccessful        |                     | 4 |
| Title 🔻   |   | Progress                                  | All                 | Action              |   |
|           | 5JanWeb2.0 OFF<br>Web-Based Version:5JanWeb2.0 OFF            | Successful<br>On:05/01/2016<br>Score: 90  |                     | Print Certificate 🔻 |   |
| <u>()</u> | 456783<br>Course<br>The course has been completed externally. | Successful<br>On:10/05/2016<br>Score: 0   |                     | Print Certificate 🔹 |   |
|           | 32Course2Prereq<br>Web-Based                                  | Unsuccessful<br>On:31/01/2016             |                     | View Summary        |   |
|           | 32Course2Prereq<br>Web-Based                                  | Unsuccessful<br>On:17/02/2016<br>Score: 1 |                     | View Summary        |   |

#### Figure 50: Status filter on My Completed Learning page

#### Setting the Default value of Status filter

To set the default value of the **Status** dropdown list on the learner's **My Completed Learning** page, system administrators must configure the following new setting under the **Transcript** service:

#### • Display default type of completed learning

Select the default type of completed learning to show users on their completed learning page. You can select from the following options:

- Successful
- Unsuccessful
- All

The default value is *All*.

| Setting                   | s: Transcri                          | pt                                |                   |                           |                   | 6   |
|---------------------------|--------------------------------------|-----------------------------------|-------------------|---------------------------|-------------------|---|
| Configure the<br>Settings | policy settings for<br>Notifications | r the service to ma<br>Components | itch your company | ny's business processes   | . Enable or disat | ole associated features.                            |
| Domain*<br>Manager a      | oproval required fo                  | world<br>or ad hoc transcrip      | ot                |                           |                   |   |
| If this busin             | ess rule is enable                   | d, manager appro                  | val will be requi | red for ad hoc transcript |                   | ● On<br>● Off                                       |
| Display def               | ault type of compl                   | eted learning                     |                   |                           |                   |   |
| Select the c              | lefault type of com                  | pleted learning to                | show users on     | their completed learning  | ) page.           | Unsuccessful ▼<br>All<br>Successful<br>Unsuccessful |

#### Figure 51: Default value of Status filter

Use case

For certain organizations, unsuccessful completed learnings of users are not relevant and they prefer that only successful completions are displayed on the user's transcript page.

# Display for Learner, Display for Call Center, and Self-registration options for certifications and curricula

How did it work?

The **Display for Learner** and **Display for Call Center** checkboxes for a course allowed administrator to control the visibility of the course. However, these options were not available in both certification and curriculum.

How does it work now?

Saba Cloud adds the **Display for Learner**, **Display for Call Center** and **Allow Self Registration** checkboxes to both certification and curriculum.

These checkboxes are displayed only if the following new setting is enabled by your system administrator:

#### Control Display and Registration of Certification/Curriculum for Learners and Registrars

If this setting is enabled, then the **Display for Learner**, **Display for Call Center**, and **Allow Self Registration** fields for a certification/curriculum are displayed on the Saba Cloud UI. These fields govern the display and registration of a certification/curriculum for learners and registrars.

If the value of **Allow Self Registration** field is set to false when this setting is enabled, then, even after disabling this setting, learners cannot register for any learning items in the certification/curriculum from within the certification/curriculum. But, they can register for those learning items outside of the certification/curriculum.

When configured, this setting is applicable to both certifications and curricula. It cannot be configured only for certifications or only for curricula.

**Note:** This is a system-level setting and is not domain aware.

The default value of this setting is 'false'.

If this setting is enabled, then it is mandatory to generate the full index for the site.

**Note:** To generate the full index, submit a support request. For assistance, contact Saba support.

#### Display for Learner

This checkbox is meant to prevent learners from discovering the certification/curriculum in the system.

If cleared, then the certification/curriculum is hidden from learners in all search areas, including:

- Global Search
- Browse
- Assign Learning
- Add Learning to Goal
- Portlets (Popular Learning, Resources, Featured, Recommendation, and Shared With You)

If a parent certification/curriculum has "Display for Learner" checkbox enabled and its child certification/curriculum has the checkbox disabled, then the learner can still view the child certification/curriculum from the parent certification/curriculum.

#### **Display for Call Center**

If cleared, then the certification/curriculum is hidden from all registrar and local learning registrar searches.

| vailable to learners.   | no ceruncation240 win bei | made available to rearriers. Only certifications_updated that are in Active status will be |
|-------------------------|---------------------------|--|
| Vailable From*          | 09-JUN-2015               | Edit   |
| Discontinued From       |                           |  |
| itatus*                 | In Effect <b>v</b>        |  |
| Featured                |                           |  |
| Display For Learner     |                           |  |
| Display For Call Center |                           |  |

#### Figure 52: Display for Learner and Display for Call Center checkboxes

In addition to these two new checkboxes, this update also introduces the following checkbox for certification and curriculum.

#### Allow Self Registration

Selecting this option allows learners to register for the certification/curriculum and learning items in it. If disabled, then learners cannot register for any learning items in the certification/curriculum from within the certification/curriculum. But, they can register for those learning items outside of the certification/curriculum.

| Registration Rules<br>Select rules for registration that th | he learner must follow when registering for the certification.  |
|---|---|
| Enforce Module Sequencing 3                                 | Learners must register for all modules and complete them in the order in which they are defined.                              |
| Enforce Target Date 📀                                       | Learner must select the classes with end date before target date selected in the completion criteria section.                 |
| One-click registration 👔                                    | The learner will be registered for all classes of a matching programme after selecting 'Register'.                            |
| Continuous launch 🕜   | Launch all web-based classes sequentially on completion of the previous class.  |
| Allow Self Registration ③                                   | ${\ensuremath{ \mathbb Z}}$ Selecting this option allows learners to register for the certification and learning items in it. |

#### Figure 53: Allow Self Registration checkbox

If the **Allow Self Registration** checkbox is disabled for a certification/curriculum, then the **View Classes** link is not displayed against the course module. But, if learner clicks any of the module and opens a detailed version of the module, then the **Enroll** link is displayed.

By default, the three fields are enabled at the component level.

The three fields support only Silent Auditing. If system administrators try to change Attribute properties for any of these three attributes, then the following actions are not supported and the attribute continue to behave as per their default values:

- Change UI Label
- Check / Uncheck "Display" option
- Check / Uncheck "Required" Option

#### Use case

There is a need to control the visibility of certifications and curricula in different searches of learners and registrars, so that administrators can decide who can register for them.

## Remove discontinued courses from learner's plan

#### How did it work?

When learning administrators discontinued a course, Saba Cloud did no post processing other than discontinuing the course in the system. For example, neither a discontinued course was automatically removed from learners' plans nor were the corresponding class registrations dropped. Learners or administrators had to manually perform these tasks post course discontinuation.

#### How does it work now?

With this update, Saba Cloud allows learning administrators to select different options when they try to discontinue a course.

**Note:** Currently, this feature is not available for recurring courses.

When a learning administrator specifies the **Discontinued From** date for a course and saves the course, Saba Cloud displays a popup page with the following options:

#### Table 99: Discontinue course options

| Option                       | Description   | Default Value |
|------------------------------|---|---------------|
| Remove course from all plans | If this option is selected, then on reaching the <b>Discontinued From</b> date, the course is removed from learning plans of learners to whom | Off           |

| Option                     | Description   | Default Value |
|----------------------------|---|---------------|
|                            | the course is assigned only if the course is in the <i>Pending Registration</i> status.   |               |
| Drop registrations         | <ul> <li>If this option is selected, then on reaching the <b>Discontinued From</b> date, all class registrations based on the course are dropped for learners registered for such classes only if:</li> <li>the class registration is not in the <i>Completed</i> status, or</li> <li>the class's start date is later than the course's <b>Discontinued From</b> date.</li> </ul>                   | Off           |
| Cancel/Discontinue classes | <ul> <li>If this option is selected, then on reaching the Discontinued From date, all session-based classes are canceled and WBT classes are discontinued only if:</li> <li>the classes are not marked as <i>Delivered</i>, or</li> <li>any class based on the course is completed by the learner, or</li> <li>the class's start date is later than the course's Discontinued From date.</li> </ul> | Off           |

| Please select the action(s) you would like to perform.<br>If you just wish to discontinue this course check nothing and click close. |  |  |  |  |  |  |
|--|--|--|--|--|--|--|
| Remove course from all plans   |  |  |  |  |  |  |
| Drop Registrations   |  |  |  |  |  |  |
| Cancel/Discontinue classes   |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| Save and Close Close   |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

#### Figure 54: Discontinue course options

By default, none of the options are selected. Administrators can select either a single option or a combination of options or all of them. Once they select the required options and click the **Save and Close** button, Saba Cloud processes a periodic event **Course Discontinue Post Activity**. System administrators must configure this event to handle the post processing activities accordingly.

Note: If no option is selected, then Saba Cloud discontinues the courses, but does no post processing. This is the behavior prior to this update.

Saba Cloud displays the options every time the **Discontinued From** date for a course is changed and the changes are saved. However, after the first change, the options displayed are read-only and administrators cannot modify them. Once the discontinued course are processed by the notification event, they are not processed again.

**Note:** Currently, the ability to specify and perform post activities for discontinued courses is not supported through bulk data import and REST APIs.

There is a need to automatically perform certain tasks such as removing courses from the learning plans of learners when the courses are discontinued. This would eliminate the need for learners or administrators from manually performing such tasks.

## **Enhanced View Classes popup page**

#### How did it work?

Prior to this update, the learners had to click the **View more** link on the View Classes popup page to see classes that were not shown on the initial page view. However, clicking the link displayed only a limited number of classes out of the available ones, and learners had to click the link multiple times till they found the required class.

How does it work now?

With this update, Saba Cloud enhances the View Classes popup page for learners by replacing the **View more** link by pagination at the bottom of the page. When there are a large number of classes, pagination makes the class search easy for learners. The page displays a scroll bar to view up to 10 classes per page. Learners can click the previous and next arrow icons to move between pages to toggle betwee pages and view more classes.

Learners can access this page from their My Plan, Course Details, Find More classes, and Continuing Education Credits pages.

| GROUPS    | ADMIN Browse All • New Hire Orientation Q 7   |
|-----------|---|
|           |   |
| More than | 61 results found for 'New Hire Orientation' Sort by Relevance Y Results per page 12 Y   |
| - All     | New Hire Orientation<br>Course (25 classes)   |
|           | CPF: No<br>0 USD  |
|           | Course Owner : This custom field is protected, it can be viewed only by the person having 'Can view protected Data' privilege |
|           | Course Sponsor : This course is created for demo of story spc-/2165   |
| $\langle$ | View classes - Share Bookmark Tags: 🔂   |

Figure 55: Pagination on View Classes page



Figure 56: Pagination on View Classes page

Clicking the **View more** button on the View Classes popup page only showed the learners a limited number of classes at a time, which hampered usability. By adding pagination to this page, learners can more easily navigate between the pages to find a specific class.

## Add lab sessions to a class activity

#### How did it work?

Prior to this update, Saba Cloud learning administrators were unable to add LAB sessions as part of their course activity.

How does it work now?

From this release, Saba Cloud learning administrators can add and track LAB sessions as part of their course activity.

To create LAB Content, at least one LAB Vendor should be configured.

To add a new content vendor, navigate to:

- 1. Admin>Learning Home>Manage Content>Content Vendors
- 2. In Vendor Integration Model select Vendor Type, Customer ID, Password, Access URL and Enroll URL. (all these fields are required)

Customer ID/Password: these credentials will be used to login to the customer site before any API call.

Enroll URL: Complete URL with tenant name should be provided.

The tenant name should be URL Param. Example: tenant=<tenantName>

Sample Enroll URL: https://<hostname>/?tenant=<tenantName>

This URL will be used to POST Entitlement and Start Entitlement.

Access URL: This URL will be used to launch the content.

#### 3. Click Save.

#### Figure 57: New content vendor

| Learning Home              | New Content Vende        | or  |              |
|----------------------------|--------------------------|---|--------------|
| Manage Learning Catalog    |                          |   | * = required |
| Manage Classes             | Name*                    | Lab Provider                                    |              |
| Manage Categories          | Domain*                  | world   |              |
| Learning Requests          | Description              | New vendor for Lab content                      |              |
| Manage Packages            |                          |   |              |
| Manage E-Commerce          |                          | Character Limit : 255                           |              |
| Manage Resources           | Provider                 |   |              |
| Training Unit              | Status"                  | Active *  |              |
| Purchase Orders            | Vendor Integration Model |   |              |
| ContinuingG Education_mstr |                          |   |              |
| Manage Assessment          | Vendor Type*             | LAB •   |              |
| Manage Content             | Customer ID*             | NewLab1   |              |
| Content Library            | Password*                |   |              |
| Content Player             | Access URL*              | https://labswtst.sabacloud.com/Saba/We Test URL |              |
| Content Vendors            |                          |   |              |
| Saba Publisher             | Enroll URL*              | nttps://labswtst.sabacioud.com/5aba/We          |              |
| Saba Anywhere              | Other Information        |   |              |
| Manage Content Completion  | ouer mormadon            |   |              |
| Monitor Content Communic   | Customo                  |   |              |
| Registrar Desktop          | Custom1                  |   |              |
| Manage LRS Registry        | Custom2                  |   |              |

In addition, the following details from the user profile are used to register the user: Email, First Name, Last Name and Organisation. If those fields are left blank, user will have to update them; otherwise, launch will not work.

To add LAB content to Saba content repository:

- 1. Navigate to Admin>Learning Home>Manage Content>Content Library
- 2. In the Import Content screen: Enter a Name
- 3. Select content format LAB
- 4. Select Active LAB Content Provider
- 5. Click Next
- 6. Enter Valid LAB Code
- 7. Click Verify Code
- 8. Click Import

#### Figure 58: Import Content

| A ME PEOPLE GRO            | UPS ADMIN                   |                 |              |               |             |           | Brows  | ie Al •      | Search      | ٩ [                  |
|----------------------------|-----------------------------|-----------------|--------------|---------------|-------------|-----------|--------|--------------|-------------|----------------------|
| Admin Home People Hi       | R Social Meetings Comp      | ensation123     | Instructor   | Learning      | Performance | Pulse 360 | Talent | Recruiting   | Marketplace | Extended integration |
| System Analytics_u37       |                             |                 |              |               |             |           |        |              |             |                      |
| Learning Home              | Import Content              |                 |              |               |             |           |        | 63           |             |                      |
| Manage Learning Catalog    | import content              |                 |              |               |             |           |        |              |             |                      |
| Manage Classes             |                             |                 |              |               |             |           |        |              |             |                      |
| Manage Categories          | 1.0                         | content Details | ···> 2.8     | nport Content |             |           |        | - = required |             |                      |
| Learning Requests          |                             |                 |              |               |             |           |        |              |             |                      |
| Manage Packages            | Name*                       | LABVendorC      | ontent       |               | ]           |           |        |              |             |                      |
| Manage E-Commerce          | Security Domain*            | world           |              |               | 6           |           |        |              |             |                      |
| Manage Resources           | Content Format*             | LAB             |              |               |             |           |        |              |             |                      |
| Training Unit              | Content Provider*           | LABVendor       |              |               |             |           |        |              |             |                      |
| Purchase Orders            | Player Template*            | New Window      | v Standard T | errojate      | 6           |           |        |              |             |                      |
| Continuing@ Education_mstr | Mobile Device Compatibility | Not Compati     | tible        |               | *           |           |        |              |             |                      |
| Manage Assessment          | Content Type                | -Select One     |              | *             |             |           |        |              |             |                      |
| Manage Content             | Version Number              |                 | 1            |               |             |           |        |              |             |                      |
| Content Library            | Evolution Date              |                 |              | 1             |             |           |        |              |             |                      |
| Content Player             | Expiration crate            | 01/00 01        |              |               |             |           |        |              |             |                      |
| Content Vendors            | Parent Potter               | . unav_ci       |              |               |             |           |        |              |             |                      |
| Saba Publisher             | Line as Evolution           |                 |              |               |             |           |        |              |             |                      |
| Saba Anywhere              | Voe as creudon              |                 |              |               |             |           |        |              |             |                      |
| Manage Content Completion  |                             |                 |              |               |             |           |        |              | 1.          | Who's Online (0)     |

Figure 59: Import Content - Content Details

| 👬 ME PEOPLE GRO            | UPS ADMIN       |                |              |            |              |             |           | Brown  | se Al        | • Search    | ٩                    |
|----------------------------|-----------------|----------------|--------------|------------|--------------|-------------|-----------|--------|--------------|-------------|----------------------|
| Admin Home People H        | R Social Me     | eetings Compen | sation123 I  | instructor | Learning     | Performance | Pulse 360 | Talent | Recruiting   | Marketplace | Extended Integration |
| olaren vereileraToo.       |                 |                |              |            |              |             |           |        |              |             |                      |
| Learning Home              | Import C        | ontont: LAP    | Vender       | Conton     | Domo         |             |           |        | 9            |             |                      |
| Manage Learning Catalog    | import C        | ontent: LAE    | vendor       | Conten     | itDemo       | LAD)        |           |        | C.0          |             |                      |
| Manage Classes             |                 |                |              |            |              |             |           |        |              |             |                      |
| Manage Categories          |                 | 1.00           | tent Details | > 2.0      | nport Conten |             |           |        | * = required | 1           |                      |
| Learning Requests          |                 | 110.0          |              |            |              |             |           |        |              |             |                      |
| Manage Packages            | Lab Code *      | SP             | HVICMED      |            |              | Verity Code |           |        |              |             |                      |
| Manage E-Commerce          |                 |                |              |            |              | tanif and   |           |        |              |             |                      |
| Manage Resources           | Other Informati | lion           |              |            |              |             |           |        |              |             |                      |
| Training Unit              |                 |                |              |            |              |             |           |        |              |             |                      |
| Purchase Orders            | Custom0         |                | -Select One- | • •        |              |             |           |        |              |             |                      |
| Continuing@ Education_mstr | Custom1_integ   | ger            |              |            |              |             |           |        |              |             |                      |
| Manage Assessment          | Custom2_real    |                |              |            |              |             |           |        |              |             |                      |
| Manage Content             | Custom3_bool    | lean           |              |            |              |             |           |        |              |             |                      |
| Content Library            | Custom4_date    | 2              |              |            |              |             |           |        |              |             |                      |
| Content Player             | Custom5_time    | ,              |              |            |              |             |           |        |              |             |                      |
| Content Vendors            | Custom6         |                |              |            |              |             |           |        |              |             |                      |
| Saba Publisher             | Custom7         |                |              |            |              |             |           |        |              |             |                      |
| Saba Anywhere              | CustomB         |                |              |            |              |             |           |        |              |             |                      |

Note: If the LAB code is not valid, you will not be able to create LAB content.

You are now ready to add content to Class Activity.

- 1. Navigate to Admin>Learning>Classes
- 2. Select the Activities tab and click Add Activities

Once the **LAB Content** is added, you can launch the content for the learner to access. The status will be incomplete till result is reported back to Saba. To report results the Result report API is used.

#### Figure 60: Launch content for learners

|  |  | Start date: 01-NOV-2016  |  |             |            |
|--|--|--|--|-------------|------------|
|  |  | Equity<br>Recurring<br>Course123 Version:2<br>Web-Based<br>CPF: No<br>Source : user one1 | (Successful)<br>Reacquisition required by :<br>05-JAN-2017 | 161 days    | Launch     |
|  |  | 1000111cert_content<br>Certification246 Version:1.1<br>.1<br>Source : user one1          | 0%<br>Assigned   | No due date | Register • |

**Note:** For LAB contents – The **Time Spent** column on the results screen will always show the time spent on the latest attempt.

When launching the LAB content, the following APIs are called to construct the Launch URL.

#### Figure 61: API calls



Saba Cloud users can add lab sessions as course activity and learners can launch these lab sessions as class activity.

## Increased default max count for VLE providers

#### How did it work?

Prior to this update, the default max count for VLE providers was set to 50 per tenant. To increase this limit, organizations were required to contact Saba support.

#### How does it work now?

With this update, Saba Cloud increases the default max count for the following VLE providers to 500 per tenant:

- Saba Meeting
- Adobe Connect
- Cisco Webex

The VLE provider max count is updated only for those tenants where the existing max count for the VLE provider was set to 50 prior to this update. If the max count was set to a value other than 50, then it remains unchanged after this update.

Administrators are not allowed to enter "*Aax Seats on Class>* + *Additional Seats for VLE Provider>*" value if it is greater than the max count for VLE provider. If the total value goes beyond the VLE provider max count, then Saba Cloud displays an appropriate error message.

Note: To increase this limit, submit a support request. For assistance, contact Saba support.

#### Limitations

- There is no check for the max seat count of blended classes and VLE Provider max count when virtual session is added to the blended class.
- There is no check for max seat count with respect to the max count on VLE Provider for blended and virtual classes when the administrator marks a waitlisted learner as Confirmed by increasing the class count.

Use case

There is a need to increase the default max count for VLE providers so that organizations do not need to contact Saba support for the same.

# Registrars and managers can enroll learners to certifications and curricula

#### How did it work?

Prior to this update, registrars or managers did not have the ability to enroll learners to certifications or curricula.

#### How does it work now?

With this update, Saba Cloud allows registrars and managers to assign and enroll learners to certifications and curricula.

The order creation wizard for registrars and managers now includes the following new option:

#### Assign and enroll certifications and curricula

Selecting this option allows registrars or managers to assign certifications or curricula to learners and automatically enroll them to the classes in those certifications or curricula. This option supports a maximum of 100 order items, beyond which the order is considered very large and can affect performance.

#### This option is applicable only to:

- Certifications and curricula that have one-click learning enabled.
- Both internal and external orders.
- Zero cost orders. This is the effective cost of the order after considering any discounts.

#### Criteria for selecting Learners in the order

When a person is selected while creating the order, and if the person satisfies certain underlying criteria, then Saba Cloud internally automatically enrolls the person for the classes in the certification or curricula for which the order is being placed. When a person is selected in step 2 of the order creation wizard, internally, Saba Cloud searches for blended programs that match the learner's domain, audience type and profile preferences; that is, it follows the same criteria that are used during one-click registration. If one and only one such blended program is found, then the enrollment proceeds. If more than one matching blended programs are found, then the learner is not enrolled.

If any error occurs, then the learner is not enrolled. Saba Cloud displays error and warning messages and registrar or manager has the option to continue or cancel the order. However, canceling the order removes all learner enrollments to classes in the certification or curriculum.

| 1 2 3 Se                 | lect Learning               |  |
|--------------------------|-----------------------------|--|
| Register for classes     | Add learning events to plan | Assign & enroll<br>certifications & curriculum |
| Order contact : User One | <b>Q</b>                    |  |

#### Figure 62: New Assign and enroll certifications and curricula option

To assign and enroll certifications and curricula to learners:

1. In the order creation wizard, select the Assign and enroll certifications and curricula option.

- 2. In step 1, select the required person as the order contact. (applicable only for registrars)
- 3. Search for and select one or more certifications and/or curricula.

Note: Only certifications and curricula having a single path and having one-click registration enabled are searched.

- 4. Click Next.
- 5. In step 2, select on or more learners to whom you want to assign and enroll.

Note: Learners are added only if they meet certain underlying criteria; else, an appropriate error message is displayed. When a learner is selected successfully, Saba Cloud internally enrolls the learner to classes in the selected certification or curriculum.

- 6. Click Next.
- 7. In step 3, review your order. The review page displays only assigned certifications and curricula, and not the classes in those certifications and curricula to which the learners are enrolled.
- 8. Click the **Register** button to confirm the order.

#### Additional UI label changes

As part of this enhancement, the following existing option labels in the order creation wizard are changed:

#### Table 100: Label changes

| Old Label   | New Label                   |  |
|-------------|-----------------------------|--|
| Register    | Register for classes        |  |
| Add to Plan | Add learning events to plan |  |

However, there is no functional change for these existing options.

Use case

Organizations need managers and registrars to automatically enroll learners to classes in certifications and curricula.

## Bookmarklet for recording informal learning resources outside of Saba Cloud

#### How did it work?

Saba Cloud did not have the support to track informal learning resources taken by users outside of Saba Cloud into a Learning Record Store.

#### How does it work now?

This update introduces the **Bookmarklet (Beta)** service in Saba Cloud. Enabling this service enables tracking of informal learning resources taken by users outside of Saba Cloud in a Learning Record Store (LRS).

System administrators must enable the **Bookmarklet** (Beta) service under Learning Record Store to activate this feature. The service is disabled by default.

| Learning Record Store      |   |      |
|----------------------------|---|------|
| ···· ·· Bookmarklet (Beta) | <ul> <li>Image: A start of the start of</li></ul> | Push |
| Social LRS                 |   | Push |
| Performance@Work           | <b>v</b>  | Push |
| Planning@Work              |   |      |

Figure 63: Bookmarklet service

#### LRS Registry

Once the **Bookmarklet (Beta)** service is enabled, Saba Cloud allows learning administrators to control the informal activities of users that need to be recorded in the Saba LRS using the LRS registry. A new **Manage LRS Registry** link is available under **Learning**. They can create new LRS records in the registry or search for existing ones. They can use predefined LRS verbs such as completed, initialized, experienced, passed, and so on to create and search LRS records.

| Learning Home             | Learning Record St | ore Registry         |             |                     |            |
|---------------------------|--------------------|----------------------|-------------|---------------------|------------|
| Manage Learning Catalog   | g                  | iere riegien,        |             |                     |            |
| Manage Classes            |                    |                      |             |                     |            |
| Manage Categories         |                    |                      |             |                     |            |
| Package                   | Name:              | Url:                 |             |                     |            |
| Manage E-Commerce         | Verh:              | *                    |             |                     |            |
| Manage Resources          |                    |                      | Crewk       |                     |            |
| Purchase Orders           |                    |                      | Search      |                     |            |
| Manage Assessment         |                    |                      |             |                     |            |
| Manage Content            | LRS Records        |                      |             |                     | New Record |
| Manage Content Completion | Name               | Url                  | Verb        | Generate Transcript | Actions    |
| Monitor Content Communic  | User Guide         | www.saba.com         | bookmarked  | No                  | / X        |
| Registrar Desktop         |                    |                      |             |                     |            |
| Manage LRS Registry       | Wikipedia          | www.wikipedia.org    | experienced | No                  | × ×        |
|                           | Survey             | www.surveymonkey.com | attempted   | Yes                 | / 🗙        |
|                           | Java Certification | www.sun.com          | passed      | Yes                 | 1 🗙        |
|                           | Photo              | www.flickr.com       | previewed   | No                  | / X        |

#### Figure 64: LRS Registry

To create a new LRS record, click the New Record button and specify the required details.

| Create Record           |  |                    | × |
|-------------------------|--|--------------------|---|
| Name:*                  |  |                    |   |
| Description:            |  |                    |   |
|                         |  |                    |   |
| Url:*                   |  |                    |   |
| Verb:*                  |  | ~                  |   |
| Generate<br>Transcript: |  |                    |   |
|                         |  | Cancel Save & Exit |   |

#### Figure 65: New LRS record

Learning administrators can configure a list of Websites that they want to be registered as informal learning activities in Saba's LRS. The requests coming from only those Websites that are mentioned in the list, are captured as informal learning activity in the LRS. For example, if you create a registry record for the URL https://www.mysite.com but the page URL that you want to track is

https://www.mysite.com/Photography-training-tutorials/, then Saba LRS records the URL because the parent domain of the site matches the one defined in the LRS registry. However, if you specify the URL as https://www.mysite.com/Design-training-tutorials/ and try to track https://www.mysite.com/Photography-training-tutorials/, then Saba LRS does not record this URL.

For a particular resource of a Website, if the administrator has configured a record to generate a formal learning record using the **Generate Transcript** option, then an ad hoc transcript is generated for that user. Users can view such transcripts under Me > Plan > Learning & Certifications.

#### Bookmarklet (Beta)

Once the Bookmarklet (Beta) service is enabled, users can see the Bookmarklet widget in their Downloads page.

| Browser Bookmarklet (Beta)   |   |
|--|---|
| Aggregate all your learning in Saba. Add this bookmarklet to your browser and start tracking all<br>your learning from anywhere in Saba.   | 🚯 Saba: Downloads x   |
| Drag and drop the Bookmarklet button to your browser's bookmarks bar. To record an external<br>learning activity, click Bookmarklet on the bookmark bar when the required site is open in your<br>browser and click Mark Complete. | ← → C [ https://mysite.sabacloud.com/Saba/Web_; ;<br>Email [] Groups [] Bookmarklet |
| Bookmarklet  | <u>^</u>  |

#### Figure 66: Bookmarklet widget

Users can drag and drop the **Bookmarklet** widget to their browser's bookmarks bar. A **Bookmarklet** is added to the bar.



#### Figure 67: Bookmarklet

Now, if users want to record a particular site activity to Saba LRS, then they must click **Bookmarklet** in the browser's bookmark bar when the site is open in their browser. A popup with the **Mark Complete** action appears. Click **Mark Complete** to record the activity to LRS.

Note: In case of an authentication error, the Saba Cloud login page is displayed to users in a popup page. Once the users specify their login details and are authenticated, they are redirected to the popup with the Mark Complete action.



Figure 68: Mark Complete



Figure 69: Activity added to LRS

#### **Activity Stream**

The contributions captured in the LRS are displayed in the user's **Activity Stream** under **Me > Activity > Learning Activity**. The statement format is as follows:

<User Name> <Verb mentioned in LRS Registry> link <URL Name mentioned in LRS Registry>

| cent Updates Comment wall Learning Activity                             |   |
|---|---|
| User One watched video "Wildlife.wmv"<br>Yesterday                      | _ |
| User One experienced link "Cloud Computing Training video"<br>Yesterday |   |
| User One experienced file "Salesforce design doc"<br>Yesterday          |   |

#### Figure 70: Informal activities in Learning Activity stream

#### Use case

There is a need to maintain a Learning Record Store for tracking informal learning activities of users outside of Saba Cloud.

## **E-commerce**

## Add private video channel or group to subscription

#### How did it work?

The learning admin had no provision to add video channels or groups to a subscription.

#### How does it work now?

From this update, the learning admin can now add groups and video channel to the subscription. A new **Community detail** section has been added on the **Subscription details** page where you can use **Add group** link to add groups and use **Add video channel** link to add video channels to the subscription. This section appears only when the **Social** service is enabled.

| Community detail   |                |                            |
|--------------------|----------------|----------------------------|
| Create group       |                |                            |
| Communities        |                | Add group Add video channe |
| Community name     | Community type | Action                     |
| Account Management | Group          | Delete                     |
| Tech Videos        | Video channel  | Delete                     |

#### Figure 71: Add group and video channel

While creating a subscription, the learning administrator can select the **Create group** checkbox to create a private group for the subscription. The administrator can select this checkbox only during the creation. Once the subscription is saved, a corresponding group will be formed by concatenating the subscription name and the number. The admin will not be able to set the visibility of this group as it will always be private. The administrator who creates the subscription will be added as the group owner. The **Create group** checkbox and **Add group** is available only when **Group** service is enabled. Also, the **Add video channel** link is available only when the **Video channel** service is enabled.

If a learner successfully enrolls to such a subscription, then he/she is automatically added to the respective Video Channel or group. The existing workflow of notifications and access will be used. When the learner's subscription order is confirmed, the learner is automatically subscribed to all the channels and groups included as a part of the subscription. Once subscribed, the learner can view the groups and video channels in Me > Groups and Me > Video Channels, respectively. The same groups and video channels are accessible from Groups tab > Groups Home and Groups tab > Video Channels. For unassigned users, the channels will be added when a user is assigned to the subscription order. If a learner is changed for a subscription order, then the original user will be unsubscribed from the channels and groups, and at the same time the new learner will be subscribed. If a subscription is bought at an organization level, there is no logic to choose which learners should be subscribed to that group.

If any learner from such an organization wants to access group or video channel, then that learner has to subscribe to that group from **My Subscription** screen. A **Join** button will be shown next to the video channel or group.

| Management                               |              |              | Client2 Three2's Status              |
|--|--------------|--------------|--------------------------------------|
| Subscription Number: 00001422            |              |              | Client2 Three2                       |
| Limit in days: 100                       |              |              |                                      |
| Maximum registrations allowed: Unlimited |              |              | Subscribed                           |
| Limit in cost: Unlimited                 |              |              |                                      |
| u35sub001                                |              |              | Subscription Order Detail            |
|  |              | USD Renew    |                                      |
| Delivery type >                          |              | T CLETPLE IT | Subscriber : Client2 Three2          |
|  |              | _            | Subscription Order Number : 00001877 |
| Community                                |              |              | Start date : 08/11/2016              |
| community                                |              |              | End date : 11/19/2016                |
| Title                                    | Туре         |              | Remaining Amount : Unlimited         |
| äcommunitys                              | Group        | <u>^</u>     | Remaining Seats : Unlimited          |
|  |              |              |                                      |
| actualCourse                             | Group        |              |                                      |
| video ch1                                | Mdoo Chappel |              |                                      |
|  |              |              |                                      |
|  |              |              |                                      |
| Drop • Share • Bookmark • Tag            |              |              |                                      |
|  |              |              |                                      |

#### Figure 72: Subscription details page

If the learner's subscription expires or the subscription becomes invalid for any reason, then the learner will be removed from the video channel or group.

Use case

Users will be more eager to purchase a subscription of learning offering, which includes social resources.

## Bulk import of states within country

#### How did it work?

The system administrator had to manually create state entries for each country by navigating to **System** > **Configure System** > **Countries** > **Search** for and edit country > **New State**. There was no provision to import the state details.

How does it work now?

From this update, the system administrator ca now bulk import states within each country using a CSV file.

To bulk import states within each country:

- 1. Log into the application as a system administrator.
- 2. Navigate to System > Configure System > Countries > Search for and edit country.
- 3. Click Import States.

| Country Deta   | ils   |                            |
|----------------|-------|----------------------------|
| Name*          | India |                            |
| Short name     | IND   |                            |
| Active         | ø     |                            |
| List of states |       | Import States<br>New State |
| No items found |       |                            |
|                |       | Save                       |

#### Figure 73: Import States

- 4. Click **Download sample file here** button to download the sample file.
- 5. Edit the file to add the required details of the States that need to be imported.
  - a. In the CSV file, enter the state details as Name, ISO\_Code, and Short\_Name.
    - **Note:** The CSV file is UTF-8 encoded.

| 11 | 1 👻         | : 🗙      | $\checkmark f_x$ |
|----|-------------|----------|------------------|
|    | А           | В        | С                |
| 1  | NAME        | ISO_CODE | SHORT_NAME       |
| 2  | Maharashtra | MH001    | MAH              |
| 3  | Goa         | GO002    | GOA              |
| 4  | Gujarat     | GU003    | GUJ              |
| 5  |             |          |                  |

#### Figure 74: Internationalize icon

- **b.** Save the file.
- 6. Choose the required file and click Import to begin the import process.

#### Use case

Each country has many states, hence CSV import functionality will help in faster creation of the data.

## Currency conversion for class price is dynamic

#### How did it work?

If a class is created with **This Class is available in all the active currencies in the system.** multi-currency pricing option, then whenever the defined and applicable exchange rate is updated, the base price of the class was not getting updated.

How does it work now?

From this update, the class will pick the latest conversion rate defined in the system. A new setting **Update catalog price based on the updated exchange rate** has been added in **Orders** > **Pricing**. By default, this setting is disabled.

| Settings: Pricing   | (a)                                 | 1 |  |  |
|---|-------------------------------------|---|--|--|
|   |                                     |   |  |  |
| Settings_Ideas_Configure the policy settings for the service to match your company's business processes. Enable or disable associated features.                               |                                     |   |  |  |
| Settings Notifications Components Description   |                                     |   |  |  |
| Domain* world   |                                     |   |  |  |
| Internal Pricing Functionality On/Off   |                                     |   |  |  |
| Internal Pricing Functionality  | <ul> <li>On</li> <li>Off</li> </ul> |   |  |  |
| Price List - Use class start date for price calculation.  |                                     |   |  |  |
| Use Class start date for effective price calculation.   | ● On<br>● Off                       |   |  |  |
| Enable adjust price for Registrar   |                                     |   |  |  |
| Allow Registrar to adjust price for existing order as well as while placing order   | ● On<br>● Off                       |   |  |  |
| External learner waitlist On/Off  |                                     |   |  |  |
| Add external learner to waitlist if Payment is On   | ○ On<br>● Off                       |   |  |  |
| Update catalog price based on the updated exchange rate   |                                     |   |  |  |
| In case the price based on the current exchange rate is added to the catalog, then on updating the<br>exchange rate, the corresponding price of the catalog will get updated. | ◯ On<br>● Off                       |   |  |  |

#### Figure 75: New setting under Pricing

If this setting is enabled, then whenever the exchange rate is updated, the class price will be updated accordingly. This is applicable only to those classes for which **This Class is available in all the active currencies in the system.** Multi-Currency pricing option is enabled. This update process will be an asynchronous process, as the prices will not get reflect on real time. The price will not be changed on updating the exchange rate in the following scenarios:

- Added price is not as per the exchange rate
- Base currency is not set
- Price is overridden

This change is applicable for all the catalog across system for the following objects:

- Course
- Delivery Type
- Class
- Package
- Subscription (price and cost limit)
- Training Unit
- Marketing Campaign

#### Use case

The users will now get accurate prices in E-commerce, where exchange rates are defined.

## **Country and State fields shown as LOV in organization details**

How did it work?

Prior to this update, the Country and State fields were shown as LOV only in the addresses details on the order checkout page. There was a need to make these fields as LOV across the application.

How does it work now?

In this update, the Country and State fields will be shown as LOV only in Internal and External organization address fields and in Billing addresses.

On internal/external organization's Create and Update pages, the **Country** field will be shown as LOV. The HR admin can now select the country and the respective state from the existing list.

| Internal Organization Details: Banking |                        |  |  |  |
|--|------------------------|--|--|--|
|  |                        |  |  |  |
| Profile Members Position               | ons Prescriptive Rules |  |  |  |
|  |                        |  |  |  |
| Internal Organization*                 | Banking                |  |  |  |
| Mission Statement                      |                        |  |  |  |
|  |                        |  |  |  |
|  | Character Limit : 2000 |  |  |  |
| Internal Organization Number           | 00001007               |  |  |  |
| Learning Contact                       | <i>ر</i>               |  |  |  |
| Secondary Contact Person               | J. 6                   |  |  |  |
| Parent Organization*                   | Vertical Organizations |  |  |  |
| Vertical                               | -Select One- 🔻 🔛       |  |  |  |
| Address 1                              | 1200 5th Ave           |  |  |  |
| Address 2                              |                        |  |  |  |
| Address 3                              |                        |  |  |  |
| City                                   | New York               |  |  |  |
| Country                                | United States •        |  |  |  |
| State/Province                         | New York 🔹             |  |  |  |

Figure 76: Internal Organization details

If the country has valid states, then the **State** field will be shown as LOV or it will be shown as text field only. If the existing data in Country or State contains invalid or incorrect values, then those values will be underlined in red. This will not mandate the user to change the values but just indicate about invalid values.

| Internal Organization Details: Banking           |                                    |      |  |  |
|--|------------------------------------|------|--|--|
| Profile Members Positio                          | ons Prescriptive Rules             |      |  |  |
| Internal Organization*<br>Mission Statement      | Banking                            |      |  |  |
| Internal Organization Number<br>Learning Contact | Character Limit : 2000<br>00001007 |      |  |  |
| Secondary Contact Person                         |                                    | Q. 🗳 |  |  |
| Parent Organization*                             | Vertical Organizations             | S. C |  |  |
| Vertical   | -Select One- 🔻 🔛                   |      |  |  |
| Address 1  | 1200 5th Ave                       |      |  |  |
| Address 2  |                                    |      |  |  |
| Address 3  |                                    |      |  |  |
| City   | New York                           |      |  |  |
| Country  | Bermuda                            | •    |  |  |
| State/Province                                   |                                    |      |  |  |

#### Figure 77: Country LOV and State textbox

To facilitate migration of current incorrect values of countries and states, an easy to use migration tool is provided in System > Configure System > Countries. On clicking Migrate, it detects incorrect country or state names and lets the admin update the correct values for selected object.

To update incorrect country or state details:

1. Navigate to System > Configure System > Countries.
| Search countries                                   |        |                     |
|--|--------|---------------------|
| This search displays the master list of countries. |        |                     |
| Name ISO Code                                      |        |                     |
| Configure   Save Search Query                      | Search |                     |
|  |        | Vigrate New Country |

#### Figure 78: Migrate incorrect values

2. Click Migrate. The tool detects all the invalid names in the system for the selected object.

| Select Object    | <ul> <li>Internal Organization</li> <li>External Organization</li> </ul> |                |
|------------------|--|----------------|
| Search token     |  |                |
| Select Type      | ●Country<br>●State   |                |
|                  |  | Search         |
|                  |  | Print   Export |
| Country name     | select correct value   |                |
| rcountry         | -Select One-   | •              |
| 7038023423445204 | -Select One-   | ▲              |
| USA              | Afghanistan<br>Aland Islands   |                |
|                  | Algeria  | Update         |
|                  | American Samoa   |                |
|                  | Andorra  |                |
|                  | Angola   |                |
|                  | Anguilla<br>Antarctica   |                |
|                  | Antigua and Barbuda  |                |
|                  | Argentina  |                |
|                  | Armenia  |                |
|                  | Aruba  |                |
|                  | Australia  |                |
|                  | Austria<br>Azerbaijan  |                |
|                  | Bahamas  |                |
|                  | Bahrain  |                |
|                  | Bangladesh   | •              |

Figure 79: Migrate incorrect values

**3.** Enter the following details.

#### Table 101: Migrate fields

| Field name            | Description  |
|-----------------------|--|
| Select Object         | <ul> <li>Select the object in which the incorrect entries are avail~<br/>able. The options are:</li> <li>Internal Organization</li> <li>External Organization</li> </ul> |
| Search Token          | Enter the token number against which you will make the changes.  |
| Select Type           | Select <b>Country</b> or <b>State</b> whose incorrect entries you need to update.  |
| Update correct values | Select the correct value against each incorrect/invalid country or state name.   |

4. Click Update. The updated entry is removed from the list.

#### Use case

This feature will ensure there is consistent data across the system and it improve the integrations with other systems.

## **Expand Tax API**

#### How did it work?

There was a need to improve Tax integration to send additional information, such as class details, course details, organization details, and learner custom fields in the API call made to client tax system.

#### How does it work now?

The following attributes are now added to Tax Information and Tax Exemption JSON request:

- Class location address
- Class number
- Class custom fields
- Course title
- Course no
- Course version
- Course custom fields
- Delivery type id
- Delivery type name
- Organization number
- Organization custom fields
- Learner custom fields In case of an unassigned learner, all these fields will be blank
- Learner username
- Learner person number
- Learner full name

#### Points to remember

- 1. Learner location information is not included since learner addresses are already part of request.
- 2. Course/subscription/training unit custom fields are sent in customPrimary attributes.
- 3. Class custom fields are sent in customSecondary attributes.
- **4.** Registration ID is generated only after completion of order, so registration ID is not available while calling the tax engine.

If the request structure is changed, it will impact existing customers who are using tax service with old structure. Hence, new properties are introduced under the **Tax Configuration** properties of the microsite so that the new information will be sent only if these properties are enabled.

To enable the new properties:

- **1.** Log into the application as a system administrator.
- 2. Navigate to System > Configure System > Microsites > Search for a select a site whose tax configuration properties need to be updated.
- **3.** Click **Site properties**.
- 4. Click Tax Configuration.
- 5. Enable the following new properties:

#### Table 102: New properties in Tax configuration

| Name                                    | Description   |
|---|---|
| Enable Learner's details in Tax Service | Sends the following learner specific details with the tax request.  |
|   | <ul> <li>learnerId</li> <li>userName</li> <li>personNo</li> <li>fullName</li> <li>customUser</li> <li>orgId</li> <li>orgName</li> <li>customOrg</li> <li>The possible values are:</li> <li>On</li> <li>Off</li> </ul> |
| Enable Location of class in Tax Service | Sends the location of class with the tax request. This<br>property is applicable for session-based classes only. The<br>possible values are:<br>• On<br>• Off   |
| Enable details of class in Tax Service  | Sends the following class specific details with the tax<br>request:<br>• courseId<br>• courseTitle<br>• version class<br>• No delivery<br>• TypeId<br>• deliveryTypeName  |

| Name  | Description   |
|---|---|
|   | The possible values are:<br>• On<br>• Off   |
| Enable Learner's details in Tax Exempt Service        | Sends the following additional learner related details with<br>the tax exempt service. These will be part of the new at~<br>tribute learnerDetails. This attribute will have the follow~<br>ing sub attributes like:<br>• learnerId<br>• userName<br>• personNo<br>• fullName<br>• personCustom<br>• orgId<br>• orgName<br>• companyCustom<br>The possible values are:<br>• On<br>• Off |
| REST API URL to send tax action on order confirmation | <ul> <li>Set up an endpoint to send additional tax call whenever order gets confirmed. The JSON request will have the following additional attribute:</li> <li>"orderAction" : "Confirm"</li> </ul>   |
| REST API URL to send tax action on refund of order    | <ul> <li>Set up an endpoint to send additional tax call whenever the payment gets refunded or adjusted. The JSON request will have the following additional attribute:</li> <li>"orderAction" : "Refund"</li> <li>"refundAmount" : 3.2</li> </ul>   |

| Enable Learner's details in Tax<br>Exempt Service        | Off  |
|--|--|
|  | Enable Learner's details to be captured and sent during request to tax engine (Specify On/Off)   |
| Enable Learner's details in Tax<br>Service               | Off  |
|  | Enable Learner's details to be captured and sent during request to tax engine (Specify On/Off)   |
| Enable Location of class in Tax<br>Service               | Off  |
|  | Enable Location of class to be captured and sent during request to tax engine (Specify On/Off)   |
| Enable VAT information                                   | Off  |
|  | Enables VAT information to be captured and sent during request to tax engine   |
| Enable details of class in Tax<br>Service                | Off  |
|  | Enable details of class in to be captured and sent during request to tax<br>engine (Specify On/Off)  |
| Enable dummy tax generation                              |  |
|  | Enable generation of dummy tax information for sandbox environment<br>(On / Off)   |
| Enable tax exemption                                     |  |
|  | Enable tax exemption functionality for microsite. Valid values are:<br>dr>1.Off<br>- Turn off exemption functionality<br>dr>2.On - Turn on exemption<br>functionality without performing any validation using client provided<br>exemption REST service.<br>dr>3. OnWithValidation - Turn on exemption<br>functionality, exemption will be validated using client's provided REST<br>service |
| Host URL   |  |
|  | Client URL to used for making API call for tax calculation   |
| Password   |  |
|  | Password required for authentication   |
| REST API URL to send tax action<br>on order confirmation |  |
|  | Saba will call url specified here on order confirmation  |
| REST API URL to send tax action<br>on refund of order    |  |
|  | Saba will call url specified here on refund of order   |

Figure 80: New properties of Tax Service

- 6. Click Save.
- 7. Click **Done**. Now if the above properties are enabled, the new details will be sent with the tax request.

Tax Info JSON request (New attributes are highlighted)

```
{
    "addresses":[
        {
            "zip":"400709",
            "country":"US",
            "addressCode":"SHIP_FROM",
            "city":"400003",
            "region":"MH",
            "line3":"",
            "line2":"line2",
```

```
"line1":"line 1"
    },
{
        "zip":"61820",
        "country": "AX",
        "addressCode": "SHIP_TO",
        "city": "Champaign",
        "region": "AS",
        "line3":"",
        "line2":"",
        "line1":"2109 fox dr"
    },
{
        "zip":"co3bzip",
        "country": "CA",
        "addressCode":"BILL_TO",
        "city": "co3bcity",
        "region": "BC",
        "line3":"",
        "line2": "ADDR2",
        "line1":"co3baddress1"
    },
{
        "zip":"400059",
        "country":"india",
        "addressCode":"00200040",
        "city":"Mumbai",
        "region":"MH",
        "line3":"",
        "line2":"",
        "line1":"address line1"
    }
],
"orderNo": "00209767",
"custom0":"",
"custom1":"",
"custom2":"",
"lines":[
    {
        "itemCode": "class00000000201088",
        "orgId": "cmpny000000000001002",
        "courseTitle":"MultiCurrency_Price@Offering",
        "lineNo":"ioreg00000000004941",
        "learnerId":"persn000000000001031",
        "billTo":"BILL_TO",
        "currency": "USD",
        "personNo":"001031",
        "courseId":"cours00000000201439",
        "shipFrom": "SHIP_FROM",
        "amount":30,
        "orgName":"Company3",
        "quantity":1,
        "customUser":[
            {
                 "custom9":"CTHREE2 Custom 9\t",
                 "custom0":"CTHREE2 Custom0",
                 "custom3":"CTHREE2 Custom3",
                 "custom4":"CTHREE2 Custom4",
                 "custom1":"CTHREE2 Custom1",
                 "custom2":"CTHREE2 Custom2",
                 "custom7":"CTHREE2 Custom7",
                 "custom8":"CTHREE2 Custom8",
```

```
"custom5":"CTHREE2 Custom5",
                     "custom6":"CTHREE2 Custom6"
                }
            ],
            "classLocation":"00200040",
            "fullName":"Client2 Three2",
            "userName":"CTHREE2",
            "version":null,
            "customPrimary":[
                {
                     "customl": "Course customl",
                     "custom7":"Course custom7"
                }
            ],
            "deliveryTypeId":"eqcat00000000000004",
            "deliveryTypeName":"Instructor-Led",
            "customSecondary":[
                ł
                     "custom0":"ILT Offering custom0",
                     "custom6":"ILT Offering custom6"
            ],
            "classNo":"ILT",
            "customOrg":[
                {
                     "custom0":"co3custom0",
                     "custom3":"co3custom3",
                     "custom4":"co3custom4",
                     "custom1":"co3custom1",
                     "custom2":"co3custom2"
                }
            ],
            "shipTo":"SHIP TO"
        }
    ],
    "orderDate": "08-18-2016"
}
```

Tax Exempt JSON request (New attributes are highlighted)

```
{
    "firstName": "Client2",
    "lastName":"Three2",
    "custom0":null,
    "profileCustom":[
        {
            "custom9":"CTHREE2 Custom 9\t",
            "custom0":"CTHREE2 Custom0",
            "custom3": "CTHREE2 Custom3",
            "custom4":"CTHREE2 Custom4",
            "custom1":"CTHREE2 Custom1",
            "custom2": "CTHREE2 Custom2",
            "custom7":"CTHREE2 Custom7",
            "custom8": "CTHREE2 Custom8",
            "custom5": "CTHREE2 Custom5",
            "custom6": "CTHREE2 Custom6"
        }
    ],
    "shippingAddress":{
        "zip":"61820",
        "country": "AX",
        "addressCode":"SHIP_TO",
```

```
"city": "Champaign",
        "region":"AS",
        "line3":"",
        "line2":"",
        "line1":"2109 fox dr"
    },
    "custom1":null,
    "custom2":null,
    "personNo": "001031",
    "learnerDetails":[
        Ł
            "orgName":"Company3",
            "learnerId":"persn000000000001031",
            "personCustom":{
                "custom9":"CTHREE2 Custom 9\t",
                "custom0":"CTHREE2 Custom0",
                "custom3":"CTHREE2 Custom3",
                "custom4":"CTHREE2 Custom4",
                "custom1":"CTHREE2 Custom1",
                "custom2":"CTHREE2 Custom2",
                "custom7":"CTHREE2 Custom7",
                "custom8":"CTHREE2 Custom8",
                "custom5":"CTHREE2 Custom5",
                "custom6":"CTHREE2 Custom6"
            },
            "fullName":"Client2 Three2",
            "userName": "CTHREE2",
            "personNo":"001031",
            "orgId":"cmpny000000000001002",
            "companyCustom":{
                "custom0":"co3custom0",
                "custom3":"co3custom3",
                "custom4":"co3custom4",
                "custom1":"co3custom1",
                "custom2":"co3custom2"
            }
        }
    ],
    "username": "CTHREE2"
}
```

#### **Enabling Order Payment Refunded notification**

The users, who are using Webhooks action to achieve additional tax API calls can use **Order Payment Refunded** notification. By default, this notification is disabled. The system admin must navigate to **System** > **Configure System** > **Services** > **Orders** and enable this notification. This notification will be triggered when an order payment is refunded.

| N                | otifica   | ations: Orders   |  | 6   |
|------------------|---|--|--|---|
| No<br>ser<br>oth | tf_Ideas_0<br>nd timely r<br>er files. So<br>Settings | Configure the notification events f<br>eminders when actions must be<br>chedule periodic events for a spe<br>Notifications Compone | for the service. Notifitaken. Create attach cific time period. Sel | ications alert people to activities, meetings, and other updates and<br>ments for events to specify email text and include documents or<br>lect the checkbox beside events that you want to enable. |
|                  | Evente  |  |  |   |
|                  | Lvents  | _  | -  | Print   Export   Modify Table   |
|                  | Enable  | Events   | Туре   | Description   |
|                  |   | Automatic Completion   | Periodic Event   | This event automatically marks the completion status of<br>learners   |
|                  |   | Automatic Waitlist   | Periodic Event   | This is the periodic function for cancelling offered_<br>registrations  |
|                  | <b>A</b>  | Class Commencement<br>Reminder as per Registration   | Periodic E∨ent   | Triggered X days before a class commences, based on learner<br>registrations for the class, where X is defined in the Reminders<br>field of an event.   |
|                  |   | OpenEnroll For All Promotion   | Periodic Event   | Periodically promotes waitlisted registrations after an open<br>enrollment for all  |
|                  |   | Order Cancelled  | Triggered Event  | Order Cancelled   |
|                  |   | Order Confirmed  | Triggered Event  | Order Confirmed   |
|                  |   | Order Created  | Triggered Event  | Order Created   |
|                  |   | Order Payment Refunded   | Triggered Event  | Order Payment Refunded  |
|                  |   | Order Placed Asynchronous  | Triggered Event  | Triggered when an order is placed Asynchronously  |
|                  |   | Registration Created for<br>Confirmed Orders   | Triggered Event  | Triggered to create registrations for confirmed orders  |
|                  |   | Registration Pending Approval<br>Reminder (X days)   | Periodic Event   | Triggered X days after the registration date of a scheduled class that is pending approval, where X is defined in the Reminders field of the event.   |
|                  |   | Resource Assigned  | Triggered Event  | Resource Assigned   |
|                  |   | Waitlist Promotion   | Triggered Event  | Waitlist Promotion  |

Figure 81: Order payment refund notification

#### Use case

Some users use tax models that considers the location of the ILT class rather than the location of the user. Also, the information about the user's organization may also influence the tax rate. Hence, the Tax API has been updated with more information so that user gets more flexibility in taxing based on their own requirements.

### **Invoice Me enhancements**

#### How did it work?

If the payment is processed outside of Saba Cloud, then select the **Invoice** payment option. Specify the required payment-related details. This invoice data is then referenced by an external system that actually processes your payment. There was a need to enhance this payment option, by making it configurable and a provision for registrar to approve the invoice payment before confirming the order.

#### How does it work now?

The following enhancements are made to the Invoice Me payment type:

1. New setting

A new setting **Enable Invoice Payment Approval** has been introduced under **Order** > **Internal Orders** service. By default, this setting is disabled. When this setting is enabled, all the orders with Invoice payments will be in **Payment Initiated** status. Only Registrar will be able to approve such orders from the invoice details.

| Training Unit  |               |   |
|--|---------------|---|
| This business rule defines the drop policy for refunding training units to the agreement. The value represents the number of days after an order is placed. If an order is dropped after the specified number of days, the training units will not |               |   |
| be refunded. Leave this field blank to always refund training units.   |               | _ |
| Enable Invoice Payment Approval  |               |   |
| After completion of an Order, payment status will be in "payment initiated" state.   | ● On<br>● Off |   |

#### Figure 82: New setting for invoice

2. New notification

A new notification **Order invoice payment approval pending** has been introduced under the **Orders** service. By default, this notification is disabled. When its enabled, the notification will be triggered when a new order is created with an Invoice in the pending payment status.

| Notifica   | ations: Orders                                     |                 | (e ]  |  |
|--|--|-----------------|---|--|
| Configure the notification events for the service. Notifications alert people to activities, meetings, and other updates and send timely reminders when actions must be taken. Create attachments for events to specify email text and include documents or other files. Schedule periodic events for a specific time period. Select the checkbox beside events that you want to enable. |  |                 |   |  |
| Settings   | Notifications Compone                              | nts Description |   |  |
| Events   |  |                 | Print   Export   Modify Table   |  |
| Enable   | Events   | Туре            | Description   |  |
|  | Automatic Completion                               | Periodic Event  | This event automatically marks the completion status of<br>learners   |  |
|  | AutomaticWaitlist                                  | Periodic Event  | This is the periodic function for cancelling offered_<br>registrations  |  |
|  | Class Commencement<br>Reminder as per Registration | Periodic Event  | Triggered X days before a class commences, based on learner<br>registrations for the class, where X is defined in the Reminders<br>field of an event. |  |
|  | OpenEnrol For All Promotion                        | Periodic Event  | Periodically promotes waitlisted registrations after an open<br>enrollment for all  |  |
| <b>A</b>   | Order Cancelled                                    | Triggered Event | Triggered when an order is cancelled  |  |
| <b></b>  | Order Confirmed                                    | Triggered Event | Triggered when an order is confirmed  |  |
|  | Order Created                                      | Triggered Event | Triggered when an order is created  |  |
|  | Order invoice payment approval pending             | Triggered Event | Triggered when new order created with Invoice in pending<br>payment status.   |  |

#### Figure 83: New notification for invoice

3. Ability to approve invoice payments

The registrar now has the provision to approve the invoice payments for an order. Once the learner buys the course using an invoice, the order will be moved to Payment Initiated state. The registrar will go to the order details and approve the payment. Once the payment is approved, the order will be confirmed. If the registrar is not convinced with the invoice details, then he/she can reject the payment and the order will be cancelled.

| Order Details: Order Number 00159816 |                                |                 |             |                   |  |
|--------------------------------------|--------------------------------|-----------------|-------------|-------------------|--|
|                                      |                                |                 |             |                   |  |
| Order Contact                        | cone cone                      |                 |             |                   |  |
| Created On                           | 16/09/2016                     |                 |             |                   |  |
| Order Status                         | Payment Initiated              |                 |             |                   |  |
| Billed To                            | ExtOrg1                        |                 |             |                   |  |
|                                      |                                |                 |             |                   |  |
|                                      |                                |                 |             |                   |  |
|                                      |                                |                 |             |                   |  |
| Payment Details                      | Payment Details Print   Export |                 |             |                   |  |
| Method Of Payment                    | Transaction ID                 | Payment Status  | Amount      | Action            |  |
| Invoice Me                           | 00003781                       | Payment pending | 3.50<br>USD | Approve           |  |
|                                      |                                |                 | 000         | Reject<br>payment |  |

#### Figure 84: New notification for invoice

4. Enhancements to Invoice form

The **Details** field on the Invoice form can be configured to be LOV field. The learning admin and registrar can configure and add default values. By default, this field is mandatory.

| Component Details    |               |
|----------------------|---------------|
| Name                 | Value         |
| UI Label             | Details label |
| Audit                | No Auditing 👻 |
| Data Is Protected    |               |
| Default Value        | opt001        |
| Display              |               |
| Generate Mask        |               |
| Has Unique Values    | No            |
| Is a List Of Values  |               |
| Is Generated         | No            |
| Is Internationalized | No            |
| Is Referenced        | No            |
| Is Required          | Yes           |
| Maximum Size         | 255           |
| Size                 | 255           |

Figure 85: Configuration for Details field

| Provide Invoice details. |                             | × |
|--------------------------|-----------------------------|---|
| TestingDetails*          | ✓ Ø                         |   |
| Custom0:                 | Payment for Web-based class |   |
| Custom1:                 | Payment for ILT class       |   |
| Custom2:                 |                             |   |
| Custom3:                 |                             |   |
| Custom4:                 |                             |   |
| Custom5:                 |                             |   |
| Custom6:                 |                             |   |
| Custom7:                 |                             |   |
| Custom8:                 |                             |   |
| Custom9:                 |                             |   |
|                          | Save                        |   |

Figure 86: New notification for invoice

#### Use case

Users needed purchasing process to handle the tracking of payments that are not made in Saba. The new enhancements in invoice fill these gaps.

### Make payments to course owner's organization

#### How did it work?

Prior to this update, when a learner buys any course, the payments are made to the learner's organization instead of the course owner's organization.

#### How does it work now?

From this update, the admin will be able to configure the microsite in such a way so that the learner can directly make the payment to the course owner, who owns the content instead of the learner's organization. To support this, the following changes have been made:

#### 1. New setting

A new setting **After registration, make payments to course owner/creator** has been added under the **E-commerce** service. By default, this setting is disabled. When it is enabled, the catalog admin will be able to select the Microsite in class and course so that the payments will be made to the organization associated with it.

| Settings: E-Comme  | erce   | 6                       |
|--|--|-------------------------|
|  |  |                         |
| Configure the policy settings for th   | e service to match your company's business processes. Enable or disab  | le associated features. |
| Settings Notifications   | Description  |                         |
|  |  |                         |
| Domain*  | world  |                         |
|  |  |                         |
| Select ecommerce configuratior   | n based on domain  |                         |
| If this BR is enabled then the fol<br>domain instead of the microsite<br>Payment gateway configuration | lowing properties will be taken from microsite associated with the user's that the user has logged into: Shopping cart, Supported payment types, tax configuration | ○ On<br>● Off           |
| Split Payment Refund Policy  |  |                         |
| In case of split payment, selecte  | d mode of payment will be refunded first.  | Purchase order 🔻        |
| After registration, make paymen  | ts to course owner/creator   |                         |
| While registering for a single ite<br>with the course.   | m order, the payment for a course will go to the microsite associated  | ● On<br>○ Off           |

#### Figure 87: New setting under E-commerce

#### 2. Configuration in Microsite

A new checkbox **Enable Payment** has been added to the Microsite. This checkbox appears only when the above setting is enabled. By default, this checkbox is disabled. When it is enabled, this Microsite will appear on the course and class details page.

| Configure microsite   |           |
|---|-----------|
| Enable guest catalog  |           |
| Enable Shopping Cart 🕕  |           |
| Enable Payment 1  |           |
| Add currency 💶  |           |
| Add currency to microsite   |           |
| Rupees  |           |
| Marketing communication   |           |
| B I U S = = = = Paragraph   |           |
| This is html <i>formatted</i> banner for new Microsite Enhancements 1. Item 1 2. Item 2 |           |
| p   | Words: 11 |

Figure 88: Configuration at Microsite

#### 3. Configuration at course & class details page

A new **Microsite** field has been added to the course and class details page under **Pricing Information** section. This field appears only when the above setting is enabled. The catalog admin must select the Microsite to which the

payment will be sent. If a course is created through a wizard, then the **Microsite** field will not be displayed. This field appears only on editing the course.

| Price         |       |               | Add Price   Print   Expo |
|---------------|-------|---------------|--------------------------|
| Currency      | Price | Base currency | Actions                  |
| US Dollars    | 0.00  | No            | Edit<br>Delete           |
| raining Unite |       |               |                          |

Figure 89: Configuration at class & course details page

The catalog search page is updated by including Microsite as a search filter. By default, this field will not appear. The admin must enable the new setting to use it as a search filter.

| Learning Catalog                         |                |                          | •            |          |
|--|----------------|--------------------------|--------------|----------|
| Learning Catalog                         |                |                          |              |          |
| Title                                    | Course ID      |                          |              |          |
| Domain                                   | Audience Type/ | Sub Type                 | Q C          |          |
| Microsite                                | earning Event  | Type Course <b>T</b>     |              |          |
| You have a saved query.                  |                |                          |              |          |
| Configure   Save Search Query   Reset Sa | ved Query      |                          | Search       |          |
|  |                |                          |              |          |
| Catalog Search                           | 🔹 Saba - Go    | ogle Chrome              |              |          |
|  |                |                          |              |          |
|  | Confi          | gure Search Options      |              | •        |
|  |                |                          |              |          |
|  | Conditio       | n                        |              |          |
|  | Select         | Condition                | Operator     |          |
|  |                | Title                    | Starts With  | •        |
|  |                | Course ID                | Starts With  | •        |
|  |                | Domain                   | Equals       | •        |
|  |                | Audience Type/Sub Type   | Equals       | •        |
|  |                | Microsite                | Equals       | •        |
|  |                | Abstract                 | -Select One- | *        |
|  |                | Price                    | -Select One- | •        |
|  |                | Available From           | -Select One- | T        |
|  |                | Category                 | -Select One- | •        |
|  |                | Include child categories | -Select One- | <b>T</b> |

#### Figure 90: New search filter

When a class is created from a course including a microsite, then the microsite will be inherited to the newly created class as well.

When a learner purchases such a class, the payment will be made to the selected microsite, regardless of the microsite associated with the learner's domain and the microsite used by logged-in learner.

This is not applicable to a course in a multiple items order. In such a case, the **Payment Goes To** field will be ignored and default payment logic will be used (where it will either consider the microsite associated with the user's domain or microsite associated with the logged-in user) depending on the configuration. This includes:

- Shopping cart orders with more than one catalog items
- Packages
- Purchase of Curricula/Certification with multiple items
- · Registrar purchases where multiple items are chosen in one order

This is applicable only to the credit card and paypal payments. Due to this, only credit card properties will be picked up whereas other properties like tax etc, will be picked from the logged-in microsite only. When such a order gets cancelled, then the refund will be returned to the account from where the initial payments were done. If a learner or a registrar tries to make the payment later with Add payment flow and all conditions are fulfilled, then the payment will be made to the selected microsite.

Use case

This supports an organization where different business units are creating content and sharing content with all users. The money for the class should not go to the user's organization but rather to the organization that owns the content.

## New notification for pay later functionality

#### How did it work?

If a user creates an order and chooses to pay later, then a notification is not sent to the user to inform about the complete payment details.

#### How does it work now?

A new notification Order pay later has been added under System > Configure System > Services > Orders.

| Ν                | otifica                                    | tions: Orders   |  | 6   |
|------------------|--|---|--|---|
| No<br>ser<br>oth | tf_ldeas_C<br>nd timely re<br>er files. So | Configure the notification events<br>eminders when actions must be<br>chedule periodic events for a spe | for the service. Notifi<br>taken. Create attach<br>scific time period. Sel | cations alert people to activities, meetings, and other updates and<br>ments for events to specify email text and include documents or<br>ect the checkbox beside events that you want to enable. |
|                  | Settings                                   | Notifications Compone   | nts Description  |   |
|                  |  |   |  |   |
|                  | Events                                     |   |  | Print   Export   Modify Table   |
| Γ                | Enable                                     | Events  | Туре   | Description   |
|                  |  | Automatic Completion  | Periodic Event   | This event automatically marks the completion status of<br>learners   |
|                  |  | Automatic Waitlist  | Periodic Event   | This is the periodic function for cancelling offered_<br>registrations  |
|                  |  | Class Commencement<br>Reminder as per Registration  | Periodic Event   | Triggered X days before a class commences, based on learner<br>registrations for the class, where X is defined in the Reminders<br>field of an event.   |
|                  |  | OpenEnroll For All Promotion  | Periodic Event   | Periodically promotes waitlisted registrations after an open<br>enrollment for all  |
|                  |  | Order Cancelled   | Triggered Event  | Order Cancelled   |
|                  |  | Order Confirmed   | Triggered Event  | Order Confirmed   |
|                  |  | Order Created   | Triggered Event  | Order Created   |
|                  |  | Order invoice payment<br>approval pending   | Triggered Event  | Triggered when new order created with Invoice in pending<br>payment status.   |
|                  |  | Order pay later   | Triggered Event  | Triggered when new order created with pay later option.   |

Figure 91: New notification to order and pay later

By default, this notification is disabled. When this notification is enabled, then it will be triggered when a user chooses to make the payment later.

Use case

If a user creates an order and completes the payment, they receive a confirmation notification with details on how to access the course. But if a user creates an order and chooses to pay later, then the **Order pay later** notification is sent to the user which includes admin's comments on how to complete the payment and make the content available once the full payment is received.

## Content

## Track number of attempts for unlimited attempts on content

#### How did it work?

Saba Cloud did not track the learner attempts on content when the number of attempts on the content was set to unlimited. This resulted into inconsistent data during reporting.

#### How does it work now?

With this update, Saba Cloud tracks learner attempts on content even when the number of attempts on the content is set to unlimited. Basically, the content attempt count is now tracked irrespective of the attempts set on a content module.

Learner's attempts are counted for both new and existing content where the number of attempts is set to unlimited; however, learner's attempts on such content made prior to this update are not restored and taken into consideration. So, the count is not displayed for any such content that was completed prior to this update.

After this change, for content with unlimited attempts the behavior of **Content Attempt definition** setting is same as it is for content with limited attempts.

#### Use case

There is a need to report content attempts for content where the number of attempts is unlimited.

### Import Panopto videos as SCORM content

#### How did it work?

Saba Cloud imported videos by content providers such as Panopto as Video content format while adding them to the content library.

#### How does it work now?

With this update, Saba Cloud allows learning administrators to import Panopto videos as SCORM packages while adding them to the content library.

To import video as a SCORM package:

- 1. Click Admin > Learning > Manage Content.
- **2.** Select the required folder.
- **3.** Click the **Import** link.
- 4. On the Content Details page:
  - a. Select Content Format as SCORM Package.
  - b. Select Content Type as Panopto Video.
  - c. Select Player Template as Standard Content Player Template.
- 5. Specify any other details and click Next.
- 6. On the Import Content page, either select an existing video or upload a new one.
- 7. Click Save and then click Import.

The resulting SCORM zip file is stored on the Saba Content Server but the video is served through Panopto.

**Note:** Panopto must be configured and enabled by the system administrator.

If Panopto is disabled, and if you try to edit an existing content, then the **Upload Video** option is disabled so that you cannot upload a new Panopto video. However, you can edit remaining content details. If you click **Preview Content**, then Saba Cloud displays a message indicating that video service is not configured.

#### Notes

- Video as SCORM content is of SCORM 1.2 format.
- Since the annotation functionalities such as bookmarks, notes, and discussions are provided by Panopto, they are visible by default and cannot be configured for Video as SCORM content.
- Every attempt on Panopto video SCORM content after a successfully completed attempt is marked as a completed attempt.
- Currently, Panopto video content is not supported by the Saba Cloud mobile app.

#### Use case

There is a need to import videos by third-party content providers such as Panopto as SCORM packages into Saba's content library.

### **Deployed SCORM content support for mobile**

#### How did it work?

Deployed SCORM content imported to the content library was not compatible with mobile devices.

#### How does it work now?

With this update, Saba Cloud now supports mobile device compatibility for Deployed SCORM content imported into the content library.

Only the following version of Deployed SCORM content format can be imported with mobile compatibility:

• Deployed SCORM 1.2

For newly imported Deployed SCORM 1.2 content, the **Mobile Device Compatibility** dropdown list is editable. By default, the value set is **Not Compatible**, but content administrators can select the required value. For any Deployed SCORM 1.2 content imported prior to this update, the **Mobile Device Compatibility** dropdown list value can be modified by editing the content.

| Name*                                      | 0000000DeployedSCORM  |
|--|---|
| Security Domain*                           | world   |
| Content Format                             | Deployed SCORM  |
| Content Format Version<br>Player Template* | SCORM 1.2<br>New Window Standard Template                         |
| Mobile Device Compatibility                | All Devices 🔻   |
| Status                                     | Not Compatible  |
| Version Number                             | iPad  |
| Expiration Date                            | Android Small Size Device   |
| Parent Folder*                             | Android Normal Size Device<br>Android Large and Above Size Device |
| External Content ID                        |   |
| Manifest File URL                          |   |

#### Figure 92: Mobile Device Compatibility for Deployed SCORM 1.2

Currently, Deployed SCORM 2004 and Deployed SCORM 2004 ED3 formats cannot be imported with mobile compatibility because these formats are not supported by the Saba Cloud mobile app.

For such content, the Mobile Device Compatibility dropdown list is not editable.

| Name*                  | Scorm 2004-Mob-Test 4        |
|------------------------|------------------------------|
| Security Domain*       | world                        |
| Content Format         | Deployed SCORM               |
| Content Format Version | SCORM 2004 Ed3               |
| Player lemplate*       | New Window Standard Template |
| Status                 | Published Edit               |
| Version Number         |                              |
| Expiration Date        |                              |
| Parent Folder*         | . RCS-Mobile                 |
| External Content ID    |                              |
| Manifest File URL      |                              |

Figure 93: No Mobile Device Compatibility for Deployed SCORM 2004 ED3

Use case

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Saba Cloud app on mobile devices supports Deployed SCORM 1.2 content. Therefore, there is a need to support mobile device compatibility for Deployed SCORM 1.2 content while importing it to the Saba Cloud content library.

## Chapter

## 4

## Social

#### Topics:

- Organizational Chart available
   under People tab
- Control access to workspaces
- Display images and videos inline in group and activity stream
- Learning Record Store for recording social resource contributions in Saba Cloud

## **Organizational Chart available under People tab**

How did it work?

Prior to this update, the organizational chart was available only under the **Me** and **My Team** tabs. It was not available under the **People** tab.

How does it work now?

With this update, the organizational chart in Saba Cloud is now available under the People tab as well.

To access the organizational chart, click the **People** link under the **People** tab. If the corresponding service is enabled, then the organizational chart appears in the top left-side of the page while the **People I'm Following** portlet appears below the chart. If the service is disabled, then the chart is not displayed.

Additionally, this update enhances the look and feel of the organizational chart.

All existing features of the organizational chart remain as they are.



#### People

| My team | ~ | Standard | * |         |              |                 |   |  | P          |
|---------|---|----------|---|---------|--------------|-----------------|---|--|------------|
|         |   |          |   |         |              |                 |   |  |            |
|         |   |          |   | _       |              |                 |   |  |            |
|         |   |          |   |         |              |                 |   |  |            |
|         |   |          |   |         |              | inger ingerst   | Carlos and |  |            |
|         |   |          |   |         |              |                 |   |  |            |
|         |   |          |   |         |              |                 |   |  |            |
|         |   |          |   |         |              |                 |   |  |            |
|         |   |          |   |         |              |                 |   |  |            |
|         |   |          |   |         |              |                 |   |  | +          |
|         |   |          |   | lane ag | terer sterer | lagent improvi) | August anger  |  | _          |
|         |   |          |   |         |              |                 |   |  | K N<br>K N |

#### Figure 94: Organizational chart under People tab

#### Use case

Users need to easily find the organizational chart to look up a person in the organization.

## **Control access to workspaces**

#### How did it work?

Prior to this update, a workspace in Saba Cloud was accessible to users via the workspace URL, irrespective of the users' access privileges and irrespective of whether the workspace was shared with them or not.

#### How does it work now?

This update enhances the access control for workspaces in Saba Cloud by introducing a new field.

While creating a workspace, users can now define access control for a workspace by setting the following new field:

#### • Public Workspace

The value of this checkbox defines whether a workspace is available publicly to all users or it is restricted to selected users or groups with whom the workspace is shared.

- If selected, then it allows users to access the workspace, irrespective of users or groups listed in the **Share with** field.
- If cleared, then it restricts access to the workspace only to users or groups that are listed in the Share with field.

By default, this checkbox is selected. This ensures that existing users who are accessing a workspace can continue accessing the workspace until the author of the workspace explicitly marks a workspace as secured by clearing the **Public Workspace** checkbox.

| Author  |  |  |
|---|--|--|
| User One  | 0  |  |
| Role Definitions  |  |  |
| Contributor & Edito     Contributor & View     Viewer: Cap view p   | r: Can create and edit their own pages. Can view and edit pages created<br>er: Can create and edit their own pages. Can view pages created by othe<br>ages, but cannot create new pages. | d by others.<br>ers, but not edit them.        |
|   |  |  |
| <ul> <li>Public Workspace</li> <li>Enable to allow user</li> <li>Disable to restrict ac</li> </ul>                  | is to access this workspace, irrespective of users or groups listed in the 'S<br>cess to this workspace only to users or groups that are listed in the 'Share                            | thare with' field.<br>with' field.             |
| Public Workspace Enable to allow user Disable to restrict ac Share with Type person to share y                      | rs to access this workspace, irrespective of users or groups listed in the 'S<br>cess to this workspace only to users or groups that are listed in the 'Share<br>with here.              | ihare with' field.<br>with' field.             |
| Public Workspace Enable to allow user Disable to restrict ac Share with Type person to share v                      | rs to access this workspace, irrespective of users or groups listed in the 'S<br>cess to this workspace only to users or groups that are listed in the 'Share<br>with here               | hare with field.<br>with field.                |
| Public Workspace Enable to allow user Disable to restrict ac Share with Type person to share v Shared with          | rs to access this workspace, irrespective of users or groups listed in the 'S<br>cess to this workspace only to users or groups that are listed in the 'Share<br>with here               | thare with' field.<br>e with' field.<br>Action |
| Public Workspace Enable to allow user Disable to restrict ac Share with Type person to share v Shared with Joe John | rs to access this workspace, irrespective of users or groups listed in the 'S<br>cess to this workspace only to users or groups that are listed in the 'Share<br>with here               | thare with' field.<br>e with' field.<br>Action |

#### Figure 95: Public Workspace checkbox

If you want to restrict your workspace to a set of users or groups, then you must edit the workspace and clear the **Public Workspace** checkbox. Such a workspace is available only to users or groups with whom you have shared the workspace. If other users try to access such a private workspace, Saba Cloud displays an "Insufficient Privileges" error message.

In case of a workspace hierarchy, where a parent workspace has one or more levels of child workspaces and pages, the access is controlled as follows:

• If the parent workspace is private while the child workspace is public, then authorized users can access the child workspace and see the parent workspace title in hierarchy view. However, clicking the parent workspace title displays the insufficient privileges error.

- If a level-1 private child workspace itself has level-2 private child workspaces, then those level-2 child workspaces are not displayed either. However, if those level-2 child workspaces are public, then authorized users can access them. But their parent workspace is not displayed.
- If pages under a workspace are shared, then they are available to authorized users, irrespective of the workspace being public or private. However, private workspace-related details such as workspace title, Welcome page, Announcement portlet, and Workspace Contacts portlet are not displayed.
- The topmost level (Parent) workspace in a workspace hierarchy is always displayed regardless of it being Public or not. At other levels second and third, the parent workspace is not displayed if it is not Public and if a user does not have sharing privileges.

#### Notes

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- Users can add a workspace as a parent or child workspace to any other workspace they own if:
  - It is a public workspace
  - It is a private workspace but is shared with those users
- While editing a child workspace, its parent workspace is always listed in the **Parent Workspace** picker field, irrespective of whether the parent workspace is public or private.
- A private child workspace is not listed in the Child Workspace picker field when:
  - Editing a parent workspace
  - Adding a child workspace to the parent workspace
- The accessibility of a workspace that is designated as a Wiki or company Intranet under **Microsite > Workspace**, is not affected by the **Public Workspace** checkbox value.

#### Use case

If users have access to a workspace URL, but they are not in a group that has permission to view the workspace, then they must not be able to access the workspace. This security enhancement allows users to create workspaces for specific purposes.

# Display images and videos inline in group and activity stream

#### How did it work?

Prior to this update, any images or videos contributed to Saba Cloud were not displayed inline in the user or group activity stream. The stream displayed only the image or video title, which users had to click to see the actual image or video.

How does it work now?

Saba Cloud now displays images and videos inline in the user and group activity streams.

**Note:** Currently, only embedded videos are displayed inline in the activity stream; uploaded video files are not displayed.

#### **Inline Images**

When users contribute an image using the **File** option in the **Contribute** panel, the contributed image is shown inline as a thumbnail in the Home or Group Activity stream and on the resource details page. On clicking the image, it opens in the preview screen.

For images uploaded prior to this update:

- If they supported preview, then they are displayed inline.
- If edited and uploaded again, then they are displayed inline, irrespective of whether they support preview or not.



Figure 96: Inline image in Activity stream

#### **Inline Videos**

This update enhances the video contribution ability to include the new **Embed** option. So, when users click the **Video** option in the **Contribute** panel, Saba Cloud now displays the following two options:

• Embed

Selecting this option displays the **Embed code** text box along with other regular fields like title, description, and so on. Users can add the embed code of an external video to this text box. The contributed video is displayed inline in the Home or Group Activity stream and on the resource details page.

By default, this option is selected.

| 矣 Start conversation 🛛 🔤 Contribute 📸 Meet 🕞 Send Private Message | Vuick Share |
|---|-------------|
| Embed O Upload  |             |
| Video title   |             |
| Your thoughts on the video  |             |
| Embed Code  |             |
| Type person to share with here                                    |             |
| Migration Community 📀   |             |
| ► Advanced Settings   |             |
| Cancel  | Save        |

Figure 97: Embed option for video contribution

#### • Upload

The ability to upload videos works as before and there is no functional change to this feature.

**Note:** If video integration is not enabled, then just the **Embed** option is available.

| You co | ntributed a video to Migration Co  | mmunity  |   |   |  |
|--------|--|--|---|---|--|
|        | Recording12  |  |   |   |  |
|        | Recording12  |  |   | Powered by<br>Panopto   |  |
|        | Screencast-O-Matic has e   | editing tools wit  | n the Pro Recorder. Gr  | o pro for only \$151<br>s or Mac PCs. Windows requires XP or later. Mac   |  |
|        | Windows or Mac IPC. The install does NOT require admin a<br>Dess it recard the sound corring them my speaker?<br>Only it you have the Pro Recorder and a Windows Visita or<br>When I make a recording it it always uplassed to the inter<br>No. Recordings are made on your local corresponde. No part<br>uplased unless you choose to upload it after recording.<br>Can I use the five recorder for business use?<br>Intercording With wort the Pro Recorder for the extra for<br>processor in the State of State of State of State of the State of | uzers to insta<br>later.<br>met?<br>of your recording is<br>cotores. | A 10.7 or later.<br>Debit Inequire a download<br>If you are on a Windows PC usin<br>they you dan the do to download<br>need to download car "Screen I<br>right here in your borws.<br>How Long can I record for?<br>Nou can make upto 15 min record<br>Recorder to record for Longer. | ng a lava anabled briveser (and lava is installant)<br>s or install anything. For everybody else you'll<br>becarder Läunchen" so you can start the recorder<br>andings with the free version or use the Pro |  |
| 27-SEF | осказыскот то милтс<br>P-2016 2:55 PM 。 Like 。 Sh  | nare • Co  | mment 🔍 Tag   | Mark Complete   |  |

Figure 98: Inline video in Activity stream

#### Use case

Users need to see the thumbnails of images and videos they contribute in their activity stream itself. This helps to avoid multiple clicks and provides a better user experience.

## Learning Record Store for recording social resource contributions in Saba Cloud

#### How did it work?

Prior to this release, Saba Cloud did not have the support to track social resources such as files, links and videos contributed by users into a Learning Record Store. Only Tin Can statements received from Tin Can content were recorded by the Learning Record Store.

#### How does it work now?

This update introduces the **Social LRS** service in Saba Cloud. Enabling this service allows users to track the social resources they contribute to Saba Cloud in a Learning Record Store (LRS).

System administrators can configure this feature by navigating to **System > Configure System > Services** and clicking the **Social LRS** service under **Learning Record Store**. The service is disabled by default.

| Learning Record Store    |   |      |
|--------------------------|---|------|
| Bookmarklet (Beta)       |   | Push |
| Social LRS               | Ø | Push |
| ● Performance@Work     ■ | Ø | Push |
| Planning@Work            |   |      |

#### Figure 99: Social LRS service

#### **Recording Contributions**

Once the **Social LRS** service is enabled, when users contribute a social resource such as file, link, and videos to Saba Cloud, a new **Mark Complete** link is displayed besides the contributed resource.

User can click the **Mark Complete** link to record the resource contribution to Saba's LRS. Once clicked, the link for that resource changes to **Marked Complete** and is disabled, indicating that the resource is already marked for tacking in the LRS. If versioning is allowed and if the user versions the resource, then the **Mark Complete** link is displayed for the new version of the resource, and the user can record the new version to Saba's LRS.

| 触 Start con | nversation 🔤 Contribute 🛗 Meet 🕞 Send Private Message                                | 😲 Quick Share |
|-------------|--|---------------|
|             |  |               |
|             | Link File Idea Issue Video   |               |
|             |  |               |
| Activity    | Show: All For Me! - My Tags  | ▼ Type ▼      |
|             | You contributed a link   |               |
|             | Wikipedia       http://www.wikipedia.org   |               |
|             | A few seconds ago   ●   Like   ●   Share   ●   Comment   ●   Tag   ●   Mark Complete |               |

Figure 100: Mark Complete link in Activity

| ~     | Wikipedia             |   |
|-------|-----------------------|---|
| Ø     | Туре:                 | Link<br>Created on 09/12/2016 17:09:00   Author: User One<br>More like this: User One's Links |
|       | Folders:              |   |
| ***** | Launch       Mark Cor | mplete <ul> <li>Tag </li> <li>Stop watching </li> <li>Like </li> <li>More Actions </li> </ul> |

#### Figure 101: Mark Complete link on resource details page

When Social LRS recording is enabled for social resources, Saba Cloud also captures activities for the following actions on those resources:

- File
  - Download
  - Preview

For example, a user Charles sees the following statements in his activity stream - *Charles downloaded file "Salesforce document"* or *Charles previewed file "Salesforce document"* 

• Link

#### Launch

For example, a user Jena sees the following statement in her activity stream - Jena launched file "Salesforce document".

**Note:** Even if the LRS activity capturing fails due to some reason for activities like Download, Launch or Preview, the actions are still performed.

#### **Configuring the Display of Mark Complete Link**

Note: To enable the feature, submit a support request. For assistance, contact Saba Support.

Saba Cloud controls whether social resource contributions can be recorded or not to the Saba LRS. By default, Saba Cloud displays the **Mark Complete** link for social resources including files, links and videos so that resource contributions can be recorded.

However, Saba Cloud "admin" users can configure the display of the **Mark Complete** link using certain site-level properties for the Learning Record Store. If disabled, then the link is not displayed for a social resource and users cannot record such resource contributions to the Saba LRS.

Additionally, Saba Cloud provides the ability where only certain resource contributions can be recorded but not all. If enabled, then resource contributers can decide whether they want to display the **Mark Complete** link for a resource they contribute using the **Mark as Informal Activity** checkbox in the contribution panel under **Advanced Settings**. Again, Saba Cloud "admin" users can configure the display of this checkbox using certain site-level properties for the Learning Record Store.

If the **Mark as Informal Activity** checkbox is available, then the contributer can select the checkbox while contributing a resource. If selected, then Saba Cloud displays the **Mark Complete** link for that resource allowing authorized users to record the resource contribution to Saba LRS.

| Start conversation Contribute Meet |   |                            | 😲 Quick Shar |
|------------------------------------|---|----------------------------|--------------|
| File title                         |   | Choose File No file chosen |              |
| Your thoughts on the file          |   |                            |              |
| Type person to share with here     | Q |                            |              |
| Migration Community 🛞              |   |                            |              |
| Advanced Settings                  |   |                            |              |
| Language                           |   | Author                     |              |
| English                            | Q | User One112qj              | Q            |
| Tags                               |   |                            |              |
|                                    |   |                            |              |
| Send Notifications To:             |   |                            |              |
| People Listed                      |   |                            |              |
| Members of Group/s Listed          |   |                            |              |
| Mark as Informal Activity          |   | Canc                       | el Save      |

#### Figure 102: Mark as Informal Activity checkbox

By default, the Mark Complete link is displayed while the Mark as Informal Activity checkbox is hidden.

#### LRS Contributions in Activity Stream

The contributions captured in the LRS are displayed in the user's **Activity Stream** under **Me > Activity > Learning Activity**. The statement format is as follows:

<User Name> <Verb mentioned in LRS Registry> link <URL Name mentioned in LRS Registry>

|   | ↓Activity Stream  |
|---|---|
| R | ecent Updates Comment wall Learning Activity                            |
|   | User One watched video "Wildlife.wmv"<br>Yesterday                      |
|   | User One experienced link "Cloud Computing Training video"<br>Yesterday |
|   | User One experienced file "Salesforce design doc"<br>Yesterday          |
|   | ✓ More  |

#### Figure 103: Formal activities in Learning Activity stream

If the **Social LRS** service is disabled, then the **Mark Complete** button is not displayed for new and existing resources. However, the **Learning Activity** stream continues to show existing feeds.

Note: The Learning Activity feeds do not support locales. For non-English locales, all feeds appear in English only.

#### Use case

There is a need to maintain a Learning Record Store for tracking informal learning activities of users in Saba Cloud.

## Chapter

## 5

## Marketplace

#### **Topics:**

- Courses retired in lynda.com should not appear in Saba
- Saba Approver can see application details before approval
- Audit option is available for marketplace configuration changes
- Partner admin can choose which view the microapp should be available in Saba home page/profile page
- Partners can publish Micro Apps to specific tenants
- Enhancement to the Partner Approval Flow
- API dashboard available for Micro Apps created in Extended Integration

## Courses retired in lynda.com should not appear in Saba

#### How did it work?

Prior to this release, content that were expired or removed from lynda.com catalog were not removed from Saba Marketplace. When users selected one of these courses, they were facing errors with no specific details.

#### How does it work now?

Starting from this release, content that are retired in lynda.com catalog will be marked as **Expired** in Saba Cloud. Access to course created won't be discontinued but any learner who tries to launch content will see an error message.

When Saba performs a sync/bulk import operation with lynda.com, all content offered by lynda.com becomes available for Saba users. If a subsequent sync operation only shows some of the content and not all imports from the original list, content that are not available on the second sync are marked as **expired** by Saba.

Administrators can verify that the content details section under **Manage Content** show the **expired date** that is set by Saba. (this date is based on the server date and not the sync date).

By marking the content as expired, any confusion regarding the availability of content is eliminated and students will be in a position to choose alternate courses from an active list.

If a user has already been assigned to a course based on that content and tries to access it, the following error message will show:

#### Error occurred, Content is no longer available. You can close the player safely.

#### Use case

When users who are eager to enroll in a course, cannot find it but faces errors, it creates confusion. By providing meaningful error message and by giving them the details, helps them to plan for alternative options.

## Saba Approver can see application details before approval

#### How did it work?

Prior to this release, when adding and integrating applications into Saba Marketplace, Saba Approvers could not see the details of the application that they are trying to approve for integration.

#### How does it work now?

In this release, a new interface provides the approvers the capability to launch and view the details of the application that they are considering to approve to integrate with Saba Cloud.

To view application details:

- 1. From Admin menu, click Extended Integration.
- 2. From the Navigation pane on the side, click on Saba Approvals. Applications are listed by Name, contact Email, Status and Action columns.
- 3. Select View from the Actions column.

#### Figure 104: Saba Approval screen

| Admin Home People Hi<br>System Analytics_u35 | R Social Meetings Co | mpensation123 Instruct | or Learning    | Performance | Pulse 360 | Talent Rec     | ruiting Marketplace | Extended Integration |
|--|----------------------|------------------------|----------------|-------------|-----------|----------------|---------------------|----------------------|
| rivetplace Studio<br>provals                 | Saba Approval        |                        |                |             |           |                |                     |                      |
| ba Approvals                                 | Name                 |                        |                |             |           |                |                     |                      |
|  |                      |                        | Sea            | rch         |           |                |                     |                      |
|  |                      |                        |                |             |           |                |                     |                      |
|  | Name                 | Con                    | rtact Email    |             | Star      | tus            |                     | Action               |
|  | u35edge2             | u35                    | iedge2@sa.com  |             | App       | proved by Sab  | 1                   | View -               |
|  | rid_test             | abc                    | @gmail.com     |             | Rej       | ected by Saba  |                     | View +               |
|  | approval flow        | nth                    | akkar@saba.co  | m           | Per       | nding Saba Ap  | proval              | Vew +                |
|  | NewMicroView         | ama                    | ahindrakar@sab | a.com       | Per       | nding Saba Ap  | proval              | View -               |
|  | u35edge1             | u35                    | iedge1@san.cor | Π           | App       | proved by Sab  | 1                   | Vew -                |
|  | Test ABC             | ami                    | t@amit.com     |             | App       | proved by Sabi | 1                   | Vew •                |
|  | NewIntegrate/View    | ama                    | ahindrakar@sab | a.com       | Per       | nding Saba Ap  | proval              | View •               |
|  |                      |                        |                |             |           |                |                     | Disabular 1 2        |

A pop-up screen opens and displays the details of the application in **read only** mode. Saba Approver can view the details before making a decision to Approve or Reject the integration of that application; however, they cannot edit the content in the fields.

#### Figure 105: Application details in non-editable mode

| Name: approval flow |                         |  |                       |             |             |  |
|---------------------|-------------------------|--|-----------------------|-------------|-------------|--|
| Title:              | approval flow           | provai flow  |                       |             |             |  |
| Gadget URL:         | https://dqathdb1.saba   | cloud.com/production/remot   | eserver1/samplegadget | 2.xml       |             |  |
| Contact Email:      | mthakkar@saba.com       |  |                       |             |             |  |
| Image URL:          | http://disney.wikia.com | wiki/File:Inspector_Gadget   | (FS).jpg              |             |             |  |
| Evaluation Period:  | 0                       |  |                       |             |             |  |
| Marketing Text:     | advfsdgvf<br>Provensa   | v<br>Feloreczi ¥ B Z U A' A' A A * X * E E E E @ >><br>advfsdgvf<br>Feloreczi T B Z U A' A' A A * Y * E E E E @ >> |                       |             |             |  |
| Configuration       |                         |  |                       |             |             |  |
| Name                | Description             | Code   | Туре                  | Is Required | Max. Length |  |
|                     |                         | No Configuration Ave   | ailabla               |             |             |  |

#### Use case

Saba Approvers now have more control over the application content they allow to integrate with Saba Cloud.

# Audit option is available for marketplace configuration changes

#### How did it work?

Prior to this release, there were no provisions for capturing configuration changes in Marketplace for published vendors.

#### How does it work now?

In this release, this has been addressed. **Audit Details** option is added to the configuration screen. After the initial configuration, changes to all fields are audited except the following:

#### All vendors:

- Agree to Terms and Conditions field will not be audited.
- Password fields will be audited, but their values will not be visible.

#### Workday:

Currently, Import and export configurations and mappings are not audited.

To access and view the audit details of the configuration changes for a published vendor:

Navigate to:

#### Saba Cloud>Admin>Marketplace

From the displayed list of configured vendors, select the vendor name to view audit records of the configuration changes.

The configuration details screen launches.

#### Figure 106: Configuration screen for Marketplace vendor

| ngs Compensation | Instructor Learning         | Performance | Pulse 360  | Talent  | Recruiting | M |
|------------------|-----------------------------|-------------|------------|---------|------------|---|
| Salesforce       |                             |             |            |         |            | × |
| Salesforce       |                             |             |            |         |            | _ |
| Username:*       | sabaintegration@hp.cor      | m.prod      |            |         |            |   |
| Password:*       | •••••                       |             |            |         |            |   |
| Security token:* | wEAoLYHsGZU8ZPCV            | /9IZAQIIn   |            |         |            |   |
| Integration Url: | google.com                  |             |            |         |            |   |
|                  | Custom Transformati         | on          |            |         |            |   |
|                  | Import Person Extern        | nal         |            |         |            |   |
|                  | Import Person International | al          |            |         |            |   |
|                  |                             | Audit De    | tails Save | Disable | Test 💌     |   |
|                  |                             |             |            |         |            |   |

Click on Audit Details to view the details of the configuration changes.

Figure 107: Audit Details of the changes

| AUDIT DETAILS              |                     |                  |            |                       |
|----------------------------|---------------------|------------------|------------|-----------------------|
| Property Changed           | Previous Value      | Current Value    | Updated By | Updated On            |
| PASSWORD                   |                     | Password Changed | uone       | 09/08/2016            |
| ImportPersonExternal       | false               | true             | uone       | 09/08/2016            |
| PASSWORD                   |                     | Password Changed | uone       | 09/08/2016            |
| ImportPersonExternal       | true                | false            | uone       | 09/08/2016            |
| INTEGRATIONURL             | integration urlowww | google.com       | uone       | 09/08/2016            |
| PASSWORD                   |                     | Password Changed | uone       | 09/08/2016            |
| IS_CUSTOM_XSLT             | true                | false            | uone       | 09/08/2016            |
| [4] 4] Page 1 of 1  > >  2 |                     |                  |            | Displaying 1 - 7 of 7 |
|                            |                     |                  |            |                       |

In the example shown for the password change, the value is not displayed but the **Updated By** field and the date on which it was changed are provided.

For the **ImportPersonExternal** field, the **Previous Value**, **Current Value**, **Changed by** and **Updated On** field all provide the details of the change.

Use case

Addition of the **Audit Details** option to Marketplace vendor configuration section provides the capability to track and analyze changes made to the settings.

## Partner admin can choose which view the microapp should be available in Saba home page/profile page

How did it work?

Currently Microapps created by a partner admin can be published to home page view and profile page view. The admin cannot choose where they want the application to be available.

How does it work now?

The enhancement in this release enables the partner admin to indicate where they want the microapp to be available.

When creating the microapp, the admin can choose either the **Home View** option or the **Profile View** option or both and based on these selections, the microapp will show on the Home page, Profile page or both pages of the user.

To create a new Micro App:

Navigate to:

- 1. Admin>Extended Integration>Marketplace Studio>Integration
- 2. Click on New Micro App link.
- 3. In the **Create Micro App** screen enter the details for all required fields and select either the **Home View** or the **Profile View**.
- 4. Click on Save.

#### Figure 108: Create Microapp screen

|   | GROUPS DEV-QA CENTRAL 1                | ADMIN Browse AI • Search Q  |
|---|--|---|
| Admin Home People HR So<br>Analytics_UK | ocial Meetings Compensation Instructor | r Learning Performance Pulse 300 Talent Recruiting Marketplace <b>Extended Integration</b> System |
| Marketplace Studio<br>Approvals         | Create Micro App                       |   |
| Saba Approvals                          | Name *                                 | samplegadget1   |
|   | Title *                                | Sample Gadget   |
|   | Gadget URL *                           | https://dqathdb1.sabac.loud.com/prodution/remoteserver1/samplegadget1.xml                         |
|   | Contact Email                          | prose@saba.com  |
|   | Image URL *                            | http://flowerinfo.org/wp-content/gallery/liac-flowers/liac-flower-9.jpg                           |
|   | Evaluation Period                      | 0   |
|   | Home View:                             |   |
|   | Profile View:                          |   |
|   | Description *                          | Helvetica - B Z Q A x 🛆 😢 🖀 🗃 🌚   |
|   |  | New Micro App   |
|   |  |   |
|   |  |   |
|   |  |   |
|   |  |   |
|   |  |   |
|   | Marketing Text                         | Helvetka 🔹 🖪 🖉 🗚 🖍 🛆 😤 ど 📰 📓  |
|   |  |   |

Since you selected the **Profile View** option, the microapp will be available on the **Profile page** of the User. If, at a later time you want to include Home View also, you can click the **Edit** button on the corresponding MicroApp listing from the Integration page and select both options.

#### Use case

Partners now have better control over the microapps they create and can make appropriate microapps available in appropriate views.
### Partners can publish Micro Apps to specific tenants

#### How did it work?

Currently when a Micro App is published, it gets published to all tenants in Saba Cloud. This limits the ability of the partners to publish it to a select few. Some applications may be applicable only for a particular vertical or a region.

#### How does it work now?

The enhancement in this release enables the Partner Administrator to indicate which tenant they want the Micro App or an Integration to be available to. Some applications may be applicable only for a particular vertical or a region. Partner Administrators can publish their applications and Integrations across Data Centers.

When creating the Micro App, the administrator can select a region **North America** or **EMEA**, **APAC** etc and based on these selections, the Micro App will be accessible by tenants from those regions only.

To select the tenant to give access to the Micro App:

Navigate to:

- 1. Admin>Extended Integration>Marketplace Studio
- 2. Select the Micro App and click Publish

A pop up screen launches that lists the sites where the Micro App is enabled.

Select the site to publish the Micro App.

#### Figure 109: Pending Approval for Evaluation

| Admin Home People I<br>System Analytics_u37       | HR So  | cial Meetings    | Compensation123 | Instructor | Learning | Performance | Pulse 350 | Talent | Recruiting | Marketplace  | Extended Integration   |
|---|--------|------------------|-----------------|------------|----------|-------------|-----------|--------|------------|--------------|------------------------|
| Marketplace Studio<br>Aeprovals<br>Baba Aeprovals | Int    | tegration        |                 |            |          |             |           |        |            |              |                        |
|   | Update | 36 microapp      |                 |            | 5ee      | ich         |           |        |            | ×            |                        |
|   | 4 🔁 De | 102              |                 |            |          |             |           |        | L          | Add New Site | Action                 |
|   | 3      | ATHDB10Site      |                 |            |          |             |           |        |            |              | Eda •                  |
|   | 2      | T107Site         |                 |            |          |             |           |        |            |              | tat                    |
|   | 4 🔁 NA | ATHOBISTIC<br>AT |                 |            |          |             |           |        |            |              | En                     |
|   | 8      | DefaultSite      |                 |            |          |             |           |        |            |              | tat •                  |
|   |        |                  |                 |            |          |             |           |        |            |              | Edt                    |
|   |        |                  | _               |            |          |             |           |        |            |              | Displaying 1 - 8 of 47 |

- 1. Click Add new Site to enter a new site to the list.
- 2. Click Publish to.

Figure 110: Add New Site to publish the Micro App

| Marketplace Studio<br>Approvalia | Integration                                    |                                   |
|----------------------------------|--|-----------------------------------|
| Saba Approvals                   |  |                                   |
|                                  | the new1 X                                     |                                   |
|                                  | Data Center * Devga w<br>Site mobilesite w     | aration   New Micro App<br>Action |
|                                  | Selected Sites                                 | Est +                             |
|                                  | spcdemosite¥ ATHDB1Site¥ newBaseDB¥ noblesite¥ | -                                 |
|                                  |  | EX. •                             |
|                                  | Publish to Cancel                              |                                   |
|                                  |  | <u>E.R.</u> •                     |
|                                  |  | £31 +                             |
|                                  |  | E.8. (*                           |
|                                  |  | Edt +                             |
|                                  |  | Displaying 1 - 8 of 95            |

You will see the message that it was published Successfully and the new site will be added to the Data center.

#### Use case

Partners now have better control over the Micro Apps and Integrations they create and can choose and publish them across Data Centers and to only specific tenants and groups.

### **Enhancement to the Partner Approval Flow**

How did it work?

In the past, partners were not able to control the evaluation flow for Micro Apps and Integrations that they created.

How does it work now?

When a Saba Partner receives a request for evaluating a Micro App, the status on the Micro App shows **Pending Approval (Evaluation)**. Once the partner approves the request and the user starts using the application, the status will be moved to **Configured in Evaluation** status.

On evaluation, when an agreement is established between the Partner and the user, the status for the Micro App is moved to **Approved** state.

The Evaluate this App option will no longer display once the Evaluate check box is selected.

#### **Partner Approval**

To view Micro Apps that are in Pending Approval and to Approve or Reject Micro Apps:

- 1. Navigate to: Admin>Extended Integration>Marketplace Studio>Integration
- 2. Click Approval (Partner Approval)
- 3. A list of Micro Apps with different statuses display.
- 4. From Actions click on Approve for the Pending Approval (Evaluation). The status is moved to Configured in Evaluation.
- 5. Choose **Reject** if you do not approve the request.

#### Figure 111: Pending Approval for Evaluation

| Marketplace Studio<br>Approvals | Integration App | proval            |                   |                              |                       |
|---------------------------------|-----------------|-------------------|-------------------|------------------------------|-----------------------|
| Saba Approvals                  | Name            |                   |                   |                              |                       |
|                                 |                 | Search            |                   |                              |                       |
|                                 |                 |                   |                   |                              |                       |
|                                 | Site            | Name              | Contact Email     | Status                       | Action                |
|                                 | spcdemosite     | Update 34 Eval II | mthakkar@saba.com | Pending Approval(Evaluation) | Approve ·             |
|                                 | ATHDB1Site      | microapp a        | email@gmail.com   | Configured in Evaluation     | Approve -             |
|                                 | ATHOB1Site      | b1                | b1@wer.com        | Pending Approval             | Approve +             |
|                                 | spcdemosite     | 2q                | 2q@sa.com         | Pending Approval             | Approve •             |
|                                 | [4] 4] Page 1   | ari 🕨 😹 🤕         |                   |                              | Displaying 1 - 4 of 4 |

#### Use case

Partners will now have a better control over the evaluation process and can choose to approve requests that are only relevant and applicable for a specific application or integration.

### API dashboard available for Micro Apps created in Extended Integration

How did it work?

N/A

How does it work now?

A new API dashboard is available for Partners and Saba Approvers to view and monitor user activity for the Micro Apps. The dashboard provides access to API data for each Micro App.

#### Micro App API dashboard

To access the Micro Apps API dashboard:

- 1. Navigate to: Admin>Extended Integration>MicroApp Dashboard>
- 2. The dashboard screen launches.
- 3. Select the Data center name, Site name and the MicroApp name
- 4. Click Apply.

#### Figure 112: MicroApp Dashboard Showing API activity



A summary tab displays the Summary data and the API chart. All successful activities are marked in Green and all Failed activities are marked in Blue.

Below the chart, a table displays the following: MicroApp name, Data center name, API name, tenant name, Success Count, and Failure Count.

#### Error tab details

The Error tab provides the following data:

ID, API Name, Action (Get, Post) Status (failed, passed) Response time and the Request date.

Click on the Id link to launch the details of the API and the error data.

#### Figure 113: Dashboard with Error Tab

| nketplace Studio<br>provals      | MICROAPP DA          | SHBOARD    |        |        |                   |                        |
|----------------------------------|----------------------|------------|--------|--------|-------------------|------------------------|
| ba Approvals<br>croApp Dashboard | Range                | Date       | *      | Da     | 10/04/2016        |                        |
|                                  | Data Center *        | Devqa      | *      | Sit    | e * ATHDB1Site    | *                      |
|                                  | MicroApp *           | pikachu101 | *      |        |                   |                        |
|                                  |                      |            |        |        |                   | Apply                  |
|                                  | Summary Errors       |            |        |        |                   |                        |
|                                  | ld                   | API Name   | Action | Status | Response Time(ms) | Request Date           |
|                                  | 57f38b0f11703cea543. | Facility   | POST   | FALED  | 46                | 04-10-2016 10:57:19 AM |
|                                  | 57f38b0d11703cea54.  | Facility   | POST   | FAILED | 60                | 04-10-2016 10:57:17 AM |
|                                  | 57f38b0711703cea64.  | Facility   | GET    | FAILED | 65                | 04-10-2016 10:57:11 AM |
|                                  | 57f38b0511703cea54.  | Facility   | GET    | FAILED | 65                | 04-10-2016 10:57:09 AM |
|                                  | 57f38afc11703cea543. | Facility   | POST   | FAILED | 41                | 04-10-2016 10:57:00 AM |
|                                  | 57f38afb11703cea543. | . Facility | POST   | FALED  | 38                | 04-10-2016 10:56:59 AM |
|                                  | 57f38afa11703cea543. | Facility   | POST   | FAILED | 41                | 04-10-2016 10:56:58 AM |
|                                  | 57f38af911703cea543. | Facility   | POST   | FAILED | 90                | 04-10-2016 10:56:57 AM |
|                                  | 57f38af811703cea543. | . Facility | POST   | FAILED | 55                | 04-10-2016 10:56:56 AM |
|                                  | 57f38af211703cea543. | Facility   | GET    | FAILED | 44                | 04-10-2016 10:56:49 AM |
|                                  | Description of the   | 0          |        |        | Go To P           | 100                    |

#### Use case

Saba Partners and Approvers can now view the Micro App API usage information with summary, chart and error logs.

# Chapter

# 6

# Performance

#### **Topics:**

- Add locale to Additional Info section of review form
- Assign skill through PR without any goal
- Anniversary reviews update
- Edit or delete goal progress comments
- Export and import review cycle
- Filter skills by skill group
- Limit access to reviews for new managers
- New policy for review owners to release review
- New question in Company category for Pulse 360

### Add locale to Additional Info section of review form

#### How did it work?

The performance administrator could only add questions in English in the **Additional Info** section of the review form in the review cycle.

#### How does it work now?

The performance administrator can now add questions in the required locales in the **Additional Info** section of the review form.

To add questions in required locale:

- **1.** Go to the required review form.
- 2. Create an Additional Info review section type.
- 3. First add questions in English locale and save the form.
- 4. Click the section name and then view the Internationalize icon on the New Question page.

| New Question            |                                       |  |
|-------------------------|---------------------------------------|--|
| Question Name:*         | To which part does Mumbai belong?     |  |
| Question Type:*         | Multiple Choice                       |  |
| Question Text:*         | To which part does Mumbai belong?     |  |
| Question Instructions:* | Please select the appropriate value.] |  |

#### Figure 114: Internationalize icon

- 5. Click the Internationalize icon.
- 6. Select a new locale, update the question details in the selected locale, and click **Save**. The question will be updated in the selected locale.

| Translate Questi          | on                                |       |       | ×    |
|---------------------------|-----------------------------------|-------|-------|------|
| Locale:                   | Español (Mexico)                  | × 9 × |       |      |
| Question Name:            | To which part does Mumbai belong? |       | '     |      |
| Question Text:            | To which part does Mumbai belong? |       |       |      |
| Question<br>Instructions: | Please select one value           |       |       |      |
| Choice1:                  | Maharashtra                       |       |       |      |
| Choice2:                  | Gujrat                            |       |       |      |
| Choice3:                  | Bangalore                         |       |       |      |
|                           |                                   | C     | ancel | Save |

Figure 115: Translate questions in selected locale

#### Use case

The missing localisation support has now been added for Additional Info section specifically Multi-Choice Questions.

## Assign skill through PR without any goal

#### How did it work?

A goal is automatically created and added to user's plan while pushing skills through prescriptive rule (PR).

| Duesewin      | the Dule D       |              |           | DE     |                 |               |
|---------------|------------------|--------------|-----------|--------|-----------------|---------------|
| Prescrip      | tive Rule D      | etalis: lest | SKIIIS P  | Ro     |                 |               |
|               |                  |              |           |        |                 |               |
| Main M        | lember Selection | Requirements | Error Log | Proce  | essing History  |               |
|               |                  |              |           |        |                 |               |
|               |                  |              |           |        |                 |               |
| Learning Ev   | ents             |              |           |        | Add Le          | arning Event  |
| No items four | nd               |              |           |        |                 |               |
|               |                  |              |           |        |                 |               |
| Skille        |                  |              |           |        |                 |               |
| SKIIIS        |                  |              |           |        |                 | Add Skill     |
| Name          |                  |              |           |        | Proficiency Lev | el Actions    |
| Automation    | n Testing        |              |           |        | Poor            | Delete        |
| behavioral    | indicator_comp1  |              |           |        | Average         | Delete        |
| Competend     | су               |              |           |        | Average         | Delete        |
|               |                  |              |           |        |                 |               |
| Shared Goal   | s                |              |           |        | bbA             | Shared Goal   |
| No itomo four | nd               |              |           |        | , 100           | onarea ocar   |
| NO REHIS IOU  | nu               |              |           |        |                 |               |
|               |                  |              |           |        |                 |               |
| Individual Go | bals             |              |           |        | Add Inc         | dividual Goal |
| Name          |                  |              |           | Status |                 | Actions       |
| Skills PR 5   | - Goal 1         |              |           | Active |                 | Delete        |
| Test Skills I | PR5              |              |           | Active |                 | Delete        |

#### Figure 116: Skill and goal assigned via PR

Once the PR is processed, the goal & skill is pushed to the user's plan with a source as PR.

When the administrator tries to remove the skill or respective goal from the PR, then the PR removes ONLY the respective goal from the user's plan. The skill is not removed.

#### How does it work now?

From this update, when a skill is processed through PR, the goal will not be created automatically and only skill will get pushed to the user's plan. The skill details will show the PR name in the source. When the administrator removes newly added skill from the PR, the PR process will remove the skills from user's plan.

| Prescrip     | tive Rule De     | etails: Test | Skills P  | R5     |                 |               |
|--------------|------------------|--------------|-----------|--------|-----------------|---------------|
| Main N       | lember Selection | Requirements | Error Log | Proc   | essing History  |               |
|              |                  |              |           |        |                 |               |
| Learning Ev  | ents             |              |           |        | Add Le          | earning Event |
| No items fou | nd               |              |           |        |                 |               |
|              |                  |              |           |        |                 |               |
| Skills       |                  |              |           |        |                 | Add Skill     |
| Name         |                  |              |           |        | Proficiency Lev | vel Actions   |
| Automation   | n Testing        |              |           |        | Poor            | Delete        |
| behavioral   | indicator_comp1  |              |           |        | Average         | Delete        |
| Competen     | cy "\$%@#!"      |              |           |        | Average         | Delete        |
| Shared Goa   | Is               |              |           |        | Add             | l Shared Goal |
| No items fou | nd               |              |           |        |                 |               |
|              |                  |              |           |        |                 |               |
| Individual G | oals             |              |           |        | Add In          | dividual Goal |
| Name         |                  |              |           | Status |                 | Actions       |
| Skills PR 5  | - Goal 1         |              |           | Active |                 | Delete        |
| Test Skills  | PR5              |              |           | Active |                 | Delete        |

#### Figure 117: Updated PR behavior

If the administrator has changed the skill's proficiency level after processing the PR, then the administrator must remove the newly added skill and before processing the PR, add the same skill again to the PR with a different proficiency level. Once the PR is processed, the updated proficiency level will be pushed to the user's plan.

#### Use case

The goals will not be assigned to the user while pushing skills through PR.

### Anniversary reviews update

#### How did it work?

The anniversary reviews are triggered after the x number of days from user's joining date or job starting date. These details are mentioned in the review cycle. For example, if Jane joins the company on 5th April, 2016 and in review cycle the review trigger time is 365 and the trigger is based on Joining Date, then she'll receive the review on 5th April, 2017. After joining, if Jane starts her job on 10th April, 2016 and in review cycle the review trigger time is 365 and the trigger is based on Joh April, 2017. Once the review is pushed, then the review is not triggered for the subsequent year.

#### How does it work now?

From this update, multiple anniversary reviews will be created for the same user until the user's job change or termination. Once the anniversary review is triggered, the next review will be triggered based on the timeframe mentioned in the anniversary review cycle and it will be pushed to only those who fulfill the criteria. If the prescriptive rule criteria is changed in future, then the person matching with the old criteria is not processed even if the anniversary review was

pushed to the learner. Thus, after x number of days only those users who matches with the current criteria for the review, will be processed.

|                          | My review   Leading myself Anniversary<br>This cycle created to test ci <u>http://jira.saba.com:8080/browse/SPC-39536</u> |           |
|--------------------------|---|-----------|
|                          | p   | Words: 12 |
| Status:                  | ACTIVE  |           |
| Cycle Type:*             | Performance Review     MRA/feedback from     others   |           |
| Туре:*                   | Anniversary   |           |
| Synchronize h            | ield skill level with review score 🚺  |           |
| 🔲 Create a To-D          | )o List based on this review 🕕  |           |
| Review owne              | r can release reviews 🕕   |           |
| Timeframe                |   |           |
| Review Trigger<br>After: | 365   |           |
| Trigger Based<br>On:     | Soining Date  |           |

Figure 118: Anniversary review cycle

Note: The review's created on date is appended to the anniversary reviews to differentiate them from other reviews.

| Review | S  |                 |              |                      |                  |                 | Print   Ex  | port   Modify Table |
|--------|--|-----------------|--------------|----------------------|------------------|-----------------|-------------|---------------------|
|        | Review Name  | Reviewee        | Review Owner | <b>Review Status</b> | Reviewer Status  | Start Date From | End Date To | Overall Rating      |
|        | My review  <br>Leading myself<br>Anniversary               | Jon<br>Armand   | Sanjay Shaw  | Activated            | 0 of 2 Completed | 03/05/2014      | 03/05/2015  | Not Available       |
|        | My review  <br>Leading myself<br>Anniversary               | Kelli LeB       | Sanjay Shaw  | Activated            | 0 of 2 Completed | 03/05/2014      | 03/05/2015  | Not Available       |
|        | My review  <br>Leading myself<br>Anniversary               | Lane<br>Stewart | Sanjay Shaw  | Activated            | 0 of 2 Completed | 03/05/2014      | 03/05/2015  | Not Available       |
|        | My review  <br>Leading myself<br>Anniversary               | Raymond<br>O    | Sanjay Shaw  | Activated            | 0 of 2 Completed | 03/05/2014      | 03/05/2015  | Not Available       |
|        | My review  <br>Leading myself<br>Anniversary<br>09/29/2016 | Dan<br>Prima    | Sanjay Shaw  | Activated            | 0 of 2 Completed | 09/30/2015      | 09/29/2016  | Not Available       |
|        | My review  <br>Leading myself<br>Anniversary<br>09/29/2016 | Lane<br>Stewart | Sanjay Shaw  | Activated            | 0 of 2 Completed | 09/30/2015      | 09/29/2016  | Not Available       |
|        | My review  <br>Leading myself<br>Anniversary<br>09/29/2016 | Raymond<br>O    | Sanjay Shaw  | Activated            | 0 of 2 Completed | 09/30/2015      | 09/29/2016  | Not Available       |

Figure 119: Anniversary reviews

If the previous anniversary review is still active for an employee, then it will remain active, but an anniversary review for the current year will be created. Manager has the provision to cancel the old review. If the review cycle is marked as complete or cancel, then the anniversary reviews will not be created for that cycle.

If the system admin is trying to override the overall score through data import, then it will not override the score for anniversary reviews as its not supported. The system admin will be able to create historic reviews for anniversary review cycle using the Review Score object name in data import. Such reviews will be named as ReviewCycleName\_date where date is the review creation date.

Use case

Performance administrator can now create a single anniversary cycle and it will continue to create reviews until the cycle is either cancelled or closed.

### Edit or delete goal progress comments

#### How did it work?

A user associated with a goal can add comments and change the progress of the goal, but there was no provision to edit or delete any comments, once given.

#### How does it work now?

The people administrator and end user can now edit or delete their comments on the goal provided the following new privileges are enabled. The privileges have been introduced in the **Shared Goal** component:

- Can Edit Self Comments By default, this privilege is enabled. When enabled, the user can edit their own comments on the goal. An edit icon appears next to the self comments.
- Can Delete Self Comments By default, this privilege is enabled. When enabled, the user can delete their own comments on the goal. A delete icon appears next to the self comments.
- Can Edit All Comments By default, this privilege is enabled for Performance admin only. When enabled, the user can edit all the comments on the goal. An edit icon appears next to all the comments.
- Can Delete All Comments By default, this privilege is enabled for Performance admin only. When enabled, the user can delete all the comments on the goal. A delete icon appears next to all the comments.

| Simple Secur         | ity Ro    | le Details: I  | luman Capit                                | al Admin                      |  |  |  |  |
|----------------------|-----------|--|--|-------------------------------|--|--|--|--|
|                      |           |  |  |                               |  |  |  |  |
| Security Role*       |           | Human Capital A  | dmin                                       |                               |  |  |  |  |
| Description          |           | Grants access to   | Grants access to all functionality in Humi |                               |  |  |  |  |
| Domain*              |           | world  |  | Q C                           |  |  |  |  |
| Туре                 |           | <ul> <li>Domain Based</li> <li>Criteria Based</li> </ul> |  |                               |  |  |  |  |
| Is Sensitive         |           | ●No<br>●Yes  |  |                               |  |  |  |  |
| Components Peo       | ople      |  |  |                               |  |  |  |  |
|                      |           |  |  |                               |  |  |  |  |
| Component            |           | Shared Goal  |  | S 6                           |  |  |  |  |
| Component Privileges | 5         |  |  | Print   Export   Modify Table |  |  |  |  |
| Grant Access         | Privilege |  |  |                               |  |  |  |  |
|                      | New       |  |  |                               |  |  |  |  |
|                      | Edit      |  |  |                               |  |  |  |  |
|                      | Delete    |  |  |                               |  |  |  |  |
|                      | View      |  |  |                               |  |  |  |  |
|                      | Can Upda  | ate any Goal   |  |                               |  |  |  |  |
|                      | Can Dele  | te any Goal  |  |                               |  |  |  |  |
| ✓                    | Can Upda  | ate PR Pushed Indi                                       | vidual Goal                                |                               |  |  |  |  |
|                      | Can Dele  | te PR Pushed Goal  |  |                               |  |  |  |  |
|                      | Can assig | gn subgoal outside                                       | of my Direct/Indirect re                   | eports                        |  |  |  |  |
|                      | Can view  | manager's goal pro                                       | gress comments                             |                               |  |  |  |  |
|                      | Can Edit  | Self Comments  |  |                               |  |  |  |  |
|                      | Can Dele  | te Self Comments   |  |                               |  |  |  |  |
|                      | Can Edit  | All Comments   |  |                               |  |  |  |  |
|                      | Can Dele  | te All Comments  |  |                               |  |  |  |  |

#### Figure 120: New privileges in Shared goal

The user will not be able to take any actions on the first comment of the goal. The user can edit and delete only his/her comments. Once the goal is completed, if the user tries to reactivate the goal and delete the last comment (about goal reactivation), then the goal moves to its previous state.

**Note:** The progress of the goal is dependent on the goal's last comment.

| Parent goal                             | : 0   | bjective 1 for BusinessUnit1            | Change   Clear |
|---|---|---|----------------|
| Sub-goals:<br>0% Averag<br>Active Goals | + Add sul<br>a Progress for<br>s)                                   | b goal                                  |                |
| Jpdate Pro                              | gress:  |   |                |
|   |   |   | 20%            |
|   | Slide progress  | bar above OR enter progress below.      |                |
| •                                       | 20 % Complete<br>Comments *   |   |                |
|   | 1   |   | Save           |
|   | 09/01/2016  |   |                |
|   | Daily interaction with the cu<br>20% Complete<br>09/01/2016 6:45 AM | ustomer for better knowledge gathering. | / 面            |
|   | Created<br>0% Complete  |   |                |

Figure 121: Edit or delete goal

The goal progress comments being entered, edited, or deleted are being captured in the audit trail on the Goal progress details page. This supports only silent auditing.

| A | Audit Trail                           |                              |                                |                                  |                  |                         |  |
|---|---------------------------------------|------------------------------|--------------------------------|----------------------------------|------------------|-------------------------|--|
|   |                                       |                              |                                |                                  |                  |                         |  |
|   |                                       |                              |                                | Print                            | Export   N       | lodify Table            |  |
|   | Action                                | Timestamp                    | Previous Value                 | New Value                        | Author           | Reason                  |  |
| _ | Delete<br>Progress<br>Comment         | 09.09.2016<br>7:34:10 AM     | 0% :<br>Deactivated<br>vccdsds | -                                | Pat<br>Rose      | Silent<br>auditing      |  |
|   | Edit<br>Progress<br>Comment           | 09.09.2016<br>7:34:03 AM     | 0% :<br>Reactivated            | 0% : Reactivated edited by prose | Pat<br>Rose      | Silent<br>auditing      |  |
|   | Insert<br>progress<br>comment         | 09.09.2016<br>7:33:47 AM     | -                              | 0% : added by prose              | Pat<br>Rose      | Silent<br>auditing      |  |
|   | Delete<br>Progress<br>Comment         | 09.09.2016<br>7:31:28 AM     | 0% : oklll                     | -                                | yg1 yg1          | Silent<br>auditing      |  |
|   | Insert<br>progress<br>comment         | 09.09.2016<br>7:31:10 AM     | -                              | 0% : oklil                       | yg1 yg1          | Silent<br>auditing      |  |
|   | Edit<br>Progress<br>Comment           | 09.09.2016<br>7:30:42 AM     | 0% :<br>Deactivated            | 0% : Deactivated vccdsds         | yg1 yg1          | Silent<br>auditing      |  |
|   | Update :<br>Approval<br>Status        | 02.02.2016<br>11:42:16<br>AM | Pending<br>Approval            | Approved                         | mgr001<br>mgr001 | audit<br>with<br>reason |  |
|   | Update :<br>Exclude<br>From<br>Review | 02.02.2016<br>11:42:16<br>AM | false                          | true                             | mgr001<br>mgr001 | Silent<br>auditing      |  |

#### Figure 122: Goal Audit Trail

#### Use case

This feature now enables manager and employee to edit or delete their own comments as well as any comments if they have the correct permissions.

### Export and import review cycle

#### How did it work?

For a review cycle, a copy feature exists that creates an exactly same review cycle using the existing review cycle. It copies the cycle on the same environment, hence there was a need to have a provision to copy the review cycle from one environment to another.

#### How does it work now?

In this update, export and import functionality has been introduced for review cycle where the performance administrator can export the required review cycle and import the same on another environment. The export functionality will capture all the details associated with the review cycle including forms and audiences in an XML file. Administrator can export the review cycles at any state.

To export and import review cycle:

1. Navigate to **Performance** > **Manage Reviews** > **Review Cycles**.

- 2. Search for an review cycle which needs to be exported.
- **3.** Click **Export Cycle** under **Actions** column corresponding to the review cycle. The XML file is downloaded. The file will be named as review cycle and export date timestamp.



Figure 123: Export and Import review cycle



Figure 124: Exported review cycle XML file content

- 4. Go to the environment where you want to import the review cycle.
- 5. Log into the application and perform step 1.
- 6. Click Import Cycle.

| Import Review Cycle  |                                | × |
|----------------------|--------------------------------|---|
| Select Review Cycle: | Select a file to import Browse |   |
|                      | Opload                         |   |

Figure 125: Import review cycle

- 7. Click **Browse** to locate the exported file.
- **8.** Click **Upload**. The review cycle is imported. If the import is successful or failed, the details will be added in the logs.

The following items are not available in the XML file:

• Internationalization of cycle, form, or a section name and instructions

- Internationalization of questions for a review cycle with an Additional Info review form
- · Any search criteria set or saved for the forms
- Audiences set on the third step of cycle creation and on summary page

If any of the following objects do not exist in the target environment, then on successful import the object will be empty:

- To-Do List
- Goal categories
- Skills and skills groups
- Organization
- Adhoc approvers (specify individual) in an approval chain If a specific individual added to an approval chain does
  not exist in the target environment, then that user will be skipped and the approval chain with remaining users will
  be imported with updated approval level.

If a review form with a same name already exists on the target environment, then it will be associated to the existing form or new form will be created. Once the review cycle is imported, the review cycle will be moved to Draft state. The administrator must activate the review cycle manually.

This feature is applicable for all review types.

Use case

The performance administrator can now utilize the export and import review cycle functionality to copy the review cycles from one environment to another like from sandbox to production environment. This will greatly improve implementation time and reduce potential re-key errors.

### Filter skills by skill group

How did it work?

Prior to this update, the end users could filter the skills using **Type**, **Source**, **Filter by To-Do List** on the **My Plan** and **My Team** > *<Team Member*> > **Plan** page.



Figure 126: Filters on Skills Development tab

How does it work now?

A new filter **Skill Group** has been added to the **Skills Development** tab that allows the user to sort the skills based on the group name. The **Skill Group** filter displays all the skill groups that are available in the system irrespective of any skill belonging to the group, is assigned to the user or not. The user can select only one skill group at a time. If any skill group is not selected, then all the skills assigned to the user will be displayed in the search results.

| Goals & Objectives                              | Skills Developmen   | it 🗸            | Reviews, M<br>Interviews            | eetings &   |                        |
|---|---|-----------------|-------------------------------------|---|------------------------|
| 14  | 2   | 1               | 5                                   | 2 8   |                        |
| Active  | At required level<br>Above required level<br>Below required level | vel             | Cancelled<br>Complete<br>In-progres | l reviews<br>d reviews<br>is reviews                      |                        |
| Hide filters 💌                                  |   |                 |                                     |   | Get feedback from othe |
| Туре  | Source  | Filter by To-Do | List                                | Skill Group   |                        |
| All 👻   | *   |                 | ~                                   | Type to search  | •                      |
|   |   |                 |                                     | Executive   |                        |
| Apply filters Clear filters                     |   |                 |                                     | Individual Excellence                                     |                        |
| Title   | Progress  | Skill Group     |                                     | Manager   | Actions                |
| Communication<br>Source Self: Super<br>User     | Below required level  | Individual Exce | ellence                             | Organizational<br>Excellence<br>short skill group<br>name | Assess                 |
| Continuous<br>Improvement<br>Source Self. Super | Below required level  | Individual Exce | ellence                             | 1 to 5  | Assess -               |

Figure 127: Skill Group filter for Skills on My Plan page

The same filter is also available when the manager accesses team member's plan.



Figure 128: Skill Group filter for Skills on Team member's Plan page

#### Use case

Users will now be able to filter skills by groups under ME > My Plan.

### Limit access to reviews for new managers

#### How did it work?

A current manager, who is a review owner can access employee's review by navigating to My Team > <team-member> > My plan and clicking the desired review. But, once the manager is changed, then that new manager can still access the employee's review who has the previous manager. There is a need to update the behavior since the old reviews need to be confidential between the old manager and the employee.

| ME MY TEAM PEOPLE GROUPS ADMIN   | Browse All • Search Q  |
|--|--|
| Review for Todd Oakley 2011 Performance Review   |  |
| • Summary<br>Please complete the following sections by providing ratings and comments that reflect your perception of how well this individual<br>performed against your expectations. You may save the review for completion later. Once your feedback is complete, please Submit<br>your ratings.<br>Please complete the following sections by entering ratings and feedback on how well this individual performed against your<br>expectations. You may save the review for completion later. Once your feedback is complete, please Submit the review. | Todd Oakley<br>Kundebehandler  |
| - Core Competencies  | 2011 Performance Review-201  |
| Weight 22%<br>Please rate the employee on the core competencies listed.  | 1 2 3 4 5 6  |
| Respect Vew details  | Start date 01/01/2011<br>End date 12/31/2011<br>Review owner Pat Rose Change |
| Weight 50%   | ► Reviewers  |
| In our relationships with our colleagues and with others, it is important everyone is respected both for what they contribute and<br>who they are. That includes their ideas and their cultural and personal beliefs.  | Approvers  |
| Teamwork View details  |  |
| Weight 50%   |  |

#### Figure 129: Old review access behavior

#### How does it work now?

The access to the reviews owned by the old managers is now governed by the following privileges introduced in the **Person, Internal** component for the **Internal Manager Basic Privileges** security role:

- **Reviews Direct Managers and Indirect Managers Can View Sensitive Information** Allows the new direct and indirect managers to view the sensitive information, such as ratings and comments in the reviews owned by the old managers. By default, this privilege is enabled. When this privilege is disabled, the new manager will not be able to view the team member's sensitive review information.
- **Reviews Alternate Managers Can View Sensitive Information** Allows the alternate managers to view the sensitive information, such as ratings and comments in the reviews owned by the old managers. By default, this privilege is enabled. When this privilege is disabled, the new alternate manager will not be able to view the team member's sensitive review information.
- **Note:** If the above privileges are disabled, then the pie chart shows the count of review but the listing will not be shown due to the mismatch between the numbers shown on the pie chart and the listing.

| <b>A</b> | ${\sf Reviews} \mbox{-} {\sf Direct} \mbox{ Managers} \mbox{ and } {\sf Indirect} \mbox{ Managers} \mbox{ Can} \mbox{ View} \mbox{ Sensitive} \mbox{ Information}$ |
|----------|--|
| <b></b>  | Reviews - Alternate Managers Can View Sensitive Information  |

#### Figure 130: New privileges for reviews for managers

#### Use case

The new privileges added to restrict new managers from viewing past reviews where they were not the review owner. This supports EMEA Work Council regulations.

### New policy for review owners to release review

How did it work?

Prior to this update, review owner could release review to the reviewee. In case the review owner is not available, performance administrator could release the review on behalf of the review owner. There was no provision to restrict the review owner from releasing the review.

How does it work now?

From this update, the performance administrator can choose whether the review owner can release the review or not. A new policy **Review owner can release reviews** is introduced in the **Review Cycle** > **Cycle Description** tab that decides whether the review owner can release the review or not.

| Review D                                   | escription   |                          |
|--|--|--------------------------|
| Review Cycles allo<br>different audiences. | •<br>w you to create and monitor Reviews in bulk. You can create one or more Review Forms to tailor the Review<br>For Focal, Anniversary, and Off-Cycle Reviews, users can only have one active Review per Review Cycle. | v content and process fo |
| Review Name:*                              | Anniversary-review   |                          |
| Review<br>Instructions:                    | B I U S = = = = Paragraph → Font Family → Font Sizes → ==  |                          |
| Statua                                     | p  | Words: 0                 |
| Cycle Type:*                               | Performance Review      MRA/feedback from  |                          |
| Туре:*                                     | Anniversary  |                          |
| Synchronize hel                            | d skill level with review score 📵  |                          |
| Create a To-Do                             | List based on this review 👔  |                          |

Figure 131: New policy on the review cycle

By default, this checkbox is enabled. If it is disabled, the **Release** option is not shown to the review owner on the approved reviews. Only performance administrator can release those reviews on behalf of the review owner.

**Note:** This policy is available only for anniversary, focal, and off cycle reviews.

On the My Plan page, when the reviewee hovers on the **Release the review** milestone, the tool tip indicates that the Performance admin will release the review.

|                   | 1 2 3 4 5 6 7                                 |            |
|-------------------|---|------------|
| Relea             | ase the review                                |            |
| Perforr<br>Due da | mance Administrator 19 day/s remaining<br>ate | 31.08.2016 |

Figure 132: Tool tip on Release the review milestone

Use case

Performance administrator can now restrict managers from releasing reviews. This will allow admin to release approved reviews in bulk.

### New question in Company category for Pulse 360

How did it work?

Prior to this update, the Company category in Pulse 360 had the following questionnaire.

| Company                                      |                   |   |   |   |
|--|-------------------|---|---|---|
| Questions                                    | Answer Options    | 3 | 4 | 3 |
| What are we doing well?                      | Company Culture 👻 | ~ |   |   |
| What could we be doing better?               | Company Culture 👻 | ~ | ~ | ~ |
| Describe our culture in three words or less. | Any three words   |   | V |   |

Figure 133: Old questions under the Company category

How does it work now?

In this update, the following enhancements has been made to Pulse 360.

#### New question in Company category

A new question **Describe your preferred future culture in three words or less** has been added to the **Company** category to capture the FUTURE culture. This will allow companies to understand not only their current culture but also the kind of culture their employees would like to see in the future. By default, its enabled for all the emoticons.

| Company  |                   |                       |          |          |
|--|-------------------|-----------------------|----------|----------|
| Questions  | Answer Options    | <u> </u>              | <        | <u> </u> |
| What are we doing well?  | Company Culture 🔹 | <ul> <li>✓</li> </ul> |          |          |
| What could we be doing better?                                 | Company Culture 🔹 | <ul> <li>✓</li> </ul> | ~        | ~        |
| Describe our current culture in three words or less.           | Any three words   |                       | <b>V</b> |          |
| Describe your preferred future culture in three words or less. | Any three words   |                       |          |          |

Figure 134: New questions under the Company category

| It will appear on the How's it going? portlet on selecting the c | esired emoticon. | The end user v | will have to | enter 3 word | ls |
|--|------------------|----------------|--------------|--------------|----|
| that will describe the company's culture in future, one keywor   | l per box.       |                |              |              |    |

|   |     | ×        |
|---|-----|----------|
| 🧴 Me  | ও 🥹 | <u> </u> |
| 渗 Management  | ى ئ | 4        |
| Company   | 🧠 🥹 | <u> </u> |
| Great! Tell us more   |     |          |
| What are we doing well?   |     | ~        |
| What could we be doing better?                                    |     | ~        |
| Describe our current culture in<br>three words or less.           |     |          |
|   |     |          |
|   |     |          |
| Describe your preferred future<br>culture in three words or less. |     |          |
|   |     |          |
|   |     |          |
|   |     |          |
| Express how you feel. Your data is anonymous. Submit              |     |          |

Figure 135: New question on How's it going? portlet

Once all the employees are done with the survey, these words will then be shown in the dashboard Manage Pulse 360 > Dashboard > Expand Company category.



#### Figure 136: Tags mentioned in culture

Pulse will now list top 10 keywords for both Current and Future culture. It also provides supporting statements based on an algorithm. The admin can also filter these words by clicking the **Current Culture** and **Future Culture** labels. The admin can click the **TOP 10 WORDS** label to view the maximum entered words for both current and future culture.

| CULTURE TOP 10 WORDS  |   |  |  |  |  |
|---|---|--|--|--|--|
| We have a culture that aspires to be more <b>friendly</b> and <b>Work-life-balance</b> while continuing to be very <b>agile</b> and <b>Customer-Centric</b> . |   |  |  |  |  |
| 1. flexible<br>2. Customer-Centric<br>3. Open<br>4. agile<br>5. Distracted  | 1. friendly<br>2. Work-life-balance<br>3. agile<br>4. EmployeeCaring<br>5. Dedicated<br>6. Enthusiastic<br>7. People-Centric<br>8. Customer-Centric<br>9. Talent-Leader |  |  |  |  |
| Current Culture     Future Culture  |   |  |  |  |  |

#### Figure 137: Top 10 words about culture

Based on the top 10 words, an auto-generated culture statement is shown in the widget. The algorithm used to create this statement is:

- 1. Create a **Top 10** list for the current culture.
- 2. Create a Top 10 list for future culture.
- **3.** From the future culture list, go through the words with highest votes to the lowest votes and find the first two words that are **NOT** on the current culture list. Add these keywords as 1 and 2 in that auto generated statement.

**Note:** If algorithm 3 cannot be computed, then the auto-generated statement will appear as *We have a culture that aspires to be more <Future 1> and <Future 2> while continuing to be very <Future 3> and <Future 4>.* 

where <Future 1> and <Future 2> are the top two unique words from the future list and <Future 3> and <Future 4> are next top two unique words from the future list that are not part of <Future 1> and <Future 2>.

- **4.** From the future culture list, go through the words with highest votes to the lowest votes and find the first two words that are on the current culture list. Add these keywords as 3 and 4 in that statement.
  - **Note:** If algorithm 4 cannot be computed, then the auto-generated statement will appear as *We have a culture that is <Current 1> and <Current 2> and aspires to be more <Future 1> and <Future 2>.*

where <Current 1> and <Current 2> are top two unique words from the current list and <Future 1> and <Future 2> are top two unique words from the future list and not in current top two words.

#### Use case

This enhancement will now allow the business to get a better understanding of the working culture that the employees want to see in the future.

# Chapter

# Pulse 360

Topics:

- New question in Company category for Pulse 360
- Pulse custom surveys

### **New question in Company category for Pulse 360**

#### How did it work?

Prior to this update, the Company category in Pulse 360 had the following questionnaire.

| Company                                      |                   |          |   |   |
|--|-------------------|----------|---|---|
| Questions                                    | Answer Options    | ڪ        | < | 3 |
| What are we doing well?                      | Company Culture 👻 | ~        |   |   |
| What could we be doing better?               | Company Culture 🔹 | ~        | ~ | ~ |
| Describe our culture in three words or less. | Any three words   | <b>V</b> | 4 |   |

Figure 138: Old questions under the Company category

#### How does it work now?

In this update, the following enhancements has been made to Pulse 360.

#### New question in Company category

A new question **Describe your preferred future culture in three words or less** has been added to the **Company** category to capture the FUTURE culture. This will allow companies to understand not only their current culture but also the kind of culture their employees would like to see in the future. By default, its enabled for all the emoticons.

| Company  |                   |          |   |        |
|--|-------------------|----------|---|--------|
| Questions  | Answer Options    | <u> </u> | < | $\leq$ |
| What are we doing well?  | Company Culture 🗸 | ✓        |   |        |
| What could we be doing better?                                 | Company Culture   | ✓        | ~ | ~      |
| Describe our current culture in three words or less.           | Any three words   |          |   |        |
| Describe your preferred future culture in three words or less. | Any three words   |          |   |        |

#### Figure 139: New questions under the Company category

It will appear on the **How's it going?** portlet on selecting the desired emoticon. The end user will have to enter 3 words that will describe the company's culture in future, one keyword per box.

|   |         |     | ×        |
|---|---------|-----|----------|
| 🦲 Me  | હ       | 4   | <u></u>  |
| 渗 Management  | હ       | ~   |          |
| Company   | C.      | 4   | <b>e</b> |
| Great! Tell us more   |         |     |          |
| What are we doing well?   |         |     | *        |
| What could we be doing better?                                    |         |     | *        |
| Describe our current culture in three words or less.              |         |     |          |
| Describe your preferred future<br>culture in three words or less. |         |     |          |
| Express how you feel. Your data is                                | anonymo | us. | Submit   |

#### Figure 140: New question on How's it going? portlet

Once all the employees are done with the survey, these words will then be shown in the dashboard Manage Pulse 360 > Dashboard > Expand Company category.



#### Figure 141: Tags mentioned in culture

Pulse will now list top 10 keywords for both Current and Future culture. It also provides supporting statements based on an algorithm. The admin can also filter these words by clicking the **Current Culture** and **Future Culture** labels. The admin can click the **TOP 10 WORDS** label to view the maximum entered words for both current and future culture.

| CULTURE TOP 10 WORDS   |   |
|--|---|
| We have a culture that aspires to be mo<br>continuing to be very agil      | re friendly and Work-life-balance while<br>e and Customer-Centric.  |
| 1. flexible<br>2. Customer-Centric<br>3. Open<br>4. agile<br>5. Distracted | 1. friendly<br>2. Work-life-balance<br>3. agile<br>4. EmployeeCaring<br>5. Dedicated<br>6. Enthusiastic<br>7. People-Centric<br>8. Customer-Centric<br>9. Talent-Leader |
| Current Culture     Future Culture   |   |

#### Figure 142: Top 10 words about culture

Based on the top 10 words, an auto-generated culture statement is shown in the widget. The algorithm used to create this statement is:

- 1. Create a Top 10 list for the current culture.
- 2. Create a Top 10 list for future culture.
- **3.** From the future culture list, go through the words with highest votes to the lowest votes and find the first two words that are **NOT** on the current culture list. Add these keywords as 1 and 2 in that auto generated statement.

**Note:** If algorithm 3 cannot be computed, then the auto-generated statement will appear as *We have a culture that aspires to be more <Future 1> and <Future 2> while continuing to be very <Future 3> and <Future 4>.* 

where <Future 1> and <Future 2> are the top two unique words from the future list and <Future 3> and <Future 4> are next top two unique words from the future list that are not part of <Future 1> and <Future 2>.

- **4.** From the future culture list, go through the words with highest votes to the lowest votes and find the first two words that are on the current culture list. Add these keywords as 3 and 4 in that statement.
  - **Note:** If algorithm 4 cannot be computed, then the auto-generated statement will appear as *We have a culture that is <Current 1> and <Current 2> and aspires to be more <Future 1> and <Future 2>.*

where <Current 1> and <Current 2> are top two unique words from the current list and <Future 1> and <Future 2> are top two unique words from the future list and not in current top two words.

#### Use case

This enhancement will now allow the business to get a better understanding of the working culture that the employees want to see in the future.

### **Pulse custom surveys**

#### How did it work?

Surveys in Saba Cloud could be consumed only through class evaluations. There was no means of delivering and consuming surveys independent of a class.

How does it work now?

With this update, Saba Cloud introduces the **Saba Pulse Custom Surveys** feature, where administrators can create custom surveys that can be delivered and consumed independent of a class.

**Note:** You cannot use custom surveys in Learning or Recruitment surveys.

To use this feature, administrators need to make the following configurations:

#### **New Service**

To enable this feature, system administrators must enable the following service under Pulse 360 service:

Custom Survey

By default, this service is disabled.

| Pulse 360                 | Push |
|---------------------------|------|
| E Check-Ins               |      |
| ···· Custom Survey        | Push |
| English Pulse Survey      | Push |
| Eull Dashboard & Heat Map |      |

Figure 143: Custom Survey service

#### **New Security Role**

System administrators must grant the following security role to users who need to administer Pulse 360 custom surveys:

Pulse Custom Survey Admin

By default, this role is granted the required privileges on the following components:

- Pulse Custom Survey
- MenuVisibility-PulseAdmin

| Simple Security Role Details: Pulse Custom Survey Admin           |                                       |  |  |
|---|---------------------------------------|--|--|
|   |                                       |  |  |
| Security Role*  | ulse Custom Survey Admin              |  |  |
| Description G   | rants access to Pulse Custom Survey a |  |  |
| Domain*   | orld                                  |  |  |
| Туре  | Domain Based<br>Criteria Based        |  |  |
| Is Sensitive  | No                                    |  |  |
| Components People Component Pi This component is not domain-based | ulse Custom Survey                    |  |  |
| Component Privileges  | Print   Export   Modify Table         |  |  |
| Grant Access  | Privilege                             |  |  |
| <b>V</b>  | New                                   |  |  |
| <b>v</b>  | Edit                                  |  |  |
| I.  | Delete                                |  |  |
| <b>v</b>  | View                                  |  |  |
| <b>v</b>  | Can View Protected Data               |  |  |
|   | Admin View                            |  |  |
|   |                                       |  |  |

#### Figure 144: Pulse Custom Survey Admin role

#### **New Notifications**

System administrators can configure the following notifications for custom surveys:

- Assign Pulse Custom Survey to Users
- Send Email to assigned Users

| vents  |                                     |                 | Print   Export   Modify Table                                      |
|--------|-------------------------------------|-----------------|--|
| Enable | Events                              | Туре            | Description  |
|        | Assign Pulse Custom Survey to Users | Periodic Event  | Assign Pulse Custom Survey to Users                                |
|        | Send Email to assigned<br>Users     | Triggered Event | Send mail to users when they are assigned a Pulse Custom<br>Survey |

#### Figure 145: Custom Survey notifications

#### **Pulse Custom Survey Administration**

Once all configurations are in place, the Pulse custom survey administrators can create and monitor custom surveys from the new **Survey Administration** menu under **Pulse 360**.

To create a new custom survey, click the **Create Custom Survey** menu link, select the required folder in the assessment library and click the **New** button. Specify the details in the new survey wizard and publish the survey. Once you create a custom survey, you can use this survey in the launch survey wizard and assign it to designated users. Pulse custom surveys cannot be reused in any other areas of Saba Cloud, such as in class evaluations.

| Pulse 360 Home<br>Manage Pulse Survey  | Create & Edit Custom Su  | ırveys |      |            |           |        |                |                             |
|--|--|--------|------|------------|-----------|--------|----------------|-----------------------------|
| Survey Administration                  |  |        |      |            |           |        |                |                             |
| Custom Surveys<br>Create Custom Survey | Assessment Library <   |        | Sea  | rch        |           |        | Q Advanced Sea | rch New Move                |
| Create Custom Questions                | Add Root Level Folder  | Title  | Туре | Version    | ld        | Status | Updated On     | <ul> <li>Actions</li> </ul> |
| Create Custom Scales                   | Standalone Contents  C. D05upriya_standalo  q qa  ShrFolder  ShrFolder  ShrFaP Surveys |        | I    | No Test/Su | irvey fou | nd     |                |                             |

#### Figure 146: Custom survey creation

To launch a new custom survey, click the **Custom Surveys > Create Custom Survey** link. This opens the custom survey creation wizard. This is a 4-step wizard where you can perform the following:

- 1. Survey Launch Information Add basic information such as survey name, ID, start and end dates, and so on.
- 2. Add Survey Select an existing survey either from Custom, Learning and Recruiting options. Only one survey can be added.
- **3.** Assign Survey Assign the survey to designated members who can be selected manually and/or using smartlists. Smartlists are processed only when the custom survey is activated. However, administrators can preview members selected by the smartlist even before activation.
- 4. Summary Preview the survey details and either save as draft or activate the survey.

| Survey Launch | Add Survey  |
|---------------|---|
| mormauon      | Survey Source: <ul> <li>© Custom</li> <li>© Recruiting</li> </ul> |
| Add Survey    | Select Custom Survey  |
| Assign Survey |   |
| Summary       |   |
|               | Previous Exit Next  |

Figure 147: Custom survey launch wizard

#### **Custom Survey Consumption**

Once a custom survey is activated, Saba Cloud assigns it to designated members through the **Assign Pulse Custom Survey to Users** periodic notification. Users can take the survey only when the survey's start date is reached. When users attempt the survey, Saba Cloud launches it in a new content player template **Pulse Custom Survey Player template**.

#### Use case

Organizations need to use surveys not only as part of class evaluation, but also for several other reasons such as to measure the training department's effectiveness in delivering quality training or to launch a opinion poll for a selected set of users or groups, and so on. Additionally, an important use of surveys is to present the survey results data to administrators in the organization for analysis. Therefore, Saba Cloud needs to have the ability to create and deliver standalone surveys that can have varied consumption and reporting patterns.

# Chapter

# **Talent**

#### **Topics:**

- Control display of experts in career planning
- Display Career Planning section on Talent Profile irrespective of career paths
- Display talent attributes on hovering person in N-box view
- Export/print n-box view to Excel and PDF
- Hover messages for potential rating and departure risk on Talent pool views
- Surface job details and attachments from Job details on Profile page and in Career Planning
- Surface Actions menu on N-box view

### **Control display of experts in career planning**

#### How did it work?

The people who have gained expertise in skills associated with the job appears in the **Experts** tab of the job added in the career path. This tab displays all the people who have attained expertise in the skills of the job. There was a need to display the most qualified people as expert resources instead of all.

How does it work now?

From this update, the **Experts** tab of the job will display only the most qualified people as experts. This will be dependent on the value mentioned in the new setting **Enter the threshold percent at which someone is considered to be an expert** under **Succession@Work** > **Career Planning** service.

| Settings: Career Planning  | 6                                   |
|--|-------------------------------------|
| Configure the policy settings for the service to match your company's business processes. Enable or  | disable associated features.        |
| Settings Notifications Components Description  |                                     |
| Domain*  |                                     |
| Enable Search By Person as option when adding a job  |                                     |
| This allows people to find the right next step by searching for the person currently in that job.  | <ul> <li>On</li> <li>Off</li> </ul> |
| Keys to Success  |                                     |
| Display comments in Career Planning  | ● On<br>○ Off                       |
| Allow incumbents associated with the job to add comments   | ● On<br>● Off                       |
| Allow managers associated with the job to add comments   | ● On<br>● Off                       |
| Enter the threshold percent at which someone is considered to be an expert.  |                                     |
| Specify the value (in %) at which the person will be considered as an expert. Since the number of<br>units used on a rating scale can vary from skill to skill, this number defines how far up the scale<br>(as a percent) someone must be to be considered an expert. Anyone below this percent will not<br>appear on the Experts tab in Career Planning. | 0                                   |

#### Figure 148: New setting for Experts in Career Planning

The default value of this setting is 0%. The value must be in the range of 0% to 100%. This value is required and cannot be blank. Now, based on this value, the people in the **Experts** column will be shown accordingly. For example, if you specify **80%** in the setting, then the people who have attained 80% proficiency in the skills associated with that job will be shown in the **Experts** tab.




If there are many people with the same level, then such experts are grouped and shown in random order while others will be shown in descending order of the level.

#### Use case

A company is training its employees in a new skill area. While the overall competency level is low (because the skill is new), the company does not want anyone flagged as an expert until a certain **threshold** level of expertise is attained. In this case, the company decides to set that threshold at 80% of the max attainable value. The company uses a 5-point scale for this skill so a worker must be rated at 4 or 5 to have the system flag them as an expert in that skill.

# Display Career Planning section on Talent Profile irrespective of career paths

How did it work?

The **Career Planning** section on the person's **Talent Profile** was governed by the **Career Planning** service. But, if the person had not created any career paths, then the section would not appear, even though the service was enabled.

How does it work now?

From this update, the **Career Planning** section will appear on the person's Talent Profile even when the person has not created any career paths. In such a case, the *No career paths have been created*. message appears. When the **Career Planning** service is disabled, the section is hidden.

| Potential Job    |  |  |  |  |  |  |
|------------------|--|--|--|--|--|--|
| Type to search   | 9  |  |  |  |  |  |
| Career Planning: | Jobs of Interest   |  |  |  |  |  |
| Path name        | 1-3 Year Target-update 3-5 Year Target-update Long Term Target-upd |  |  |  |  |  |
|                  | No career paths have been created                                  |  |  |  |  |  |
| Contributions    |  |  |  |  |  |  |

#### Figure 150: Career Planning section

Use case

A manager can do a better job of prompting the team to create career paths, if there is a visual reminder like an empty career path on the Talent Profile page. With this reminder, the manager will be able to trace the missing information and inform people about it.

## **Display talent attributes on hovering person in N-box view**

#### How did it work?

On hovering the person in N-box view, it only use to show the person's name and designation.

How does it work now?

From this update, along with the name and designation, person's following talent attributes are also shown on hovering the person in N-box:

• Ethnically Diverse - Display values as **Unknown** and **Yes**. If the **Ethnically diverse for their region of origin**, **other than due to gender.** checkbox in the person's full profile is selected, it will be shown as **Yes** or as **Unknown**.

This attribute will appear only when is\_diverse attribute is enabled in Configure System > Services > User Profile > Components > Core profile.

- Retirement Risk Display person's retirement risk. This attribute will display the options based on the values selected in the person talent profile data.
- Performance Review Score Display person's focal review score. This attribute will appear only when the **Reviews** service under **Performance** is enabled.

| Mentor/ Coach           | Professional                      | High Potential - Promote  |
|-------------------------|-----------------------------------|---|
| AltManger AltMang       | Ben Willis<br>Automation          | Todd Oakley<br>Professional Servic  |
|                         | John Conner<br>Instructor         | Jim Gordon<br>Platform Cementing  |
|                         | Aaron Good<br>Customer Service Ma | Jim Gordon<br>Platform Cementing Supervisor<br>Ethnically Diverse - Unknown<br>Retirement Risk - High |
| Monitor                 | Develop for promotion             | Next Lea Performance Review Score - 3,67 - Exceeds Expecta  |
|                         | Jaime Slocum<br>Manager, Finance  |   |
|                         | ygl5 ygl5                         |   |
| Performance Improvement | Monitor                           | Subject Matter Expert   |

#### Figure 151: Talent attributes in N-box view

These changes will reflect in all the N-box across the application.

#### Use case

A manager or a talent administrator calibrating people within a N-box needs to be able to evaluate a lot of information quickly. Hence, having the talent information readily available can greatly improve the efficiency of the decision making process of placing a person on the grid. The metrics for a person's diversity, retirement risk, and most recent performance review score will now be visible when hovering over a person's box.

## Export/print n-box view to Excel and PDF

#### How did it work?

There was no provision to either export the n-box view to excel or print it to PDF.

#### How does it work now?

From this update, the manager, talent administrator, and performance administrator can now export the current n-box view to excel and print it to PDF. Launch the n-box and then click **Export to Excel** or **Print** from the **Actions** dropdown list.

|    | Actions -            |
|----|----------------------|
|    | Assign Learning      |
| er | Add completed course |
|    | Assign Checklist     |
| l  | Assign Goal          |
| 1  | Assign Review        |
| ĺ  | Assign Skill         |
|    | Print                |
|    | Export to Excel      |

#### Figure 152: Actions dropdown list

Based on the selected option, the current n-box view will be shown.

To export the n-box to excel:

- 1. Navigate to talent pool where you want to compare people.
- 2. Click Compare > N-box.
- 3. Click Actions > Export to Excel. The .xls file gets downloaded.
- **4.** Click the file to open and verify the details.
  - Note: Only 8 people can be shown per box. If more people exist, then additional pages will be generated to accommodate the coverage.

| x  | E 5 · C · · · Team N-box comparison_2016-09-21 [Compatibility Mode] - Excel |                           |   |                  |  |  |  |  |  |
|----|---|---------------------------|---|------------------|--|--|--|--|--|
| E  | ILE HOME INSERT PAG   | E LAYOUT FORMULAS DATA    | REVIEW VIEW   |                  |  |  |  |  |  |
| Pa | K Cut<br>Copy →<br>Ste<br>Ste<br>Ste<br>Ste<br>Ste<br>Ste<br>Ste<br>Ste     |                           | Image: Wrap Text     Get       Image: Merge & Center ▼     \$ | neral            |  |  |  |  |  |
|    | Clipboard 🕞   | Font 🕞                    | Alignment 5   | Number 15 Styles |  |  |  |  |  |
| D2 | D21 • : $\times \checkmark f_x$ AltManger AltManger                         |                           |   |                  |  |  |  |  |  |
| 1  | А   | В                         | С   | D                |  |  |  |  |  |
| 1  | PerformanceRating(X - Axis)   | PotentialRating(Y - Axis) | Box Label   | Full Name        |  |  |  |  |  |
| 2  | 2   | 1                         | Monitor   | Aaron Good       |  |  |  |  |  |
| 3  | 2   | 1                         | Monitor   | Anil Puliyeril   |  |  |  |  |  |
| 4  | 2   | 1                         | Monitor   | Anne Gupta       |  |  |  |  |  |
| 5  | 2   | 1                         | Monitor   | Brazil Manager   |  |  |  |  |  |
| 6  | 2   | 1                         | Monitor   | manager manager  |  |  |  |  |  |
| 7  | 2   | 1                         | Monitor   | Frank Underwood  |  |  |  |  |  |

#### Figure 153: N-box view in Excel

To print the n-box to PDF:

- 1. Navigate to talent pool where you want to compare people.
- 2. Click Compare > N-box.
- **3.** Click **Actions** > **Print**.
- 4. Click the Printer Friendly View icon. The Printer Friendly View opens.
- 5. Change the destination to save it as PDF. Ensure Background graphics is selected in Options.
- 6. Click Save. The file will be saved in the chosen destination folder and the PDF opens in browser.

| L Untitled Document.pdf - Adobe Acrobat Reader DC |                                  |                                    |  |  |  |  |  |  |
|---|----------------------------------|------------------------------------|--|--|--|--|--|--|
| File Edit View Window Help                        |                                  |                                    |  |  |  |  |  |  |
| Home Tools Untitled Document ×                    |                                  |                                    |  |  |  |  |  |  |
|   |                                  |                                    |  |  |  |  |  |  |
| N-box comparison                                  |                                  |                                    |  |  |  |  |  |  |
| Mentor/ Coach                                     | Professional                     | High Potential - Promote           |  |  |  |  |  |  |
|   | John Conner<br>Instructor        | Fodd Oakley<br>Professional Servic |  |  |  |  |  |  |
|   | Ben Willis<br>Automation         | Jim Gordon<br>Platform Cementing   |  |  |  |  |  |  |
|   |                                  | AltManger AltManger                |  |  |  |  |  |  |
|   |                                  |                                    |  |  |  |  |  |  |
| Monitor   | Develop for promotion            | Next Leader                        |  |  |  |  |  |  |
| •   | Angie Ross<br>Instructor         | Steve Thomas<br>Software Architect |  |  |  |  |  |  |
|   | Jaime Slocum<br>Manager, Finance |                                    |  |  |  |  |  |  |
|   | ygl5 ygl5                        |                                    |  |  |  |  |  |  |
|   | Abhishek ASH<br>A7694            |                                    |  |  |  |  |  |  |

Figure 154: N-box view in PDF

#### Use case

A user needs to capture data at a point in time. Since there is no provision to save the n-box view in Saba Cloud, an export and print would preserve the data at a point in time.

# Hover messages for potential rating and departure risk on Talent pool views

#### How did it work?

On hovering the bar images of **Potential Rating** and **Departure Risk** in the Talent pool, there was no clear indication about the selected ratings.

#### How does it work now?

From this update, hover messages will be shown on the bar image under the **Potential Rating** and **Departure Risk** columns. The messages on the popup will be updated based on the changes made in the person's Talent Profile.

Note:

These messages appear in both Manager and Talent admin views.

| Add Cand | lidates Ad hoc: Typ                        | pe to s | earch |                        | Q Add                 | ]                    |                    |             |
|----------|--|---------|-------|------------------------|-----------------------|----------------------|--------------------|-------------|
|          | Name                                       |         | % Mat | Time in<br>Current Job | Performance<br>Rating | Potentia<br>I Rating | Departu<br>re Risk | Readiness   |
| V        | USER ONE<br>pQ 0 🔮 2                       | X       | 100%  | Not Available          | Not Available         |                      |                    | Ready Now 🔻 |
|          | Bill Wolpert<br>Product Consul<br>pQ 0 🖄 2 |         | 100%  | 0 Years<br>7 Months    | 3,00 - Meets          |                      | Potential Rat      | Ready Now 🔻 |

Figure 155: Hover message on Potential Rating column

| Add Can  | didates Ad hoc: Typ                        | be to searcl | n                                       | م Add                 |                      |                    |  |                    |                                  |    |
|----------|--|--------------|---|-----------------------|----------------------|--------------------|--|--------------------|----------------------------------|----|
|          | Name                                       | % N          | lat <sup>•</sup> Time in<br>Current Job | Performance<br>Rating | Potentia<br>I Rating | Departu<br>re Risk | Readiness                                    | Ranking            | Actions                          | ^  |
| <        | USER ONE<br>pQ0 🔅 2                        | <b>x</b> 100 | % Not Available                         | Not Available         |                      |                    | Ready Now -                                  |                    | Actions 💌                        |    |
|          | Bill Wolpert<br>Product Consul<br>pQ 0 💓 2 | 100          | % 0 Years<br>7 Months                   | 3,00 - Meets          | al                   |                    | Ready Now -                                  |                    | Actions -                        |    |
| <b>V</b> | Thomas Lee<br>Production Engi<br>pQ 0 🕐 0  | 100          | % 10 Years<br>3 Months                  | Not Available         |                      |                    | Ready Now +<br>Thomas Lee was in             | dentified to be at | Actions 💌<br>Medium risk because | c. |
|          | Barry Marks<br>Customer Servi              |              | 9 Years<br>2 Months                     | 1,74 - Devel          |                      |                    | Retirement Risk - High<br>Critical Knowledge | _ow<br>- Yes       |                                  |    |

Figure 156: Hover message on Departure Risk column

Use case

A manager working on talent pools for her organization couldn't relate with the bar images shown under **Potential Rating** and **Departure Risk**. Hence, on hovering the bar images, a popup appears that explains the criteria to determine the rating.

## Surface job details and attachments from Job details on Profile page and in Career Planning

How did it work?

An employee's profile page and their career path did not provide the job description, responsibilities, and attachments associated with the job.

How does it work now?

From this update, attachments can now be added to the job object and seen in both Career Planning, and Profile views.

Profile page

On the Profile page, the Job title is now hyperlinked which opens a popup with job description, responsibilities associated with the job, and attachments. This data is fetched from the Job details filled by the HR admin. If the HR admin has attached any documents related to skills, then those documents will surface on the popup under the **Attachments** heading. The employee can click the attachment name and access the file.

Note: The visibility of attachment is based on the privileges assigned to the logged-in user on attachments. The security rules still apply so if an attached document is marked as private, then only those individuals with **Can view private attachments** enabled on the **System** component, can view.

|                     |                                 | Oustomentitensite Representation ×  |
|---------------------|---------------------------------|---|
|                     |                                 | -A document attached to the job object (with the IsPrivate option set to "No") is visible when view selecting that job in Career Planning and clicking on the Job Overview tab. The link to the attachment is at the bottom of the Job. |
|                     |                                 | <ul> <li>A validation rule runs to check for data in the Internal Description and Key Responsibilities fields on<br/>the job object.</li> </ul>   |
| - Current Job       |                                 | Responsibilities  |
| Company             | Corporate Operations            | -A validation rule runs to check for data in the Internal Description and Key Responsibilities fields on the job object.  |
| Organization        | Sales                           | -If data is present, the title of the job shown on the profile view becomes linked.   |
| Business Card Title | Customer Service Rep            | Qualifications  |
| Job                 | Customer Service Representative | - BSC<br>- MCA<br>- MEA   |
|                     |                                 | Years of Experience   |
|                     |                                 | Minimum 1<br>Maximum 2  |
|                     |                                 | Attachments Saba Performance PDF, Saba Logo Image, Learning Doc   |
|                     |                                 | ок  |

#### Figure 157: Job description with Attachment section on Profile

#### Career Planning

The **Attachments** section is also added under the **JOB OVERVIEW** tab of a career path. The employee can click the attachment name and access the file.

| JOB OVERVIEW                                  | CURRENT VS<br>TARGET SKILLS                           | LEARNING  | EXPERTS  | OPEN JOBS   |
|---|---|---|--|---|
| Qustamon Sonsko                               | Representative  |   |  |   |
| -A document attached<br>Career Planning and c | to the job object (with ti<br>licking on the Job Over | he IsPrivate option s<br>rview tab. The link to | et to "No") is visible who<br>the attachment is at the | en view selecting that job in<br>e bottom of the Job. |
| Job Description                               |   |   |  |   |
| -A validation rule ru<br>object.              | ns to check for data in t                             | he Internal Descript                            | ion and Key Responsib                                  | ilities fields on the job                             |
| Responsibilities                              |   |   |  |   |
| -A validation rule ru<br>object.              | ns to check for data in t                             | he Internal Descript                            | ion and Key Responsib                                  | ilities fields on the job                             |
| -lf data is present, th                       | e title of the job shown                              | on the profile view I                           | becomes linked.  |   |
| Qualifications                                |   |   |  |   |
| • BSC<br>• MCA<br>• MBA                       |   |   |  |   |
| Years of Experience                           | 1   |   |  |   |
| Minimum 1                                     |   |   |  |   |
| Maximum 2                                     |   |   |  |   |
| Attachments Saba                              | Performance PDF,                                      | Saba Logo Image                                 | , Learning Doc   |   |

Figure 158: Job description with Attachment section in career path

If the **Recruiting@Work + Internal Opportunities** service is enabled and a job requisition exists for the same job, then additional details, such as Qualifications, Years of Experience and job requisition template description appears at the top of the profile page.

#### Use case

A user, who does not have Career Planning feature, can still make the pertinent job information, such as the job description and associated skills available to employees via their Profile page. The HR administrator fills the job information into the job and attaches a list of skills to the same job. Employees associated with that job can now go to their profile page, click the job title to view its details in a popup. They can also view attachments with skills on the profile page as well.

### **Surface Actions menu on N-box view**

#### How did it work?

The manager could assign learning, reviews, skills, and etc to his/her direct and alternate team members through **MY TEAM** > **Overview** > **Team Actions**. There was a need to assign the same to the members who are plotted on n-box.

#### How does it work now?

From this update, the manager will be able to assign the following to the members who are plotted on n-box:

- Learning
- Completed course
- Checklist
- Goal
- Review
- Skill

In the n-box view, **Actions** dropdown list has been added from where the manager can assign the above plan items to the ones who are plotted on the n-box. The manager will be able to assign plan items to his direct, alternate, and other team team members that are plotted on n-box.

| Go B<br>N-I | <sup>aek</sup><br>Dox comparison  |  | Actions<br>Assign Learning<br>Add completed c<br>Assign Checkst<br>Assign Review  | :ourse<br>t |
|-------------|---|--|---|-------------|
|             | Mentor/ Coach   | Professional   | High Potential - Promote Assign Skill   | i           |
|             | Seasoned professional capable of expanded role, but may<br>be experiencing problems that require coaching and<br>mentoring I am changing this locally II .) | Current role may still provide opportunity for<br>growth/development; focused on tactical; focus should be<br>on helping improve strategic thinking. | Consistently Performance well in a variety of assignments;<br>superstar employee. Big picture thinker, problem solver,<br>self motivated. |             |
|             | 1 People  | O People   | 2 People  |             |
|             | Monitor   | Develop for promotion  | Next Leader   |             |
|             | With coaching, could progress within level; focus on<br>stretch goals for this employee.  | May be considered for job enlargement at the same level,<br>but may need coaching in several areas, including people<br>management.                  | Does extremely well at current job with potential to do<br>more; give stretch assignments to help prepare for next<br>level.              |             |

#### Figure 159: Plan actions

While assigning the plan item to people, the manager will be able to choose between **Currently plotted**, **Direct team**, or **Alternate team**. Once the plan item is assigned, it will appear in the person's plan.

| Ad | d team goal |      |                     |        |          |           |        |                   |          |         | × |
|----|-------------|------|---------------------|--------|----------|-----------|--------|-------------------|----------|---------|---|
| 1  | 2 3 Select  | team | members             |        |          |           |        |                   |          |         | * |
|    |             |      | Q Currently plotted | Direct | t team   | Alternate | team   | Direct and Indire | ect team | Cle     |   |
|    | Nag Chandra | 8    | Bhavik Bhagat       | 8      | Siddhesh | h Sa      | ۲      | Judy Bright       |          | 0       |   |
|    |             |      |                     |        |          |           |        |                   |          |         | Ŧ |
| 4  |             |      |                     |        |          |           | Cancel | Back              | Assigr   | n goal: | 8 |

Figure 160: Assign goal to currently plotted people on N-box

#### Use case

A user is performing a calibration and wants to add something to an employee's plan. With this new functionality, they can click **Actions** button and easily add a goal, assign learning, or a variety of other items. There is no longer a need to navigate away from the N-box page.

## Chapter

9

## Recruiting

#### **Topics:**

- Auto reject candidates with incomplete profile
- Display custom and extended custom fields on candidate's profile
- Job requisition summary digest
- Multiple career sites
- New setting to pull job description in requisition
- New keywords in offer letter template
- Smarter one click approval from email
- Manage onboarding forms in HR admin flow
- Reposition Terms and Conditions
- UI enhancements on the Hiring Team page

## Auto reject candidates with incomplete profile

#### How did it work?

When the candidate's profile is incomplete (mandatory fields are not filled after the job application), then the candidate is moved to the **Complete** status in the **New** tab.

#### How does it work now?

Candidates can now be auto-rejected if the mandatory fields are missing or not added on the profile so that only the genuine candidates are processed further who have added the necessary and required details on their profiles.

In this update, new settings **Candidate has not filled the mandatory fields X days post application** and **X Days Notification-Candidate Auto-rejection for Incomplete profile** have been introduced under **Recruiting@Work + Internal Opportunities**.

| Candidate has not filled the mandatory fields X days post application   | <ul> <li>On</li> <li>Off</li> </ul> |
|---|-------------------------------------|
| X Days Notification-Candidate Auto-rejection  |                                     |
| Indicate the number of days post which the candidate<br>should be auto-rejected if he/she has not completed the<br>assessment                                     | 1                                   |
| X Days Notification-Candidate Auto-rejection for<br>Incomplete profile  |                                     |
| Indicate the number of days post which the candidate<br>should be auto-rejected if he/she has not filled the<br>mandatory fields on the candidate profile details | 0                                   |

#### Figure 161: New settings for candidate auto rejection

By default, the **Candidate has not filled the mandatory fields X days post application** setting is disabled. When it is enabled and the number of days are mentioned in the **X Days Notification-Candidate Auto-rejection for Incomplete profile** setting, then the candidate's profile will be rejected after the mentioned days. These settings will work only after the periodic notification **Candidate Auto Rejection** event is triggered. Based on the information provided in the above settings, the candidates will be auto rejected from the system. In the Hiring team group, the candidates with incomplete profile appears in the **New** tab > **Incomplete** link.

| All<br>9<br>6 Rejected<br>3 Active | New<br>3<br>1 Incomplete<br>2 Complete | Inter     | ested<br>O | Interviewing<br>O    | Offers<br>0                 |
|------------------------------------|--|-----------|------------|----------------------|-----------------------------|
|                                    |  |           | \$         | Sort By:             | % Match 💌                   |
| Mihir Tathavade                    | ekar                                   |           |            | Candidate #9 • 31 se | conds ago • Via Career Site |
|                                    | New<br>0                               | 0         | 0          | Schedule             |                             |
|                                    | % MATCH                                | RATINGS   | COMMENTS   | INTERVIEW            |                             |
| View candidate                     | details                                | Not Rated |            | More actions         | ▼ Mark interested-med       |

#### Figure 162: Incomplete profile candidates in New tab

If the candidate does not fill the information before X days, the candidate will be rejected with the reason as **Incomplete profile**.

| All<br>9<br>6 Rejected<br>3 Active | New<br>3<br>1 Incomplete<br>2 Complete | Interested<br>0                  | Interviewing<br>0 | Offers<br>0                                  |
|------------------------------------|--|----------------------------------|-------------------|--|
| Sheetal Kadam                      |  |                                  | Sort By:          | % Match                                      |
|                                    | 0<br>% MATCH RA                        | Rejected<br>0 0<br>TINGS COMMENT | TS                |  |
| View candidate                     | details                                | Not Rated INCOMPLE               | More actio        | ns • Mark interested-med<br>ofile Incomplete |

#### Figure 163: Auto rejected candidates

Such rejected candidates will be then moved to **All** tab > **Rejected**.

**Note:** These candidates can once again re-apply for the same job requisition.

#### Use case

Candidate is auto-rejected if the mandatory fields are missing or not added on the candidate's profile.

# Display custom and extended custom fields on candidate's profile

#### How did it work?

Prior to this update, if any details are added in the candidate's custom fields (under **Additional details** section), then those fields are not populated on the candidate's **Profile** tab.

| Lovly Singh   | Edit the Personal Inform  | nation                     |   |
|---|---|----------------------------|---|
| 16-FEB-2015 6:08 PM  Via Career S Lovly Singh Resume view Profile Lovly Singh PERSONAL INFORMATION EE kih | Person Legal ID_12345 /<br>SSN:<br>Date of birth:<br>Spoken languages:<br>Salary requested:<br>Currency:<br>Tell us more! | L                          | Salary earned in job<br>currency:<br>Add employment |
| sljdlk, Mahasgd, 987983<br>India  | Eligible to hire/rehire:  | Not Specified              | *   |
| 23987498  | Additional details  |                            |   |
| 3298749832  | ExCustom1:  | Swimming, Reading, Running |   |
| Eligible to hire/rehire: NOT SPECIFIE<br>Skills2016   | Work refrience  | remo                       | ive   |
| JAVA, A, B, C, Eclipse, HTML, Manag   | Employer title:   |                            |   |
| TELL US MORE!   | Phone:<br>Email:  |                            |   |
|   | Add a work reference  |                            |   |

#### Figure 164: New setting to pull job description

Also, there was a need to update the look and feel of the Career site login page.

#### How does it work now?

From this update, any additional details available in the candidate's custom fields will now be surfaced on the candidate's **Profile** tab.

| Lovly Singh   |   |                       |          |
|---|---|-----------------------|----------|
| 16-FEB-2015 6:08 PM 🛛 Via Career Site 🛛 阈                           |   |                       |          |
| Lovly Singh   |   |                       | 0        |
| Resume view Profile Timeline  |   |                       |          |
| Lovly Singh   | Edit profile                            | LinkedIn Cover letter | Download |
| PERSONAL INFORMATION  |   |                       |          |
| kjh<br>sljdlk, Mahasgd, 987983<br>India                             |   |                       |          |
| 23987498  |   |                       |          |
| 3298749832  |   |                       |          |
| Eligible to hire/rehire: NOT SPECIFIED                              |   |                       |          |
| Skills2016  |   |                       |          |
| JAVA, A, B, C, Eclipse, HTML, Management, Windows, Android, 1, 2, 3 | 3, Computer Application, Mysql, Databas | e, PHP, Oracle        |          |
| TELL US MORE!   |   |                       |          |
|   |   |                       |          |
| ADDITIONAL DETAILS  |   |                       |          |
| ExCustom1: Swimming, Reading, Running                               |   |                       |          |

#### Figure 165: New setting to pull job description

The Profile tab is accessible from:

- Go to My Team > Jobs > Job Requisitions > Go to Hiring Team > Click any candidate > View candidate details > Profile tab.
- Go to People > Jobs > My Job Requisitions > Go to Hiring Team > Click any candidate > View candidate details > Profile tab.
- Go to Admin > Recruiting > Manage Candidates > Search any candidate > Click candidate name link > Profile tab.

The custom fields are also shown on Step 2 Candidate details when a candidate applies for a job.

| 1 Step 1<br>Begin               | 2 Step 2<br>Candidate Details | 3 Step 3<br>Additional Detail     | A Step 4<br>Submit Application           |
|---------------------------------|-------------------------------|-----------------------------------|--|
| Apply for: needmined            | l White the                   |                                   |  |
| Personal information            | 1                             | Education                         | remove                                   |
| Full name:*                     | Sheetal                       | Institution:                      |  |
| Last name:*                     | Kadam                         | Degree:                           |  |
| Country:*                       | India                         | Start date:                       | A  |
| State:*                         | Maharastra                    | End date:                         |  |
| City:*                          | Mumbai                        | Score:                            |  |
| Street:*                        | MG Road                       | Add advantion                     |  |
| Zip:*                           | 400090                        | Add education                     | romovo                                   |
| Home phone:                     |                               | Employment                        | Tentove                                  |
| Mobile phone:                   |                               | Position title:*                  | lechnical Writer                         |
| Skills2016:                     |                               | Employer name:*                   | Saba                                     |
|                                 |                               | Start date:*                      | 01-Mar-2010                              |
|                                 |                               | Scope/Responsibilities:           | Refer the bugs reported by customers and |
| Executive summary:              |                               | Reason for leaving job:           |  |
|                                 |                               | Salary earned in job:             |  |
| Person Legal ID_12345 /<br>SSN: |                               | Salary earned in job<br>currency: | Select 🗸                                 |
| Date of birth:                  |                               | Employment                        | remove                                   |
| Spoken languages:               |                               | Position title:*                  | Technical Writer                         |
| Salary requested:               |                               | Employer name:*                   | Saba                                     |
| Currency:                       | Select 💌                      | Start date:*                      | 01-Mar-2010                              |
| Additional details              |                               | Scope/Responsibilities:           |  |
| ExCustom1:                      |                               | Reason for leaving job:           |  |

#### Figure 166: Fill custom fields while applying for job

#### Use case

This now improves the candidate's profile view by showing the custom fields.

## Job requisition summary digest

#### How did it work?

Prior to this update, there was no provision to receive any digest notifications or summary updates for requisition.

How does it work now?

From this update, the recruiter and hiring manager will be able to receive a requisition summary through email either weekly or monthly. A new field has been introduced on the  $\langle user name \rangle >$ Account Preferences > Job Requisition Summary.

| Job Requisition Summary |                |
|-------------------------|----------------|
| Job Requisition Summary | Weekly email 🔻 |
|                         | No email       |
| Save                    | Weekly email   |
|                         | Monthly email  |

Figure 167: Job Requisition Summary

By default, **No email** will be selected for this field. The user may select either **Weekly email** or **Monthly email**. The emails will be triggered only when the **Job Requisition Summary Digest Monthly Email Dispatch** and **Job Requisition Summary Digest Weekly Email Dispatch** notifications are enabled. By default, these notifications are enabled. These notifications will be triggered only when the **Process mailer service queue** notification under the **Collaboration** service is enabled.

| Not  | Notifications: Recruiting@Work + Internal Opportunities 🛛 🕾  |   |                 |   |  |
|--|--|---|-----------------|---|--|
| Notf_lo<br>and se<br>docum<br>enable<br>Se | lotf_Ideas_Configure the notification events for the service. Notifications alert people to activities, meetings, and other updates nd send timely reminders when actions must be taken. Create attachments for events to specify email text and include ocuments or other files. Schedule periodic events for a specific time period. Select the checkbox beside events that you want to nable.         Settings       Notifications       Components       Description |   |                 |   |  |
| Eve  | ents   |   |                 | 1 <b>2</b> 3<br>Print   Export   Modify Table   |  |
| Fr   | nable  | Events  | Туре            | Description   |  |
| 4  | 1  | Job Offer Approved  | Triggered Event | Triggered when Job Offer is Approved by all approvers   |  |
| 1  |  | Job Offer is pending for<br>approval after X days of its<br>submission. | Periodic Event  | Triggered X days after the submission of approval request for job Offer, where X is defined in Recruiting services.           |  |
|  | 1  | Job Offer Pending Approval  | Triggered Event | Triggered when a job offer requires an approval.  |  |
| 1  | )  | Job Offer Rejected  | Triggered Event | Triggered when Job Offer Status changed to Rejected   |  |
| 1  |  | Job Requisition Activated /<br>Hiring Team Welcome                      | Triggered Event | Triggered when a new Job requisition is activated and a<br>welcome message sent to hiring team                                |  |
| 4  | 1  | Job Requisition Approved  | Triggered Event | Triggered when Job Requisition Status changed to Approved   |  |
| 1  | 1  | Job Requisition Auto<br>Unpublish                                       | Periodic Event  | Job Requisition Auto Unpublish  |  |
|  | )  | Job Requisition is pending for approval after X days of its submission. | Periodic Event  | Triggered X days after the submission of approval request for<br>job requisition, where X is defined in Recruiting services.  |  |
|  | )  | Job Requisition Pending<br>Approval                                     | Triggered Event | Triggered when a job requisition requires an approval   |  |
| 4  | )  | Job Requisition Rejected  | Triggered Event | Triggered when Job Requisition Status changed to Rejected   |  |
|  |  | Job Requisition Summary<br>Digest Monthly Email<br>Dispatch             | Periodic Event  | Monthly digest for Job Requisition Summary, this event is<br>responsible for email dispatch [DO NOT CHANGE EVENT<br>SCHEDULE] |  |
|  | )  | Job Requisition Summary<br>Digest Weekly Email Dispatch                 | Periodic Event  | Weekly digest for Job Requisition Summary, this event is<br>responsible for email dispatch [DO NOT CHANGE EVENT<br>SCHEDULE]  |  |

Figure 168: Job Requisition Summary notifications

Based on the option selected for **Job Requisition Summary** on your account preferences, an email will be sent to the recruiter and/or hiring manager.

| Job Requisition Summary- W  | Veek of October 3, 2016                |                               |   |  |
|---|--|-------------------------------|---|--|
| Your Job Requi  | sition Summary                         |                               | 👌 SA  | BA   |
| Hi Pat Rose,  |  |                               |   |  |
| Here are certain activi   | ties happening around you              | r job requisition(s):         |   |  |
| Career Site Manager   | (7585) opened 1 days ago               | Status                        | Active  |  |
| Hiring Manager: Pat F   | Rose Recruiter: John Ma                | icy Interviewers: Ben         | Trimmer   |  |
| LATEST APPLIED  | OLDER CANDIDATES                       | SCHEDULE INTERVIEWS           | S UPCOMING INTERVIEWS   | OFFERS   |
| John Stacy<br>today   | Viren Jackmer<br>Applied 2 months ago  | Ravi Gandhi<br>Interested Low | John Craver<br>In-Person on 12th Sep 2016<br>at Boom 1                        | Vineet Saxena<br>Pending Approval<br>with Rajeev Sar |
| <b>Ravi Gandhi</b><br>today   | Jack Stammer<br>Applied 2 months ago   | Interested Low                |   |  |
| Macy Oxford   |  |                               |   |  |
| today   |  |                               |   |  |
| View All 15 Candidates  |  |                               |   |  |
| RECENT ACTIVITY   |  |                               |   |  |
| 'Pat Rose' updated the j  | ob requisition for job: 'Car           | eer Site Manager (7585)' -    | today   |  |
| 'Pat Rose' marked statu   | s 'Interested Low' to candid           | date 'Referral Test' for job  | 'Career Site Manager (7585)' - today  |  |
| 'Pat Rose' marked statu   | s 'Interested Low' to candid           | date 'Oxford Private' for io  | b: 'Career Site Manager (7585)' - today                                       |  |
| 'Macy Oxford' marked s  | tatus 'Withdrawn' to candi             | date 'Oxford Private' for id  | ah: 'Career Site Manager (7585)' - 1 days                                     | 200  |
| Inter Devel le de d'hite h  |  |                               | b. Concer Site Manager (7505) 1 days  |  |
| 'Pat Rose' 'added' 'vks n   | ecruiter' to hiringteam as l           | RECRUITER for job: 'Caree     | s: Career Site Manager (7585) - 1 days<br>- Site Manager (7585)' - 1 days ago | ago  |
| Click have to go to the Vising Terry Visio                              |  |                               |   |  |
| Click here to go to the   | Hiring Team View                       |                               |   |  |
|   |  |                               |   |  |
| Senior Product Manage   | r (7566) created 1 days a              | go Status Pe                  | nding Approval with Reeta Wani  |  |
| Hiring Manager: Pat Rose Recruiter: John Macy Interviewers: Ben Trimmer |  |                               |   |  |
| Product Manager (7566   | <ol> <li>created 1 days ago</li> </ol> | Status Pe                     | nding Approval with Reeta Wani  |  |
| Hiring Manager: Pat Ros   | se Recruiter: John Macy                | Interviewers: Ben Tr          | immer   |  |
|   |  |                               |   |  |
|   |  |                               |   |  |
|   |  |                               |   |  |
| Ĥ   |  |                               | <u> </u>  |  |
| Create a new job requ   | uisition View                          | all my jobs                   | View all my interviews  |  |
| Unsubseribe? Click have   | to unsubscribe from this -             | mail or odit your cottine     | Baurand Lu A  | SARA   |
| Shausshipe: Click here  | , to ansubscribe from this e           | man or eart your settings.    | rowered by V  |  |
|   |  |                               |   |  |

#### Figure 169: Job Requisition Summary email (Part 1)

The notification email will show detailed report on each requisition associated with the logged-in user. The details shown are:

- Job requisition name On clicking this link the user is navigated to requisition's hiring team page.
- Status
- Hiring Manager's name, Recruiter's name, and Interviewer's name
- Latest candidates applied
- Older candidates Displays older candidates so that the hiring team screen these candidates quickly and take some actions on them.
- Upcoming interviews

- Schedule interviews
- Offers made
- · Recent Activity Shows the updates that appears in the activity stream.
- Click here link to navigate the user to hiring team view

If there is no data, then the hiring manager and recruiter will not receive any email. You can download the candidate's resume by clicking the candidate's name. Under every candidate, the candidate's current status is mentioned. It also indicates with whom the job requisition or candidate's job offer is pending with for an approval.

The above sections of the job requisition will be repeated for every **Active** and **Pending Approval** job requisitions provided the data is available for each section. If the data is unavailable, then the section will not be displayed in the notification.

#### Use case

The individual hiring managers and recruiters can now opt to get job requisition summary email digests at weekly or monthly interval. Hiring managers and recruiters are well-informed and stay up-to-date with the latest happenings around their job requisitions with hyperlinks to directly access the job requisition's hiring team view.

## **Multiple career sites**

#### How did it work?

Prior to this update, the recruiting administrator could create only one career site which was a default site where all the job openings across all the locations were published.

#### How does it work now?

From this update, the recruiting administrators can create multiple career sites, associate each with a region or group and also brand them independently. This will maintain the look and feel to various job sites that ties back to sites or regions. The administrator can also publish the job openings to the selected career site. The administrator can also set a default time zone for each career site. Analytics enables user to distinguish between the job sites while reporting on applications and provides an ability to users to view all the available jobs from an All Jobs site or toggle to other available job sites.

The recruiting administrator must navigate to the default career site and click Add Career Site to add multiple career sites.

To add multiple career sites:

- 1. Navigate to ADMIN > Recruiting > Manage Career Sites > Career Sites > <career-site-name>.
- 2. Click Add Career Site.
- **3.** Enter the following details.

#### Table 103: Career Site Fields

| Field Name     | Description  |
|----------------|--|
| Name           | Provide a name for the career site.  |
| URL Identifier | URL identifier that is appended to your site's URL to<br>form the URL for the career site. For example:ht~<br>tps:// <your_default_career_site_url>-<new_ca~<br>reer_site_url_identifier&gt;</new_ca~<br></your_default_career_site_url> |

| Field Name              | Description   |
|-------------------------|---|
| Description             | Provide a description for the new career site.  |
| Is Private              | Select the checkbox to make it as private career site. This site will be accessible only to those with whom the career site URL will be shared.   |
| TimeZone                | Select the desired time zone based on your current local~<br>ity.   |
| Marketing Communication | Address potential applicants with information about your company. The marketing communication appears in the front section of the career site home page. Use the rich text formatting bar to add images and apply formating. The width must be around 862 pixels. |
| Locales                 | Select the locate in which you want to display the text.  |
| Edit Theme              | Change the theme based on the career site's location.   |

| Region Detail         | s 🔮 🗟 🗎   |
|-----------------------|---|
|                       | * = required  |
| Career Site URL:      | https://dqspcdemo.sabacloud.com/Saba/Web_spf/SPCDEMO/jobs1-Indiajobs/career/home/ |
| Name*                 | Saba INDIA_ST   |
| URL Identifier*       | Indiajobs   |
| Description           | India Career site   |
| Is Private            |   |
| TimeZone*             | (GMT+10:00) Brisbane v  |
| Marketing Communicati | on B / 및 S 등 등 등 들 Braragraph · Font Family · Font Sizes · 패                      |
|                       | Career Opportunities  |
|                       | p Words:  |
| Localos               |   |
| Defect                | Les Les   |
|                       | ame Actions   |
|                       | Findish   |
|                       | Edit Theme Save   |

#### Figure 170: Multiple career site

- 4. Click Save. The new career site location wise is created.
- 5. Click Activate corresponding to the newly created site to activate it. Click **De-activate** to deactivate the site.
  - **Note:** The user will not be able to deactivate the default career site.

| Career Sites Add Care |                     |             |
|-----------------------|---------------------|-------------|
| Name 🔺                | Description         | Actions     |
| All Jobs              | All Jobs            | De-activate |
| North America         | North America Jobs  | Activate    |
| Oxford University     | Private Region      | De-activate |
| Saba Africa           | Saba Africa Careers | De-activate |
| Saba APAC             | APAC Career site    | De-activate |
| Saba Europe           | Saba Europe Careers | Activate    |
| Saba India            | India Careers       | De-activate |
| Saba Middle-East      | Middle-east careers | De-activate |
| Saba UK               | UK Career Site      | Activate    |
| Saba US               | US Career Site      | De-activate |

#### Figure 171: Multiple career site

- 6. Click Save.
- 7. Navigate to System > Configure System > Services > Recruiting@Work + Internal Opportunities > Components.
- 8. Click JobRequisition.
- **9.** Navigate to **attributes** > **regions**.
- 10. Select the **Display** checkbox.

| Component Details                | : JobRequisition |  |  |  |  |  |
|----------------------------------|------------------|--|--|--|--|--|
|                                  |                  |  |  |  |  |  |
|                                  |                  |  |  |  |  |  |
| Component Details Print   Export |                  |  |  |  |  |  |
| Name                             | Value            |  |  |  |  |  |
| UI Label                         | Career Sites     |  |  |  |  |  |
| Audit                            | Silent auditing  |  |  |  |  |  |
| Data Is Protected                | No               |  |  |  |  |  |
| Default Value                    |                  |  |  |  |  |  |
| Display                          |                  |  |  |  |  |  |
| Generate Mask                    |                  |  |  |  |  |  |
| Has Unique Values                | No               |  |  |  |  |  |
| Is a List Of Values              | No               |  |  |  |  |  |
| Is Generated                     | No               |  |  |  |  |  |
| Is Internationalized             | No               |  |  |  |  |  |
| Is Referenced                    | No               |  |  |  |  |  |
| Is Required                      |                  |  |  |  |  |  |
| Maximum Size                     |                  |  |  |  |  |  |
| Size                             |                  |  |  |  |  |  |

#### Figure 172: Regions attribute

11. Click Save twice.

Once the career site is created and the attribute is enabled, the **Career sites** dropdown list starts appearing in the **Job Postings & Services** tab of the job requisition. The admin and hiring manager will be able to select multiple career sites to post the job requisition on multiple sites. Every job by default will be posted on the default site and then on the selected multiple career sites. Also, all the deeplinks and emails that includes an URL, gets the URL of the default site.

| Job Postings    |                       |             |           |  |  |  |  |  |
|-----------------|-----------------------|-------------|-----------|--|--|--|--|--|
| Publish to:     | Internal and External |             |           |  |  |  |  |  |
| Career Sites:   |                       | Q ▼ 🚯       |           |  |  |  |  |  |
|                 | Saba Africa           | ×           |           |  |  |  |  |  |
| Enhanced Job Ad | 📝 Saba Africa         | 0           | O investo |  |  |  |  |  |
| Style:          | 📄 Saba Asia           | J Cool      | Simple    |  |  |  |  |  |
|                 | 📄 Saba India          | <b>&gt;</b> | •••••     |  |  |  |  |  |
|                 | 1 to 3                |             | 0000000   |  |  |  |  |  |
|                 |                       |             |           |  |  |  |  |  |

Figure 173: Job Postings & Services tab

While logging into the Career site, the user can also search for the job based on the career site's location.

| Career Opportu<br>Marketing Communication Data for Global Career S<br>FEATURED JOB POSTINGS | nities<br>wite Testing !!   | Sign In All Jobs P E<br>Search Job<br>Saba Africa<br>Saba APAC<br>Saba India<br>Saba Middle-E<br>Saba US | ast  |
|---|---|--|------|
| Correct Olde Manager  | Automation Engineer   | Account Executive  |      |
|   |   | O Chicago  |      |
| Pune     Postod 1 dov(c) ago  | Posted 14 day(s) and  | Posted 1 month(s) ago  |      |
|   | - Fosted 14 day(s) ago  |  |      |
| Product management is an organizational<br>lifecycle function within a company dealing      | Prepare and execute test strategy for testing of<br>web applications across all devices and | Prepare and execute test strategy for testing<br>web applications across all devices and                 | g of |
| with the plannin  | scree   | scree  |      |

Figure 174: Career site login page

#### **Data Import**

In the job requisition import via CSV, a new column **REGION1** has been added to provide the regions where the job will be posted. The admin can mention multiple regions by separating it by commas. This column is optional. If the value is not provided, the job will be by default posted to the global region.

| A | A014 • : $\times \checkmark f_x$ |            |               |                    |               |                    |                  |              |             |  |
|---|----------------------------------|------------|---------------|--------------------|---------------|--------------------|------------------|--------------|-------------|--|
|   | AG                               | AH         | AI            | AJ                 | AK            | AL                 | AM               | AN           | AO          |  |
| 1 |                                  |            |               |                    |               |                    |                  |              |             |  |
| 2 |                                  |            |               |                    |               |                    |                  |              |             |  |
| 3 |                                  |            |               |                    |               |                    |                  |              |             |  |
| 4 |                                  |            |               |                    |               |                    |                  |              |             |  |
| 5 | EXPERIENCE1                      | YEAR1      | SKILL1        | SKILL_LEVEL1       | SKILL2        | SKILL_LEVEL2       | SCREENER1        | INTERVIEWER1 | REGION1     |  |
| 6 | String                           | String     | String        | String             | String        | String             | String           | String       | String      |  |
|   |                                  | Year of    |               | Please see list of |               | Please see list of |                  | Name of      | Name of the |  |
| 7 | Experience                       | experience | Name of skill | value              | Name of skill | value              | Name of screener | interviewer  | Region      |  |
| 8 | manager                          | 3          | java          | guru               | oracle        | novice             | uone             | uone         | new region  |  |

Figure 175: Job Requisition data file

Use case

This feature now allows recruiting administrators to post job requisitions specific to certain regions which are individually branded.

## New setting to pull job description in requisition

#### How did it work?

When a recruiting administrator or a manager tries to create a job requisition using a template, then the job description is pulled from the template. If a new requisition is created, then the job description field is blank and there was no provision to pull this data from any source.

#### How does it work now?

From this update, whenever a recruiting admin or a hiring manager creates any new job requisition, the **Job Description** field on the job requisition now has the value pulled directly from the jobs defined by HR. To support this, a new setting **Do you wish to inherit Job Description from the Job defined by HR? If no, it will be inherited from the Job Req Template.** has been introduced in **Recruiting@Work + Internal Opportunities** service. By default, this setting is disabled. When this setting is enabled, the job description and key responsibilities are pulled from the job that is created by an HR (**HR** > **Manage Jobs** > **Jobs**), clubbed, and displayed under the **Job Description** on the requisition. If the HR has not mentioned any information in these fields, then the **Job Description** field in the requisition will be blank.



#### Figure 176: New setting to pull job description

If an administrator or manager tries to update the job in the existing requisition, then a confirmation message appears that asks whether you want to overwrite the existing job description from the new job or not.

| Requisition        | Description  |   |
|--------------------|--|---|
|                    |  |   |
|                    |  | ۵.  |
|                    |  |   |
| Location:*         |  |   |
|                    | B I U S ≣ ≣ ≣ Parag  | raph 👻 Font Family 👻 Font Sizes 💌 🏧           |
|                    | This will help to improve product quality                      |   |
|                    |  |   |
|                    |  |   |
|                    |  |   |
|                    |  |   |
| Requires Tr Confir | mation   | ×   |
| Qualificatio       | Do you wish to overwrite the existing job des<br>selected job? | cription with the description pulled from the |
|                    | Yes  | No  |

Figure 177: Confirmation message to overwrite job description

Use case

The job requisition used to inherit majority of information from the template itself. It would have been more usable if the requisition pulls the data from the job defined by the HR. Through this enhancement, the job description can now be pulled from the respective job instead of an existing requisition template, based on the business rule.

## New keywords in offer letter template

#### How did it work?

The candidate's address fields and custom fields were not part of the offer letter since the corresponding keywords were not part of the offer letter template. In addition to this, the offer letter template had keywords related to candidate's full name instead of first name and last name.

#### How does it work now?

From this update, the hiring manager or recruiter can now use candidate's first name and last name instead of a full name and address keywords in the offer letter template so that the offer letter will show the corresponding details. The following keywords are now part of the offer letter template:

- @JobOffer\_JobOffer\_Candidate\_First\_Name@
- @JobOffer\_JobOffer\_Candidate\_Last\_Name@
- @JobOffer\_JobOffer\_Candidate\_Address\_Line\_One@
- @JobOffer\_JobOffer\_Candidate\_Address\_Line\_Two@
- @JobOffer\_JobOffer\_Candidate\_City@
- @JobOffer\_JobOffer\_Candidate\_State@

- @JobOffer\_JobOffer\_Candidate\_Country@
- @JobOffer\_JobOffer\_Candidate\_Zip\_Code@
- @JobOffer\_JobOffer\_Custom0@
- @JobOffer\_JobOffer\_Custom1@
- @JobOffer\_JobOffer\_Custom2@
- @JobOffer\_JobOffer\_Custom3@
- @JobOffer\_JobOffer\_Custom4@
- @JobOffer\_JobOffer\_Custom5@
- @JobOffer\_JobOffer\_Custom6@
- @JobOffer\_JobOffer\_Custom7@
- @JobOffer\_JobOffer\_Custom8@
- @JobOffer\_JobOffer\_Custom9@

| Name*     |   |          |
|-----------|---|----------|
| Domain*   | Q 6   |          |
| Keywords  | @JobOffer_RSU_Offered@  |          |
|           | @JobOffer_RSU_Offered@  | *        |
| Template* | @JobOffer_JobOffer_Custom8@<br>@JobOffer_JobOffer_Custom4@<br>@JobOffer_Number of Months_Nonrecoverable_Draw@ |          |
|           | @JobOffer_JobOffer_Req_Title@   |          |
|           | @JobOffer_Signon_Bonus_Amount@  |          |
|           | @JobOffer_JobOffer_Req_OrganizationName@  |          |
|           | @JobOffer_JobOffer_Reg_EmploymentType@  |          |
|           | @JobOffer_JobOffer_HR_Partner@  |          |
|           | @JobOffer JobOffer Candidate City@  |          |
|           | @JobOffer Relocation Amount@  |          |
|           | @JobOffer_JobOffer_Candidate_Address_Line_One@  |          |
|           | @JobOffer_JobOffer_Custom9@   |          |
|           | @JobOffer_Offer_Title@  |          |
|           | @JobOffer_JobOffer_Req_HiringManager@   |          |
|           | @JobOffer_JobOffer_Custom5@   |          |
|           | @JobOffer JobOffer Candidate Name@  |          |
|           | @JobOffer_JobOffer_Rejection_Reason@  | _        |
|           | @JobOnel_JobOnel_SalaryCurrency@  | <b>•</b> |

#### Figure 178: New keywords for offer letter

If the above keywords are added to the offer letter template, then when the hiring manager or recruiter appends this letter template to the offer, the name, address, and custom details from the **Candidate Information** tab will be shown in the offer letter.

#### Use case

The users will now be able to use the full fledged offer letter wizard to generate offer letters for the candidates.

## Smarter one click approval from email

#### How did it work?

There were security issues with the job requisition and the job offer approval notifications.

#### How does it work now?

In this update, one time certificate functionality has been introduced for the job requisition and job offer deeplinks within the notifications, where once the certificate (associated with the deeplink) is used, it expires.

| Job Requisition S  | Summary   |
|--|---|
| Title and Description  |   |
| Job Title:   | Software Associate  |
| Requisition ID:  | 2185  |
| Job Family:  | Default Job Family  |
| Location:  | USA (North America)   |
| Status:  | Pending Approval  |
| Job Description:   |   |
| As the Development Specialist in   | our product development group you will be designing and delivering solutions that scale to meet the needs of some of the largest and most innovative organizations in the world; working with other learns at Saba to understand and  |
| exceed the expectations of users;  | constantly pushing the technical envelope and neiping saba deliver great results.   |
| <ul> <li>Solid Core Java Skills</li> <li>Experience on advanced. JEEE</li> <li>Object Oriented Java develop</li> <li>Worhig Knowledge of transac</li> <li>A understanding of AGLE m</li> <li>Great problem solving and an</li> <li>Experienced in delivering larg</li> <li>Product Development experience</li> <li>Ability to deliver on time working</li> <li>AJAVATTAL/CSS experience</li> <li>General Business Skills</li> <li>Skroog and the and verbal com</li> <li>Very strong problem solving an</li> <li>Experience mercanacement</li> </ul> | e<br>ment experience<br>ment experience<br>bycat all lig pool apportmic sarcycamming is highly desirable<br>lycat all lig, pool apportmic sarcycamd, and can find erabine solutions to challenging technical proteems<br>exail basis base design pool to have<br>exail basis base design environment<br>a pille<br>desicion mating selfas<br>desicion mating selfas |
| <ul> <li>Ability to work efficiently and in</li> </ul>   | dependently   |
| <ul> <li>Ability to work under pressure</li> <li>Ability to handle multiple tasks</li> </ul>   | and time constraints<br>simultaneously  |
| Initiative and sense of ownership  |   |
| Qualifications:<br>B.E/MCA   |   |
| Requires Resume:   | Yes   |
| Hire Type:   | New Hire  |
| Employment Classification:   | Not Meditored   |
| Employment classification.   | Hot Mellionieu  |
| Compensation Budget  |   |
| Number of Hires:   |   |
| Approval (Private):  | Yearly 0 - 3 US Dollars   |
| Budget Per Hire:   | Yearly 1.5 (mid) - 3 (max) US Dollars   |
| Total Budget:  | Yearly 1.5 (mid) - 3 (max) US Dollars   |
|  |   |
| Hiring leam  |   |
| Hiring Manager:  | Ryan Vesely   |
| HR Partner:  | Nagbhushanramcharan Chandrashekarswami  |
| Notes:<br>nOTES  |   |
| Job Boards   |   |
| Internal and External Posting  |   |
| Auto-Unpublish : No  |   |
|  |   |
| Approvals  |   |
| Quid avaluation<br>(0) 1068-2013 Northwoold Software<br>No for distribution or production use<br>merode.com  | Rym Vesely  |
|  |   |

#### Figure 179: Job requisition summary

When the approver clicks the job requisition/job offer deeplink from the notification, the requisition summary/offer summary page opens without the navigation panel and control panel. The logged-in user's information will not appear on the top. The approver can either approve or reject it.



Note: The approver must not forward such emails to another user. A disclaimer is mentioned in the notification emails too.

Once the approver takes any action, he/she is logged out from the system. Also, the certificate also expires, which means if the approver clicks on the same certificate again, then he/she needs to log into the application. The same thing happens when the approver duplicates the browser page after taking any action.

#### Figure 180: Job requisition notification

#### Use case

The security breach can now be minimized if the email is accidentally forwarded to any other user. This feature will enhance the security around unauthorized access of the one click URL (attached with authorized user's auto-login certificate).

## Manage onboarding forms in HR admin flow

#### How did it work?

The recruiting administrator could view candidate's shared and personal type of onboarding forms by navigating to **HR** > **Manage Onboarding Forms**.

#### How does it work now?

The recruiting administrator can now only view **Global** type of onboarding forms by navigating to **HR** > **Manage Onboarding Forms**. Also, the documents are sorted in alphabetical order.

| HR Home                      | Manage Onboarding Forms                   |            |               |  |  |  |  |
|------------------------------|---|------------|---------------|--|--|--|--|
| Manage Organizations         |   |            |               |  |  |  |  |
| Manage Skills                |   |            |               |  |  |  |  |
| Manage Jobs                  |   |            |               |  |  |  |  |
| Manage Goal Library          | Manage candidate onboarding forms.        |            |               |  |  |  |  |
| Manage Location & Facilities |   |            |               |  |  |  |  |
| Manage Onboarding Forms      | Document:                                 | Add Upload |               |  |  |  |  |
| Manage Positions             |   |            |               |  |  |  |  |
| Manage Industry and Geogr    | Document                                  | Туре       | Date Modified |  |  |  |  |
| Transition Management        | CareerSite_NewDesign_V4.pdf               | GLOBAL     | 09.09.2016    |  |  |  |  |
| Manage Badges                | Certificate_AnnualCorporate.pdf           | GLOBAL     | 07.09.2016    |  |  |  |  |
| Manage Feedback              |   |            |               |  |  |  |  |
|                              | Document uploaded in Adobe                | GLOBAL     | 09.09.2016    |  |  |  |  |
|                              | I-9 (Employment Eligibility Verification) | GLOBAL     | 10.12.2013    |  |  |  |  |

#### Figure 181: Onboarding forms

Use case

This feature will help in maintaining the privacy of the documents, hence only Global type of documents will be visible to the recruiting administrator.

## **Reposition Terms and Conditions**

#### How did it work?

There was a need to reposition the Terms and Conditions section to make it a conspicuous hyperlink.

How does it work now?

The following changes are made on the Career site:

- 1. The Complete form to apply link is now changed to a button on the Career site Login page.
- 2. The position of the **Terms and Conditions** hyperlink has been changed. This is applicable to all the Career site login pages where Terms and Conditions appear.



Figure 182: Login page after applying for job



Figure 183: General resume submission view

**3.** The Login page is now updated.

Note: The text Apply with and Sign in! can now be localized.

| Ħ |                                      |
|---|--------------------------------------|
|   | Sign in with your service of choice. |
|   | Sign in with LinkedIn                |
|   | 8+ Sign in with Google               |
|   | Have an account? Sign in!            |

Figure 184: Career site Login page

#### Use case

The Terms and Conditions link is now a conspicuous hyperlink under the browse-wrap agreement policies.

## **UI enhancements on the Hiring Team page**

#### How did it work?

Prior to this update, the following actions were performed on the Hiring Team page:

- 1. Once the hiring manager or recruiter creates an offer for candidate, the candidate cannot be marked as hired until the candidate is in **Offered** state.
- 2. Once an offer is sent to the candidate, the candidate could view the offer in Career site. But, as soon as the candidate is marked as hired, he/she was not able to view the offer.
- 3. Once the candidate is hired, there was no provision to reject the candidate.
- 4. View assessments link is not shown in More actions corresponding to the candidate once the requisition is closed.

#### How does it work now?

The following enhancements are made on the Hiring Team page:

1. Once the hiring manager or recruiter creates an offer for the candidate, they can hire the candidate once the offer is approved by approvers. The **Mark hired** link will appear in the **More actions** even when the candidate's status is in **Offer Approved** state.

|              |                   |                    |              | Sort By:           | % Match   |
|--------------|-------------------|--------------------|--------------|--------------------|---|
| avi Gandhi   |                   |                    |              | Candidate #2       | • 6 days ago • Via Caree  |
|              | >                 | >                  |              | >                  | Offer Approved  |
|              | 23                | 0                  | 0            |                    |   |
|              | % MATCH           | RATINGS            | COMMENT      | s                  |   |
|              | Top Skiller Dupon | nie Content Manag  |              |                    |   |
|              | TOP SKIIIS: Dynam | nic Content Manage | ementi Respo | onsidilities   Com | merce more  |
|              | Top Skills: Dynan | nic Content Manage | ement  Respo | onsibilities   Con | imerce  more  |
| View candida | ate details       | Not Rated          | Needs review |                    | More actions + Serv   |
| View candid  | ate details       | Not Rated          | Needs review |                    | More actions  Send  |
| View candid  | ate details       | Not Rated          | Needs review |                    | More actions<br>Copy candidate<br>Update Resume   |
| View candid  | ate details       | Not Rated          | Needs review |                    | More actions  Send<br>Copy candidate<br>Update Resume<br>Add to compare   |
| View candid  | ate details       | Not Rated          | Needs review | , 🕄                | Copy candidate<br>Update Resume<br>Add to compare<br>View applications  |
| View candid  | ate details       | Not Rated          | Needs review |                    | More actions - Sent<br>Copy candidate<br>Update Resume<br>Add to compare<br>View applications<br>View offer                             |
| View candid  | ate details       | Not Rated          | Needs review | 1 🕄                | More actions × Serv<br>Copy candidate<br>Update Resume<br>Add to compare<br>View applications<br>View offer<br>Edit offer               |
| View candid  | ate details       | Not Rated          | Needs review |                    | More actions - Sent<br>Copy candidate<br>Update Resume<br>Add to compare<br>View applications<br>View offer<br>Edit offer<br>Mark hired |

#### Figure 185: Mark hired candidate in Offer Approved state

 Once the candidate is marked as Hired, the candidate will be able to view the offer on the Career site > My Job Applications page. A View offer button will be shown next to the requisition that will preview the offer to the candidate.

| A MY.     |        | MY PROF | ILE                 |               |            |
|-----------|--------|---------|---------------------|---------------|------------|
| My Job    | Applic | ations  |                     |               |            |
| Submitte  | d      | Status  | Title               | Location      | Actions    |
| 29.08.201 | 6      | Hired   | PM Job - Job Req Te | mplate ( Pune | View offer |

Figure 186: Hired candidate can view offer

**3.** Once the candidate is hired, a recruiter or hiring manager can reject the candidate since it is quite possible that the hired candidate accepted the offer but did not join the company. Once the candidate is marked as **Rejected** after hiring, then the **Mark Interested-Medium** action will not be visible. These candidates will not be processed further for the same job requisition but can be copied to some other job requisition.

| Find Candidate by name, loc |  |   | Advanced Se       | arch → Saved Searches →   |
|-----------------------------|--|---|-------------------|---|
| All<br>4<br>4 Active        | New<br>3<br>2 Incomplete<br>1 Complete | Interested<br>0   | Interviewing<br>0 | Offers<br>1<br>1 Hired  |
|                             | Mark Candidate                         |   | ×                 | % Match   |
| Pravin Gawande              | Do you want to reje<br>Specify Reason: | opportunity<br>Did not show up for<br>interview<br>No show on joining<br>Not fit technically<br>Other candidate<br>selected<br>Role mismatch<br>Salary mismatch |                   | 5 days ago - Ma Career Sile<br>Hired<br>More actions - View offer<br>Update Resume<br>Add to compare<br>View applications<br>Mark rejected<br>Message |

Figure 187: Reject hired candidates

4. View assessments link is now shown in the More actions corresponding to the candidate irrespective of the requisition's status.

| Description (D)     | 1000                        |                  |                           |                      |
|---------------------|-----------------------------|------------------|---------------------------|----------------------|
| Requisition ID:     | 4066                        |                  |                           |                      |
| Status:             | Closed - 6 Hired            |                  |                           |                      |
| Hiring Manager:     | Sandeep Thorat              |                  |                           |                      |
| Location:           | Chicago                     |                  |                           |                      |
| Number of hires     | 6                           |                  |                           |                      |
| Approved On:        | 30.01.2016 (Internal Only)  |                  |                           |                      |
| Last Updated:       | 04.08.2016                  |                  |                           |                      |
| Days to fill:       | 145 day(s)                  |                  |                           |                      |
| 🎤 View / Edit job   | 📑 Publish/Unpublish 🛛 🦉 Cor | mpare Candidates |                           | More actions 🔹       |
| CANDIDATES          | CANDIDATE SUGGESTIONS       | ACTIVITY STREAM  | HIRING TEAM               |                      |
| Find Candidate by r | ame, locations and more     | Search           | Advanced Search           | Saved Searches >     |
| All <b>25</b>       | New 2                       | Interested 0     | Interviewing<br>1         | Offers <b>7</b>      |
| 1 Withdrawn         | 2 Complete                  |                  |                           | 6 Hired              |
| 14 Rejected         |                             |                  |                           |                      |
| 10 Anti-            |                             |                  |                           |                      |
| TU Active           |                             |                  |                           |                      |
|                     |                             |                  |                           |                      |
|                     |                             |                  |                           |                      |
|                     |                             |                  | Sort By: % Ma             | atch 💌               |
| Winesel Kacnes      | -                           |                  | Candidate #26 • 4 weeks a | go • Via Career Site |
|                     | New                         |                  |                           |                      |
|                     |                             |                  |                           |                      |
|                     | 0 0                         | 0                |                           |                      |
|                     | % MATCH RATING              | S COMMENTS       |                           |                      |
|                     |                             |                  |                           |                      |
|                     |                             |                  |                           |                      |
| View candid         | ate details                 |                  | More actions              | Copy candidate       |
|                     |                             |                  | Update Resur              | ne                   |
|                     |                             |                  |                           |                      |
| ohexeitali Ktad     | Alega hinn                  | •                | Candidate #2 Add to compa | re areer Site        |
|                     | New                         |                  | View applicati            | ons                  |
|                     |                             |                  |                           |                      |
|                     | 0 0                         | 0                | Mark rejected             |                      |
|                     | % MATCH RATING              | S COMMENTS       | View poor                 |                      |
|                     |                             |                  | view assessii             | lentresuits          |

Figure 188: View assessments for any type of requisitions

#### Use case

This improves the usability on the Hiring Team page.

# Chapter 10

## Compensation

#### **Topics:**

- Send notifications when compensation letter is published
- Import and export plan cycle
   worksheets
- Freeze header row in manager's worksheet
- Delete Compensation Plan
   Cycles
- Support for string translation in Compensation
- I18N support for Plan Cycle names and descriptions
- Localization support for Library Fields
- Translation support for compensation categories
- Comment field added
- Out of the Box notifications to display text
- Allow compensation managers to access compensation data on profile page
- Cancelled/Deleted plan data can no longer be reported in Analytics
- Data sync between Compensation and Analytics – Plan Activation
- Improved data Sync between Compensation and Analytics Reporting
- Create Custom Manager hierarchy to distribute budget

## Send notifications when compensation letter is published

#### How did it work?

Currently, when compensation letters are published to managers and released to employees, there is no communication sent to either a manager or the employee.

#### How does it work now?

In this release, a new feature enables this. When the compensation administrator publishes the Compensation Letter to a manager, and when the administrator releases the compensation letter to an employee, a notification is sent via email to the manager and the employee respectively.

#### Manager

Compensation administrator clicks on Publish to Manager.

#### Figure 189: Publish to Manager

| 🔷 Saba Cloud               |   |                                |               |               |             |            |               | Hi, Super User 👻 |            | Q- 0 |  |
|----------------------------|---|--------------------------------|---------------|---------------|-------------|------------|---------------|------------------|------------|------|--|
| 📅 ME PEOPLE GR             | OUPS ADMIN  |                                |               |               |             | Bn         | owse All      | Search           |            | Q ⊽  |  |
| Admin Home People I        | HR Social Meetings  | Compensation                   | Instructor Le | saming Perfor | mance Pulse | 360 Talent | Recruiting Ma | arketplace Syste | m Analytic | \$   |  |
| Update Letter              |   |                                |               |               |             |            |               |                  |            | ×    |  |
| Compensation Letters       |   |                                |               |               |             |            |               |                  |            |      |  |
| Letter Name.*              | PH 2016 03 17 Letter 03   |                                |               |               |             |            |               |                  |            |      |  |
| Letter Template:           | PH 2016 03 17 Letter 03 docx Browse Template Uploaded: 06-MAV-2016 12:30 PM |                                |               |               |             |            |               |                  |            |      |  |
| Plan Cycle.*               | PH 2016 01 27 Base Salary plar 💌  |                                |               |               |             |            |               |                  |            | - 8  |  |
| Status:                    | Draft   |                                |               |               |             |            |               |                  |            |      |  |
| Append Name to File:       | Plan Cycle  | r O                            |               |               |             |            |               |                  |            | - 8  |  |
| Split Files:               | 🔿 Individual 🛛 🛞 Bulk   | Maximum Lette<br>per PDF File: | rs 200        |               |             |            |               |                  |            |      |  |
| Apply Sort                 | Start Date  |                                | ~             |               | *           |            |               |                  |            |      |  |
| Letter Generation Progress |   |                                |               |               |             |            |               |                  | Refre      | sh   |  |
| Start Date                 | End Date  | Status                         | Progress Info | # Employees   | Success     | Failed     | Initiated By  |                  |            |      |  |
| 24-JUL-2016 7:43 PM        | 24-JUL-2016 7:43 PM   | Queued                         | 0%            | -             | -           | -          | superuser     |                  |            | _    |  |
|                            |   |                                |               |               |             | Publis     | ih to Manager | Generate Sa      | ve Cano    | el   |  |

All managers associated with that plan will receive a notification via email.

#### Employee

Compensation administrator clicks on Release to Employee

#### Figure 190: Release to employee
|  |  |                   | remptan       | e oproeded. Dow | HT-2010 12:41 |        |              |         |
|--|--|-------------------|---------------|-----------------|---------------|--------|--------------|---------|
| 'lan Cycle:"   |  | Plan Cyck 💌       |               |                 |               |        |              |         |
| itatus:  | Published 11-A                                     | VUG-2016 12:00 AM |               |                 |               |        |              |         |
|  |  |                   |               |                 |               |        |              |         |
|  |  |                   |               |                 |               |        |              |         |
| ppend Name to File:  | Plan Cycle   | Other 📵           |               |                 |               |        |              |         |
| ppend Name to File:  | Plan Cycle   | Other 🚯           |               |                 |               |        |              |         |
| ppend Name to File:<br>plit Files:   | <ul> <li>Plan Cycle</li> <li>Individual</li> </ul> | Other 😗           |               |                 |               |        |              |         |
| ppend Name to File:<br>plit Files:<br>#ther Generation Progress              | ) Plan Cycle ()<br>() Individual () 8              | Other 📵           |               |                 |               |        |              | Refront |
| ppend Name to File:<br>pit Files:<br>etter Generation Progress<br>Start Date | Plan Cycle  Individual  End Date                   | Other 🕢           | Progress info | # Employees     | Success       | Failed | Initiated By | Refree  |

All employees from the manager's team who are eligible to receive the compensation package will receive a notification via email.

Note: In a situation where a manager has several direct reports who are all eligible for a certain compensation plan, when you publish the compensation letter, the manager will only receive a single message.

If the administrator revokes the compensation letter by clicking **Revoke**, the notifications to the manager and the employees will not be sent. When the administrator is ready to republish the Compensation Letter, he needs to click on **Publish to Manager** again to republish. Similarly, administrator clicks on **Release to Employees** again to notify the employees.

Use case

This update enables the notification to be sent to a manager when the Compensation Letter is published to a manager and when it is released to an employee. This enables better communication among managers, employees and administrators.

# Import and export plan cycle worksheets

#### How did it work?

Prior to this release, when creating worksheets for a compensation plan, compensation administrators had to manually copy their plan settings and worksheet configurations to a new plan they needed to create. This manual process is tedious and sometimes lead to errors.

How does it work now?

In this update a new feature has been added to the worksheet page which allows a Compensation administrator to import and export an existing plan cycle worksheet in a simple and automated method.

#### Import and Export steps:

To download an existing worksheet that you choose to import to a new plan cycle:

1. Navigate to ADMIN>Compensation>Plan Cycles>All Plan Cycles

- 2. Search for the specific Plan Cycle and click to open the Plan Cycle.
- 3. From the Worksheet tab, select the component that you choose to export.

4. Click Download.

| S 2,879 USD<br>Total Plan Budget   | MR Approval   |                          |                       |                        |                   |                        |   |
|--|---|--------------------------|-----------------------|------------------------|-------------------|------------------------|---|
| WELCOME  | Select the template you<br>Select a best practice template: | would like to            | use for the B         | ase Salary             |                   |                        |   |
| ✓ PLAN DETAIL  |   |                          |                       |                        |                   | Le I                   | Å |
| V PLAN APPROVAL  |   |                          |                       |                        |                   |                        |   |
| V WORKSHEET  Base Salary  MIPORT DATA                                      | Example Worksheet<br>This is an example of what your work   | sheet will look like for | managers during the c | ompensation allocation | on process.       | Add new column         |   |
|  | Employees   | Person No                | Organization          | Start Date             | Overall Rating    | Current Base<br>Salary |   |
| COMPONENT DETAILS     Salary         ✓ Eligibility                         | John Smith<br>Senior Architect                              | 10000001                 | Development           | 02/01/2014             | A-Exceptional P   | 96,000.00              | ^ |
| ✓ Lenne Budget Strategy ✓ Guidelines ✓ TIM Analysis ✓ TIM Analysis Summary | Amit Patel<br>Senior Software Engineer                      | 1000002                  | Engineering           | 01/02/2011             | B - Superior Perf | 350,000.00             |   |
| Distribute Budget  PLAN ACTIVATION   | Jackie Lewis<br>UX Designer                                 | 10000003                 | User Experience       | 07/02/1987             | B - Superior Perf | 105,000.00             | ~ |
| EXIT   |   | <                        |                       |                        |                   | )                      |   |

Figure 191: Import and export options for plan cycle worksheet

To upload the desired worksheet to a new Plan cycle on the new tenant:

- 1. Navigate to Plan Cycle>Worksheet>Component
- 2. Click Upload. The Upload Worksheet pop-up screen opens.
- 3. Browse and select the file to upload and click Upload. The plan cycle page will now display the new worksheet.

| Import worksheet data                  | ×           |
|--|-------------|
| Please select a Base Salary worksheet. |             |
| Select File                            | Browse      |
|  | Save Cancel |

## Figure 192: Browse to select file

Use case

Compensation administrators can now import and export Plan Cycle worksheets from a previous plan and use it for deployment on a new production environment. This method of using an existing worksheet saves a lot of time and effort for the compensation administrators and minimizes errors when manual process is involved.

# Freeze header row in manager's worksheet

How did it work?

Currently, Compensation Managers cannot see headers, columns and labels simultaneously while scrolling on worksheets with many entries.

#### How does it work now?

In this release, this interface has been improved. The header row and the first column containing employee names are kept visible when using the scroll bars. The vertical scroll bar helps to move up and down the list of entries below the header row and the horizontal bar allows navigation left to right adjacent to a fixed column of Employee names.

This improvement provides more flexibility for a manager to scroll through a large list of data and to efficiently locate relevant information - thereby eliminating accidental errors and deletion of data.

| Employees                 | Currency | Person No | Organization | Start Date | Overall Rating | Current Base<br>Salary | Base Sala<br>Market<br>Midpoint |
|---------------------------|----------|-----------|--------------|------------|----------------|------------------------|---------------------------------|
| grunt245_m17_np1 grunt245 | USD      | 00201613  | Comp_Det_O   | 01/01/1900 | 0,00           | 75.750,00              | 100.00                          |
| grunt246_m17_np1 grunt246 | USD      | 00201614  | Comp_Det_O   | 01/01/1900 | 0,00           | 138.150,00             | 100.00                          |
| grunt247_m17_np1 grunt247 | USD      | 00201615  | Comp_Det_O   | 01/01/1900 | 0,00           | 109.750,00             | 100.00                          |
| grunt248_m17_np1 grunt248 | USD      | 00201616  | Comp_Det_O   | 01/01/1900 | 0,00           | 52.750,00              | 100.00                          |
| grunt249_m17_np1 grunt249 | USD      | 00201617  | Comp_Det_O   | 01/01/1900 | 0,00           | 69.250,00              | 100.00                          |
| grunt250_m17_np1 grunt250 | USD      | 00201618  | Comp_Def_O   | 01/01/1900 | 0,00           | 145.500,00             | 100.00                          |
| grunt251_m17_np1 grunt251 | USD      | 00201619  | Comp_Def_O   | 01/01/1900 | 0,00           | 103.950,00             | 100.00                          |
| grunt252_m17_np1 grunt252 | USD      | 00201620  | Comp_Def_O   | 01/01/1900 | 0,00           | 87.450,00              | 100.00                          |
| grunt253_m17_np1 grunt253 | USD      | 00201621  | Comp_Def_O   | 01/01/1900 | 0,00           | 142.700,00             | 100.00                          |
| grunt254_m17_np1 grunt254 | USD      | 00201622  | Comp_Def_O   | 01/01/1900 | 0,00           | 98.350,00              | 100.00                          |
| grunt255_m17_np1 grunt255 | USD      | 00201623  | Comp_Def_O   | 01/01/1900 | 0,00           | 149.100,00             | 100.00                          |
|                           | 4        |           |              |            |                |                        |                                 |

# Figure 193: Worksheet showing slide bar

Use case

N/A

# **Delete Compensation Plan Cycles**

### How did it work?

Until this release, Compensation administrators could not delete Plan Cycles that were no longer needed.

#### How does it work now?

Starting from this release, Compensation administrators can delete Plan Cycles that are no longer needed in the system.

**Note:** Plan cycles can be deleted only when they are in Draft or Cancelled state.

To delete a Plan cycle:

- 1. Navigate to All Plan Cycles page.
- 2. Choose either Draft or Cancelled from the Status option.
- 3. Search for the specific Plan Cycle that needs to be deleted.
- 4. Click on Delete Plan Cycle from Actions.
- 5. A warning message will display to indicate that you are about to delete the Plan Cycle.
- 6. Click OK, and the selected Plan Cycle will be deleted from the list.

#### Figure 194: Delete a Plan Cycle

| 📸 ME PEOPLE GR        | ROUPS ADMIN                 |                |                 |                    | Browse                         | All • Search | 1                | 0 |
|-----------------------|-----------------------------|----------------|-----------------|--------------------|--------------------------------|--------------|------------------|---|
| Admin Home People I   | HR Social Meetings Compensa | ition Instruct | or Learning Per | formance Pulse 360 | Talent Recruiting              | Marketplace  | System Analytics |   |
| Compensation Home     | All Plan Cycles             |                |                 |                    |                                | <u>en</u>    |                  |   |
| Man Cycles            |                             |                |                 |                    |                                |              |                  |   |
| All Plan Cycles       | Name                        |                | Start Date >=   |                    | <b></b>                        |              |                  |   |
| Allocated Plan Cycles | End Date <=                 |                | Allocation Du   | e Date >=          | m                              |              |                  |   |
| Configuration         | Approval Due Date <=        |                | Alocation Sta   | rt Date >=         |                                |              |                  |   |
| Manage Letters        | Allocation Find Date of     |                |                 |                    |                                |              |                  |   |
| TIM Settings          | Palocation End Date <-      |                | Domain          |                    | Q, 🖭                           |              |                  |   |
|                       | Status Draft                | ~              |                 |                    |                                |              |                  |   |
|                       |                             |                |                 |                    | Search                         |              |                  |   |
|                       | Annual State State          |                |                 |                    | 12                             | 345          |                  |   |
|                       | Compensation Plan Cycle     |                |                 | Add a              | New Plan Cycle Print           | Export       |                  |   |
|                       | Name                        | Status         | Start Date      | End Date           | Actions                        |              |                  |   |
|                       | MPlan_uoi1z                 | Draft          | 25-MAR-2016     | 24-MAR-2017        | View Plan Cycle<br>Delete Plan |              |                  |   |
|                       | FY16 Comp Cycle             | Draft          | 01-JAN-2018     | 31-DEC-2016        | View Plan Cycle<br>Delete Plan |              |                  |   |
|                       | MPlan_ytr1x                 | Draft          | 25-MAR-2016     | 24-MAR-2017        | View Plan Cycle<br>Delete Plan |              |                  |   |
|                       | MPtan_opr1x                 | Draft          | 25-MAR-2016     | 24-MAR-2017        | View Plan Cycle<br>Delete Plan |              |                  |   |
|                       | Yd_Test_29_07_2017          | Draft          | 25-MAR-2016     | 24-MAR-2017        | View Plan Cycle<br>Delete Plan |              |                  |   |
|                       | Compensation Plan 2017      | Draft          | 25-MAR-2016     | 24-MAR-2017        | View Plan Cycle                |              |                  |   |

#### Use case

Compensation administrators needed the ability to remove from the system old and incomplete Plan Cycles that were no longer relevant to their scenario. By enabling this option, they are now able to work with more relevant data and a less cluttered environment.

# Support for string translation in Compensation

#### How did it work?

Until this release, support for string translation was not available in Compensation module.

#### How does it work now?

Starting from this release, when users log in to Saba Cloud Compensation module using a non-English locale, they will see all the strings translated into their locale.

# Figure 195: Compensation Dashboard page localized

| MIT OVERBLIK NETV           | ERK GRUPPER ADMIN                     |  | Gennemse                             | Alle • Seg                   | Q      |
|-----------------------------|---------------------------------------|--|--------------------------------------|------------------------------|--------|
| Admin.hjemmeside Personer   | HR Social Møder Løn U                 | Inderviser Læring Præstation             | Pulse 360 Talent Rekruttering        | Markedsplads System Analyse  |        |
| enudgangspunkt              |                                       |  |                                      |                              |        |
| Planrunder<br>Configuration | FY 2017                               |  |                                      |                              |        |
| dministrer breve            |                                       |  |                                      |                              |        |
| M-indstillinger             | Lad os oprette en ny lønd             | versigt                                  |                                      |                              |        |
|                             | Der er ingen aktiv plan defineret for | regnskabsåret. VII du oprette en ny plar | ? TIM kan hjælpe. Han vil føre dig ( | gennem oprettelsesprocessen. |        |
|                             | Opret en ny plannunde                 |  |                                      |                              |        |
|                             | Tidslinie for løn                     |  |                                      |                              |        |
|                             | EV 2017                               |  |                                      |                              |        |
|                             |                                       |  |                                      |                              |        |
|                             | 2.180,39 (USD)<br>Tildelt len i alt   | 1<br>Eonede medarbeidere                 | 1<br>Plannunder                      | View: Alle planrunder        | •      |
|                             |                                       |  | 1.1                                  |                              |        |
|                             |                                       |  |                                      |                              |        |
|                             |                                       |  |                                      |                              |        |
|                             |                                       |  |                                      | Alloker                      | at     |
|                             |                                       | - 3.706,66                               | Danish Base Salary -                 | - Ikke ale                   | skeret |
|                             |                                       | Danish Base Salary                       |                                      | Civersit                     | iderse |
|                             |                                       |  |                                      |                              |        |
|                             |                                       |  |                                      |                              |        |
|                             |                                       |  | 0 500                                | 1K 1.5K 2K 2.5K 3K 3.5K 4K   |        |

#### Use case

Non-English speaking users can now use Compensation module in their preferred locale, provided, it is one of Saba Cloud's supported languages.

# **I18N support for Plan Cycle names and descriptions**

How did it work?

NA

How does it work now?

Starting from this release, Compensation Administrators can provide Plan Cycle names, Plan Component names and the description text for the Plan cycle, with their locale name.

#### Steps to localize Plan Cycle names and description

1. Navigate to: Admin>Compensation>Plan Cycles> Add a New Plan Cycle> Guide Me

The Plan Detail page will display.

- 2. On the Plan Detail page, enter the Plan Name and the description for the plan.
- 3. Enter other required field data and click Continue.

You will see the **Plan Timeline** page.

From this page, you need to go back to the **Plan Detail** page where you will see a **Globe** icon added to the top of the page.

4. Click on this Globe icon.

### Figure 196: Globe icon shown on Plan Cycle Details page

| 🗳 Saba Cloud               |   |                              |                      |                | Hi, Su                 | iper User 🕶 🖪 🖾 🖉 🕫  |  |
|----------------------------|---|------------------------------|----------------------|----------------|------------------------|----------------------|--|
| 📅 ME PEOPLE GROUPS A       |   |                              |                      |                | Browse AI • Sea        | rch 🍳 🏹              |  |
| Admin Home People HR Socia | al Meetings C                                       | ompensation Instructor       | Learning Performance | Pulse 360 Tale | nt Recruiting Marketpl | ace System Analytics |  |
| O USD Total Plan Budget    | New-P   | lan Cycle201                 | 7                    |                |                        |                      |  |
|                            | Tell us some basic information about the plan cycle |                              |                      |                |                        |                      |  |
| WELCOME                    | Plan Name:*   | New-Plan Cycle2017           |                      |                |                        |                      |  |
| ✓ PLAN DETAIL              | Description:  | It is a new plan cycle creat | ed for 2017.         |                |                        | т                    |  |
| PLAN TIMELINE              |   |                              |                      |                |                        |                      |  |
| PLAN APPROVAL              |   |                              |                      |                |                        |                      |  |
| WORKSHEET                  |   |                              |                      |                |                        | 960                  |  |
| Base Salary                | Plan Currency:*                                     | US Dollars                   |                      | × .            | dd New Plan Currrency  |                      |  |
| IMPORT DATA                |   |                              |                      |                | and the second second  |                      |  |

The Standard EXTJS I18N Translate screen launches.

# Figure 197: Translate Plan Details to Selected language

| 👌 Saba Cloud               |                       |                             |                       | HL.                      | Super User 🔹 🔛 🔳   | <b>Д• 0</b> |
|----------------------------|-----------------------|-----------------------------|-----------------------|--------------------------|--------------------|-------------|
| 🚔 ME PEOPLE GROUPS A       | ADMIN                 |                             |                       | Browse All • S           | earch              | Q 7         |
| Admin Home People HR Socia | al Meetings Compe     | nsation Instructor Learning | Performance Pulse 360 | Talent Recruiting Market | place System Analy | ites .      |
| 0 USD<br>Total Plan Budget | Plan-Nam              | e2                          |                       | ×                        |                    |             |
|                            | Tell t<br>Locale:     | Nederlands (Dutch)          | × 9, •                | ^                        |                    | 0           |
| WELCOME                    | Plan h Plan Name:"    | Plan-Naam2                  |                       |                          |                    |             |
| V PLAN DETAIL              | Descr Description:    | extra plan                  |                       | т                        | т                  |             |
| PLAN TIMELINE              |                       |                             |                       |                          |                    |             |
| PLAN APPROVAL              |                       |                             |                       |                          |                    |             |
| WORKSHEET                  |                       |                             |                       | 992                      |                    |             |
| Base Salary                | Plan C                |                             |                       | Currency                 |                    |             |
| IMPORT DATA                |                       |                             | Cancel                | Save                     |                    |             |
| BUDGET DISTRIBUTION        | Exchange Rate.* De    | tauk Batch                  | ×                     | Add New Plan Batch       |                    |             |
| COMPONENT DETAILS          | Plan Fiscal Year * 20 | 15                          |                       |                          |                    |             |

In this screen, you select the language to which you want this Plan cycle name and description content translated.

- 1. Enter the Plan Cycle name in the selected language and add the description details as well.
- 2. Click on Save.

The Plan cycle name in the locale selected will be used in all subsequent references in the plan.

### Steps to translate the Component name on a Plan Cycle:

- 1. Navigate to the Plan Detail step in the Plan Cycle wizard.
- 2. From the list of components, choose the component name that you need to translate.
- 3. Click Edit.

The Add New Component screen will open with the component name displayed.

4. Click on the Globe icon located at the top right corner.

# Figure 198: Component Name screen showing the Globe icon

| FY2016                       |             |                     |        |
|------------------------------|-------------|---------------------|--------|
| Tell us some basic inform    | Add New Con | nponent             | ×      |
|                              |             |                     | •      |
| Plan Name:* FY2016           | Name:*      | Base Salary         |        |
| Description:                 | Туре        | 💿 Cash 🛛 💿 Non-Cash |        |
|                              | Category:   | BASE                | ~      |
|                              | Cancel      | Save Comp           | onent  |
|                              |             |                     |        |
| Plan Currency:* USD          |             |                     | n Curr |
|                              |             |                     |        |
| Exchange Rate:* Default Bate |             | Ad                  |        |

You will see the Translate Compensation Component screen.

# Figure 199: Translate Compensation Component name to Selected language

| Admin Home People HR    |        |                                 |                |              |    |        |    |     |  |  |  |
|-------------------------|--------|---------------------------------|----------------|--------------|----|--------|----|-----|--|--|--|
| O USD Total Plan Rudget | MPL    | an_i18n                         | suppo          | rt           |    |        |    |     |  |  |  |
| iotal Plan Buoger       | Tell v | Translate Compensiton Component |                |              |    |        | ×  |     |  |  |  |
|                         |        | Locale:                         | Dansk (Danish) | )            |    | ₽, ₩   |    | - 8 |  |  |  |
| WELCOME                 | Plan N | Name:*                          | Danish Base Sa | ilary_Update | 8  |        |    | - 1 |  |  |  |
| V PLAN DETAIL           | Descr  |                                 |                |              |    | Cancel | Sa |     |  |  |  |
| ✓ PLAN TIMELINE         |        |                                 | Category:      | 8/           | SE |        |    | *   |  |  |  |

In this screen, you will select the language to which you want the component name translated.

1. From the drop down option for the Locale, select the locale name.

The component name in the specified language will be added to the Name field.

2. Click on Save.

The component name will appear in the translated language in subsequent references within the plan.

Use case

Compensation administrators can now create plan cycles for different locale for different regions.

# **Localization support for Library Fields**

How did it work?

NA

How does it work now?

Saba Cloud provides OOB (out-of-the-box) translations for OOB fields in the OOB locales for Compensation. When you log into the application using a locale that is different from English and if that locale is supported by Saba Cloud, the library fields will be displayed in that locale. Additionally, you can see the OOB fields in the user's local language in Analytics reports as well.

| Figure 200: Librar | y fields names | in selected | locale |
|--------------------|----------------|-------------|--------|
|--------------------|----------------|-------------|--------|

| 📅 ICH EIGENES TEAM                                  | PERSONEN GRUPPE          | ADMIN    |             |                | Du                | irchsuchen Alle | Suchen                   | Q 7             |
|---|--------------------------|----------|-------------|----------------|-------------------|-----------------|--------------------------|-----------------|
| Admin-Startseite Personen                           | HR Social Vergütung      | Trainer  | Lernen Leis | tung Pulse 360 | Talent Marktplatz | System          |                          |                 |
| Vergütungsstartseite<br>Planzyklen<br>Konfiguration | Set up the Library Fi    | elds     |             |                |                   |                 | Add a new field   Export | tLibrary Fields |
| Währungsumrechnung                                  | Field Name               |          | Data Type   | Data<br>Source | Category          | Created by      | Updated on               | Actions         |
| Geschäftsjahr<br>Kategorien                         | Person                   |          | Text        | Saba           | ADDITIONAL DATA   | uone            | 26.09.2016, 2:19 PM      | 78              |
| Personenabbildungen                                 | Personen-Nr.             |          | Memo        | Saba           | ADDITIONAL DATA   | uone            | 26.09.2016, 2:19 PM      | 72              |
| Erhöhungsrichtlinien<br>RDI-Vorlagengenerator       | Organisation             |          | Text        | Saba           | ADDITIONAL DATA   | uone            | 26.09.2016, 2:19 PM      | 78              |
| Sicherheit  | Postieitzahl             |          | Memo        | Saba           | ADDITIONAL DATA   | uone            | 26.09.2016, 2:19 PM      | 78              |
| Briefe verwalten<br>TIM-Einstellungen               | Interne Organisationsnum | mer      | Memo        | Saba           | ADDITIONAL DATA   | uone            | 26.09.2016, 2:19 PM      | 72              |
|   | Organisationstyp         |          | Text        | Saba           | ADDITIONAL DATA   | uone            | 26.09.2016, 2:19 PM      | 72              |
|   | Ort                      |          | Text        | Saba           | ADDITIONAL DATA   | uone            | 26.09.2016, 2:19 PM      | 72              |
|   | Domâne                   |          | Text        | Saba           | ADDITIONAL DATA   | uone            | 26.09.2016, 2:19 PM      | 78              |
|   | Manager                  |          | Internal ID | Saba           | ADDITIONAL DATA   | uone            | 26.09.2016, 2:19 PM      | 78              |
|   | Startdatum               |          | Date        | Saba           | ADDITIONAL DATA   | uone            | 26.09.2016, 2:19 PM      | 72              |
|   | Anzeige von 1 bis 10 v   | on 131 O |             |                |                   |                 |                          |                 |

Field descriptions support UTF8 characters, but field display names are restricted to ASCII letters and digits.

| Locale Name         | key word entry |
|---------------------|----------------|
| Arabic              | ar_SA          |
| Bulgarian           | bf_BG          |
| Chinese             | zh_CN          |
| Chinese Traditional | zh_TW          |
| Czech Republic      | cs_CZ          |
| Danish              | da_DK          |
| Dutch               | nl_NL          |
| English (Britian)   | en_GB          |
| French Canadian     | fr_CA          |
| French              | fr_FR          |
| Finnish             | fi_FI          |
| German              | de_DE          |
| Greek               | el_GR          |
| Hungarian           | hu_HU          |
| Hebrew              | he_IL          |
| Italian             | it_IT          |
| Japanese            | ja_JP          |
| Korean              | ko_KR          |

The table below presents the locale names supported in Saba Cloud:

| Locale Name         | key word entry |
|---------------------|----------------|
| Malay               | ms_MY          |
| Norwegian           | no_NO          |
| Polish              | pl_PL          |
| Portugese Brazilian | pt_BR          |
| Portugese           | pt_PT          |
| Russian             | ru_RU          |
| Spanish             | es_ES          |
| Spanish Mexican     | es_MX          |
| Swedish             | sv_SE          |
| Slovak              | sk_SK          |
| Turkish             | tr_TR          |
| Thai                | th_TH          |
| Ukranian            | uk_UA          |
| Vietnamese          | vi_VN          |

# Use case

This story enables compensation administrators, managers and employees to see labels of compensation amounts (i.e. library field names) in their own language.

# **Translation support for compensation categories**

## How did it work?

NA

How does it work now?

Starting from this release, Compensation users can define their own locale names for Compensation Categories both custom and out of the box.

## Steps to localize Compensation Category names.

- 1. Navigate to: Admin>Compensation>Configuration> Categories>
- 2. Click on Add New Categories link.
- 3. On the Compensation Category screen, under Field Details, enter the Category Name.
- 4. Select the status >Active or Inactive. Only Active categories will be displayed on the Library Fields page.
- 5. Select the Display options: No, Profile and Statement or Profile option.
- 6. Click Save.

# Figure 201: Add new Category

| Set up the Cat       | tegory              |                        | _      |     |
|----------------------|---------------------|------------------------|--------|-----|
| Pliter category by r | Compensation Catego | ry                     | ×      |     |
| Name                 | – 🔺 Field Detail –  |                        |        |     |
| 1                    | Name:*              | Custom-category        | ner    | nts |
| ADDITIONAL DA        | Status:*            | Active 🗸               | ner    |     |
|                      | Display:            | O NO                   |        |     |
| BASE                 |                     | Profile and Statements |        |     |
| Category Comp?       |                     | Profile                |        |     |
| Category Comp?       |                     |                        | Save   |     |
| Category Comp1       |                     |                        | Cancer |     |
| Category Comp1_      | _1cdjkmo            | Active                 | NO     |     |

The new category will be added to the list of categories.

To add your locale name to this custom category:

Click on the Edit icon under Actions for the category you created.

You will see a Globe icon added to the top of the page.

# Figure 202: Compensation Category page with globe icon

| iter category by r | Compensation Categ | jory                           |      | ×     |
|--------------------|--------------------|--------------------------------|------|-------|
| Name               |                    |                                |      | •     |
| Category Comp1     | Name:*             | custom-category                |      |       |
| Category Comp1     | Status:*           | Active 👻                       |      |       |
| CategoryName1      | Display:           | I NO                           |      |       |
| CompCategory1      |                    | Profile and Statements Profile |      |       |
| CompCategoryL      |                    |                                |      |       |
| Complinactive      |                    |                                | Save | nents |
| custom category    |                    | Active                         | NO   |       |
|                    |                    |                                |      |       |

Click on this **Globe** icon to launch the Standard EXTJS I18N Translate screen.

In this screen, select the language to which you want the Category name translated.

# Figure 203: Select Language for Translation

|          |             | te Compensation Category | ×           |
|----------|-------------|--------------------------|-------------|
| 5        | select loca | le                       |             |
|          | Title -     |                          |             |
|          | Dansk       | Danish)                  |             |
|          | English     |                          |             |
| gory     | Nederk      | nds (Dutch)              |             |
| egory (  | Norsk E     | okmål (Norwegian)        |             |
| gory     | Portuge     | ese Continental          |             |
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|          |             |                          |             |

Enter the new name in the selected language and click on Save.

The Category name in the selected locale will display according to the options chosen when created.

You will follow similar steps to translate the out of the box category names to local languages.

Use case

Users can localize the category names for out of the box category names and for custom created category names and the translated names will be part of the employee history section and profile page as well as the library fields when logged in that locale.

# **Comment field added**

#### How did it work?

Prior to this release, managers and approvers could not add appropriate comments and notes on employees when making budget calculations and compensation plan decisions. Existing options were limiting and without a proper mechanism to keep a record of these observations and notes.

#### How does it work now?

In this update, the comment field has been enhanced to address this. Now, all out of the box templates have comments field added and during plan cycle creation, an admin can add the comment field from the library to be included in the worksheet.

**Note:** During compensation historical data import via RDI template, comments cannot be imported; they can be added as a text field using the library fields.

**Note:** When using worksheet export feature, comments are also exported and the modifications to the comment are also available in the audit log option.

On the worksheet, comment column is available for each user and anyone who has view access to the manager's worksheet will be able to view all comments for that person. For each field, a maximum of 1020 characters are allowed. Clicking on the comment icon will display all comments in reverse chronological order and each comment will display the text,

the date/time it was last updated, name of the person who added the comment, and the name of the person who updated it. If a comment has not been updated or edited, then, the date/time it was created will display.

Based on the security privileges, add, edit and delete options will also display.

On the worksheet page for each employee under comments column either the + sign icon or a comment icon will display. The + sign icon means no comment has been added yet for this employee; the comment icon means at least one comment is added for this employee. You can view the existing comment by clicking the comment icon.

| Worksheet Team                                 | of Karen Tsou<br>Export 强 Submit      |                 |                                      |                        |                          |                                |          |
|--|---------------------------------------|-----------------|--------------------------------------|------------------------|--------------------------|--------------------------------|----------|
| Display: V Short Term Incent<br>Plan           | ive                                   | Search Clear s  | earch                                |                        |                          |                                |          |
| BRL<br>PLAN CURRENCY                           | 0.00<br>AVG. BASE SALAR<br>INCREASE % | 42,2<br>Y FUNDS | 2 <mark>59.0326</mark><br>S ASSIGNED | 4,440.4<br>FUNDS ALLC  | 48<br>ICATED             | 37,818.5526<br>FUNDS AVAILABLE | ŧ        |
| Employees                                      | Date                                  | Overall Rating  | Current Base<br>Salary               | Discretionary<br>Bonus | Discretionary<br>Bonus % | Total<br>Compensation          | Comments |
| Andy Taylor<br>3 Direct Reports                | AY-2016                               | 0.00            | 52,500.00                            | 0.00                   | 0.00%                    | 0.00                           | 0        |
| Jack Blackman<br>Sales Director, ANZ           | 4N-2010                               | 0.00            | 51,450.00                            | 0.00                   | 0.00%                    | 0.00                           | 0        |
| Jose Salvador<br>RVP LATAM<br>1 Direct Reports | N-2010                                | 0.00            | 63,550.00                            | 1,200.00               | 1.89%                    | 64,750.00                      | Þ        |
| A Matt Holliday                                | AY-2016                               | 0.00            | 66,000.00                            | 0.00                   | 0.00%                    | 0.00                           | •        |
|  | 4                                     |                 |                                      |                        |                          |                                | ) ÷      |

#### Figure 204: Worksheet with comments column

#### To View comments added on the worksheet page:

Click on the comments icon against the employee's name. The comments screen will display the comments added for that person with the following details:

- The comment text
- Created By, Edited By and Last Updated on
- The Edit and Delete options show if you have the privilege to edit and delete.

Note: If you have the privilege to edit values on the worksheet grid (in any fields that are designated as **editable**), then you also have the privilege to create comments, and to edit and delete your own comments. (Compensation admin and HRBP can also edit and delete comments created by other users.)

| 0 / 1020         Image: Agood Comment2 - edited by Super User         Created By: Aaron Good         Edited By: Super User         Last Updated On: 31-AUG-2016 10:27 AM         Image: Super User Comment for Cindy         Created By: Super User         Last Updated On: 31-AUG-2016 10:27 AM | Comments | for Cindy Geer  |                 |      | x |
|---|----------|---|-----------------|------|---|
| Agood Comment2 - edited by Super User<br>Created By: Aaron Good • Edit • Delete<br>Edited By: Super User<br>Last Updated On: 31-AUG-2016 10:27 AM<br>Super User Comment for Cindy<br>Created By: Super User • Edit • Delete   | 0 / 1020 |   |                 | Save |   |
| Super User Comment for Cindy<br>Created By: Super User • Edit • Delete  | 2        | Agood Comment2 - edited by Super User<br>Created By: Aaron Good<br>Edited By: Super User<br>Last Updated On: 31-AUG-2016 10:27 AM | ∘ Edit ∘ Delete |      |   |
| Edited By: Super User<br>Last Updated On: 31-AUG-2016 9:50 AM   | -        | Super User Comment for Cindy<br>Created By: Super User<br>Edited By: Super User<br>Last Updated On: 31-AUG-2016 9:50 AM           | ∘ Edit ∘ Delete |      |   |

# Figure 205: View comments

In the comment text box at the top, you can also add your comments and save.

#### To add a new comment:

- 1. Click on the + sign next to the person that you want to add your comments. (Or, click on the **Comment** symbol, if you are adding a comment for an employee who already has one or more comments).
- 2. The comment screen will display.
- **3.** Enter your comments and save.

| PH 2016 09 02 Comments 2                | - Approver ON, Mgr. OFF    | Tea  |
|---|----------------------------|------|
| Worksheet Van Team of F                 | Comments for Aaron Good    | ×    |
| Back Bulk Allocation Display:           | I have jadded my comments. | Save |
| BRL<br>PLAN CURRENCY AVG.               | No Records to Display      |      |
| Employees                               |                            |      |
| Aaron Good<br>CHIRO<br>2 Direct Reports |                            |      |

#### Figure 206: Add new comments

Edit and delete privileges for comments are given only on the security based allocation and the worksheet status.

- Compensation Admins can edit comments on any status of the worksheet except the Completed status.
- HRBP can edit comments on any status of the worksheet except the Completed status.
- An allocated manager can edit the comments only in the **Allocation in Progress** status and **Returned to Manager** status.
- An Approver can edit comments during Awaiting Approval status of the worksheet.

An approver's ability to edit depends on the worksheet status and whether the **Approver can edit allocation values** policy for the plan cycle is turned on.

#### Use case

Compensation managers and approvers can include comments in the worksheet that they are authorized to view and edit. This feature provides a mechanism to record details associated with compensation decisions made for each member in an organization.

# Out of the Box notifications to display text

How did it work?

Until this release, out of the box notifications did not contain any text or attachments.

How does it work now?

Starting from this release, when notifications are triggered, messages associated with each notification will be displayed.

Example:

Notification Name: Compensation Plan Assigned

Message Subject Line: Compensation Plan Assigned

Target Audience: Managers

Email text:

A Compensation Plan has been assigned to you.

Plan Name

Allocation Due Date

Click here to access the plan. [link to the plan]

# Figure 207: Notification Generated

| Mayur  | 7   |
|--|---|
| Mayur Patel  |   |
| If there are problems with how this message is displayed, cl | lick here to view it in a web browser.        |
|  |   |
|  |   |
|  |   |
|  | 🖒 Saba  |
|  |   |
|  | Notification: Compensation plan is assigned   |
|  | A Compensation Plan has been assigned to you. |
|  | Plan Name TCW_cycle_651651                    |
|  | Allocation Due Date 10/06/2016                |
|  | Case nero to access your compensation pain.   |
|  |   |
|  |   |
|  |   |

Following table provides compensation specific notification details and when they are triggered during each stage of a compensation plan.

# **Table 104: Notification Details**

| No | Notification   | Trigger Point  | Component           | Action   |
|----|--|--|---------------------|--|
| 1  | Approval required for compens~<br>ation allocation             | Triggered when approval is<br>required for compensation<br>allocation  | ManagerPlanCycleRel | Predefined - Send No~<br>tification to adminis~<br>trator<br>Predefined - Send No~ |
|    |  |  |                     | tification to approvers  |
| 2  | Compensation plan has been<br>approved by all approvers        | Triggered when compensa~<br>tion plan has been approved<br>by all approvers in the ap~<br>proval chain                       | ManagerPlanCycleRel | Predefined - Send No~<br>tification to adminis~<br>trator                          |
| 3  | Compensation plan has been<br>approved by any approver         | Triggered when compensa~<br>tion plan has been approved<br>by any approver in the ap~<br>proval chain                        | ManagerPlanCycleRel | Predefined - Send No~<br>tification to manager                                     |
| 4  | Compensation plan has been re~<br>jected                       | Triggered when compensa~<br>tion plan has been rejected  | ManagerPlanCycleRel | Predefined - Send No~<br>tification to manager                                     |
| 5  | Compensation plan has been re~<br>opened by compensation admin | Triggered when compensa~<br>tion plan has been reopened<br>by compensation admin.  | ManagerPlanCycleRel | Predefined - Send No~<br>tification to approvers                                   |
|    |  |  |                     | Predefined - Send No~<br>tification to manager                                     |
| 6  | Due date for approval is ap~<br>proaching                      | Triggered for compensation<br>distributions that are in<br>pending approval and due<br>date for approval is approach~<br>ing | ManagerPlanCycleRel | Predefined - Send No~<br>tification to Approver                                    |
| 7  | Compensation plan is assigned                                  | Triggered when compensa~<br>tion plan is available for<br>budget distribution and alloc~<br>ation                            | ManagerPlanCycleRel | Predefined - Send No~<br>tification to managers                                    |
| 8  | Compensation plan marked completed                             | Triggered when a compensa~<br>tion plan has been marked<br>completed.  | CompensationPlan    | Predefined - Send No~<br>tification to compensa~<br>tion administrator             |
| 9  | Compensation plan activated                                    | Triggered when a compensa~<br>tion plan is activated.  | CompensationPlan    | Predefined - Send No~<br>tification to compensa~<br>tion administrator             |
| 10 | Due date of the compensation plan is approaching               | Triggered when due date of<br>the compensation plan is ap~<br>proaching  | CompensationCycle   | Predefined - Send No~<br>tification to managers                                    |

Out of the box notifications now convey appropriate messages. Managers, approvers, and compensation administrators can now be alerted by clear messages and links to actual documents that they need to review to complete their actions.

# Allow compensation managers to access compensation data on profile page

#### How did it work?

Until this release, a manager captured in a snapshot view as the manager for a specific employee but no longer the **Line manager** (current), did not have access to the employee's compensation historic data, compensation statements, letters and other necessary data from the profile page.

#### How does it work now?

Starting from this release, line managers, approvers and others who are assigned to a worksheet can access compensation specific data from the worksheet and will also have access to employee compensation profiles, compensation letters and statements.

A manager who is assigned to a worksheet for an employee and needs the profile details, can click on the name link on the employee's profile mini card. The link will launch a new view that displays the following compensation specific details for the employee:

- Basic Information
- Current Job Information
- Compensation
- Compensation History
- Compensation History Additional Data
- Compensation Statement
- Compensation Letters

To launch and view an employee profile page:

- **1.** Log in to Compensation module as a manager.
- 2. Navigate to My Team > Compensation>Compensation Plans
- 3. From the list of plans select the Plan which lists the employee whose profile you want to view.
- 4. On the worksheet, click on the employee's name.

The employee's profile mini card will display on the side.

| 👌 Saba Cloud                       |                             |                  |                  |                     | •              |                        | Hi, Aaron           | Good 👻 🔤 🎫         | I                      | × 10     | 0  |
|------------------------------------|-----------------------------|------------------|------------------|---------------------|----------------|------------------------|---------------------|--------------------|------------------------|----------|----|
| 👘 МЕ МУТЕАМ РЕО                    | PLE GROUPS ADN              | lin              |                  |                     |                | Browse                 | Al • Se             | earch              |                        | Q        | V  |
| Overview Talent Learning           | g Jobs Analytics C          | ompensation      |                  |                     |                |                        |                     |                    |                        |          |    |
| PH 2016 09 07 Comm                 | ents Again                  |                  |                  |                     |                |                        | 1                   | Team Member's Lo   | cal Curre              | nc) ¥    |    |
| Worksheet - Tea                    | im of Aaron Good            |                  |                  |                     |                |                        |                     |                    |                        |          |    |
| - Back I Bulk Allocation           | Export 🚡 Submit             |                  |                  |                     |                |                        |                     |                    |                        | Audit L  | og |
|                                    |                             |                  |                  |                     |                |                        |                     | Saving is do       | ne autom               | atically | Ķ  |
| Display:                           | Short Term Incentiv<br>Plan | e                |                  |                     |                |                        |                     |                    |                        |          |    |
|                                    | X Advanced Searc            | Clear search     | h                |                     |                |                        |                     |                    |                        |          |    |
| EUR<br>PLAN CURRENCY               | 0.00<br>AVG. BASE SALARY    | 4,92<br>FUNDS AS | 3.5<br>ISKONED F | 0<br>FUNDS ALLOCATE | D FUNDS        | 923.5<br>AVAILABLE     | ÷                   |                    |                        |          |    |
|                                    | INCREASE %                  |                  |                  |                     |                |                        |                     |                    |                        |          |    |
| Employees                          | Currency                    | Person No        | Organization     | Start Date          | Overall Rating | Current Base<br>Salary | Discretion<br>Bonus |                    | 1                      |          |    |
| E Cindy Geer<br>Head Of Talent     | EUR                         | P000002          | Human Res        | 31-DEC-2009         | 0.00           | 51,510.00              | 0.00                | Cind               | y Geer                 |          | L  |
| Maria Candoza     RVP Central ENEA | USD                         | P000012          | Sales EMEA       | 10-JAN-2010         | 3.67           | 50,000.00              | 0.00                | Compensati         | on Summ                | ary      |    |
|                                    | 4                           |                  |                  |                     |                |                        | •                   | Lest Sale<br>30-Jr | ry Increase<br>in-2016 | e        |    |
|                                    |                             |                  |                  |                     |                |                        |                     |                    |                        |          |    |

# Figure 208: Manager accessing the employee profile

On the employee mini card, click on the name link.

This will launch the Compensation Profile view for the selected employee.

| ompensation Profile     |                  |                          |                        |               |  |
|-------------------------|------------------|--------------------------|------------------------|---------------|--|
| Basic Information       |                  |                          |                        |               |  |
| First Name:             |                  | Cindy                    |                        |               |  |
| Last Name:              |                  | Geer                     |                        |               |  |
| Current Job Information | 1                |                          |                        |               |  |
| Organization:           |                  | Human Resources          |                        |               |  |
| Company:                |                  | [object Object]          |                        |               |  |
| Business Card Title:    |                  | Head Of Talent           |                        |               |  |
| Aanager:                |                  | Aaron Good               |                        |               |  |
| osition:                |                  | Sr. Director, Talent     |                        |               |  |
| Compensation            | nent associated. |                          |                        |               |  |
| ocal Currency           | Euros            |                          |                        |               |  |
| Annual Base Salary      | 51,510.00        |                          |                        |               |  |
| Jonus Plan              | -                |                          |                        |               |  |
| larget %                | -                |                          |                        |               |  |
| Effective From          | Effective To     | Plan Type                | Plan Name              | Target %      |  |
| Compensation History    |                  |                          |                        |               |  |
| Date                    | Category         | Source                   | Compensation Type      | Value         |  |
| 31-AUG-2016             | LTIP             | PH 2016 09 03 Comments 3 | PH LTIP NonCash 2      | 5000          |  |
| 30-JAN-2016             | BASE             | MR BUDGET DIS 2          | Current Base Salary    | 51,000.00 EUR |  |
| 30-JAN-2016             | BASE             | MR BUDGET DIS 2          | Base Salary - Increase | 510.00 EUR    |  |
| 30-JAN-2016             | BASE             | MR BUDGET DIS 2          | Base Salary - New      | 51,510.00 EUR |  |
|                         |                  |                          |                        |               |  |

Figure 209: Compensation Profile view

#### Use case

Compensation managers can now access information that they need to complete a worksheet process even if they are not the current line manager for an employee.

# Cancelled/Deleted plan data can no longer be reported in Analytics

## How did it work?

Until this release, after cancelling/deleting a compensation plan cycle, the attributes which were associated with current cycle were still available in an analytics report.

#### How does it work now?

This has been addressed in this release. If a compensation plan is deleted or cancelled, the associated attributes will be removed from Analytics.

**Note:** Plan cycles can be deleted only when they are in Draft or Cancelled state.

To delete a Plan cycle:

- 1. Navigate to All Plan Cycles page.
- 2. Choose either Draft or Cancelled from the Status option.
- 3. Search for the specific Plan Cycle that needs to be deleted.
- 4. Click on Delete Plan Cycle from Actions.
- 5. A warning message will display to indicate that you are about to delete the Plan Cycle.
- 6. Click OK, and the selected Plan Cycle will be deleted from the list.

## Figure 210: Delete a Plan Cycle

| JJ ME FEOREE GIV      | OUPS ADMIN   |  |  |  | Browse  | Al • Search     | 1      |           | Q |
|-----------------------|--|--|--|--|---|-----------------|--------|-----------|---|
| Admin Home People H   | R Social Meetings Compens  | ation Instruct   | tor Learning Per   | formance Pulse 360   | Talent Recruiting   | Marketplace     | System | Analytics |   |
| Compensation Home     | All Plan Cycles  |  |  |  |   | <b>C</b>        |        |           |   |
| Plan Cycles           |  |  |  |  |   |                 |        |           |   |
| All Plan Cycles       | Name   |  | Start Date >=  |  |   |                 |        |           |   |
| Allocated Plan Cycles | End Date <=  |  | Alocation Du   | e Date >=  | <b></b>   |                 |        |           |   |
| Configuration         | Approval Due Date <=   |  | Alocation Sta  | art Dale >=  | <b>_</b>  |                 |        |           |   |
| Manage Letters        | Allocation End Date <=   |  | Domain   |  | 0.6   |                 |        |           |   |
| TIM Settings          | Status Deaff   | ~  | -  |  |   |                 |        |           |   |
|                       | Unan   | *  |  |  | ( County )  |                 |        |           |   |
|                       |  |  |  |  | ocarun  |                 |        |           |   |
|                       |  |  |  |  |   |                 |        |           |   |
|                       |  |  |  |  |   | 145             |        |           |   |
|                       | Compensation Plan Cycle  |  |  | Add a  | 12<br>New Plan Cycle   Print  | 3 4 5<br>Export |        |           |   |
|                       | Compensation Plan Cycle<br>Name  | Status   | Start Date   | Add a  | 1 2<br>New Plan Cycle   Print  <br>Actions  | 345<br>Export   |        |           |   |
|                       | Compensation Plan Cycle<br>Name<br>MPlan_softz   | Status<br>Draft  | Start Date<br>25-MAR-2016  | Add a<br>End Date<br>24-MAR-2017   | 1 2<br>New Plan Cycle   Print  <br>Actions<br>View Plan Cycle<br>Delete Plan  | 345<br>Export   |        |           |   |
|                       | Compensation Plan Cycle<br>Name<br>MPlan_uoritz<br>FY18 Comp Cycle   | Status<br>Draft<br>Draft                                     | Start Date<br>25-MAR-2016<br>01-JAN-2016   | Add a<br>End Date<br>24-MAR-2017<br>31-DEC-2016  | 12<br>New Plan Cycle   Print  <br>Actions<br>View Plan Cycle<br>Delete Plan<br>View Plan Cycle<br>Delete Plan   | 3.4.5<br>Export |        |           |   |
|                       | Compensation Plan Cycle<br>Name<br>MPlan_uoitz<br>FY18 Comp Cycle<br>MPlan_ytr1x   | Status<br>Draft<br>Draft<br>Draft                            | Start Date<br>25-MAR-2016<br>01-JAN-2018<br>25-MAR-2016  | Add a<br>End Date<br>24-MAR-2017<br>31-DEC-2016<br>24-MAR-2017                               | 12<br>New Plan Cycle   Print  <br>Actions<br>View Plan Cycle<br>Delete Plan<br>View Plan Cycle<br>Delete Plan<br>View Plan Cycle<br>Delete Plan   | 345<br>Export   |        |           |   |
|                       | Compensation Plan Cycle<br>Name<br>MPlan_uoitz<br>PY18 Comp Cycle<br>MPlan_ytr1x<br>MPlan_ytr1x                                      | Status<br>Draft<br>Draft<br>Draft<br>Draft                   | Start Date           25-MAR-2016           01-JAN-2016           25-MAR-2016           25-MAR-2016 | Add a<br>End Date<br>24-MAR-2017<br>31-DEC-2016<br>24-MAR-2017<br>24-MAR-2017                | 12<br>New Plan Cycle   Print  <br>Actions<br>View Plan Cycle<br>Delete Plan<br>View Plan Cycle<br>Delete Plan<br>View Plan Cycle<br>Delete Plan<br>View Plan Cycle<br>Delete Plan                                   | 345<br>Export   |        |           |   |
|                       | Compensation Plan Cycle<br>Name<br>MPlan_uoitz<br>FY18 Comp Cycle<br>MPlan_ytr1x<br>MPlan_ytr1x<br>MPlan_spr1x<br>Yd_Test_29_07_2017 | Status<br>Draft<br>Draft<br>Draft<br>Draft<br>Draft<br>Draft | Start Date<br>25-MAR-2016<br>01-JA4-2018<br>25-MAR-2018<br>25-MAR-2016<br>25-MAR-2016              | Add a<br>End Date<br>24-MAR-2017<br>31-DEC-2016<br>24-MAR-2017<br>24-MAR-2017<br>24-MAR-2017 | 12<br>New Plan Cycle   Print  <br>Actions<br>View Plan Cycle<br>Delete Plan<br>View Plan Cycle<br>Delete Plan<br>View Plan Cycle<br>Delete Plan<br>View Plan Cycle<br>Delete Plan<br>View Plan Cycle<br>Delete Plan | 345<br>Export   |        |           |   |

#### Use case

Compensation administrators needed the ability to remove from the system old and incomplete Plan Cycles that were no longer relevant to their scenario. By enabling this option, they are now able to work with more relevant data and a less cluttered environment.

# Data sync between Compensation and Analytics – Plan Activation

How did it work?

Until this release, compensation plan activation could not complete until data synchronization in Analytics was completed. This was causing delays in plan activation.

How does it work now?

This has been addressed in this release. When a plan activation is initiated, data synchronization is automatically triggered in Analytics. However, this process may take some time to complete. The plan activation process once initiated can be completed independent of the data sync process. This improves the plan activation time and also reduces the risk of plan activation failing due to unexpected issue with Analytics module.

Activate a Plan cycle:

- 1. Navigate to All Plan Cycles page.
- 2. Choose Draft from the Status option.
- 3. Search for the specific Plan Cycle that needs to be activated.
- 4. Click on Check Data.
  - Note: You may need to execute the Check Data Step explicitly and rectify all the errors before starting the activation process. If Check Data step fails, you will not be able to activate the plan.
- 5. Click on Start to initiate the activation.

As mentioned above, the data synchronization will be triggered and the plan activation process will complete based on its own workflow. When the data synchronization completes in Analytics module, the associated report can be generated.

## Figure 211: Check data and activate a Plan Cycle

| Total Plan Budget           | PH 2016 08 18 Check Data Twice   |
|-----------------------------|--|
|                             | Now, let's validate your data and activate your plan cycle   |
| WELCOME                     | If a plan cycle has not been activated, you can make changes to any zections throughout the plan creation process. After a plan cycle has been activated, managers with eligible employees will be notified via email. Manager's worksheet will be opened for managers to make momentations. |
| ✓ PLAN DETAIL               | AD CONTRACT OF A DECISION OF   |
| ✓ PLAN TIMELINE             |  |
| V PLAN APPROVAL             |  |
| V WORKSHEET                 | 100 % Finished   |
| ✓ Short Term Incentive Plan |  |
| V IMPORT DATA               |  |
| V BUDGET DISTRIBUTION       | Plan Cycle Activation Progress   |
| COMPONENT DETAILS           | 100 % Finished   |
| √ Short Term Incentive Plan | Please do not modify any compensation data while Check Data/Plan Activation is going on.   |
| √ Eligibility               |  |
| ✓ Define Budget Strategy    |  |
| ✓ Guidelines                |  |
| ✓ Distribute Budget         |  |
| PLAN ACTIVATION             |  |

## Use case

Plan activation will no longer be delayed due to the delay in data synchronization with Analytics.

# Improved data Sync between Compensation and Analytics Reporting

# How did it work?

Until this release, update or edit of every single field in compensation data resulted in update to Saba Analytics.

How does it work now?

This has been addressed in this release. Compensation data is not synchronized to Analytics after every edit.

Saba Analytics Report will be updated during the following steps:

# Table 105: Use Case showing Compensation data update and Saba Analytics synchronization

| Compensation data update/edit scenario  | Update to Analytics Reporting         | Status |
|---|---------------------------------------|--------|
| A Manager launches the worksheet> makes one or more edits> clicks <b>Submit</b>   | Is Analytics reporting model updated? | Yes    |
| Approver <b>launches</b> the worksheet > makes one or more<br>edits> clicks <b>Approve</b> link or <b>Return to Manager(Re~</b><br><b>ject</b> )link. | Is Analytics reporting model updated? | Yes    |
| Compensation Plan is Approved:<br>Admin > is allowed to change values   | Is Analytics reporting model updated? | Yes    |
| Compensation Admin>closes the plan  | Is Analytics reporting model updated? | Yes    |
| Compensation plan cycle has been <b>Approved</b> >Admin has the option to <b>reopen</b> the worksheet.  | Is Analytics reporting model updated? | Yes    |

## Use case

Compensation data is not synchronized to Analytics after every edit and so Analytics Report will be updated only at specific operations. There is a clear indication of when to expect an update on the Analytics Report.

# **Create Custom Manager hierarchy to distribute budget**

How did it work?

N/A

How does it work now?

Starting from this update, compensation administrators can define who within their organization have budgets to make compensation recommendations. They can create custom hierarchy for specific plans, so that the allocation and distribution of compensation amount can be performed by managers who are not the line managers of certain employees but are identified to perform these responsibilities based on their experience, current organization structure and other aspects.

Compensation administrator can assign a custom hierarchy manager to an eligible employee, by adding the custom manager details to a template and uploading the file to snapshot data using the import option from the People Snapshots page.

The People Snapshot page lists all the snapshots created and it indicates whether a Custom Hierarchy exists for a snapshot by the **Yes/No** flag under the Custom Hierarchy column. It also features the **Edit** icon under **Actions** menu, to allow the download/import option.

Figure 212: People snapshot screen showing the Edit icon

| 👘 ме мутеам ре                                    | OPLE  | GROUP     | s AD    | MIN         |               |              |                     |            | Browse      | All    | Search    |          | ٩           |
|---|-------|-----------|---------|-------------|---------------|--------------|---------------------|------------|-------------|--------|-----------|----------|-------------|
| Admin Home People H                               | HR So | cial Mee  | atings  | Compensatio | n Instruc     | tor Learning | Performance         | Recruiting | Marketplace | System | Analytics |          |             |
| Compensation Home<br>Plan Cycles<br>Configuration | P     | eople Si  | napsh   | ot          |               |              |                     |            |             |        |           | Create N | ew Snapshot |
| Library Fields<br>Currency Conversion             |       | Date      |         | NU          | o. of<br>sers | Status       | Custom<br>Hierarchy | Commer     | ıts         |        |           |          | Actions     |
| Financial Year<br>Categories                      |       | 27-SEP-20 | 16 9:35 | AM 1        | 2466          | Success      | No                  |            |             |        |           |          | 28          |
| People Snapshots<br>Increase Guidelines           |       | 26-SEP-20 | 16 1:54 | PM 1        | 2468          | Success      | Yes                 | -          | 17. To 1981 |        |           | #1       | 23          |
| RDI Template Generator<br>Security                |       | 23-SEP-20 | 16 1:37 | PM 1        | 2465          | Success      | Yes                 |            |             |        |           |          | 78          |
| Manage Letters<br>TIM Settings                    |       | 21-SEP-20 | 16 2:12 | PM 1        | 2466          | Success      | Yes                 |            |             |        |           |          | 28          |

To add a custom manager hierarchy to a snapshot:

- 1. Navigate to Admin>Compensation>Configuration>People Snapshots
- 2. Click the Edit icon.
- 3. Download the snapshot template.

Figure 213: Edit snapshot screen

| ketp |                 |                       |                       |                   |   |         |
|------|-----------------|-----------------------|-----------------------|-------------------|---|---------|
|      | Edit snaphot    |                       |                       |                   | × |         |
| l    | Need snapho     | ot upload template    | ownload snaphot excel | l template        |   |         |
|      |                 |                       |                       |                   |   | Actions |
|      | Import snapsi   | hot data Import data  |                       |                   |   | 82      |
| l    | 5               | Select file to upload |                       | Browse            |   | 82      |
|      | Manian bistory  |                       |                       | Cancel UploadData |   | 82      |
|      | Version history |                       |                       |                   |   | 87      |
|      |                 |                       |                       |                   |   | 87      |
|      |                 |                       |                       |                   |   | 87      |

- 4. Enter the custom manager user name in their fields.
- 5. Import the file using the Import Snapshot data option.

The user name field and the custom manager's user name field are key fields.

**Note:** The import process may fail and a resulting warning message will show if the following scenarios occur:

1. Adding a nonexistent or terminated person to the list of employee user names

- 2. Specifying a nonexistent or terminated person as a custom manager
- **3.** Specifying a cyclic custom manager relationship between some users. (example: User A reports to User B, User B reports to User C, and User C reports to User A).

You can resume the import step once the issues are addressed.

#### Adding a new User to a snapshot

The **Edit snapshot** page also allows you to add a new user to the snapshot. If a new employee has joined the group or company after a snapshot was created, the **Add Users** option from the Edit Snapshot page can be used to facilitate the addition of this user to the snapshot.

#### To add a new user to an existing snapshot:

Click on the **Edit** icon for the snapshot that you want the user to be added to. The **Edit Snapshot** page opens and because we have new users in the system, the **Add Users** option displays on this page. If there are no new users for a plan cycle, this option will not show in the **Edit Snapshot** screen.

#### Figure 214: Add new user

|             | Edit Snapshot: 23-SEP-2016 1:37 PM                          | × |
|-------------|---|---|
| Date        |   |   |
| 29-SEP-2016 | Need a custom manager hierarchy template? Download Template |   |
|             | Import custom manager hierarchy. Import data                |   |
| 27-SEP-2016 |   |   |
|             | Version history   |   |
| 23-SEP-2016 | Add Users: Add Paul Import3 Add                             |   |
| 21-SEP-2016 | V Paul Import3  |   |
|             |   |   |

Select the names of the users you want to include in the snapshot and click Add.

#### **Budget Distribution**

When a snapshot is created for the plan cycle, based on the details of the imported file, the custom hierarchy manager will have the access privilege to view and edit compensation data for the eligible employees assigned to him and will be responsible for compensation recommendations, budget distribution and approval of the compensation package offered to the assigned user.

You can assign custom hierarchy to the compensation plan from the Budget Distribution page, and any update to the details of the custom hierarchy can also be handled from the **Budget Distribution** page.

## To choose custom manager hierarchy:

From the Budget Distribution page, select Custom Hierarchy:

• Use Line Manager Hierarchy - If you decide to keep the line manager for the current plan.

• Use Custom Manager Hierarchy - if you decide on the custom hierarchy manager and click Continue.

Figure 215: Budget Distribution page - Select Custom Manager Hierarchy

| Total Plan Budget     | PH 2016 09 24 Another Custom Manager Plan Cycle             |
|-----------------------|---|
|                       | How do you want to distribute your budget?                  |
| WELCOME               | C Line Manager Hierarchy                                    |
| ✓ PLAN DETAIL         | Custom Manager Hierarchy                                    |
| ✓ PLAN TIMELINE       |   |
| V PLAN APPROVAL       | Need a custom manager hierarchy template? Download Template |
| ✓ WORKSHEET           | Import custom manager hierarchy. Import data                |
| ✓ Base Salary         |   |
| ✓ IMPORT DATA         | Version history   |
| ✓ BUDGET DISTRIBUTION |   |

The custom hierarchy will be applied to all assigned employees in the selected Plan Cycle.

Note: When choosing the custom hierarchy, it is not necessary to define custom managers for all employees in that snapshot, but all employees in the eligibility criteria should have a valid custom manager. If an eligible person has no custom manager, then during the Distribute Budget step, the eligible user will be placed into the **Reserved** pool. In that situation, the administrator can revisit the **Budget Distribution** page or the **People Snapshot** page to add custom manager to those users and reimport the file. Alternatively, the administrator can also allocate, approve, and distribute their compensation funds.

#### **Budget Allocation**

The following sequence of events will occur with custom hierarchy selection:

- The custom manager will receive the budget funds to be allocated to the employees selected for the plan.
- Check Data step will validate whether compensation managers are assigned for all eligible users.

A warning message will appear at the check data stage, if there are eligible users with no custom manager assigned. Compensation administrator can update and import custom hierarchy again for the snapshot or choose to ignore the warning.

- Custom manager will have access to Compensation in My Team.
- The custom manager will have access to the employee's compensation data and will make compensation recommendations and budget allocations for the employee.
- After activation of the plan, approvers will be selected based on custom hierarchy.

## **Currency Selection**

Whichever hierarchy option you choose, all managers selected for the plan and all eligible users should have valid currency options assigned. Otherwise, during the check data step, an error message will display and the managers without a currency selection will not be eligible for budget allocation.

- If a plan cycle is configured with All managers in the organization hierarchy who have eligible direct reports option is selected, the system will check the currency details only for the direct manager of the user.
- If the plan cycles configured with nth level selected, (example 3rd level) then the system will check the currency details for the entire hierarchy of the eligible user.
- If the custom manager hierarchy is selected, then the system will check the currency details for the custom manager selected.

### Use case

Compensation managers can now access information that they need to complete a worksheet process even if they are not the current line manager for an employee. For the compensation administrator, this feature provides the option to define who within their organization have budgets to make compensation recommendations.