What's New

Saba Cloud | Update 38 | June 2017

Notice

Limitations on Warranties and Liability

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Contents

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 description	Functional area	Feature
1.0	09-May-2017	Initial version	N/A	N/A
2.0	19-May-2017	Added new topic	Performance	Create note via email
		Updated the topic	Compensation	Out of Cycle Compensation
		Updated New features at a glance	Improved User Experience	Home page (New **Apps** style navigation menu)
3.0	22-May-2017	Updated How does it work now?	Ecommerce	Register for multiple classes using registration deeplinks
		Updated the topic and New features at a glance	System	Optimized global search results
4.0		Updated the topic	Improved User Experience	My Team page
5.0	20-June02017	Upated the List of Portlets table	Social	Ability to close outdated ideas and issues

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.

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

Table 2: Summary of features

Functional area	Feature	Enabled by default?*	Requires admin setup	Submit a Support ticket to enable	Affects existing configuration or data	Affected audience
Improved User Experience	Enhanced browsing capability	Y				All
	Home page (New **Apps** style navigation menu)		System admin			All
	Profile page	Y				End user
	My Plan	Y				End user
	My Team page	Y				Manager
	List and Grid view extended to all resource types	Y	System admin			System admin End user
	Usability enhancements to Organization Chart					Manager End user
Analytics	Current Month and Current Year as new filters	Y				Analytics admin Analytics user
	Manage reports based on services	Y				Analytics admin Analytics user

Functional area	Feature	Enabled by default?*	Requires admin setup	Submit a Support ticket to enable	Affects existing configuration or data	Affected audience
	Performance Rating Distribution Report	Y				Analytics admin Analytics user
	New Attributes NEW	Y				Analytics admin Analytics user
	Updated Attributes	Y				Analytics admin Analytics user
	String concatenation for custom dimensions NEW	Y				Analytics admin Analytics user
	Suggestions on missing performance filter attributes	Y				Analytics admin Analytics user
	New file extension for the encrypted files	Y				Analytics admin Analytics user
Compensation	Pre-defined criteria added for Eligibility list	Y				Compensation admin
	Filter by Manager option available for compensation plan search NEW	Y				Compensation admin
	Job status progress and tracking	Y				Compensation admin
	Out of Cycle Compensation NEW					Compensation admin
Career Planning	Introducing Career Planning as a separate service		Talent admin	Y	Y	Talent admin
	Back link to ease navigation within Career Planning	Y				End user
	Updated Career Planning landing page	Y				End user

Functional area	Feature	Enabled by default?*	Requires admin setup	Submit a Support ticket to enable	Affects existing configuration or data	Affected audience
E-com~ merce	Registrar to choose preferred currency for order and subscrip~ tion NEW	Y				Registrar
	Custom credit card integration NEW		System ad~ min			System admin End user
	Register for multiple classes using registration deeplinks NEW	Y				External users
	Configurable agreement number and custom fields in Training Unit Agreement NEW		System ad~ min			System admin Ecommerce ad~ min
	Type and Owner fields for sub~ scriptions NEW	Y				Ecommerce ad~ min Learning admin Registrar
	Create user account on Micros~ ite using external email ID NEW		System ad~ min			System admin Candidate
	Purchase class in training units irrespective of user preferred currency NEW	Y	System ad~ min			System admin End user
Marketplace	Import Past Completions from Lynda.com into Saba NEW	Y				Marketplace ad~ min End User
	Support for removing current positions when using Workday connector	Y				Marketplace ad~ min
	Ability to download Workday export logs from UI NEW					Marketplace ad~ min
	Additional field added for Workday integration steps	Y				Marketplace ad~ min
	UI enhancement for Workday data mapping screen	Y				Marketplace ad~ min

Functional area	Feature	Enabled by default?*	Requires admin setup	Submit a Support ticket to enable	Affects existing configuration or data	Affected audience
	Use Saba user name to create WebEx account	Y				Marketplace ad~ min
Learning	Support for adding subtopics to topics in tests NEW	Y	Learning admin			End user
	Export test and surveys to use in Saba Meeting NEW	Y	Learning admin			End user
	Create assessment player themes NEW	Y	System ad~ min			Learning admin Recruiting ad~ min Pulse admin
	Navigate to unanswered ques~ tions NEW		Learning admin			End user
	Increased default results per page in global search	Y				All
	New organization manager re~ lated named queries	Y	System ad~ min			Manager
	Popular Learning replaced by Top Rated Learning section	Y	System ad~ min			End user
	Display recurring course notific~ ations for recurring courses	Y	System ad~ min			Learning admin End user
	Completion of versioned recur~ ring course via equivalent	Y				Learning admin End user
	Enhanced session template cre~ ation work flow		System ad~ min			Learning admin
	Enhanced usability of search filters	Y				All
	Usability enhancements to bulk learning assignment wizard	Y				Learning admin Registrar

Functional area	Feature	Enabled by default?*	Requires admin setup	Submit a Support ticket to enable	Affects existing configuration or data	Affected audience
						Instructor Manager End user
	Enhanced display of warning and error messages during regis~ tration	Y				Learning admin Registrar Instructor Manager
	Pagination for order items in orders and subscription orders	Y				Learning admin Registrar Instructor
	Disable a class evaluation and add a new version	Y	Learning admin			Learning admin Instructor End user
	Configure Roster Sign-in Sheet NEW	Y	Learning admin			Learning admin Instructor
	Changes to mobile compatibil~ ity behavior of classes	Y				All
	Launch Saba Meeting app dur~ ing playback	Y				All
	New Virtual Class Recording Player Template NEW	Y	Learning admin			End user
	Support for Saba Publisher and Inspire 17 NEW	Y				Content admin
	Enhanced encryption for Saba Anywhere token	Y			Y	All
Pulse 360	Enhanced ability to manage members in a Pulse survey	Y	Pulse ad~ min			End user

Functional area	Feature	Enabled by default?*	Requires admin setup	Submit a Support ticket to enable	Affects existing configuration or data	Affected audience
	Display Pulse survey folders in logged in locale	Y				Learning admin Pulse admin
	Enhancements to pulse ques~ tions and dashboard	Y				Pulse admin
Perform~ ance	Hide review sections NEW		Perform~ ance admin			Performance manager Manager End user
	Create note via email NEW	Y				End user
	Enhancements to Review page	Y				End user
	Enhancements to Check-Ins	Y				End user
	Enhancements to Skills page	Y				End user
	Improved search ability for skills	Y				End user
	Override overall rating score in pending approval state	Y	Perform~ ance admin			Performance ad~ min
Recruiting	Jobs menu appears in new header menu NEW		System ad~ min			End user
	Upload background image for Career site login page	Y	Recruiting admin			Recruiting ad~ min
	Enhancements to hiring team view	Y				Recruiting ad~ min Hiring team
	Updated learning flows in ca~ reer site	Y				Candidate

Functional area	Feature	Enabled by default?*	Requires admin setup	Submit a Support ticket to enable	Affects existing configuration or data	Affected audience
	Rejection templates NEW	Y	System ad~ min			System admin Recruiting ad~ min Hiring manager Recruiter
	Enhancements to approval chain	Y	Recruiting admin			Approvers
	Updated candidate profile page	Y				Candidate Hiring manager Recruiter
	Job board mapping fields for Monster and LinkedIn	Y	Recruiting admin			Recruiting ad~ min
	Updated candidate profile page	Y				Candidate Recruiting ad~ min Hiring manager
REST APIs	Organization APIs to support cascading down and partial up~ dates	Y				Developer
	Profile APIs for following a person NEW	Y				Developer
	Enhancements to the API Dashboard	Y				Developer
	Recurring completion API to include additional fields	Y				Developer
	Enhancements to the TUA APIs	Y				Developer
	Held Certification APIs to re~ flect expired reassigned status	Y				Developer

Functional area	Feature	Enabled by default?*	Requires admin setup	Submit a Support ticket to enable	Affects existing configuration or data	Affected audience
	FIND DETAILS OF ORDERS API to support additional search criteria	Y				Developer
System	Support 2048 bit RSA key					System admin
	Add Organization Manager to approval flow	Y				System admin Learning admin Performance ad~ min Recruiting ad~ min
	Workspaces menu appears in new tile style header menu NEW		System ad~ min			End user
	Personalized From field for no~ tifications		System ad~ min			End user
	Display source object details for SMF jobs	Y				System admin "admin" user
	Enhancements to the search services page	Y				System admin
	Enhancements to the notifica~ tions interface	Y				System admin
	Optimized global search results	Y				All
	Display SMF Job ID on UI Im~ port monitoring page	Y				System admin
	Enhancement to Skip omitted column functionality					System admin
	Ability to associate evaluations to certification and curriculum using Data Import					System admin

Functional area	Feature	Enabled by default?*	Requires admin setup	Submit a Support ticket to enable	Affects existing configuration or data	Affected audience
	Scheduled Jobs will pick up and trigger according to timezone settings					System admin
	Data import jobs created by Migration_Admin NEW					Migration Ad~ min
	New notifications in prescript~ ive rules	Y				System admin
	Smart list return correct records for expired certifications	Y				People admin
	Impact analysis for prescriptive rules NEW	Y				People admin
	New smart list criteria fields	Y			Y	People admin
	Content vendor field can be populated using Bulk Content Import					System admin
	Ability to select SFTP servers by Administrators					System admin
	Enhancement to Organization Import/Export functionality					System admin
	Bulk Content Import to support Unique ID					System admin
	Restrict access based on IPs NEW	Y				System admin "admin" user
	New settings to calculate and update job start date NEW	Y	People ad~ min			People admin End user
	Configurable FROM address for Two Factor Authentication emails			Y		System admin "admin" user
	System wide BCC support for emails NEW			Y		System admin "admin" user

Functional area	Feature	Enabled by default?*	Requires admin setup	Submit a Support ticket to enable	Affects existing configuration or data	Affected audience
	Enhancement to Training Unit Agreement Import step					System admin
	Enhancement to data import file to allow multiple evaluators for checklists					System admin
	Disable download logs button after 30 days					System admin
	Change in the locale ID for the Greek locale	Y				All
	Bulk Content_IsSCORING set~ting during bulk content import					System admin
	DMS Import and Equivalents					System admin
	Transition from the Old RDI interface to the new one					System admin
Saba Discov~ery	Learning Experiences service renamed to Saba Discovery	Y	System ad~min			End user Learning admin
	Enhanced Saba Bookmarklet functionality		System ad~min			End user
Social	Reassign resources to different users NEW		Social ad~min			Social admin
	Ability to close outdated ideas and issues NEW		Social ad~min			Social admin
Talent	Removed hover message from Successor Status column	Y				Talent admin Manager
	Role expansion of Talent admin~istrator	Y				Talent admin

Chapter 1

Improved User Experience

Topics:

- Overview
- Profile page
- Home page
- My Team page
- My Plan
- Usability enhancements to Organization Chart
- Enhanced browsing capability
- List and Grid view extended to all resource types

Overview

In this update, Saba rolls out a new look and feel. It means a product that is more modern in appearance and easier to use.

Have a look:

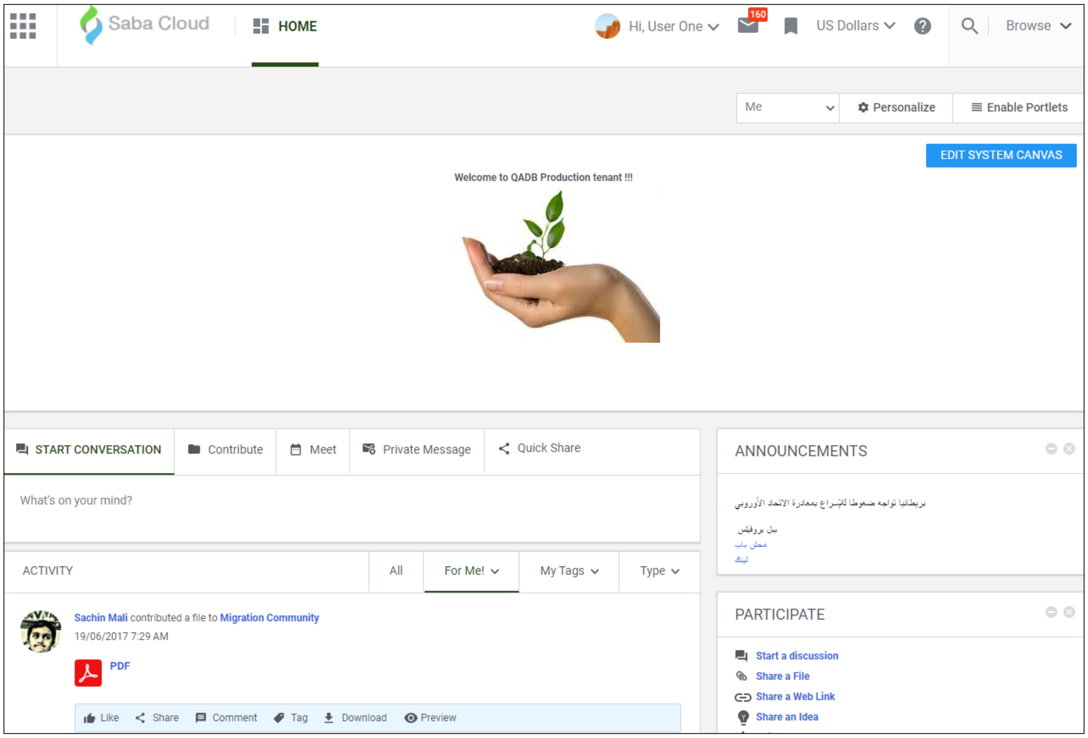


Figure 1: Saba Cloud

The new look and feel means a smoother experience for our users. It is:

- **CLEANER:** More universal design, less verbose, more whitespace, less visual noise, new font, round images and flat iconography.
- **LEANER:** Improved performance (flat icons and lack of gradients and button type images allow pages to load faster).
- **EASIER TO USE:** Easier to understand, easier to use (simpler, consistent, design) including larger field and font sizes, fewer clicks and less design variation. Users should find buttons are easier to see, which makes them easier to use

Saba Cloud is now optimized for 1280 screen resolution. The default font style is now updated to a modern new font. To make the application more readable and engaging, the default font size has also been increased. All of these small tweaks should make for a refined user experience within the Saba Cloud.

Profile page

The new layout of the Profile page is now simple, clean and easier to use. The following are the most evident changes to the Profile page:

1. Updated icons, labels and other elements on the profile page.
2. Data is now displayed in two columns in each portlet.

   Note: This is applicable even while editing the data.

3. The Profile header now displays the percent complete.

   Note: The site level configuration **Profile percentage complete** under **Profile** needs to be enabled to see the percent complete.

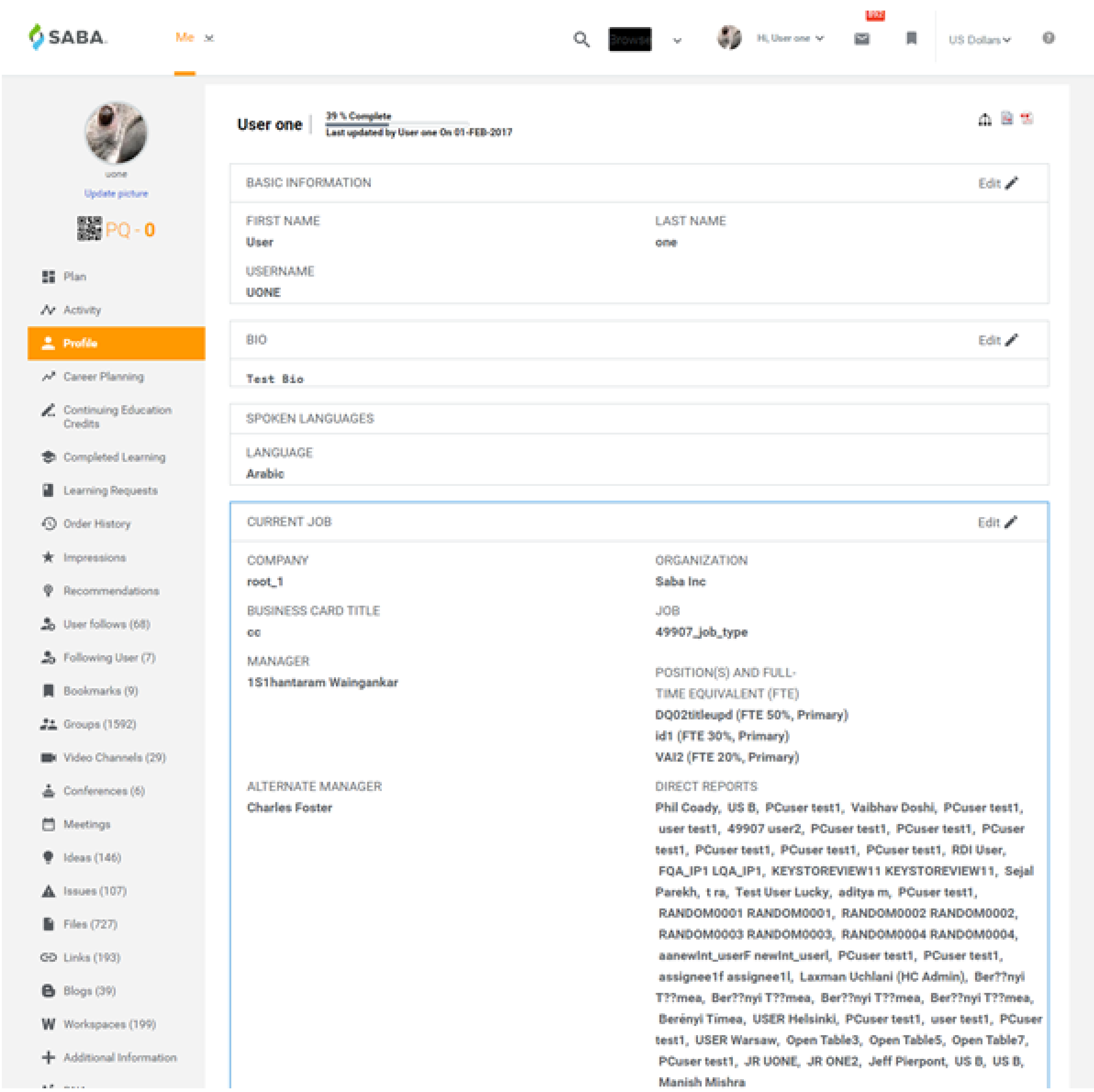


Figure 2: Profile page

Home page

Saba Cloud Home page now shows the **new** header that is cleaner and less cluttered with a modern new **Apps** style navigation menu. This menu appears only when the setting **Enable new tile style IA** is enabled in **System > Configure System > Services > Foundation > User Interface**. By default, this setting is disabled. To enable, please contact your system administrator.

When the new **Apps** menu is enabled, the following changes occur on the Home page:

1. The existing menu structure disappears and new Apps menu appears with **Home** selected as default. On clicking the Apps menu, the other options appear.

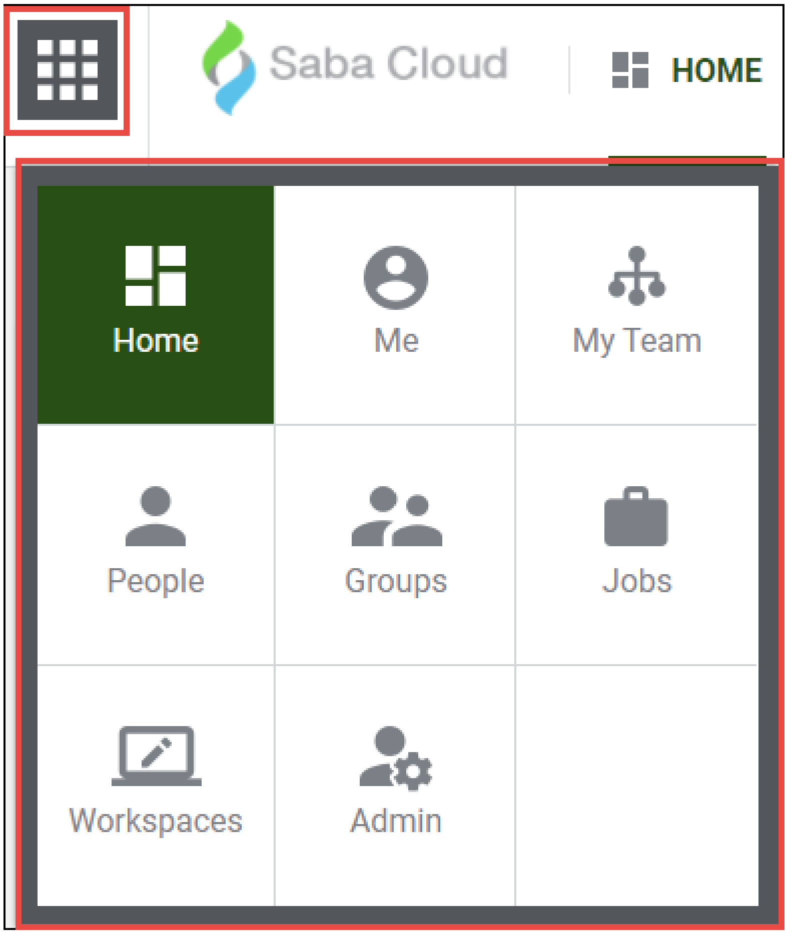


Figure 3: New tile menu

2. Global search box opens a popover through a glass icon click.

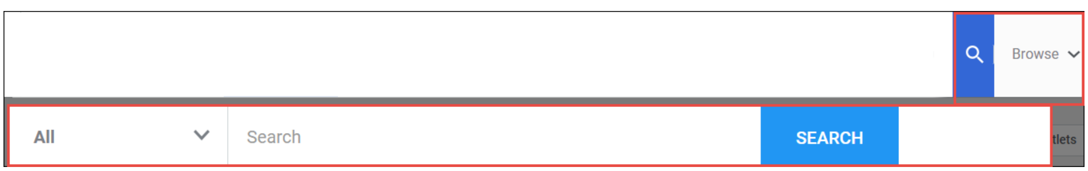


Figure 4: Global search box

3. The arrow besides **Browse** opens the dropdown list.

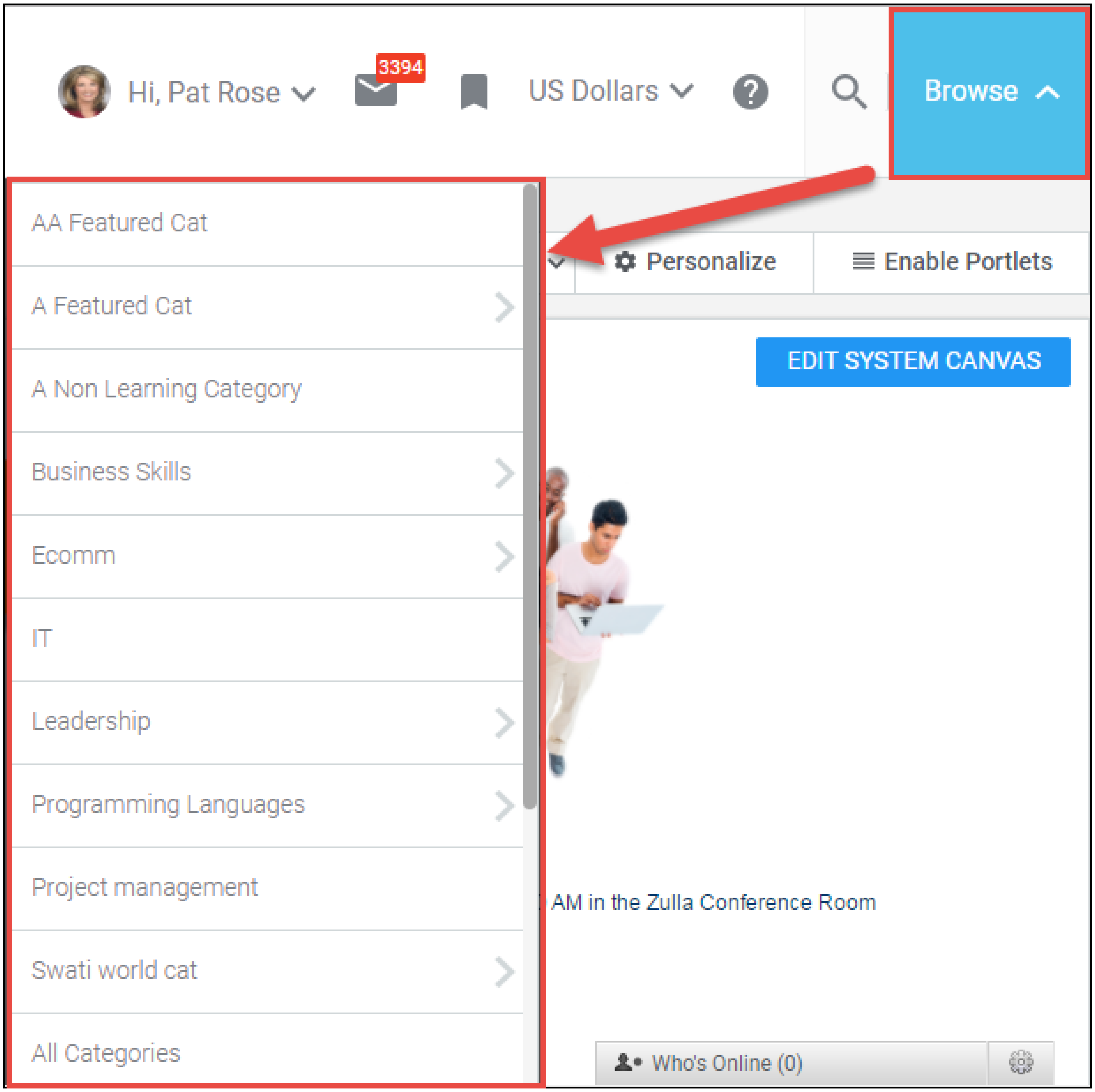


Figure 5: Browse

4. Calendar and Meetings menus moved under the username dropdown list. The user's profile picture is surfaced besides the username dropdown.

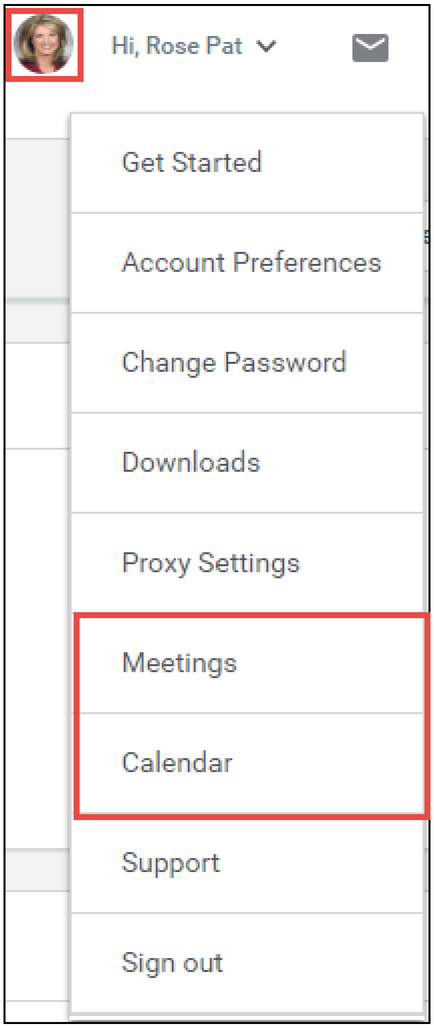


Figure 6: Improved username dropdown

The other changes made on the Home page:

1. The copyright text from the configurable area of the footer is now moved to the right along with the logo. This section is not configurable and applicable only to the default theme. In custom themes (Microsite), the super user or system administrator must remove the following copyright text from Application footer (HTML) configuration by navigating to Admin > System > Configure System > Microsites > <microsite-name> > Configure branding.

   Copyright &#169 2016 Saba Software, Inc. All rights reserved.

   Note: This is mandatory or duplicate copyright messages will appear in the footer.

   The left section of the footer is still configurable which is 770px for screens up to 1280px wide resolution and 870px for screens with higher resolutions.

2. The **My Plan** portlet is enhanced such that it is now displayed vertically on the right edge of the Saba Cloud **Home** page. This portlet expands and contracts with the number of modules or features that are enabled in the application.

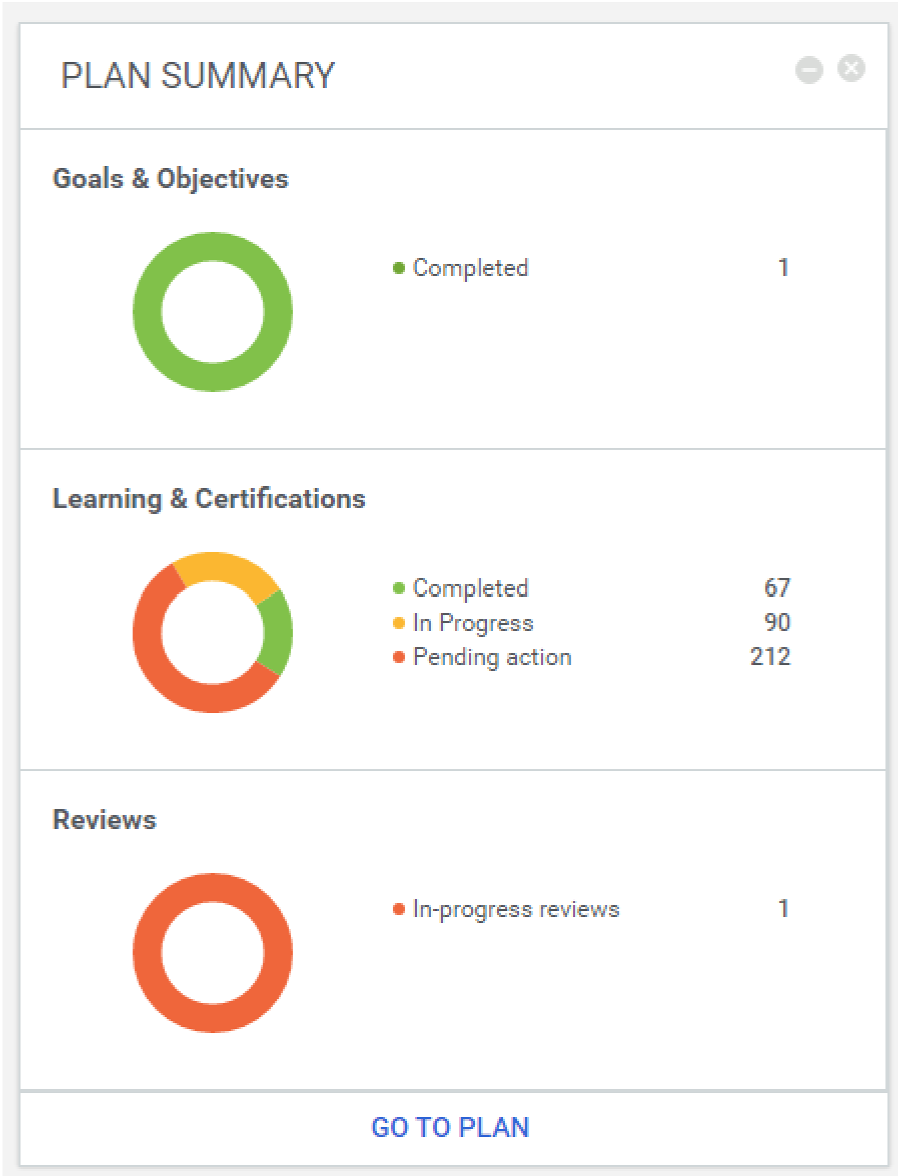


Figure 7: Plan Summary portlet when different modules are enabled

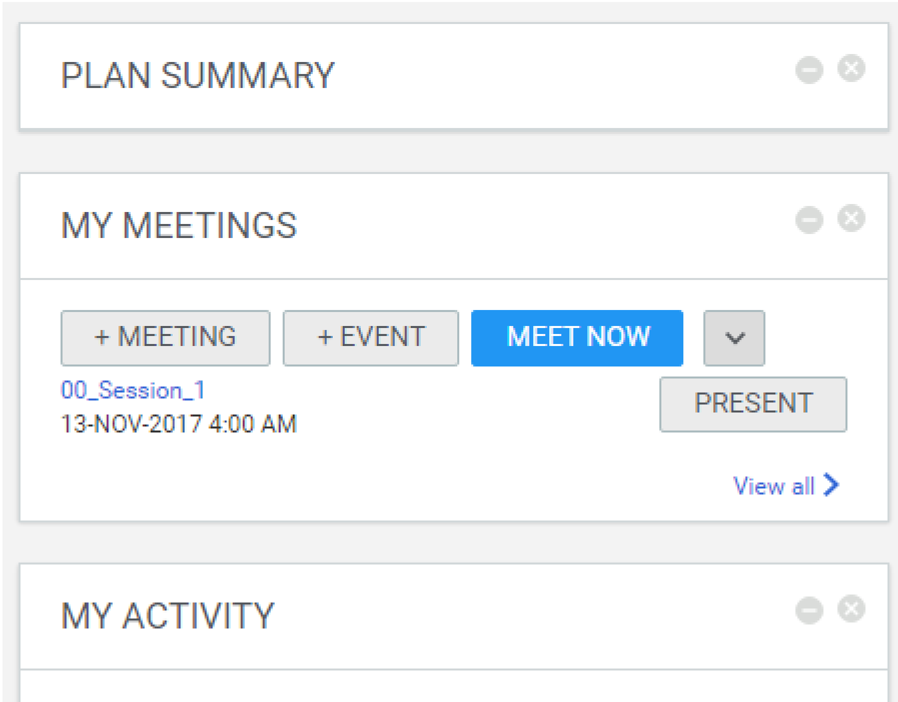


Figure 8: Plan Summary portlet when no modules enabled

My Team page

This update enhances the **My Team** page to provide a better visual styling and user experience. The enhancements affect the following roles:

- Manager
- Alternate Manager
- Organization Manager
- Position Manager

The following prominent changes are done to the **My Team** page:

- The learner result listing on the page has a new grid appearance with the following new columns:
  - Upcoming
  - Overdue
  - Approval

  Each column can contain a number, if applicable, which indicates the number of activities in that status. Clicking the number opens a pane inline displaying those activities along with actions for them. For example, the following image displays four overdue activities of Abhishek.

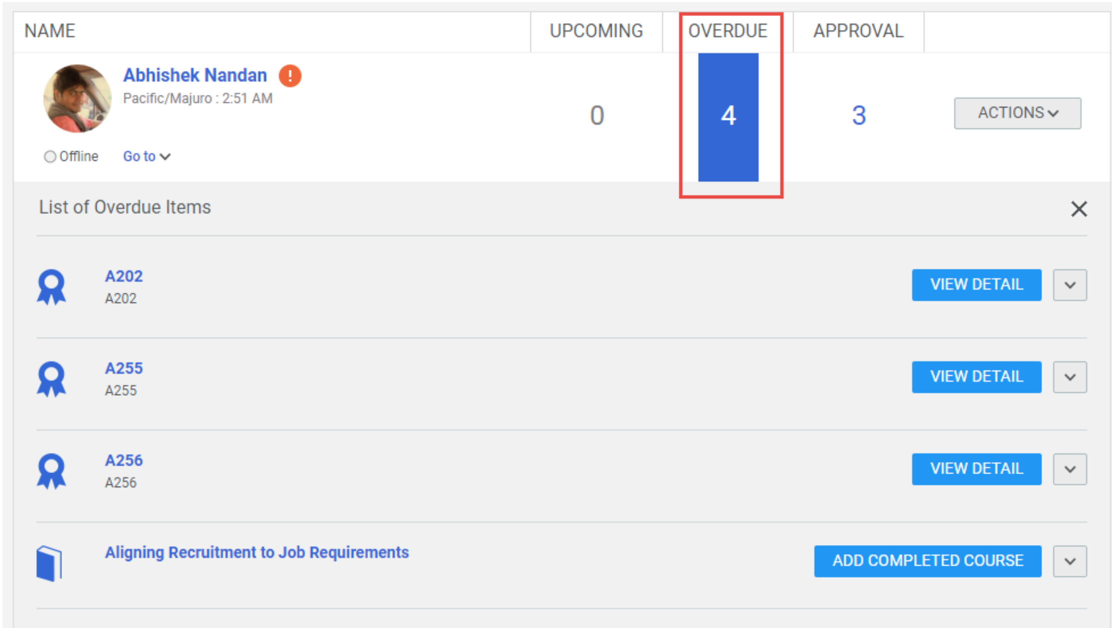


Figure 9: My Team - Expandable columns

- The filters are now integrated and expand and collapse on the page. Filters vary as per the role you access the page with.

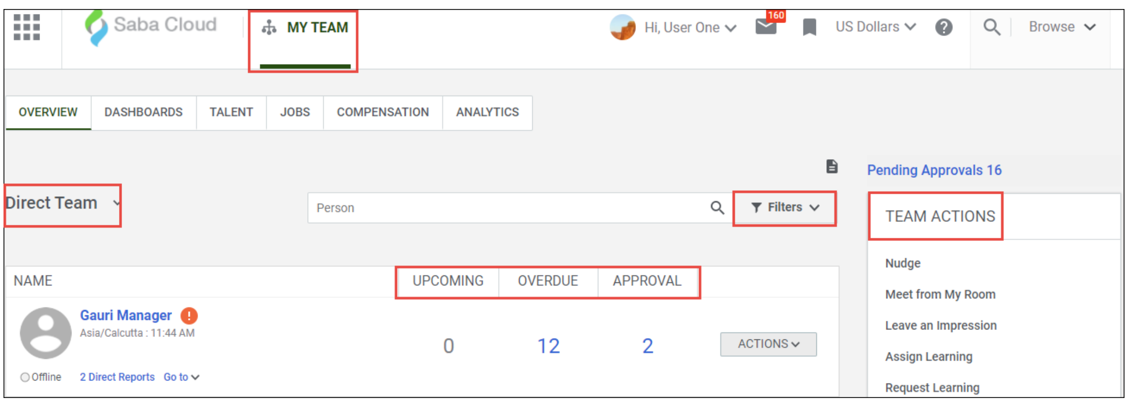


Figure 10: My Team - Direct Team

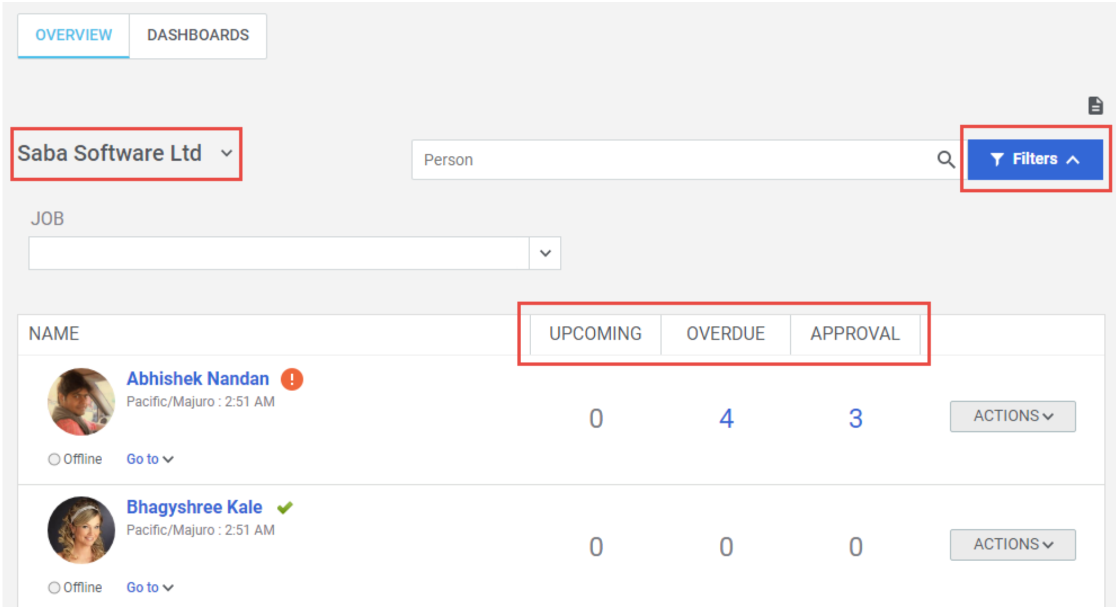


Figure 11: My Team - Organization Manager

The following sections describe enhancements specific to each role.

Organization Manager

The **Organizations I Manage** dropdown is now renamed to **Organizations** for organization managers on the **My Team** page, and enhances its usability so that organization managers can now search for organizations they manage from the dropdown itself.

By default, a blank search displays all organizations that they manage.

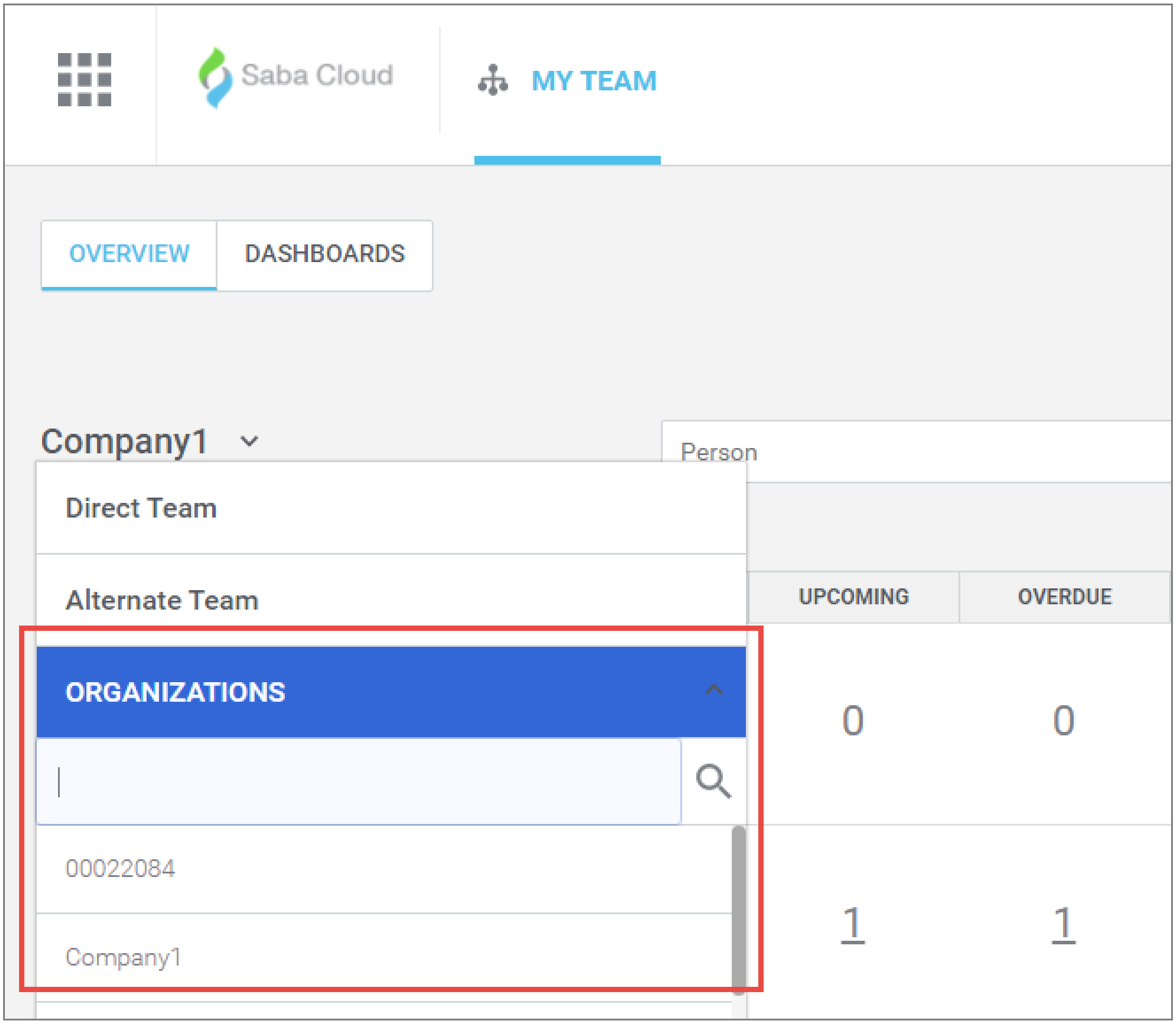


Figure 12: Enhanced Organizations dropdown menu with blank search

Specifying a search string displays only the organizations with titles that match the search string.

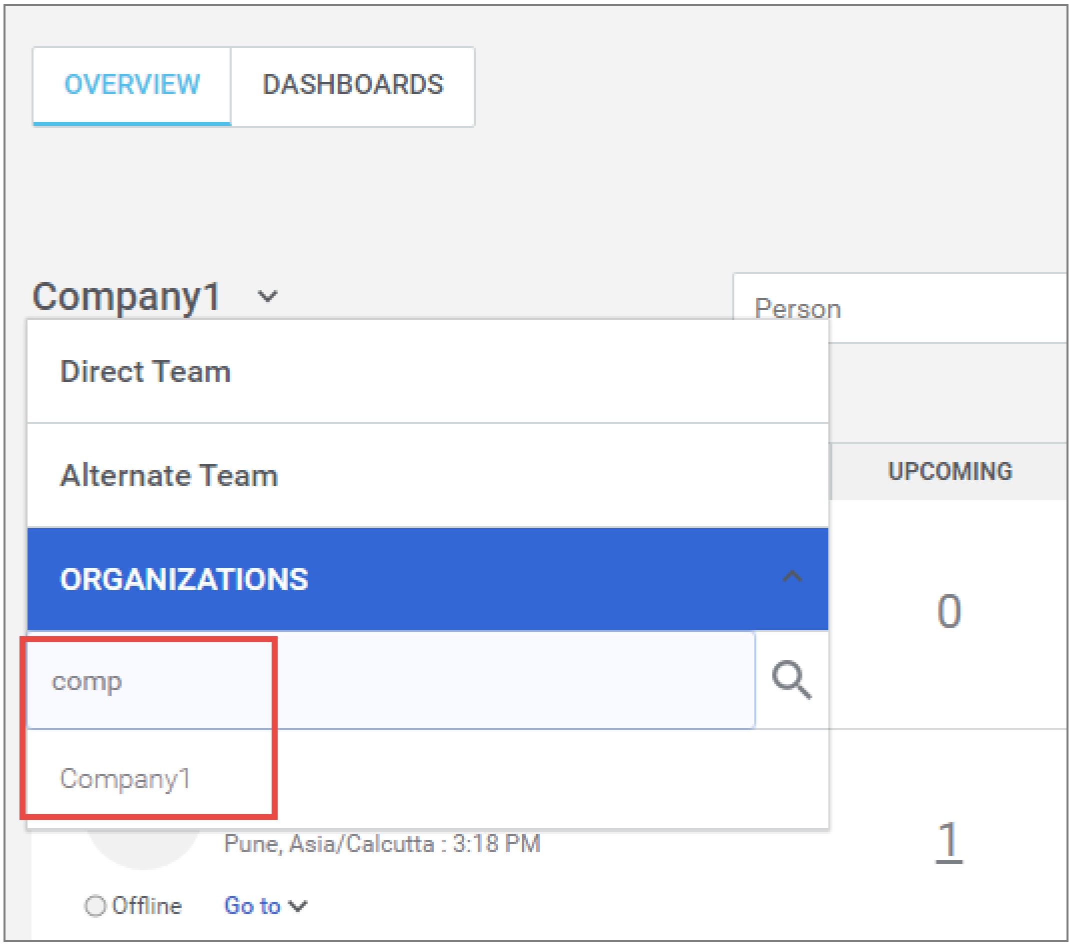


Figure 13: Enhanced Organizations dropdown menu with search string

Position Manager

If a position manager has more than one position to manage, then the **Other Teams** dropdown list displays the **All positions I manage** option. This option is displayed as the last option in the dropdown list.

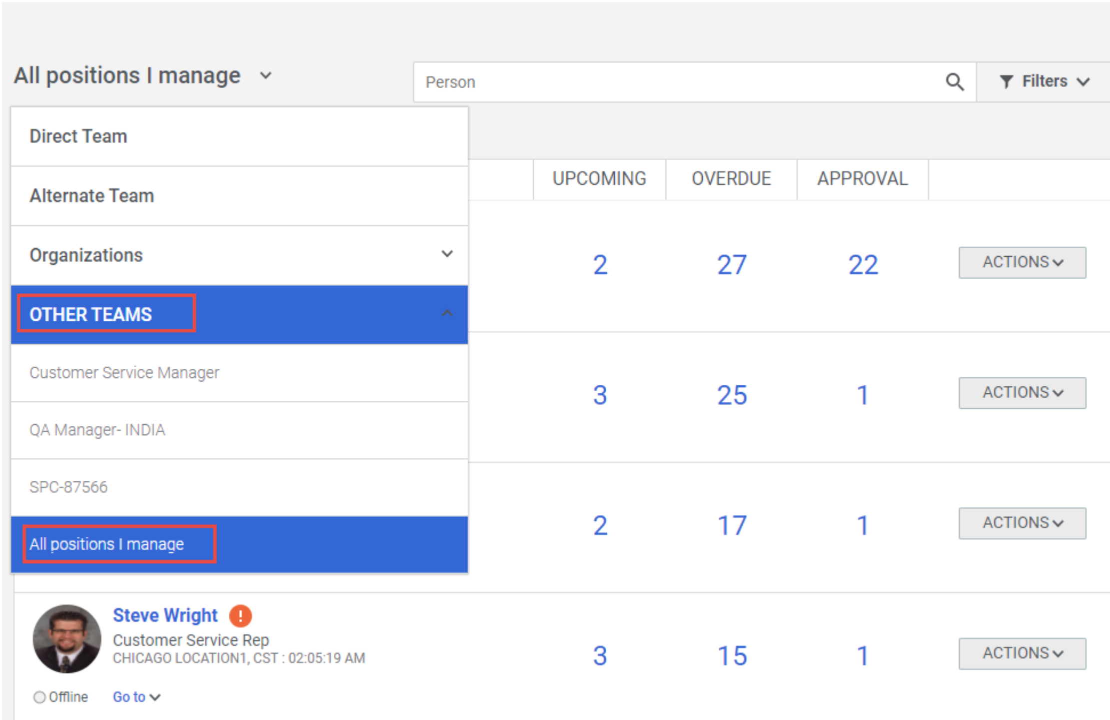


Figure 14: My Team - Position Manager

Selecting this option displays all positions you manage as a position manager. If there is a single position you manage, then this option is not displayed, though.

If you are only a position manager and have no other managerial role, then **All positions I manage** is displayed as the pre-selected option.

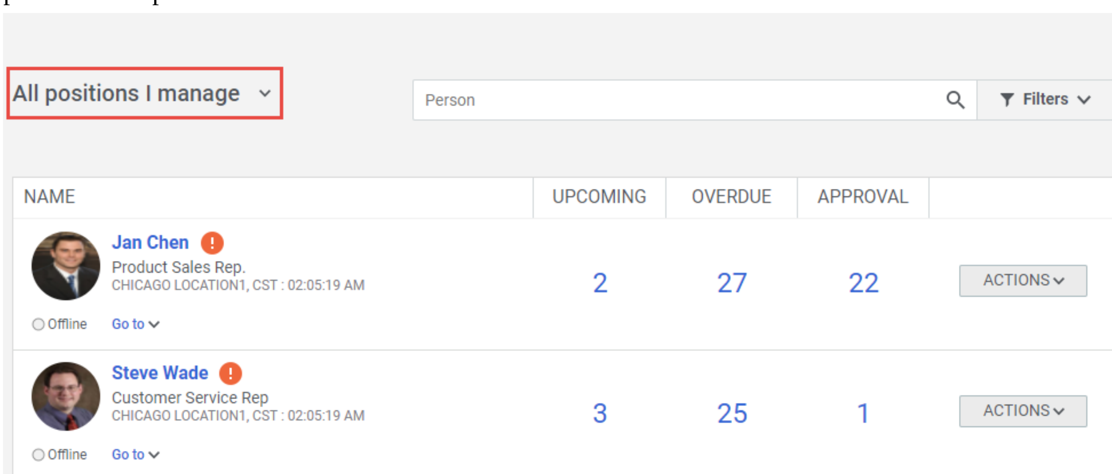


Figure 15: My Team - Position Manager

My Plan

Configurable My Plan icons

The system administrator can now create a common sprite for all plan icons and upload it in microsite so that the icons appear for courses, certifications, skills, goals, reviews, and other plan items in My Plan view. The admin needs to navigate to **System** > **Configure System** > **Microsites** > <*microsite-name*> **Configure branding** and click **Download** corresponding to **16. Upload configurable sprite image or provide URL** to view the sprite palette. Create a palette similar to the downloaded image and then click **Choose File** to upload the configurable sprite image or enter a URL.

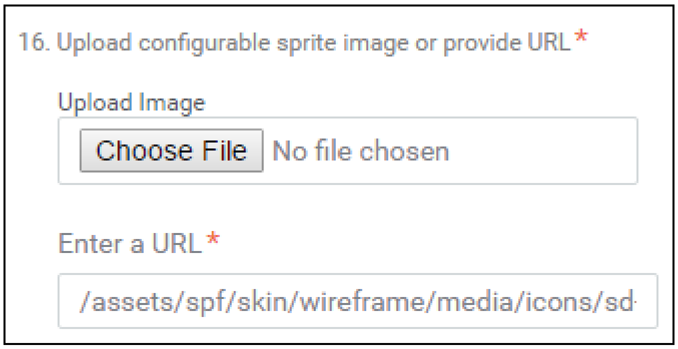


Figure 16: Upload configurable sprite image

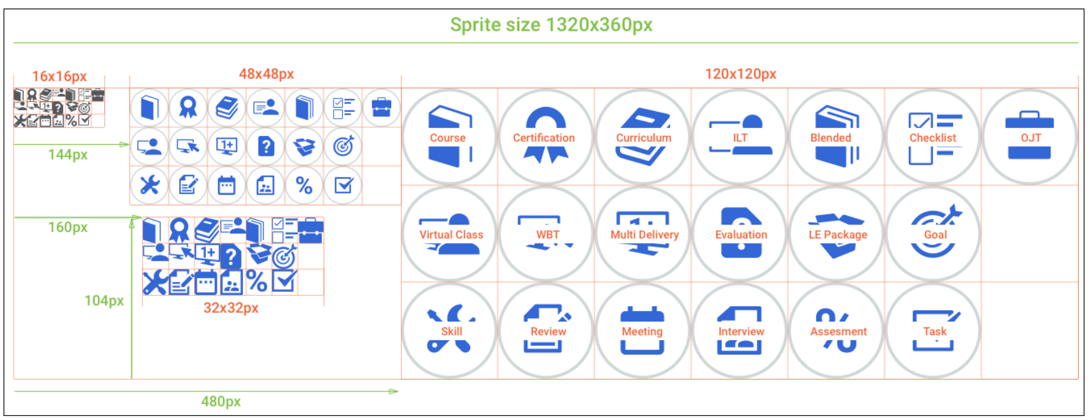


Figure 17: Sprite image

The dimensions of icons and the sprite size should be similar to the dimensions mentioned in the above figure. Once the sprite is uploaded, the icons appear accordingly for the plan items.

As an end user, navigate to ME. Notice the icons for courses, certifications, skills, goals, reviews, and other plan items.

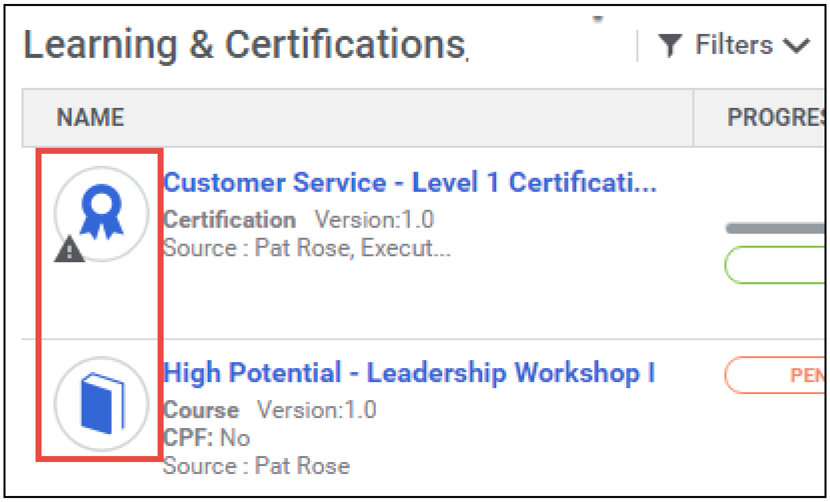


Figure 18: My Plan > Learning items

First level breadcrumb trail

The **My Plan** & **My Team** pages now supports the first level breadcrumb trail. On the My Plan page, the user can click the desired tab (Goals & Objectives, Skills Development, and etc) to access the related items and click **Back** to navigate to the **My Plan** page.

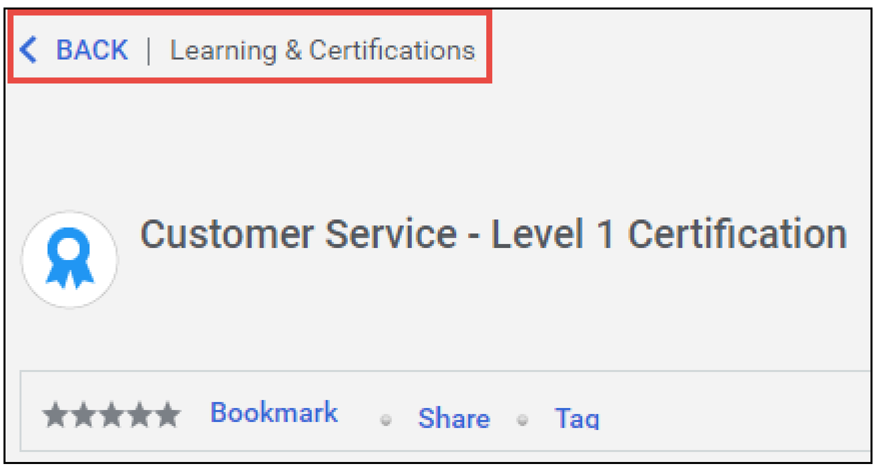


Figure 19: First level breadcrumb in My Plan

On the My Team page, the manager can click the team member name and click **Back** to access the **My Team** page.

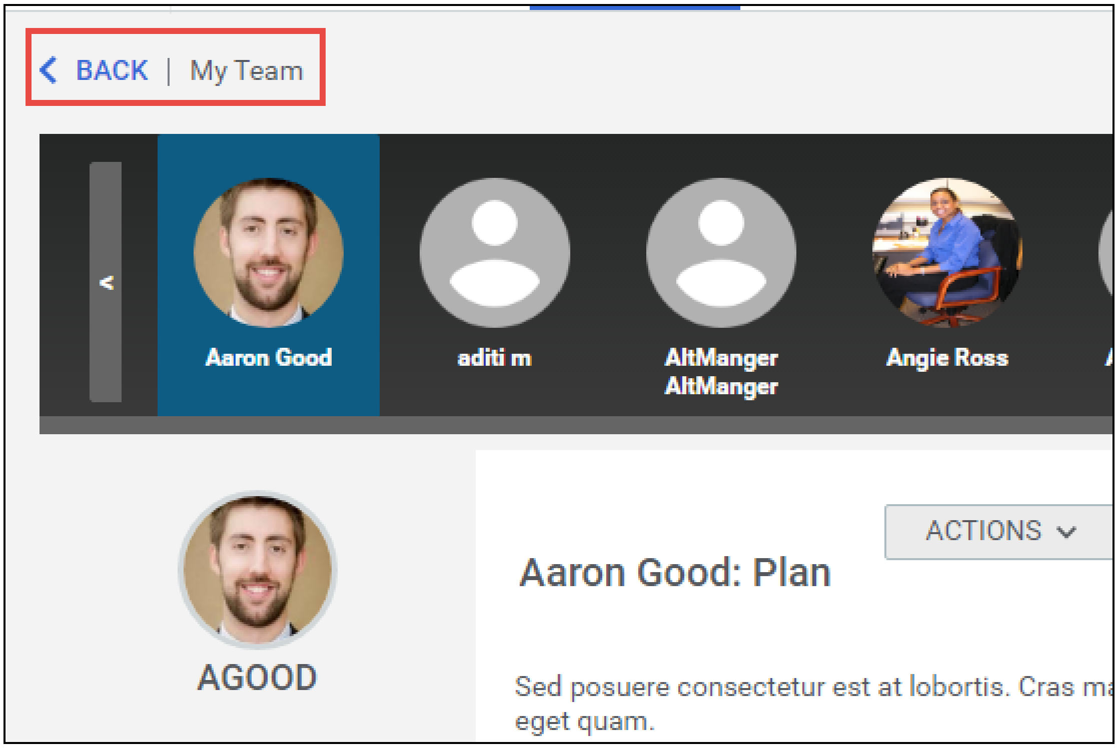


Figure 20: First level breadcrumb in My Team

Usability enhancements to Organization Chart

How did it work?

N/A

How does it work now?

In this update the Organization Chart layout and design has been enhanced to match the new design and layout of Saba Cloud.

The changes made to the Org chart design apply to all access points of the Org Chart: The Home Page, People Tab and from My Team Actions and Talent menu.

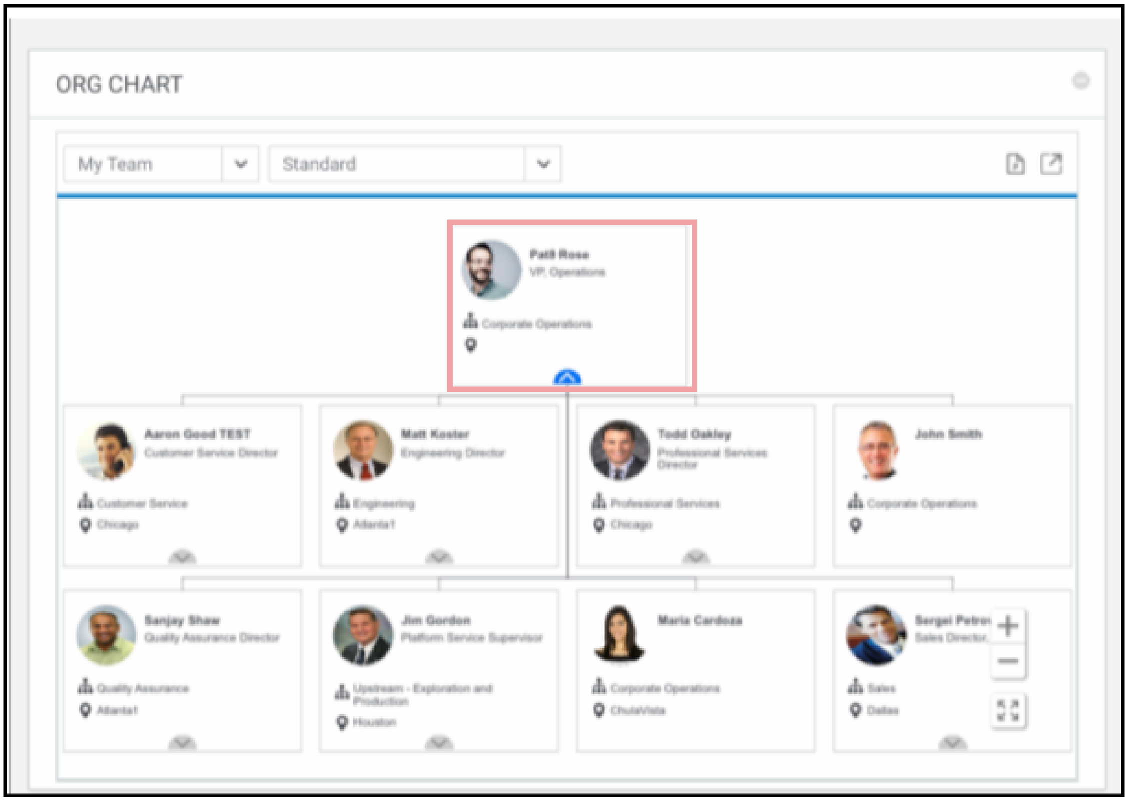


Figure 21: Org Chart

The following label text has been changed:

- My team to **My Team**
- Org view to **Management Chain**.

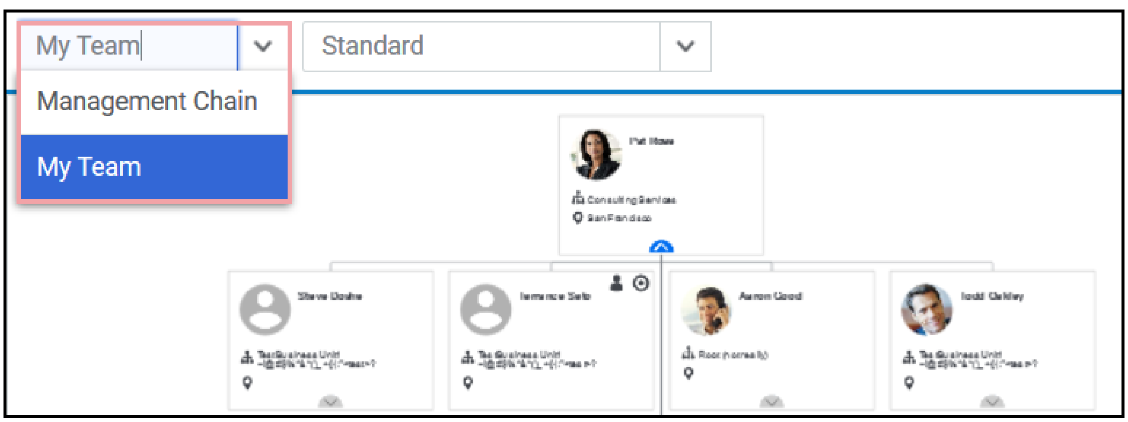


Figure 22: Label Changes

The following label text in the main Org Chart drop down:

- Contact details to **Directory View**
- Name and picture only to **Basic View**
- Talent data to **Talent View**

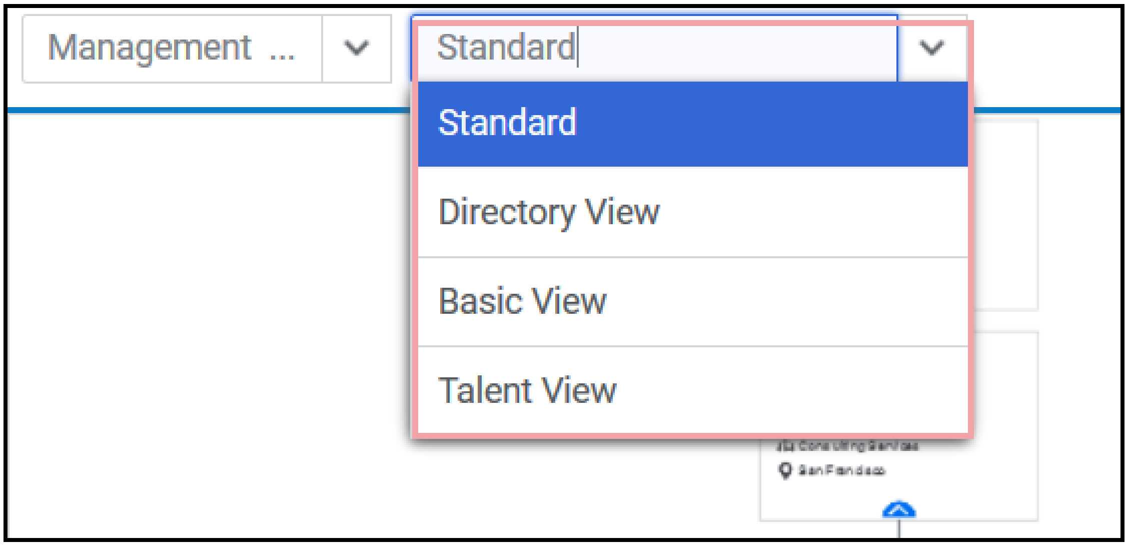


Figure 23: Label Changes

Use case

Organization chart layout and design has been enhanced to match the latest design of Saba Cloud.

Enhanced browsing capability

How did it work?

Prior to this update, the **Browse** button in Saba Cloud took users to the **Browse** page that displayed many browse options, where users had to perform multiple clicks to browse for the required resource. The top portion of the page displayed featured categories (folders). Below the Featured area, the page displayed a site map of all resource types. Depending on how users navigated and what was shared with them, they could see different category lists and options on different pages.

Additionally, the **Browse** portlets on the application home and group home pages and the category widgets had different behavior in terms of how they displayed various browse categories.

How does it work now?

This update enhances the usability and working of the **Browse** button, **Browse** portlets, and category widgets so that they provide a consistent user experience.

Enhanced Browse button

The **Browse** button in Saba Cloud is enhanced by introducing a dropdown menu on the button.

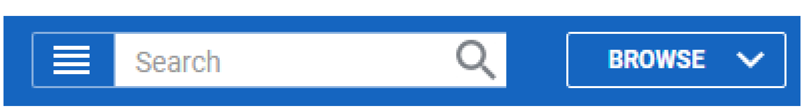


Figure 24: New Browse button

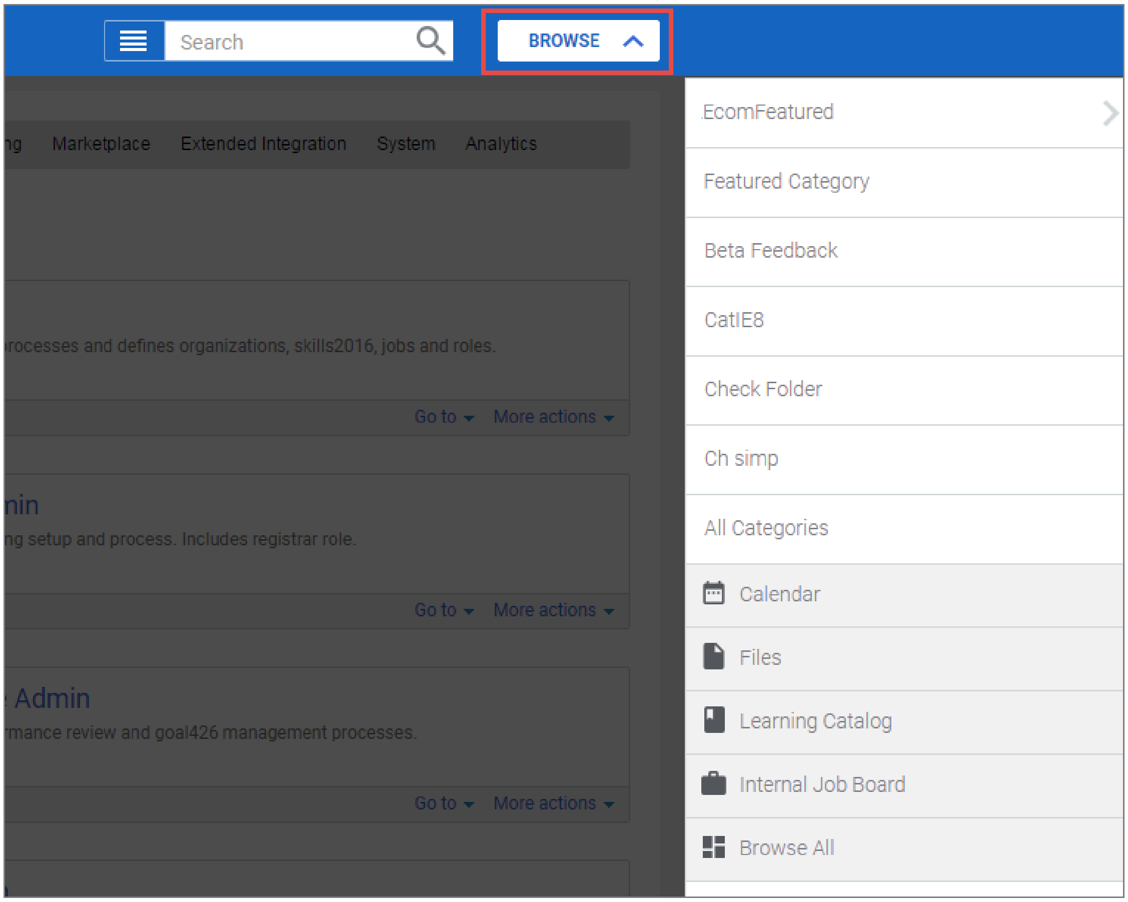


Figure 25: New Browse button with dropdown menu

The **Browse** dropdown menu contains the following:

- **Categories**
  - Displays first 10 featured categories in alphabetical order. If there are no featured categories, then the list displays all categories available to the user in alphabetical order.
  - This is followed by an **All Categories** menu link, clicking which displays all available categories, featured and non-featured, in an alphabetical order. Clicking **All Categories** provides a **Search Categories** field to search for the required category.

    Note: The **Search Categories** field is available only if there are 150 or more categories.

  - Displays only those categories that contain at least one resource (formal or informal) to which the user has access. If there is no content in a category, then the category is not displayed.
  - Categories with child categories display a right arrow icon, clicking which displays the child categories. If the child category itself has next level child categories, then they can be viewed in similar way.
  - Each category level contains a **Back** link and a **See all <*parent category name*>** link.
  - Clicking a category name or the **See all <*parent category name*>** link displays the result page listing all resources in that category. Users can further narrow down results using the applicable search filters.
  - On clicking any link from Browse, except for Learning Catalog, Saba Cloud displays only those categories that have the specific resource type added to it.
- **Calendar**

  The **Calendar** link is displayed after the categories section. Clicking this link takes users to the calendar page. This page was earlier accessible via the calendar icon in application header.

- **Files**, **Learning Catalog**, and **Internal Job Board**

  These links take users to all files, learning catalog, and all job openings pages respectively.

- **Browse All**

  Clicking the **Browse All** link takes users to the Browse home page.

Enhanced Browse portlets

The **Browse** portlet on home page, group home page and the folder browse widget in **Resources** tab of a group are enhanced so that they are consistent with the **Browse** button experience. They display categories in an alphabetical order. Only those categories that are available to users and have content are displayed. Some distinguishing changes include:

- Displays 10 categories at a time. The **More** link is replaced with **More** button that allows users to expand the list of categories at each level and load more.
- The portlet does not have the **Calendar**, **Files**, **Learning Catalog**, and **Internal Job Board** resources, and **Browse All** links.

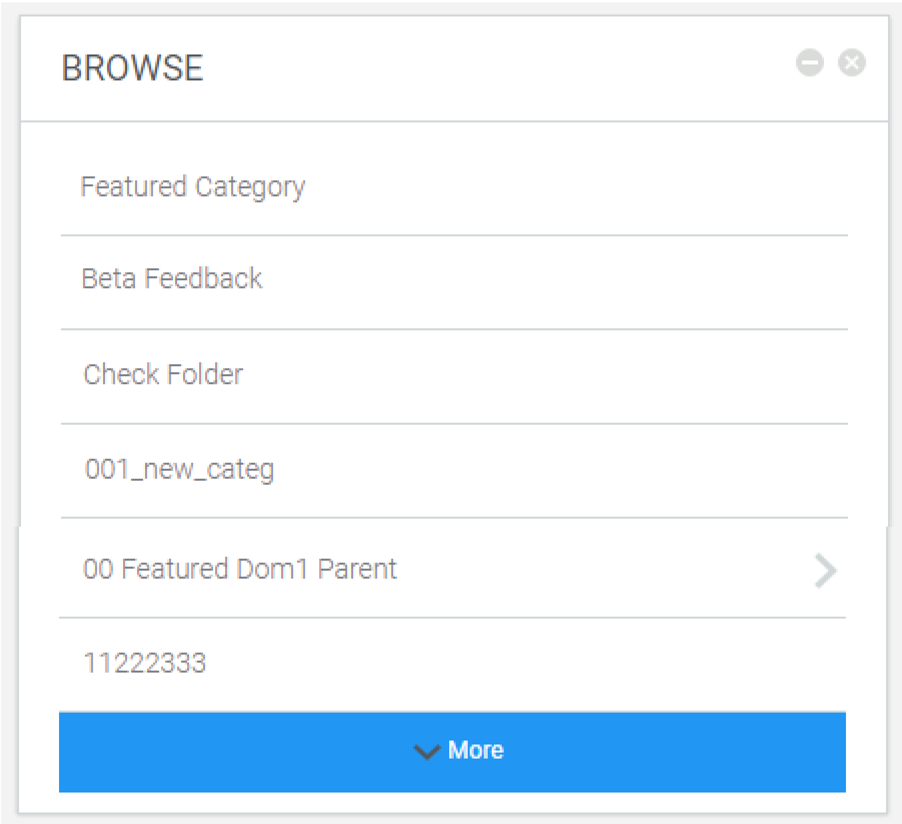


Figure 26: New Browse portlet

Enhanced Category widget

The **Category** widget is also enhanced so that it is consistent with the **Browse** button experience. It is consistently displayed when the user starts by browsing for a resource, for every resource type. The category browse widget is not displayed if users reach the results page from global search. The changes are consistent with the **Browse** button and **Browse** portlets. The category widget is not displayed for jobs and meetings because there is no support to add categories to them.

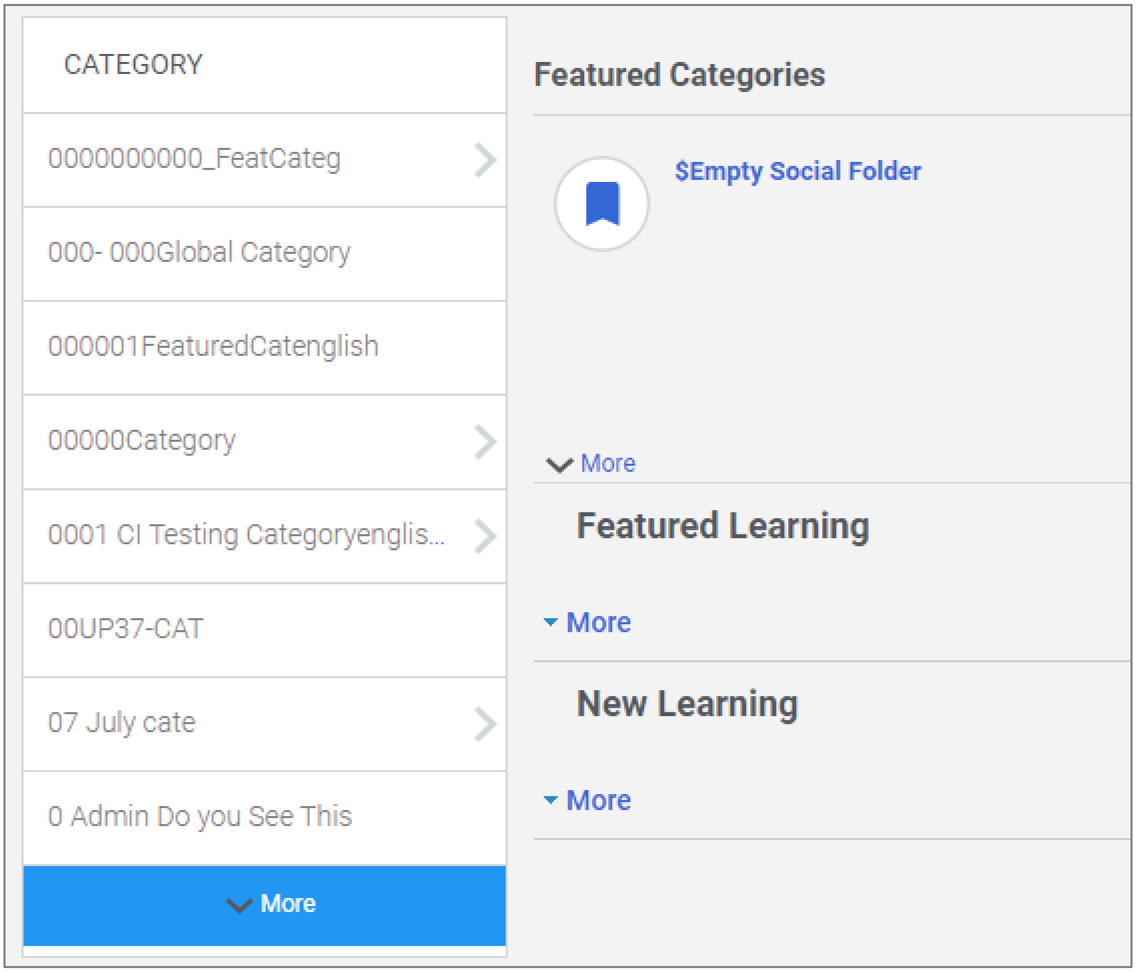


Figure 27: New Browse portlet

Use case

While browsing for resources, the categories must be surfaced as a menu to allow users to easily navigate and browse for the required resources in a familiar and user-friendly manner.

List and Grid view extended to all resource types

How did it work?

Prior to this update, the grid view was only available for Learning catalog resource type. Also, the grid view was not displayed properly for courses with long names or description. The size of the grid view was not consistent. Action buttons were not displayed at one place. They were adjusted in tile box according to the course information.

How does it work now?

With this update, regardless of resource type the user can now view resources in both list and grid view. The existing setting **Default view for learning catalog search** which is now moved under **Foundation** > **User Interface** from **Catalog** is now extended to support all resource types. By default this setting is enabled. When enabled, all the search results appear in Grid view format else in List view. On clicking the List view icon in search results, the objects appear in the list format.

The list view and grid view icons are now visible for all resource types on the following pages:

- Guest catalog search results page

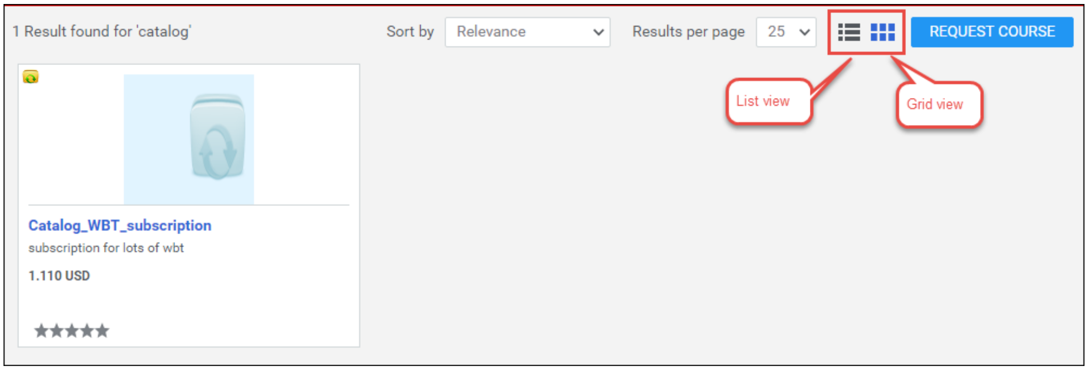


Figure 28: Guest catalog (add list grid)

- Browse Catalog page

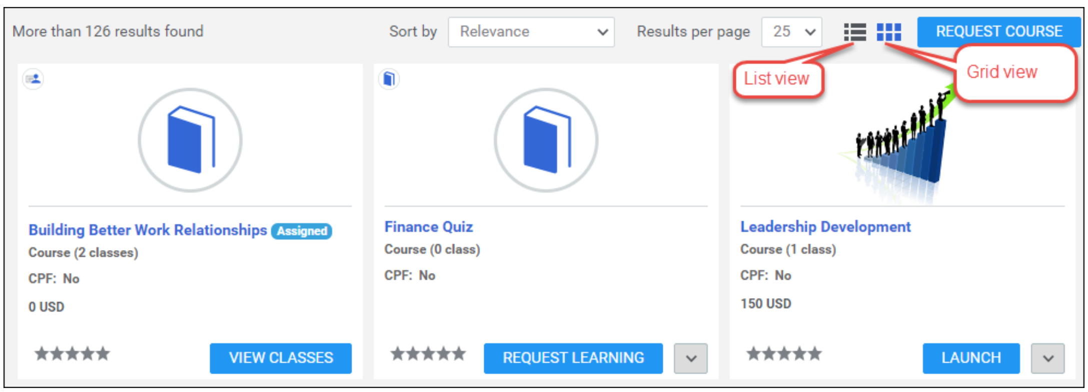


Figure 29: Browse catalog

- Blogs search results page

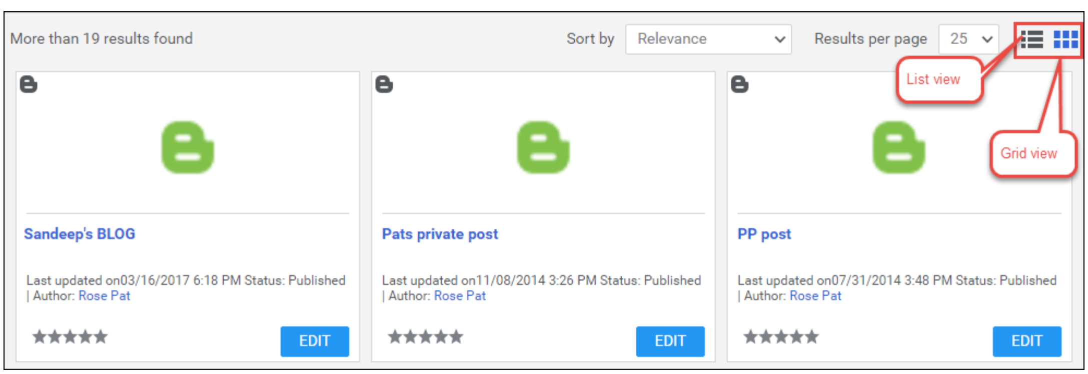


Figure 30: Blogs search results page

- Global search page

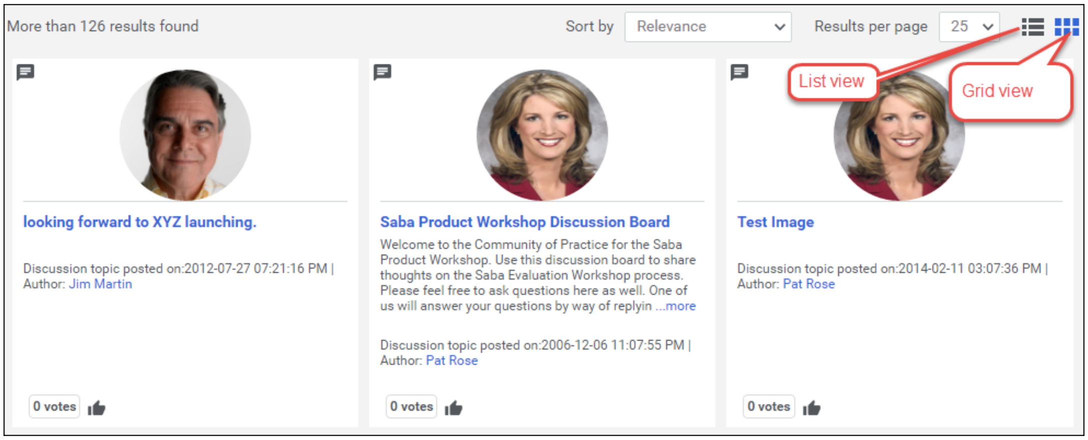


Figure 31: Global search

In addition to this, the action button for all resources are now bottom justified, and appears on the right. The star rating has been moved to the left. All the tile boxes in grid view are in same size.

Note: On the Guest learning catalog and Browse learning catalog pages, for courses with name and description more than 255 characters, a **more** link appears to view the complete description. On clicking the **more** link, the tile size increases for that course. The user must click the **less** link to resize it to the original size.

Use case

The user can now switch between grid and list view on all resource types.

Chapter

2

Analytics

Topics:

Framework enhancements

Current Month and Current Year as new filters

How did it work?

These are new filters.

How does it work now?

The following new date filters are introduced in this update:

- Current Month

  Note:

  When the user selects the *Current Month* filter, the *Current Year* filter is considered **implicitly**.

- Current Year

Both these filters can be used for date calculations, similar to Current Date such as <Months / Years> <before / after> current <month / year>.

Note:

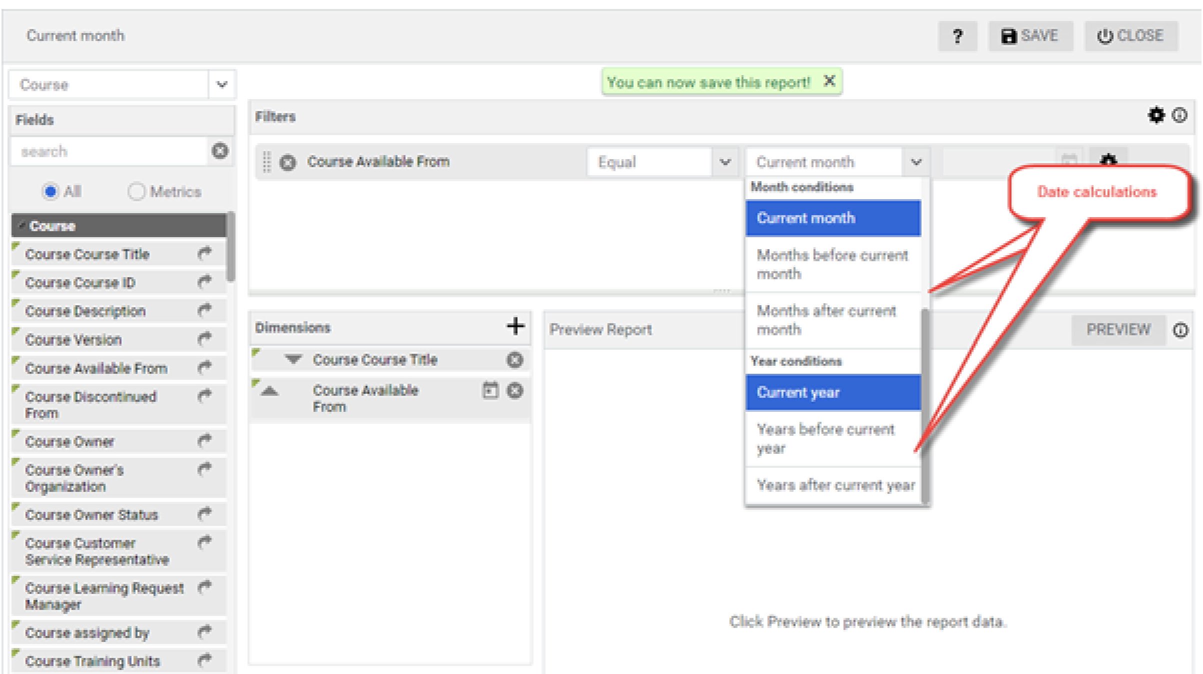


Figure 32: New filters while creating a report

These are also available while creating dashboards and scheduling reports.

Use case

This brings in filter improvements to Analytics.

Manage reports based on services

How did it work?

Currently Analytics supports functionality based access to attribute.

How does it work now?

In this update, all the functionality-based access to attributes in Analytics is now replaced by service-based access. This means, if a Service is disabled under System > Configure System > Services, all the corresponding Analytics attributes will be unavailable.

In addition to this, even the entity groups drop down list will not show the respective groups, if the services are disabled under System > Configure System > Services.

Note: If you attempt to run or edit or schedule reports that have attributes that belong to a disabled service, an error will be shown to switch on the respective service. You can delete such reports that have attributes that belong to a disabled service.

Use case

It will be easier to manage reports based on services than based on functionality.

String concatenation for custom dimensions

How did it work?

Custom dimensions did not support concatenating strings.

How does it work now?

In this update, custom dimensions will now support concatenating strings. This means you can now combine two fields of a component and present it as a single output field, for example: Recertification - Assigned, Completed - Successfully.

You can use **String Concatenation** in the THEN construct.

Note: By default, two string operands can be concatenated with an operator. This can be increased up to three operands combined with two operators by changing the configuration. The analytics admin can set the maximum number of string operands that can be used for string concatenation under **Analytics Settings > Configuration > Max string operands to concatenate in custom dimension** . The default is 2. Only non-clob string attributes will be supported for string concatenation in custom dimensions.

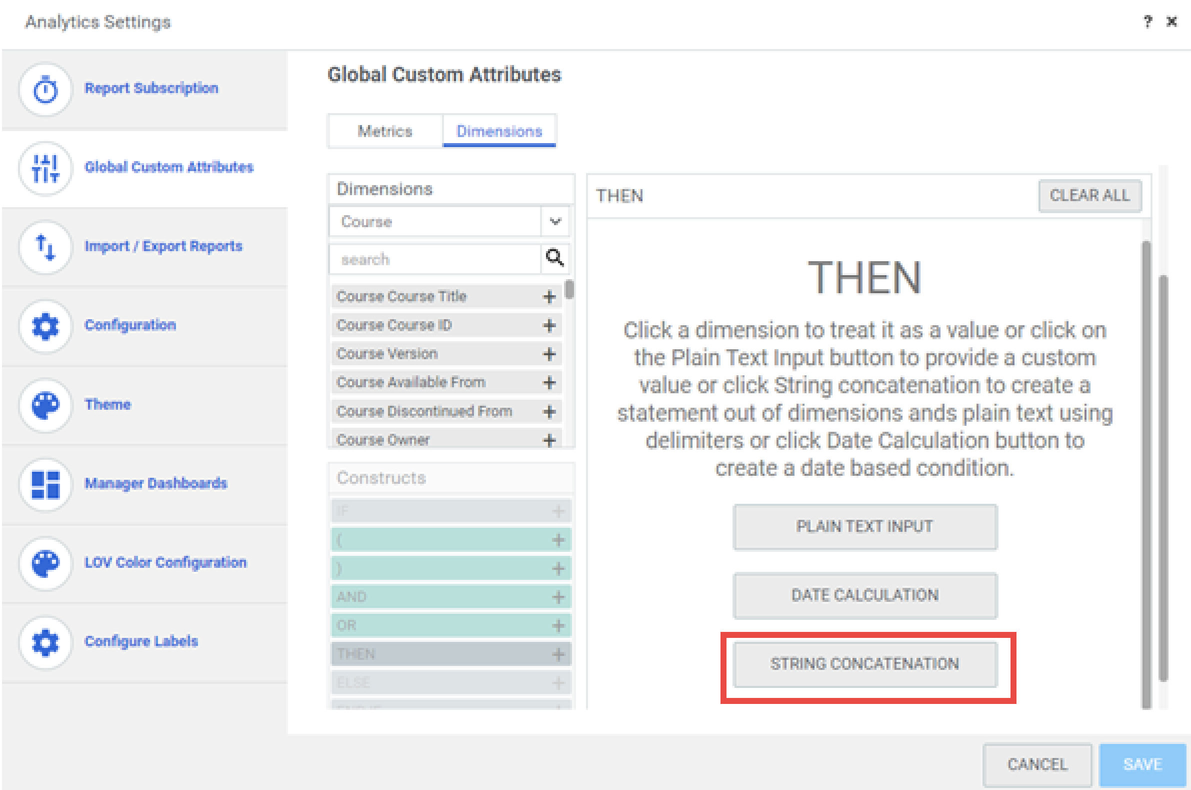


Figure 33: String Concatenation

After you click **String Concatenation**, you need to select the required dimension and the delimiter followed by another dimension or a plain text value to form the concatenated string.

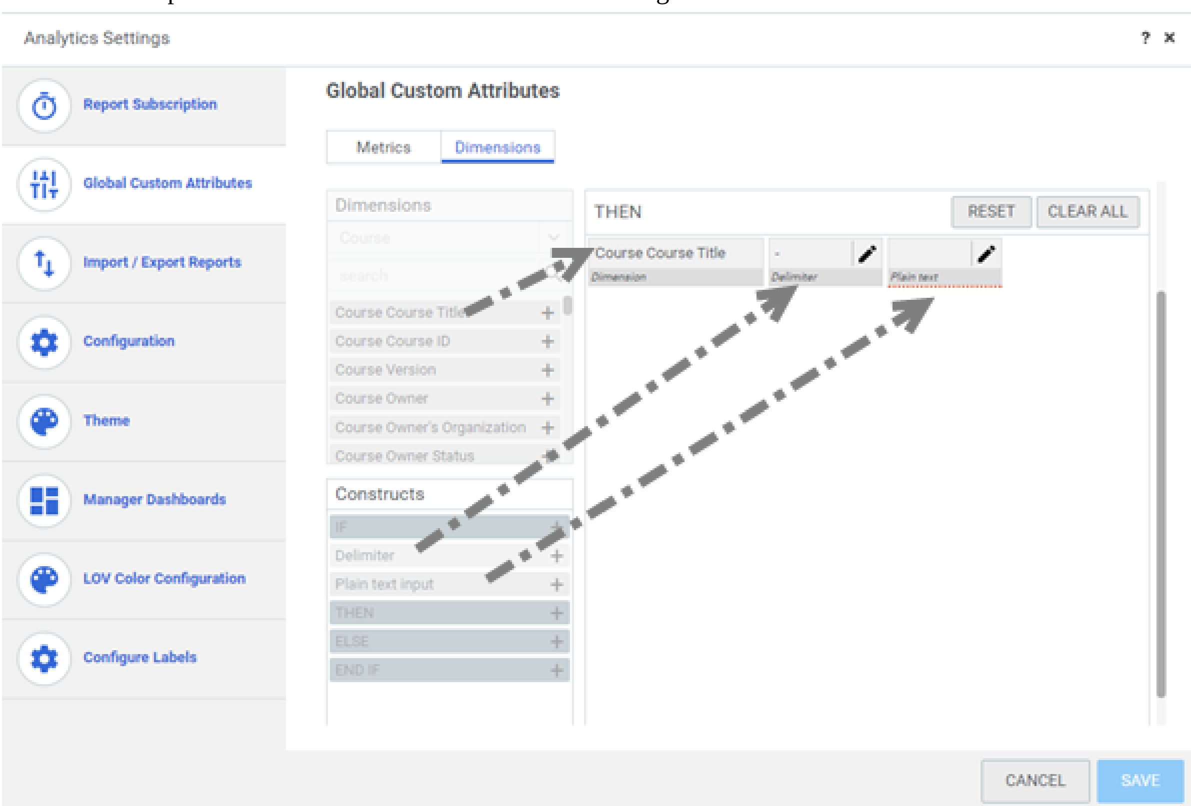


Figure 34: String Concatenation with plain text

You can edit the default "-" delimiter.

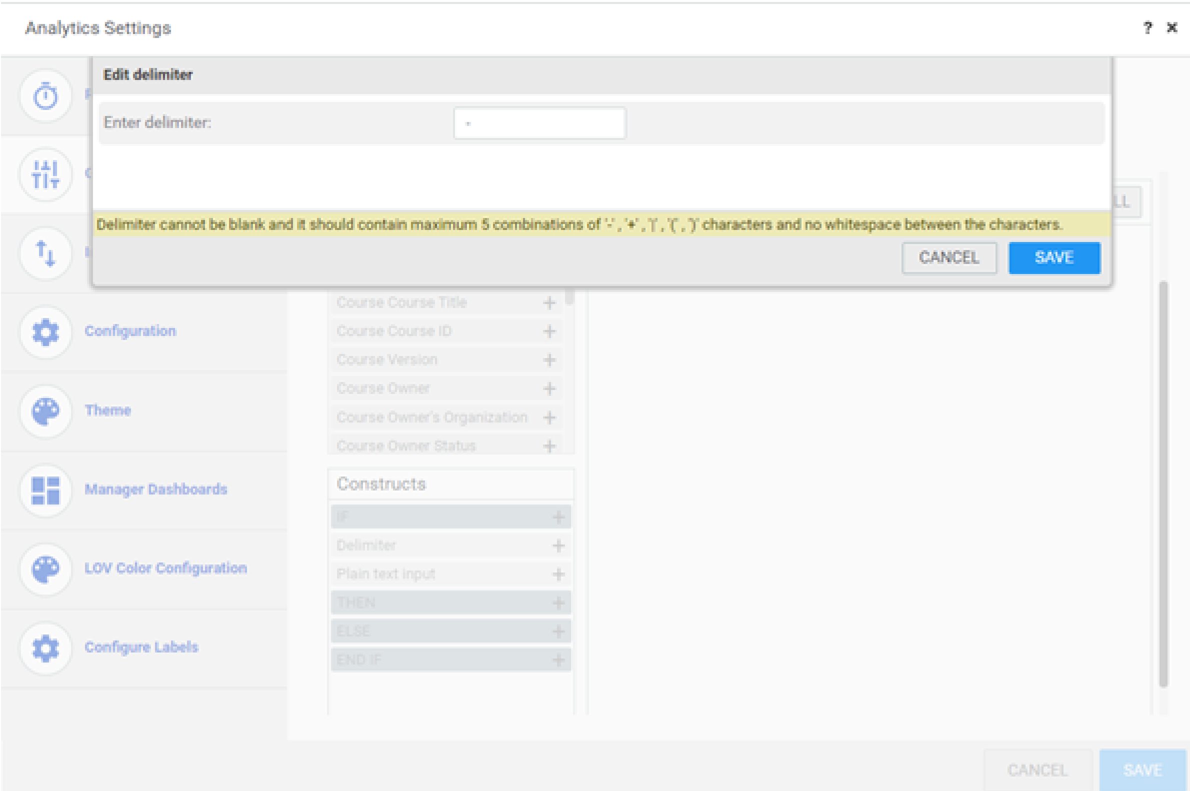


Figure 35: Edit the delimiter

A text area is provided to enter the plain text input.

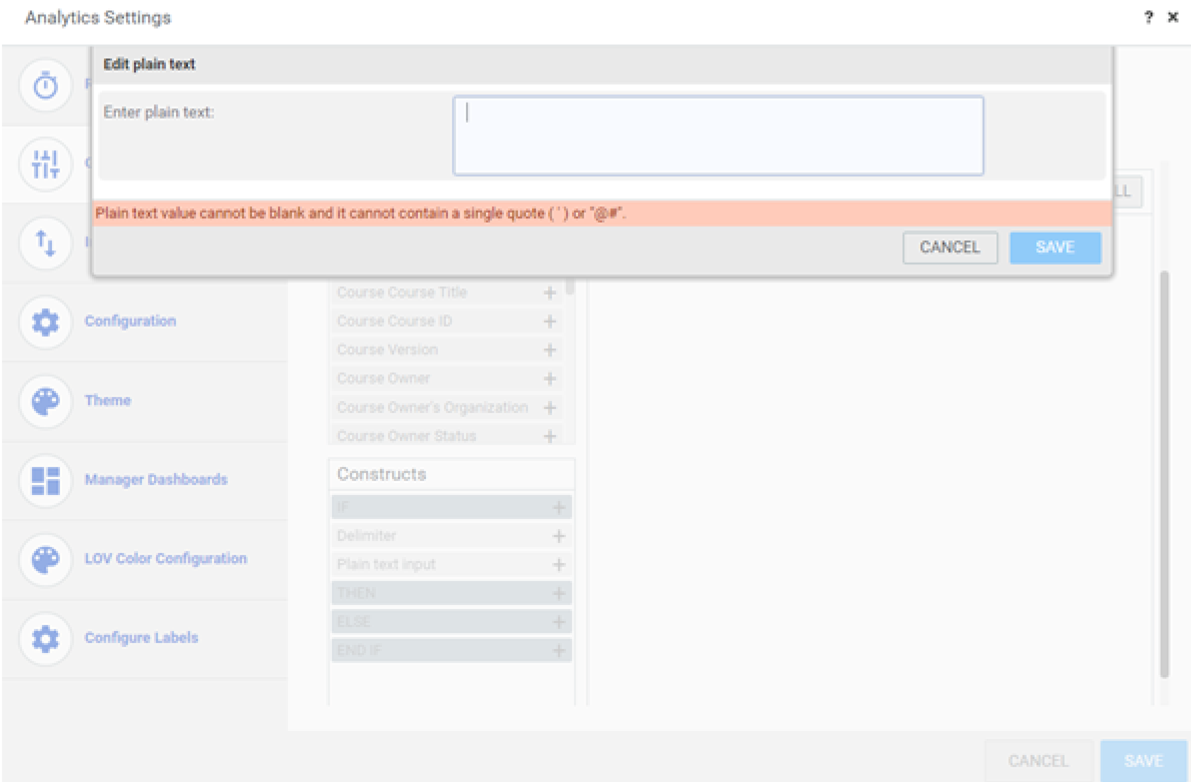


Figure 36: Enter the plain text value

After the string concatenation is done, the same is shown in preview.

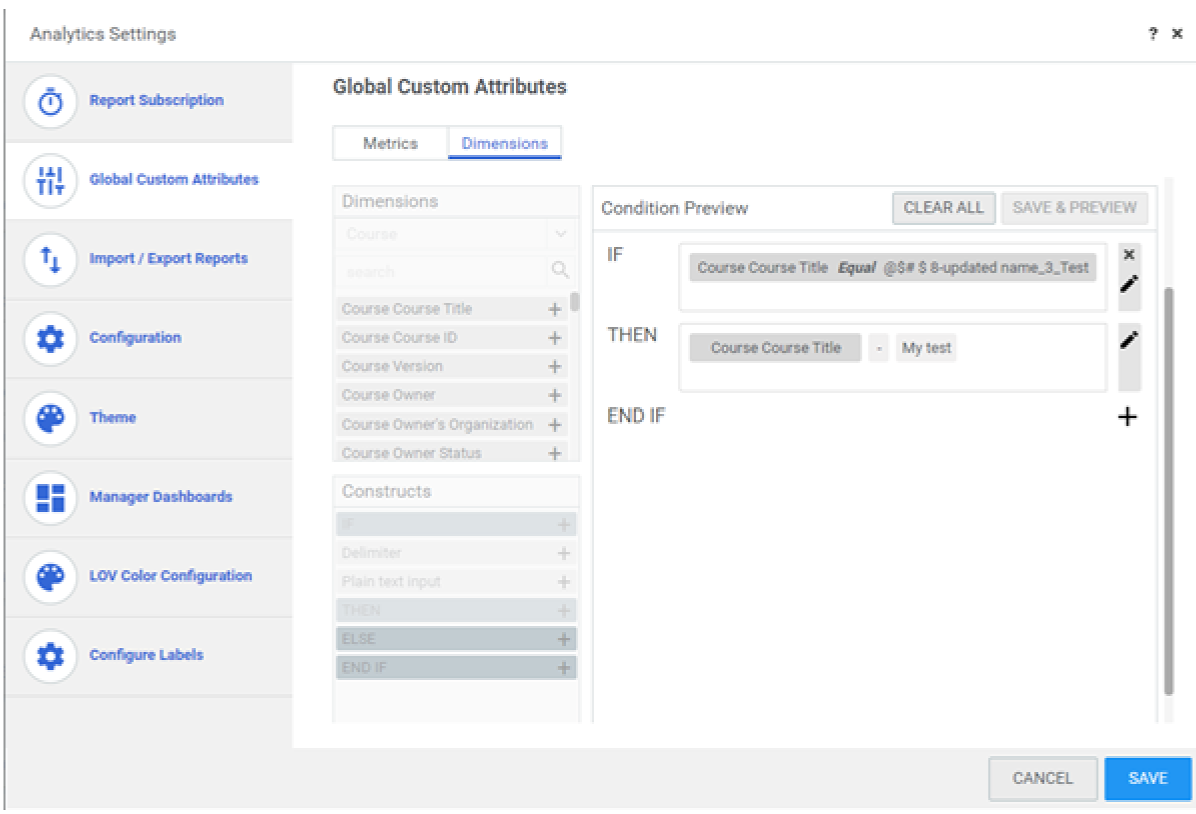


Figure 37: Preview

Use case

This brings in more flexibility to the report authoring.

Suggestions on missing performance filter attributes

How did it work?

Many report executions occupy precious processing time due to lack of filters or mainly lack of ranged values for the filters.

How does it work now?

This update starts showing a recommendation message while building the report, that will guide the user to add the missing performance filter attributes in the report.

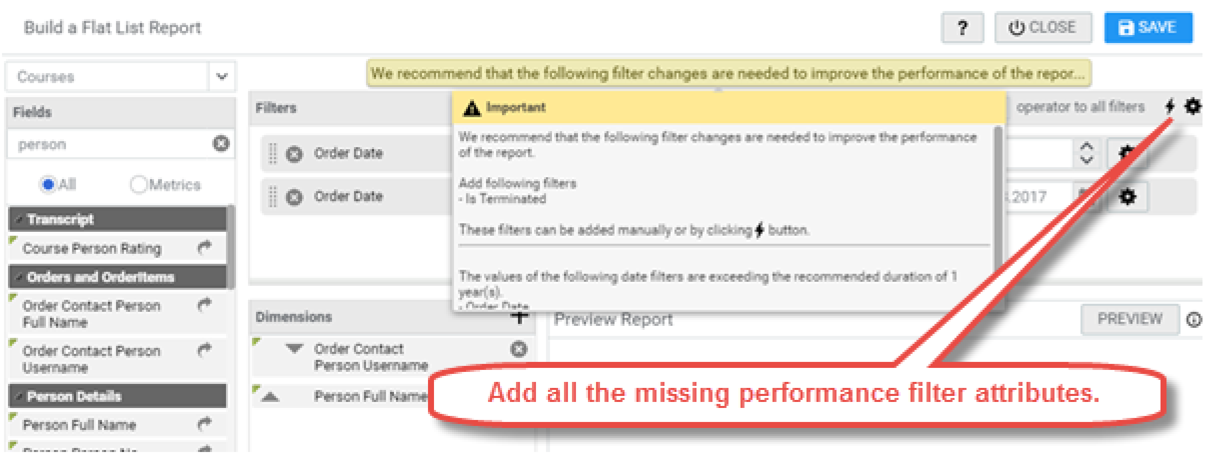


Figure 38: Recommendation message

You can click the flash / lightning bolt icon to add all the missing performance filter attributes.

This feature will also let the user know if the date ranges of the filter attributes added in the report have exceeded the recommended date range value. For example: Current date is 14-03-17, the recommended range is 1 year. A warning message will be displayed if the user enters the date as 12-02-16.

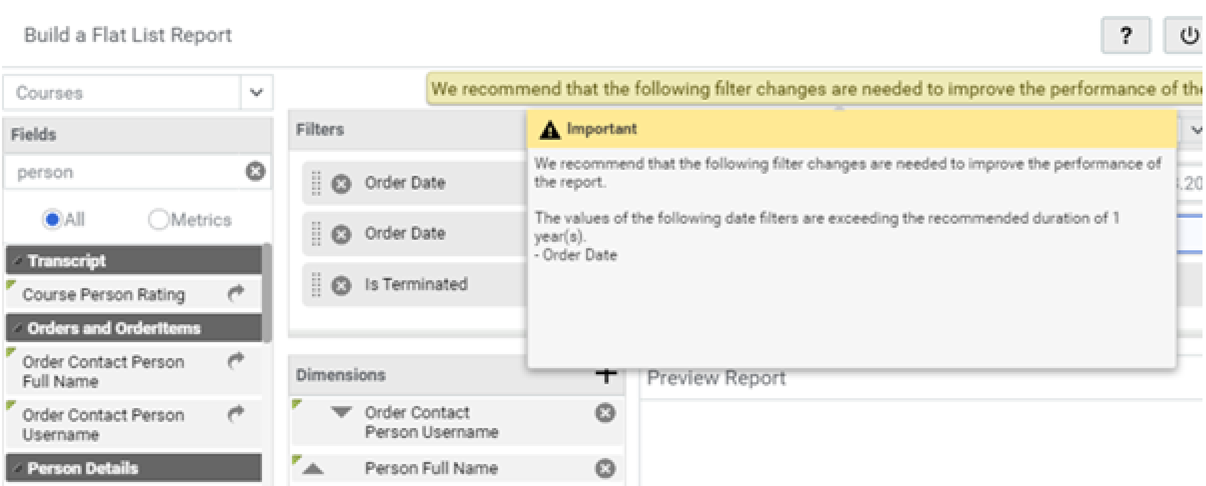


Figure 39: Recommendation message about dates

Use case

This enhancement makes user aware on what filters will benefit performance of report execution.

New file extension for the encrypted files

How did it work?

When a CSV file was exported the file extension was always .csv irrespective of whether the encryption was enabled or not.

How does it work now?

This update onwards, if the encryption is enabled, file names for the encrypted CSV files will include the suffix **.pgp**.

Note: In case the size of the CSV file is greater than the **Max. CSV Size** configuration, the CSV is zipped and if the encryption is enabled, the extension will be **.csv.pgp.zip**.

You need to update your existing integration based on this new file extension for encrypted files.

Use case

N/A

New Reports

Performance Rating Distribution Report

How did it work?

This is a new report.

How does it work now?

This update introduces a new report that provides the review rating distribution across team members for a selected review cycle.

Note: An Analytics admin should access this report and share it with the managers explicitly (using the manager privileges or even named managers). The managers will get data in the report only if the privacy data settings are enabled for performance data to be viewed.

This report needs the following services:

- Performance

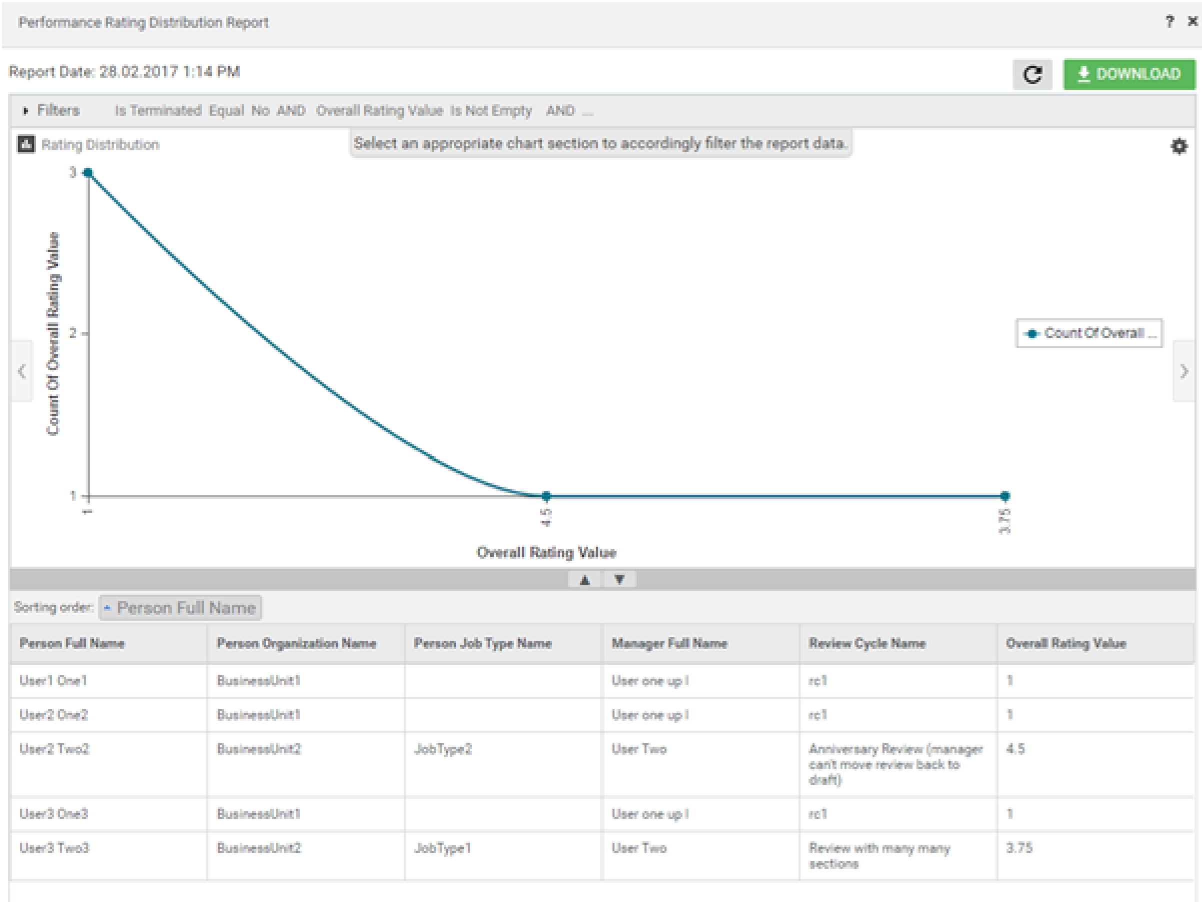


Figure 40: Performance Rating Distribution Report Example

Report Details

This section provides high-level details of the Performance Rating Distribution Report.

Filters

This report uses the following mandatory filters:

1. Is Terminated
2. Overall Rating Value
3. Review Cycle Name

This report uses the following optional filters:

1. Manager Full Name
2. Person Organization Name
3. Person Job Type Name

Dimensions

This report uses the following dimensions:

1. Person Full Name
2. Person Organization Name
3. Person Job Type Name
4. Manager Full Name
5. Review Cycle Name
6. Overall Rating Value

Use case

N/A

New Attributes

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 3: Compensation Details

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	
Potential Ratings and Risks	Flight Risk	Dimension	No	Flight Risk indicator for the person
Potential Ratings and Risks	Retirement Risk	Dimension	No	Retirement Risk Indicator for the Person

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	Description
Potential Ratings and Risks	Potential Rating	Dimension	No	Potential Rating of the Person

Use case

Users 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.

Table 4: Social Details

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	Description
Ideas	Idea Updated By User Full Name	Dimension	No	Full name of the user who has updated the idea
Ideas	Idea Updated By User Username	Dimension	No	Username of the user who has

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	D
				~pu deta d eh t aedi
Issues	Issue Updated By User Full Name	Dimension	No	l luF eman f o eh t resu o hw s ah ~pu deta d eh t ~s i eus
Issues	Issue Updated By User Username	Dimension	No	~resU eman f o eh t resu o hw s ah ~pu deta d eh t ~s i eus

Use case

Users can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports.

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 Cloud application.

Note: The **Available in Dashboard** column indicates if that entity is available in the dashboards.

Table 5: Profile Details

Entity Name	Attribute Name	Attribute Type	Available in Dashboard
Login Details	Browser	Dimension	No
Login Details	Browser Version	Dimension	No
Login Details	Device Canvas Height	Dimension	No
Login Details	Device Canvas Width	Dimension	No
Login Details	Mobile Device Identifier	Dimension	No
Login Details	Device Last Accessed At	Dimension	No
Skills	Skill Domain	Dimension	No

Use case

Users can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports.

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 Cloud application.

A new entity group called **Prerequisite Courses** is now available to get the transcript details for Prerequisite Courses. You can use this group to create reports related to **Prerequisite Course completions**.

Note: The **Available in Dashboard** column indicates if that entity is available in the dashboards.

Table 6: Learning Details

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	
Assessment Results	Assessment Version	Dimension	No	Assessment Version
Anonymous Survey as Content	Rating for scale type ques~ tions	Dimension	No	Rating for Scale Type Questions used in Assessment
Anonymous Survey as Content	Average rating for scale type questions	Metric	No	Average Rating for Scale Type Questions used in

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	ID
				[illegible]
Anonymous Survey	Rating for scale type ques~ tions	Dimension	No	[illegible]
Anonymous Survey	Average rating for scale type questions	Metric	No	[illegible]
Anonymous Survey	Survey Question Weight	Dimension	No	[illegible]
Anonymous Survey	Survey / Evaluation Ques~ tion Type	Dimension	No	[illegible]
Anonymous Survey	Evaluation Total Students Responded	Metric	No	[illegible]

Entity Name	Attribute Name	Attribute Type	Available in Dashboards	ID
Anonymous Survey	Evaluation Total Students	Metric	No	[illegible]
Anonymous Survey	Evaluation % Response Rate	Metric	No	[illegible]
Anonymous Survey	Highest Survey Score	Metric	No	[illegible]
Anonymous Survey	Lowest Survey Score	Metric	No	[illegible]
Anonymous Survey	Average Points for Survey Question	Metric	No	[illegible]
Anonymous Survey	Highest Survey Section Score	Metric	No	[illegible]
Anonymous Survey	Lowest Survey Section Score	Metric	No	[illegible]

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	D
				Section Score
Anonymous Survey	Average Survey Section Score	Metric	No	Average Survey Section Score
Anonymous Survey	Survey Section Title	Dimension	No	Survey Section Title
Classes	Class Audience Type Name	Dimension	No	Class Audience Type Name
Courses	Is Recurring Course Expired Reassigned	Dimension	No	Is Recurring Course Expired Reassigned
Courses	Is Recurring Course Reassigned	Dimension	No	Is Recurring Course Reassigned **Note:** A flag to report

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	Description
				on those users whose courses are expired but have been reassigned.
Courses	Recurring Course Previous Expired On	Dimension	No	Recurring Course Previous Expired On
Courses	Recurring Course Frequency	Dimension	No	Recurring Course Frequency
Certification Details	Certification Category	Dimension	No	[illegible]

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	[illegible]
Certification Details	Certification Path Discontin~ ued From	Dimension	No	[illegible]
Checklist Details	Checklist Item Description	Dimension	No	[illegible]
Curricula Details	Curricula Path Discontin~ ued From	Dimension	No	[illegible]

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	[illegible]
Curricula Details	Curricula Category	Dimension	No	[illegible]
Held Checklist Audit Details	Held Checklist Audit Com~ ponent	Dimension	No	[illegible]
Held Checklist Audit Details	Held Checklist Audit De~ scription	Dimension	No	[illegible]
Held Checklist Audit Details	Held Checklist Audit Attrib~ ute	Dimension	No	[illegible]
Held Checklist Audit Details	Held Checklist Audit Old value	Dimension	No	[illegible]

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	[illegible]
Held Checklist Audit Details	Held Checklist Audit New Value	Dimension	No	[illegible]
Held Checklist Audit Details	Held Checklist Audit Cre~ ated By (Full Name)	Dimension	No	[illegible]
Held Checklist Audit Details	Held Checklist Audit Cre~ ated By (User Name)	Dimension	No	[illegible]
Held Checklist Audit Details	Held Checklist Audit Cre~ ated Date	Dimension	No	[illegible]
Held Checklist Audit Details	Held Checklist Audit Reas~ on	Dimension	No	[illegible]
Held Checklist Audit Details	Held Checklist Audit Proxy Full Name	Dimension	No	[illegible]

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	[illegible]
				[illegible]
Held Checklist Audit Details	Held Checklist Audit Proxy User Name	Dimension	No	[illegible]
Held Checklist Audit Details	Held Checklist Audited On (MM/DD/YYYY HH:MI:SS)	Dimension	No	[illegible]
Learner Certification Details	Is Certification Expired Re-assigned	Dimension	No	[illegible]
Learner Certification Details	Student Certification Certi~ fication Reassigned after expiry or revoke	Dimension	No	[illegible]

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	Description
Prerequisite Course Transcript	Prerequisite Course Regis~ tration Date	Dimension	No	Date on which Prerequisite Course was registered.
Prerequisite Course Transcript	Prerequisite Course Regis~ tration Status	Dimension	No	Registration Status for Prerequisite Course registered.
Prerequisite Course Transcript	Prerequisite Course Com~ pletion Status	Dimension	No	Completion Status for Prerequisite Course.
Prerequisite Course Transcript	Prerequisite Course Com~ pletion Date	Dimension	No	Date on which Prerequisite Course was completed.
Prerequisite Course Transcript	Prerequisite Course Score	Dimension	No	Score achieved while completing

Entity Name	Attribute Name	Attribute Type	Available in Dashboards	Description
				[illegible]
Prerequisite Course Transcript	Prerequisite Course Grade	Dimension	No	[illegible]
Transcript	Transcript Attachment Name	Dimension	No	[illegible]

Entity Name	Attribute Name	Attribute Type	Available in Dashboards	Description
				[illegible]
Orders and OrderItems	Count of Subscriptions	Metric	No	Count of Subscriptions
Orders and OrderItems	Order Item Training Unit	Dimension	No	Number of Training Units used for Order Item
Orders and OrderItems	Training Unit Agreement Order Number	Dimension	No	Order Number used for Purchasing Training Unit Agreement
Orders and OrderItems	Order Training Units	Dimension	No	Total Training

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	[illegible]
				[illegible]
Orders and OrderItems	Subscription Type	Dimension	No	[illegible]
Survey And Evalu~ations	Evaluation Valid Version	Dimension	No	[illegible] **Note:** If the admin ver~sions an evalu~ation and as~soci~ates a new version with a class, the ad~min will not lose the data for the student re~sponses

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	Description
				on the original evaluation.

Use case

Users 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 Cloud application.

Note: The **Available in Dashboard** column indicates if that entity is available in the dashboards.

Table 7: Performance Details

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	Description
Goal Details	Goal Progress Comments (All)	Dimension	No	This attribute will allow users to pull all comments added while making goal progress.
Goal Details	Goal Progress Comments (All) By	Dimension	No	This at~

Entity Name	Attribute Name	Attribute Type	Available in Dashboards	Description
				tribute will allow users to see the name of the person for comments added while making goal progress.
Goal Details	Goal Progress Comments (All) Added On	Dimension	No	This attribute will allow users to see the date on which comments were added while making goal progress.

Entity Name	Attribute Name	Attribute Type	Available in Dashboards	Description
Goal Details	Goal Progress Comments (All) Percentage	Dimension	No	This attribute will allow users to see the goal progress percentage value for comments added while marking goal progress.
Goal Details	Is Latest Goal Progress Comment	Dimension	No	This attribute will allow users to see the latest comment added while marking goal progress.

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	Description
Review Details	Overall Rating Level	Dimension	No	Text value of the Over~all ~Rat~ing ~received by the [illegible].
Review Rating Details	Final Rating Level	Dimension	No	Text value of the ~final ~rat~ing ~received by the [illegible].

Use case

Users can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports.

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 Cloud application.

Note: The **Available in Dashboard** column indicates if that entity is available in the dashboards.

Table 8: System Details

Entity Name	Attribute Name	Attribute Type	Available in Dashboard	Description
Prescription Rule	Prescriptive Rule Entries To Be Processed	Dimension	No	Shows the number of entries to be processed for every Processing History entry.
Prescription Rule	Prescriptive Rule Entries Processed	Dimension	No	Shows the number of entries processed for every Processing History entry.
Prescription Rule	Prescriptive Rule Processing Status	Dimension	No	Shows the Status of Prescriptive Rule Processing i.e. Completed or Failed

Entity Name	Attribute Name	Attribute Type	Available in Dashboards	[illegible]
Prescription Rule	Prescriptive Rule Error String	Dimension	No	[illegible]
Prescription Rule	Prescriptive Rule Processed On	Dimension	No	[illegible]
Prescription Rule	Prescriptive Rule Pro~ cessing Started By	Dimension	No	[illegible]

Entity Name	Attribute Name	Attribute Type	Available in Dashboarddpi D
			e luR ~orP gise

Use case

Users can now pull these new attributes (Dimensions/Metrics) while creating or updating the Analytics reports.

Updated Attributes

Performance

How did it work?

The following attributes did not show all the data in the data extract reports:

1. Review One on One Comments
2. Review Description
3. Review Cycle Description

How does it work now?

The following attributes are updated to now show all the data in the data extract reports:

1. Review One on One Comments
2. Review Description
3. Review Cycle Description

Use case

N/A

Chapter 3

Career Planning

Topics:

Back link to ease navigation within Career Planning

How did it work?

Prior to this update in Career Planning, when the user access any skill or learning items in the career path, there was no option to navigate back to the previous page or clicks **Open Jobs** tile and lands on the Search Results page, there is no option to navigate back to the previous page.

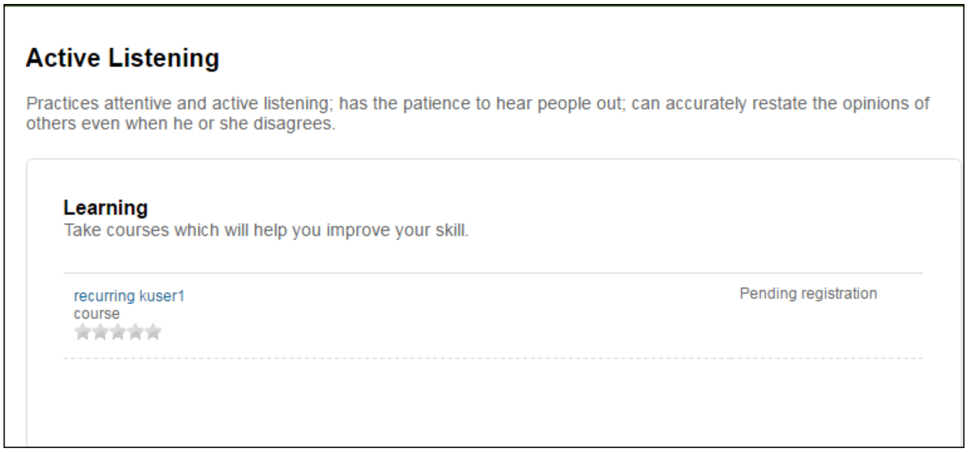


Figure 41: Old view on accessing skills in career path

The user had to use browser's **Back** button to access the previous page.

How does it work now?

The **Back** link has now been added to the required pages that navigates the user back to the previous page.

Note: There is no 2nd level breadcrumb navigation so the user is navigated only to the previous page and not to the first landing page.

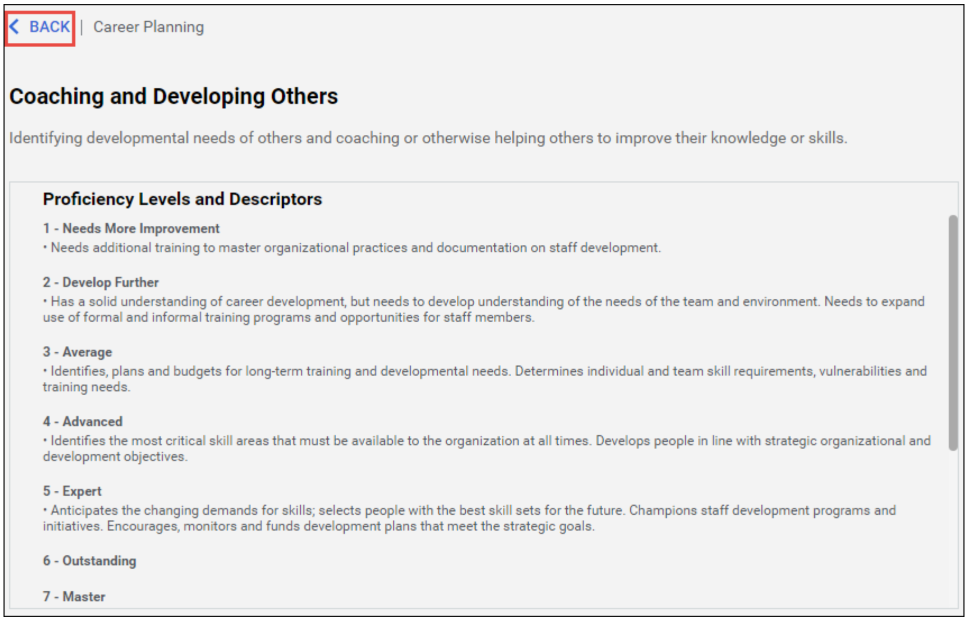


Figure 42: Back link to navigate to Career path page from skills

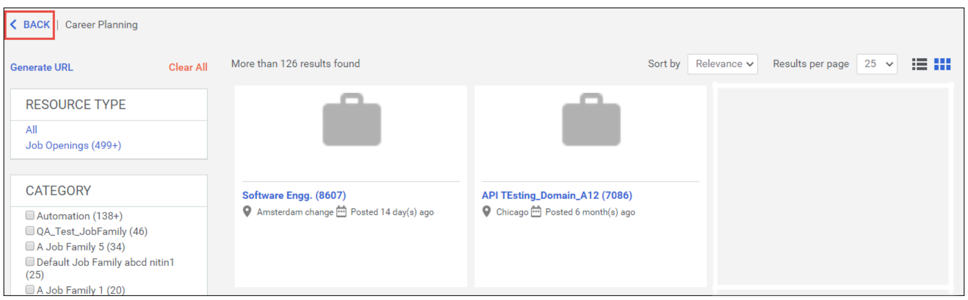


Figure 43: Back link to navigate to Career Planning landing page from Open Jobs

Use case

A user using Career Planning may have little knowledge of navigating within Saba Cloud application and may get confused when being redirected to a page outside of career planning. This enhancement makes the reverse navigation intuitive and consistent.

Introducing Career Planning as a separate service

How did it work?

Prior to this update, the **Career Planning** service was part of Succession@Work. There was a need to change the names and options of the career path timeframes to align the terminology and duration with the organization's processes without implementing Succession.

How does it work now?

The **Career Planning** service is now presented separately. By default, this service is disabled.

Note: To enable the feature, submit a support request. For assistance, contact Saba Support.

Note: This feature remains enabled for the existing users.

The Career Planning configuration now appears under **Admin** > **HR** > **Configure Career Planning**.

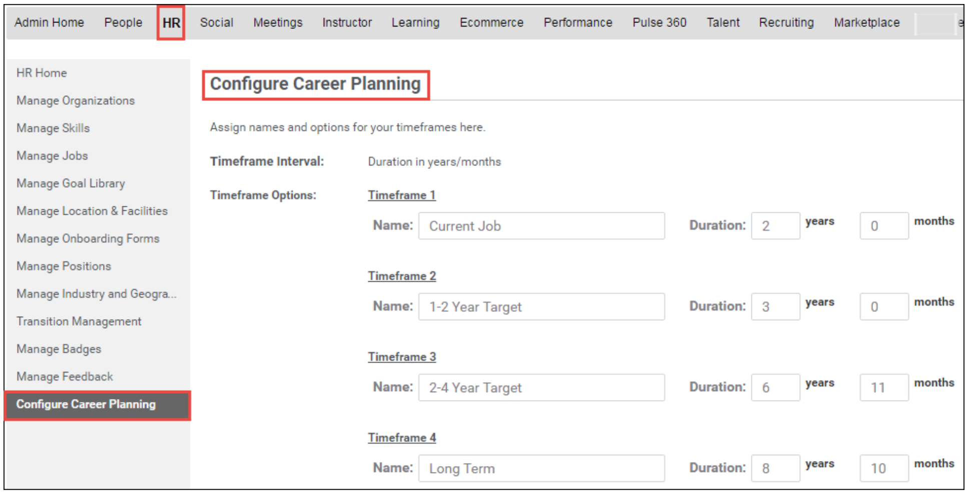


Figure 44: Career planning configuration under HR

The administrator with the following security privileges can access the **Configure Career Planning** menu:

- System component
    - Can Access Human Capital Admin Role
    - Can configure Career Planning
- MenuVisibility-HRAdmin component
    - Can access HR->Can Configure Career Planning

By default, the above privileges are granted to talent administrator and super user. The HR administrator can access this menu provided these privileges are assigned.

Note: There are no changes to the end user flow.

Use case

Saba Cloud configuration now supports the ability to sell Career Planning without Succession, and users can configure timeframes to align it with the organization's processes.

Updated Career Planning landing page

How did it work?

Prior to this update, the Career Planning landing page looked like this:

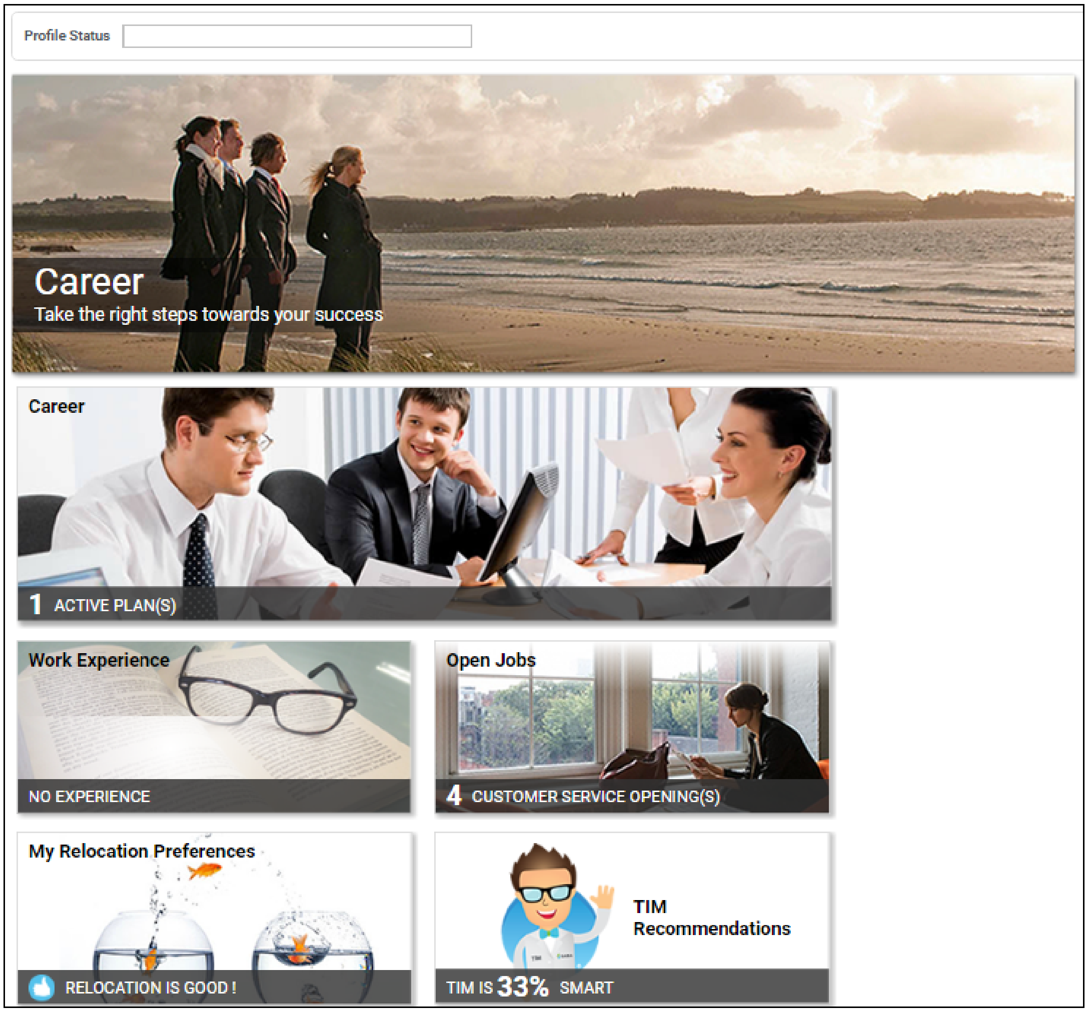


Figure 45: Older Career Planning landing page

How does it work now?

The Career Planning landing page is now updated to match with the newer UI/UX design.

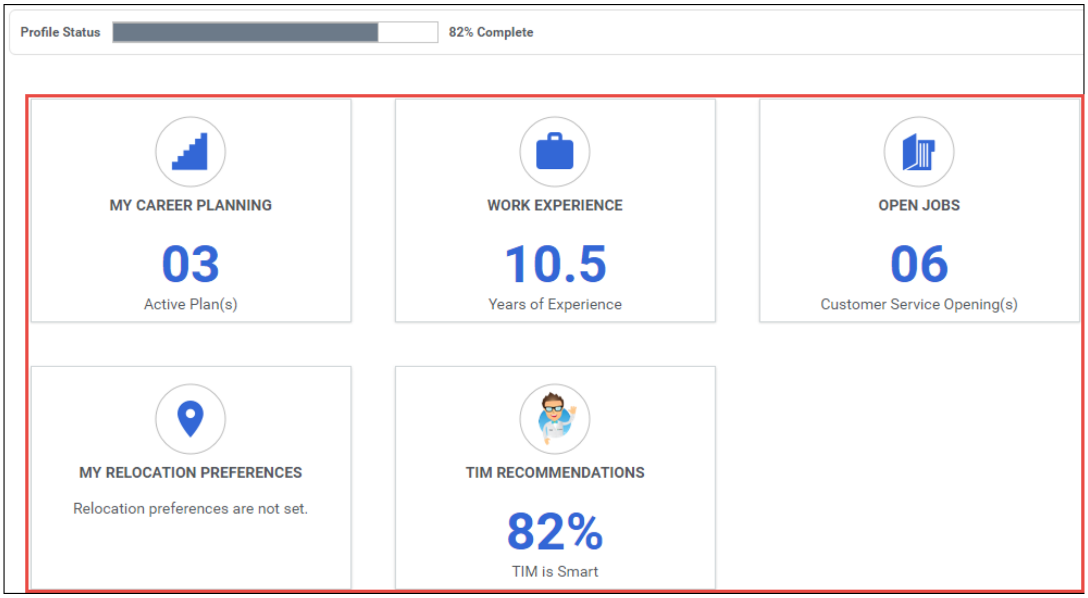


Figure 46: New tile menu

Tip: To access Career Planning, navigate to **ME** > **Career Planning**.

Use case

This enhancement improves the end user usability.

Chapter

4

Compensation

Topics:

Pre-defined criteria added for Eligibility list

How did it work?

This feature is newly added in this update.

How does it work now?

A pre-defined criteria to the Compensation Eligibility list has been added for "Organization Type" = "Internal"

By adding this default criteria only the right people are added to the Eligibility list and Compensation admin can edit or delete the pre-defined criteria.

Predefined criteria is only available for newly created plans and will not impact existing active or draft (or any other state) plans.

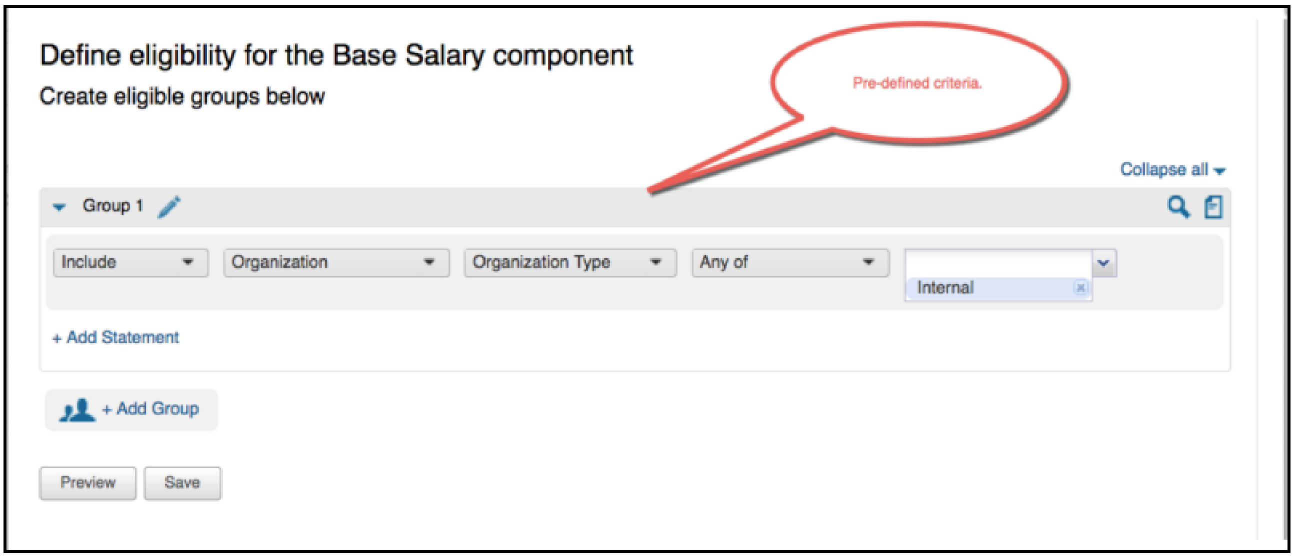


Figure 47: Pre-defined eligibility criteria

Use case

By adding the default criteria for eligibility groups, only a specific set of users are added to the eligibility list for a specific compensation plan. This will make budget calcualtion process easier.

Filter by Manager option available for compensation plan search

How did it work?

Senior Managers, Compensation Administrators, and HRBP sometimes needed to take action on a specific worksheet owned by a specific manager, and finding the worksheet has been time consuming without an appropriate filter.

How does it work now?

This has been addressed in this update. Compensation Administrators, Senior Managers and HRBPs can now search for worksheets created by specific managers and be able to retrieve specific worksheets created by those managers.

To search for worksheets owned by a specific manager:

As a **Compensation Administrator** or **HRBP**, navigate to:

Admin => **Compensation** => **Plan Cycles** => **Allocated Plan Cycles**.

Select **Show Filters** and enter the name of the manager in the **Manager** filter option provided.

Click on the **Apply Filters** button to apply the **Manager** filter.

You can also search by just entering the first letter and you will see a complete list of all managers whose names start with that letter.

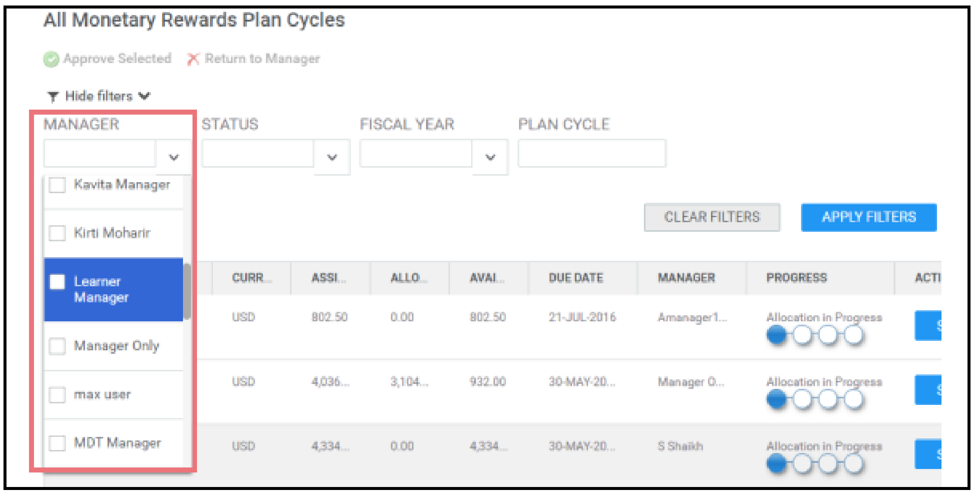


Figure 48: Filter by Manager option selected

As a **Compensation Manager**, navigate to:

My Team => **Compensation** => **Compensation Plans** => **All Compensation Plan Cycles**

Select **Show Filters** and enter the name of the manager in the **Manager** filter option provided.

Click on the **Apply Filters** button to apply the **Manager** filter.

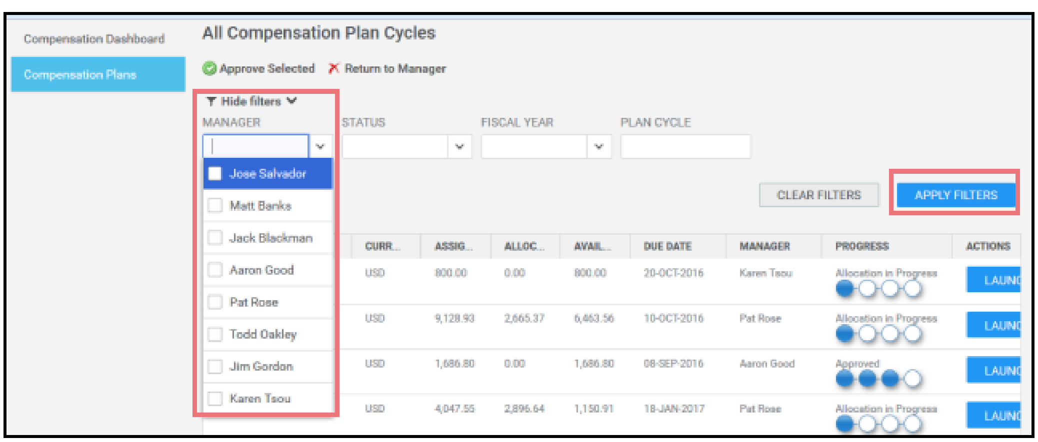


Figure 49: Filter by Manager option selected

Note:

- When choosing a manager from the search option, the resulting list of plan worksheets will be limited to only those visible to the user doing the search.
- You can select more than one manager for your search criteria.
- The Drop-down list of manager names will contain managers across all pages and not just for the current page.

Use case

Senior Managers, Compensation Administrators, and HRBPs can now search for compensation plan worksheets owned by specific managers.

Job status progress and tracking

How did it work?

Until this update, Compensation Administrators were not able to visually view and track the progress of uploading a custom manager hierarchy.

How does it work now?

Starting from this update Compensation Administrators can view and track visually, the progress and status of importing a **Custom Manager Hierarchy** to the Snapshot view of a plan cycle.

Custom Manager Hierarchy

To import custom manager hierarchy:

Navigate to: **Admin**>**Compensation**>**People Snapshots**

Click on **Edit Snapshots**.

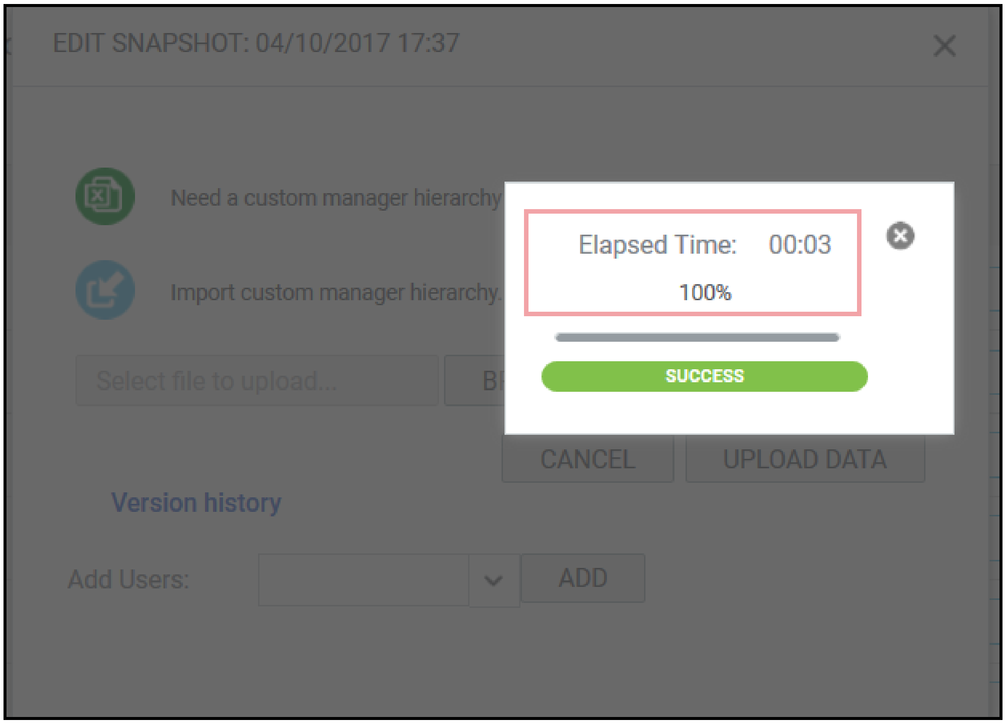


Figure 50: Progress bar showing Custom Manager Hierarchy import

Note: You can also import a **Custom Manager Hierarchy** from the **Budget Distribution** step of a Plan Cycle wizard and view the progress of the import process in a similar manner.

This update also provides enhancement to the existing feature of tracking the **Distribute Budget** , **Check Data**, and **Plan Activation** steps.

Distribute Budget

During Compensation Plan Cycle creation process, after entering appropriate data or making changes to data if necessary, continue to the **Distribute Budget** step. The **Distribute Budget** process is triggered and the progress bar will display, showing the elapsed time and the completion status. You may also click on the **Distribute for me** button to trigger the process.

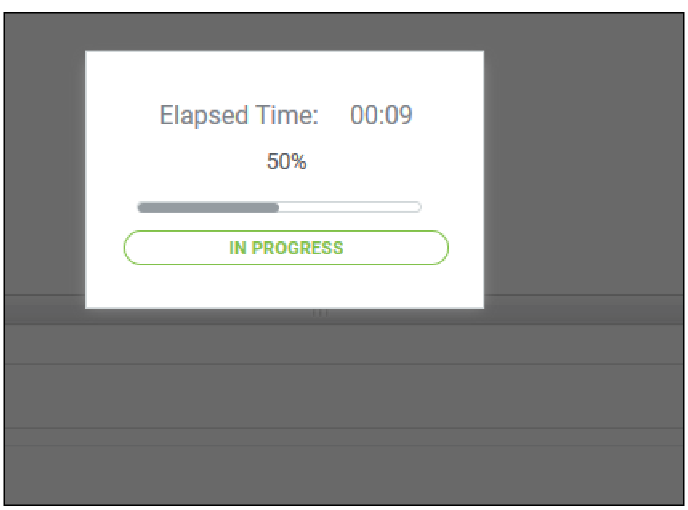


Figure 51: Budget Distribution progress status

You will see the progress status screen display the **Elapsed Time** and **In Progress** status. When the Budget Distribution process is complete, you will see the **Success** status.

Check Data and Activate Plan

Similarly, when you are ready to run the **Check Data** step and finally the **Activate Plan**, you will see the progress bar and the status update on the process.

You will first click on **Check Data** (Step 1). When it completes and shows the Success state, you can click on the **Activate Plan** button (Step 2) to activate the plan and complete the process.

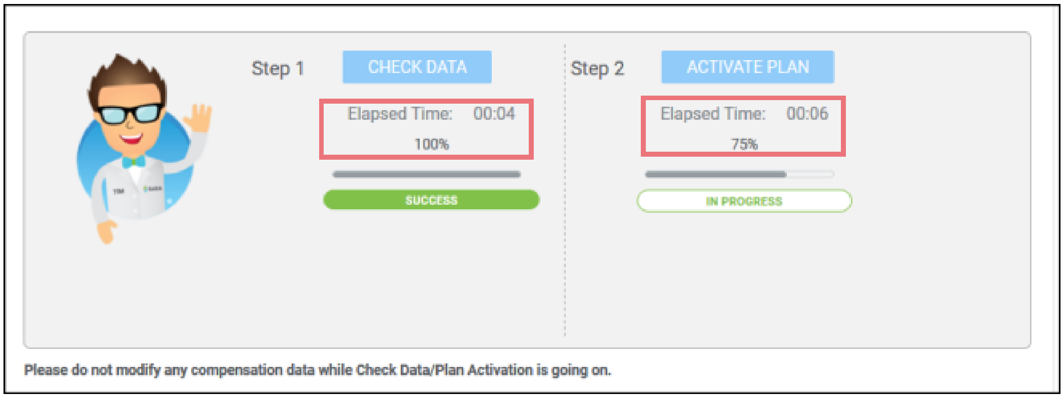


Figure 52: Check Data and Activate Plan Step progress status

Note:

- It is not possible to run two Check Data or Activate Plan jobs simultaneously. If you try to run Check Data or Activate Plan on a plan cycle, while another Check Data or Activate Plan job is already in progress on another plan cycle, then the new Check Data or Activate Plan job will be queued, and will start only when the first Check Data or Activate Plan job is completed.

Use case

Compensation Administrators can view and monitor the progress and status of Compensation jobs such as uploading a Custom Manager Hierarchy, Budget Distribution, Check Data and Activate Plan steps.

Out of Cycle Compensation

How did it work?

This feature is newly added in this update.

How does it work now?

Out of Cycle Compensation is awarded based on an Out of Cycle Request initiated and created by a Manager for an employee or a team without a time schedule associated with it. Normally, compensation cycles are created and implemented based on an annual cycle, often associated with a review or appraisal performed by managers of employees who directly or indirectly report to them.

However, these involve time and typically present prolonged processes. At times, when there is a need to reward employees spontaneously or within the span of a short interval, a less formal and adaptive process is needed. Out of Cycle Compensation option provides that.

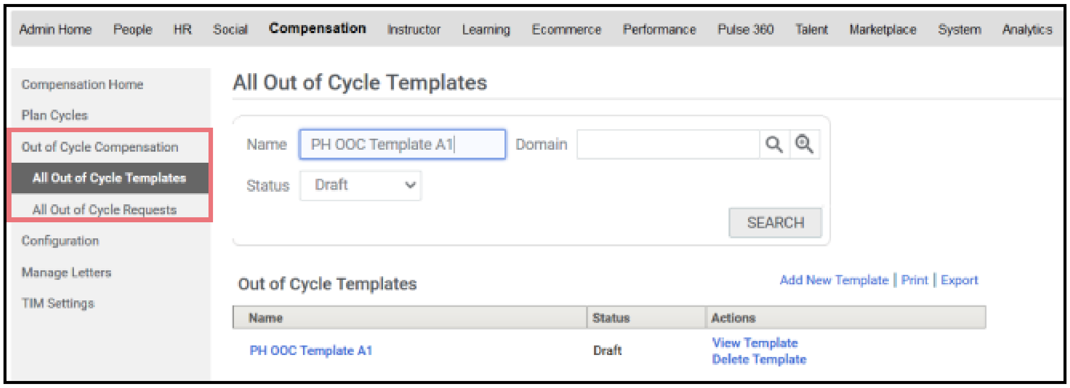


Figure 53: Out of Cycle Compensation

System Service

To enable OOC Compensation, the Out of Cycle setting has to be turned **ON** for the OOC Compensation feature to be accessible by the Compensation Administrator.

Admin>**System**> **Configure System**>**Services**>**Compensation Service**> **Settings** tab

If the setting is turned OFF, then menu options will not be visible for the Manager, Admin and HRBP.

Out of Cycle Templates

Out Of Cycle Templates are created by **Compensation Administrators** and provide a basis for Managers to request and submit **Out Of Cycle Requests** to reward a team or an employee in their groups with spontaneous recognition. The template created by the Administrator, will be used by the Manager to directly create the OOC Request based on the configured worksheet or make the necessary changes to the worksheet and submit for approval by the pre-selected Approvers.

OOC Templates can be created by navigating to:

Admin>**Compensation** >**Out of Cycle Compensation** > **All Out of Cycle Templates Add New Template** > **Guide Me** option.

Only a single Component can be included in the OOC Template and only the BASE component is available for worksheet best practise template. However, the Custom Template (worksheet template) can be used for **Long Term Incentive Plan**, and **Short Term Incentive Plan** components.

After creating the OOC Template, the approval process needs to be set. You can define the process by setting up the **Approval Due Date** and selecting the Approvers from the OOC Approval page.

Once the **Approval** process is defined, you can create the **Worksheet** based on the Template.

As an Admin, you can also edit an existing **Out of Cycle Template**. By searching and launching an existing OOC Template the changes can be added. Templates can be edited in **Draft** state only. Activated Templates can be cancelled; However, existing requests created from those templates will not be affected.

For more details, refer to the *Out of Cycle Compensation* section of the *Compensation Help* module.

Out of Cycle Request

Out of Cycle Requests are based on **Out of Cycle Templates** created by the Compensation Administrator.

OOC Requests can be created in one of the following methods:

My Team>**Direct Team**

From this page, you can search for a person (by Name, organization, Job) and choose **Out of Cycle Compensation** from the **Actions** option against the selected member's name.

Alternatively, from the **Team Actions** section select **Out of Cycle Compensation** from the menu on the side panel.

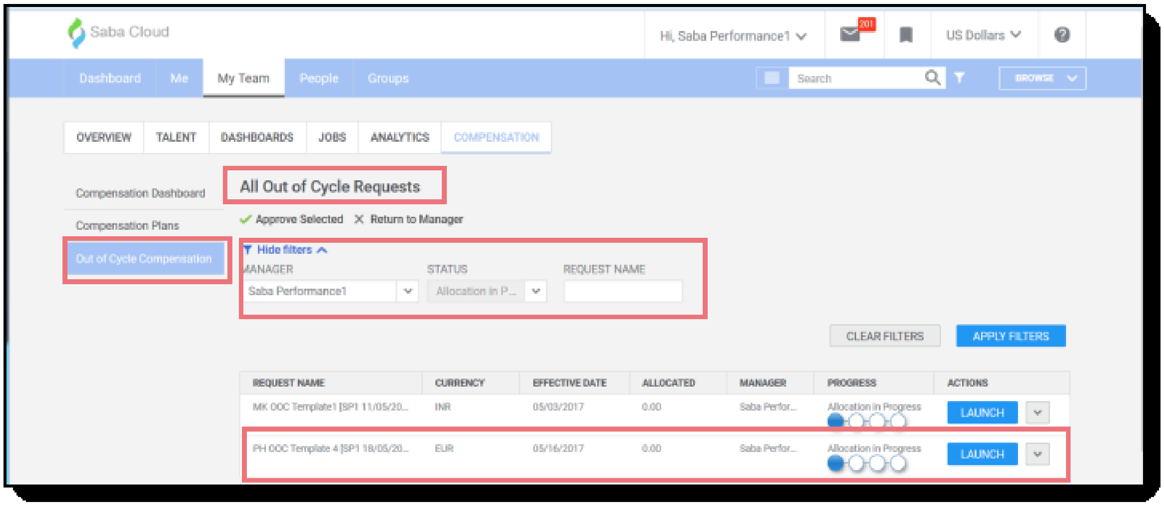
Both options will lead to the template selection screen where the option to choose one for the OOC Request will be available.

The Request will be created, and it will display with the other Requests on the **All Out of Cycle Requests** page.

My Team>**Compensation**>**Out of Cycle Compensation**>**All Out of Cycle Requests**

You can also search for an existing **OOC Request** using the filter option. You can filter by the Manager, Status and the Request Name.

Figure 54: Out of Cycle Requests



From the Request page, you can view the **Worksheet** by clicking the **Launch** button. The worksheet will display the basic details of each member selected for the Request. All basic data like Hire date, Person's currency, Organization, Start Date, Current Base Salary will be populated from the profile data. After entering data such as the Allocated Fund or the percentage of salary increase, the Manager can Submit the Request for Approval.

Once the OOC Request is submitted for approval, the data on the worksheet cannot be edited even if it changes in the profile data. Once Approved, a Request can only be reopened by a Compensation Administrator or a HRBP for review.

Note: Only the Manager who created the request can **Cancel** it. However, a cancelled OOC Request can be edited and re-submitted by the original requester.

Requests in **Cancelled** status or **Returned to Manager** status can be deleted.

For more details on OOC Requests, refer to the *Out of Cycle Compensation* section of the *Compensation Help* module.

Use case

Managers can now request Out of Cycle Compensation for their direct and indirect employees in a more spontaneous manner using the OOC Templates created by Compensation Administrators.

Chapter 5

Ecommerce

Topics:

Configurable agreement number and custom fields in Training Unit Agreement

How did it work?

Currently, training unit agreement number is auto-generated and its not configurable. In addition to this, there was no provision to enable custom fields for TUA to enter any additional information.

How does it work now?

The Training Unit's (TU) agreement number attribute is now made configurable by making the **Is Generated** attribute of **TrainingUnitAgreement** component configurable. By default, the **Is Generated** attribute is enabled. To disable it, contact your system administrator.

Note: To access the **Is Generated** attribute, navigate to **System** > **Configure System** > **Services** > **Ecommerce** > **Training Unit** > **Components** tab > **TrainingUnitAgreement** component > **Attributes** tab > **agreement_no**.

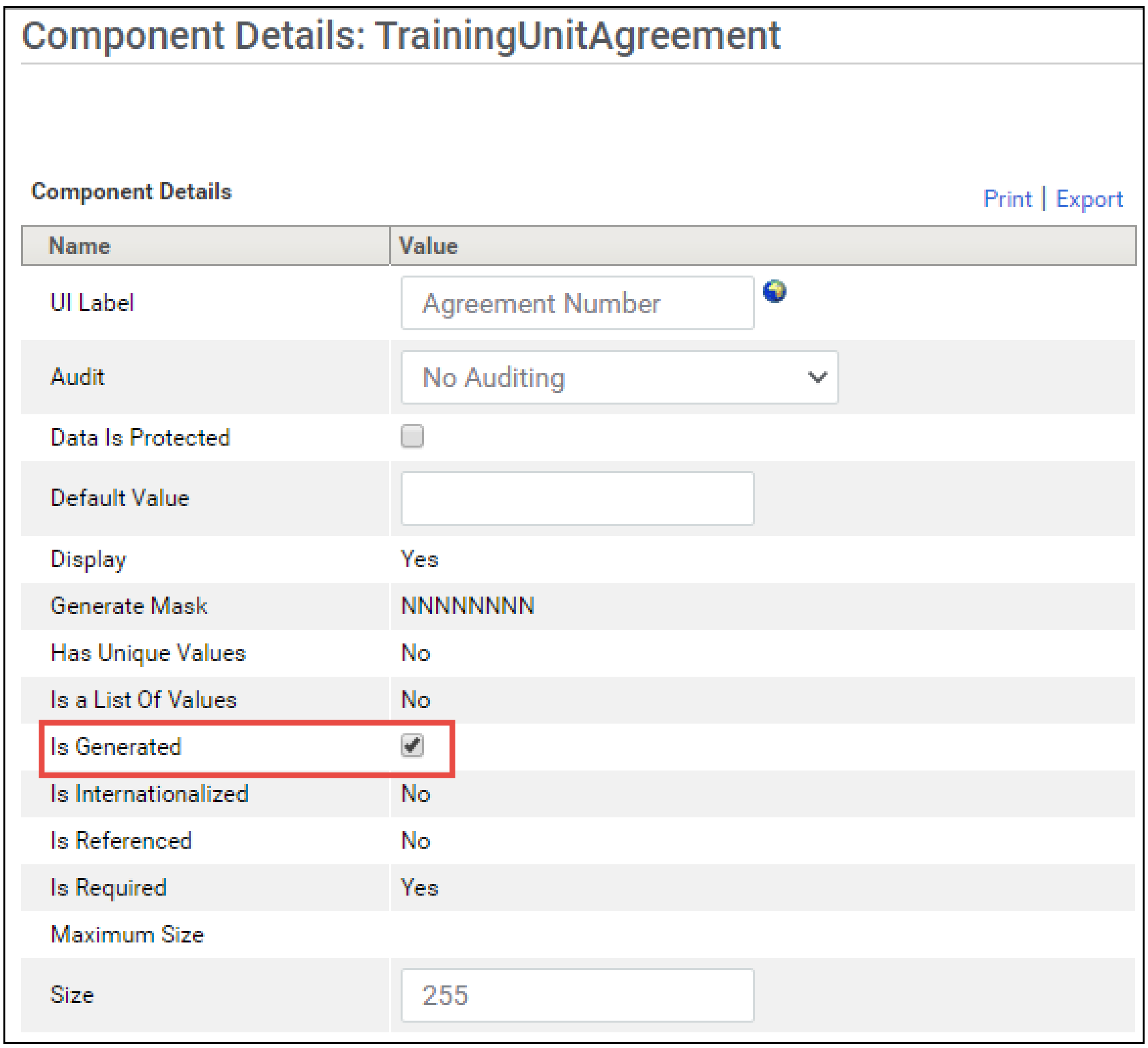


Figure 55: Agreement Number attribute

If the **Is Generated** attribute is disabled, then the **Agreement Number** field is exposed to users while creating the Training Unit Agreement (TUA). This field appears blank and its mandatory to create the TUA. The users can then enter a valid and appropriate number.

Note: This number is unique across all the agreement numbers in the system.

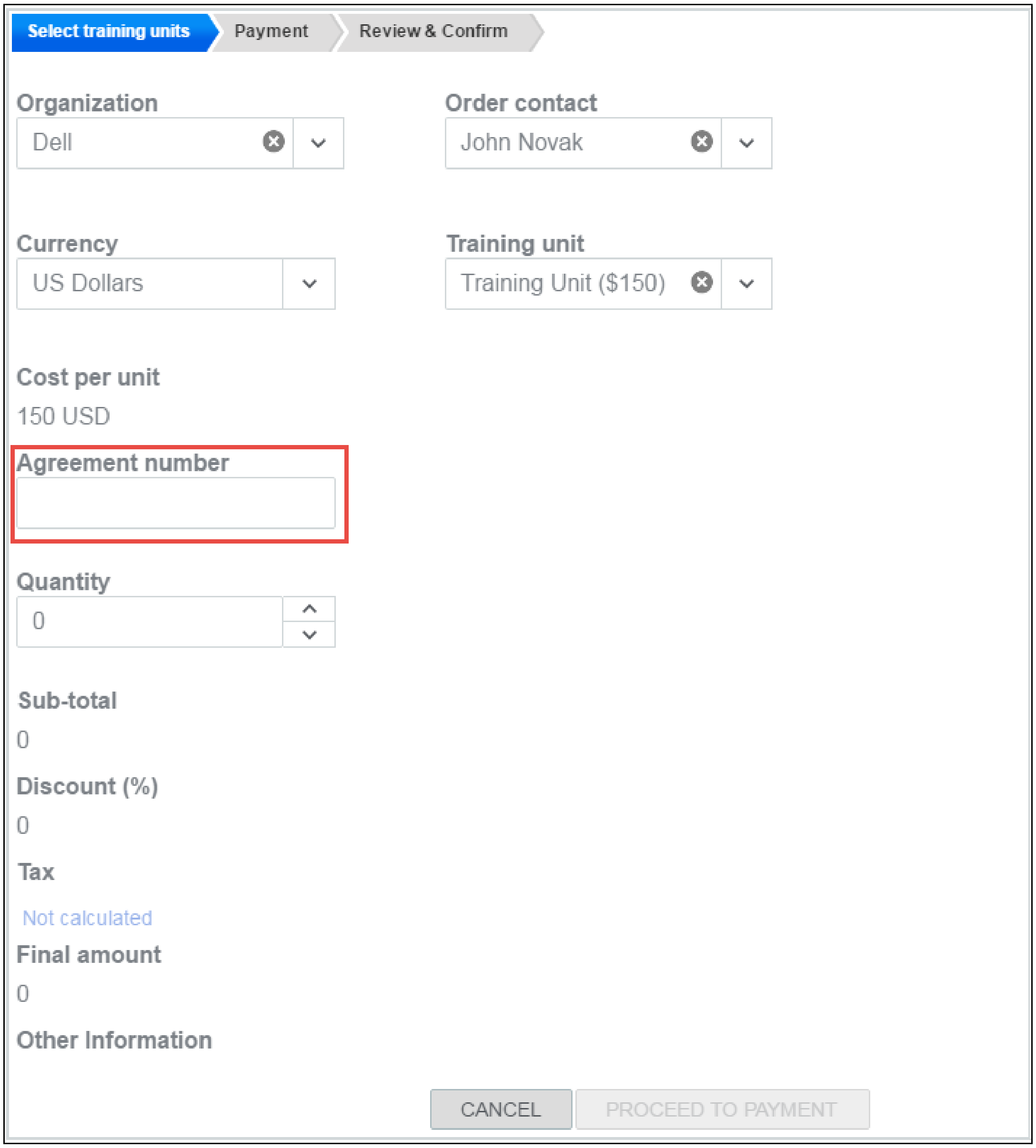


Figure 56: Agreement number field

On creation of TUA, even if agreement number is entered, the field is still editable on the TUA details page. The user can update the agreement number, if needed.

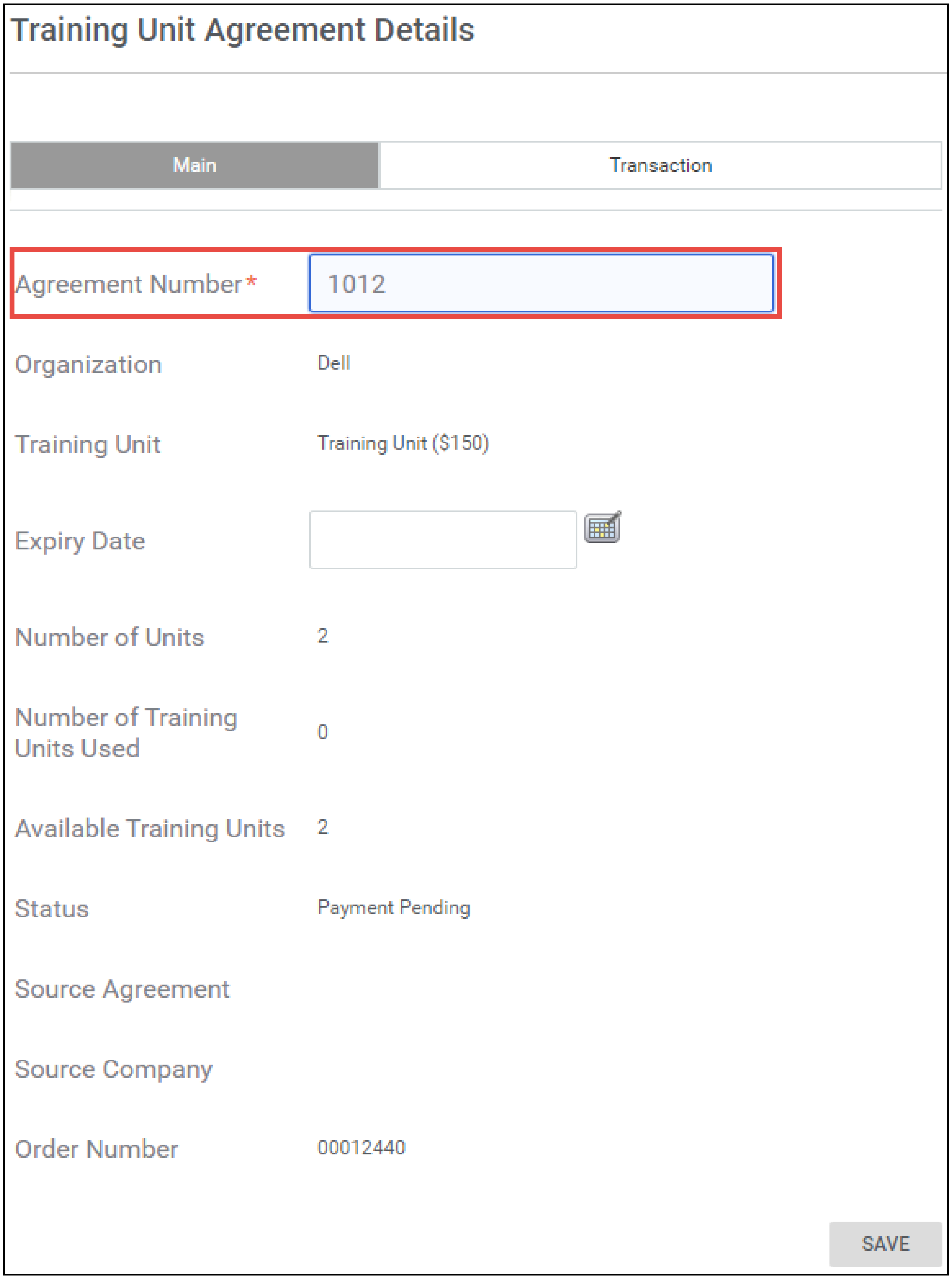
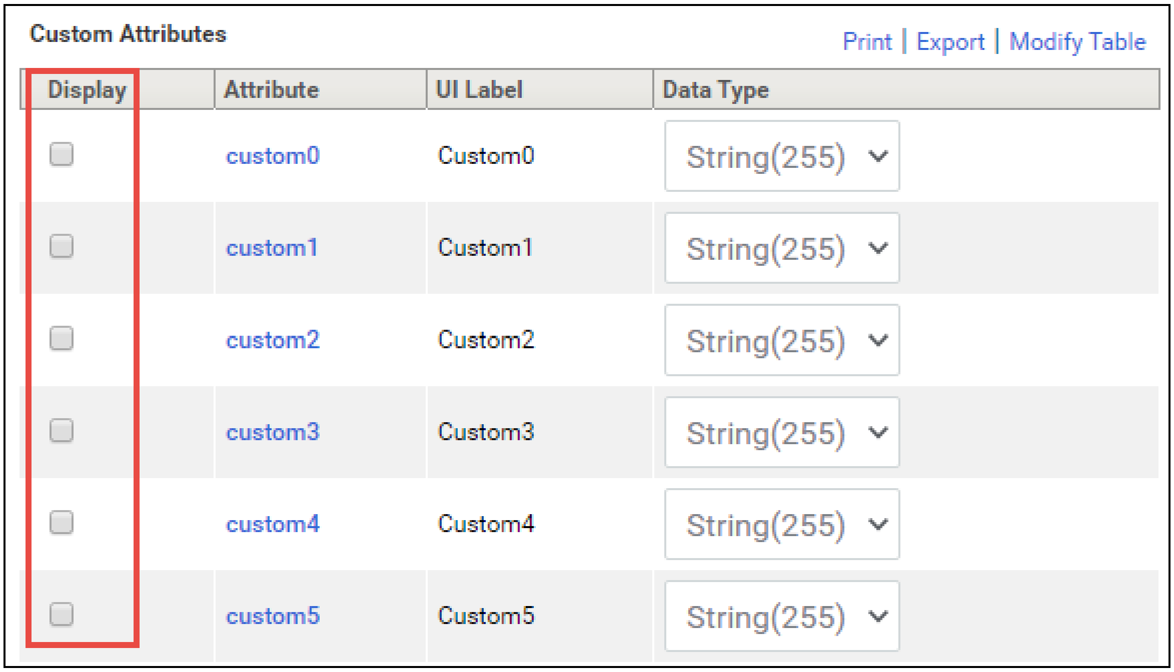


Figure 57: Editable Agreement number field on TUA Details page

On the TUA create and details page, users can use the custom fields to enter the additional information. These custom fields appear only when they are enabled in the TrainingUnitAgreement component. By default, these fields are disabled. The system administrator must enable the checkboxes under the **Display** column for the required custom fields and save the changes.



Custom Attributes

Print | Export | Modify Table

Display	Attribute	UI Label	Data Type
☐	custom0	Custom0	String(255)
☐	custom1	Custom1	String(255)
☐	custom2	Custom2	String(255)
☐	custom3	Custom3	String(255)
☐	custom4	Custom4	String(255)
☐	custom5	Custom5	String(255)

Figure 58: Enable custom fields for TUA

Figure 59: Custom fields on TUA details page

Use case

The auto-generated Training Unit Agreement Number cannot be disabled. The user had to use Web Services to update the fields which was very challenging because a Web Services call to update the Training Unit Agreement with custom fields requires the Training Unit Agreement number that is generated by Saba. The user had to find a way to pull that information from the system so that the updates can be pushed for the Web Services call. This enhancement resolves these issues as the user can now enter the agreement number on creation as well as update it and use custom fields to add any additional information.

Create user account on Microsite using external email ID

How did it work?

Prior to this update, candidates who have signed up on the Career site cannot signup on the microsite using the same external email ID, since the usernames for both the sites by default are email IDs.

How does it work now?

The candidate can now use the career site's email ID to sign up on the microsite.

Three new properties have been introduced in the **New User** site property of the microsite:

Table 9: New User properties

Property Name	Description
Username	The values are: • Off (default) • On By default this property is disabled. To enable, please contact your system adminis~ trator. Once this property is enabled, the **Username** field appears in the microsite's Sign Up form.
Username default	Enter a default value that appears in the **Username** text box on the Sign Up form.
Username is required	The values are: • Off (default) • On When this property is enabled, the **Username** field is marked as Mandatory (*) on the Sign Up form.

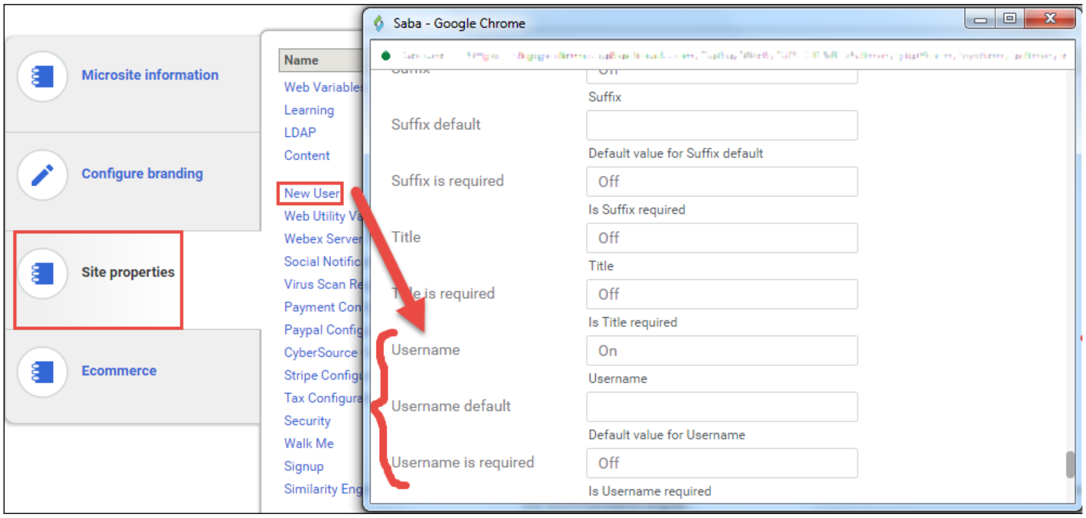


Figure 60: Username properties in New User

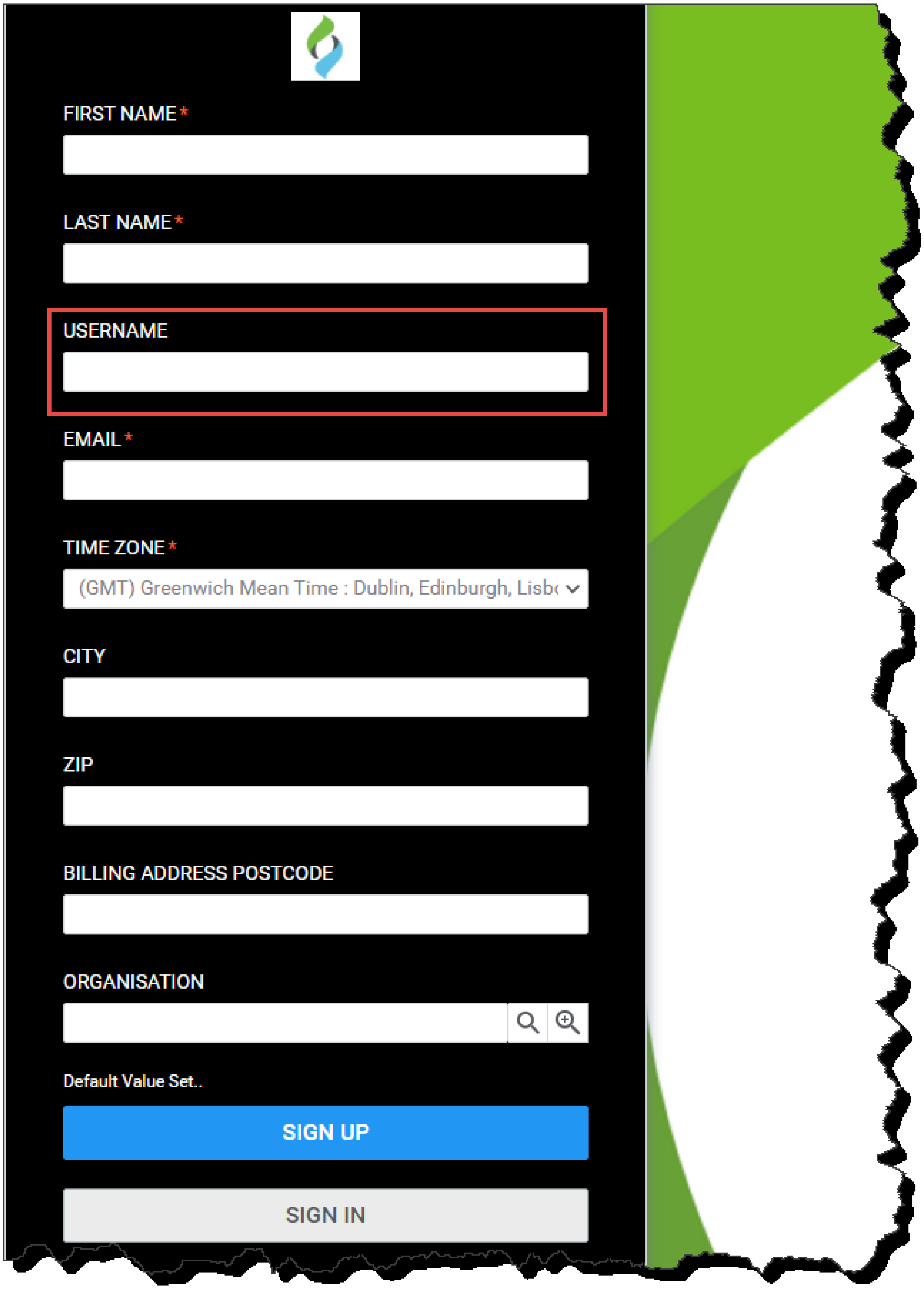


Figure 61: Username field on Sign Up form

Note: If the **Username** field is displayed on the Sign Up form, then ensure that # " = , % * ; \ <> characters are not used in the **Username** field for signing up. If the Username field is left blank, then the email ID mentioned during the signup is set as a username for the newly created user, so ensure that these characters are not used in the Email ID field too.

Use case

Candidates can now create user accounts on the microsite using the same external email ID used in the Career site.

Custom credit card integration

How did it work?

Prior to this update, only PayFlow, CyberSource, and Stripe configuration were supported for credit card payment method.

How does it work now?

With this update, a new custom credit card gateway configuration is supported so that users can integrate their own payment gateway. To support this, **Custom Credit Card Gateway Configuration** site property has been added to microsite which takes the following values from Saba Cloud to integrate with the user's own payment gateway. To access this property navigate to **System** > **Configure System** > **Microsites** > *<micorsite-name>* > **Site property**.

Table 10: Custom Credit Card Gateway Configuration site properties

Property Name	Description
API URL	Enter an API URL that is needed to refund, charges, or void transaction.
API header parameter	Enter an header parameter with a fixed value that is required for API call. If there are multiple values, use comma separator.
API request parameter	Enter parameter with fixed value that needs to be passed for calling charges or refund API. If there are multiple values, use comma separator.
Action key	Enter the values for mapping the Saba specific transaction action keys like authorize, sale, charge, refund and void with the payment gateway specific action keys. Examples, when using Orbital gateway; for **authorize** use **auth_only** and for **sale** use **auth_capture**.
Billing address key map	Enter the values for the following billing address fields used in Saba Cloud to map with the values supported by the corresponding payment gateway parameter name: • billing_addr1 • billing_addr2 • billing_addr3 • billing_city • billing_state • billing_country • billing_zipcode **Note:** If the values to be mapped are not provided, then the application pick the values mentioned in the above fields. Also, ensure that the values mentioned for parameters are comma separated.

Property Name	Description
Default payment action	Enter the payment gateway specific key for **authorization** or **sale**. By default, it is set to **sale** as per Saba Cloud configuration.
Private key	Enter the private key in case message digest (signature) is required while redirecting the user to the credit card form page. **Note:** Ensure that the key includes 256 characters. You may keep it blank, if its not required.
Redirect URL	Enter the URL that redirects the user to the credit card form page.
Redirect request parameter	Enter parameters with fixed values that are required to redirect the user to the credit card form page.
Request Method	Enter the HTTP request method values **GET** or **POST** that redirects to the credit card form page. By default, it is set to **POST**.
Request parameter key map	Saba Clouds sends the following parameters while redirecting user to the hosted credit card page (comma separated key=value pair): • action • amount • currency • locale • order_no • return_url • signature • custom request parameter **Note:** Ensure that the values mentioned for parameters are comma separated.
Shipping address key map	Enter the values for the following shipping address fields used in Saba Cloud to map with the values supported by the corresponding payment gateway parameter name: • shipping_addr1 • shipping_addr2 • shipping_addr3 • shipping_city • shipping_state • shipping_country • shipping_zipcode **Note:** If the values to be mapped are not provided, then the application pick the values mentioned in the above fields. Also, ensure that the values mentioned for parameters are comma separated.
Success code	Enter the gateway specific decision code that is used for successful transaction. The default value is **100**. Any other value should be considered as failure in Saba Cloud.

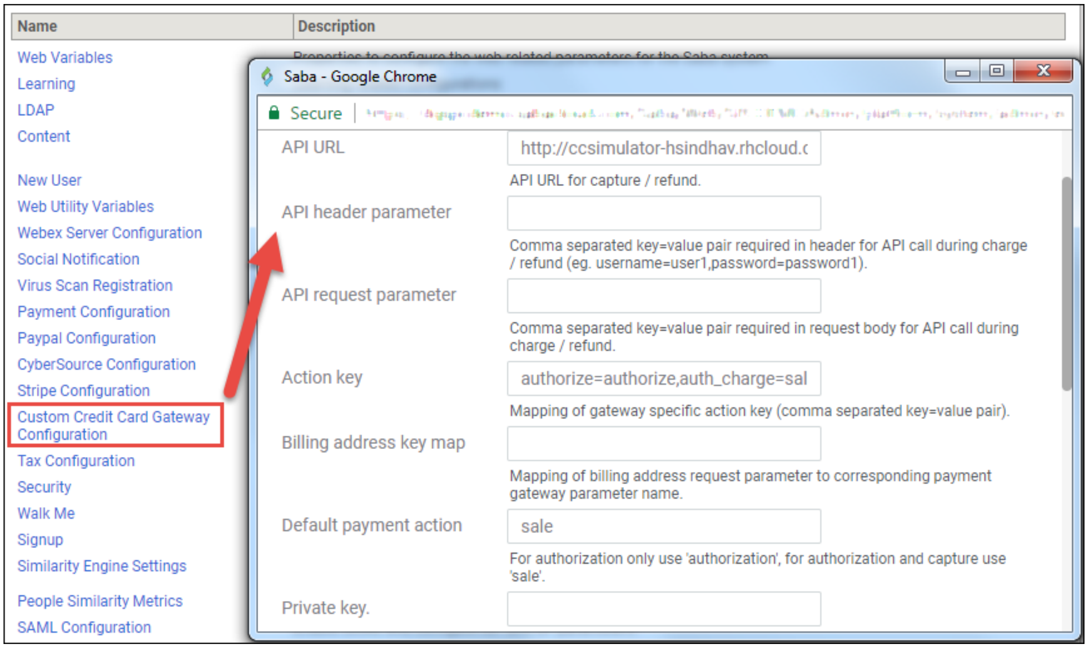


Figure 62: Custom Credit Card Gateway Configuration properties

After configuring the custom credit card gateway properties, click the **Payment Configuration** property and enter **Custom** for **CreditCard Engine** property.

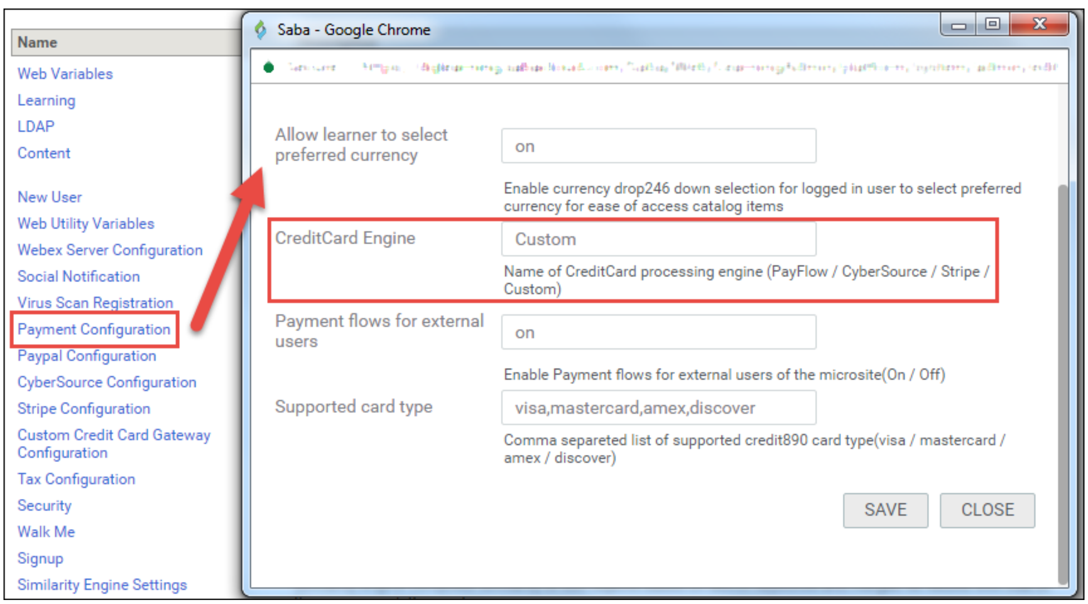


Figure 63: Set CreditCard Engine in Payment Configuration properties

On the **Payment Options** page, on clicking the **Pay by Credit Card** button, a message appears that asks the user to continue with the payment process and redirects the user to custom payment gateway page.

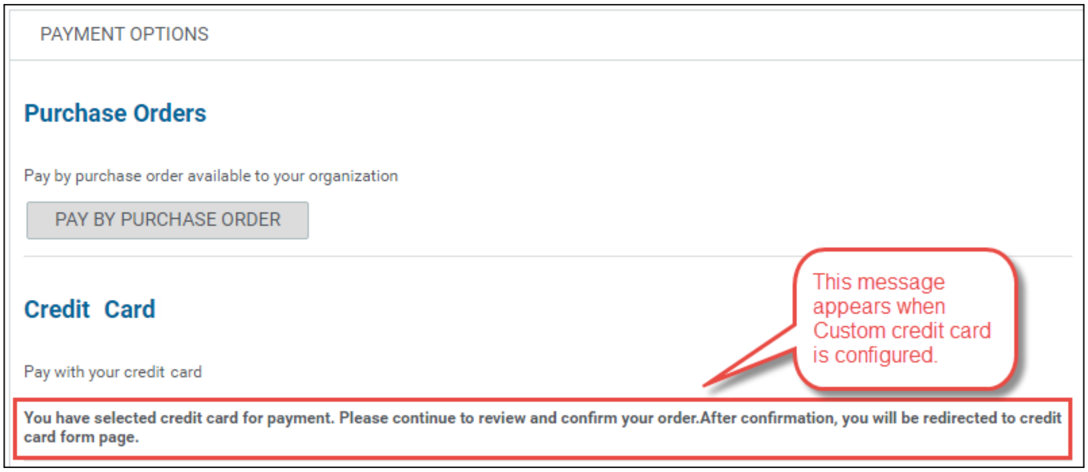


Figure 64: Payment Options

Use case

This feature can now allow users to integrate there own payment gateway in Saba Cloud and continue buying learning items.

Purchase class in training units irrespective of user preferred currency

How did it work?

Prior to this update, when a user logs into the application, it display courses and classes that has price in currency. Similarly for guest catalog, the application display classes in the default currency, which is defined on the microsite. This prevents the user from seeing courses and classes that has price defined only in training units.

How does it work now?

With this update, the external user can now see courses, classes, and subscriptions whose price is defined only in training units and not in any other currency.

Note: To pay by training units, the **Training Unit** service and **Training Unit** payment option on the microsite must be enabled. By default, the **Training Unit** service under **Ecommerce** is enabled.

This is applicable on the learning items that are searched from:

- Global search > Learning catalog
- Guest catalog search
- Browse Catalog

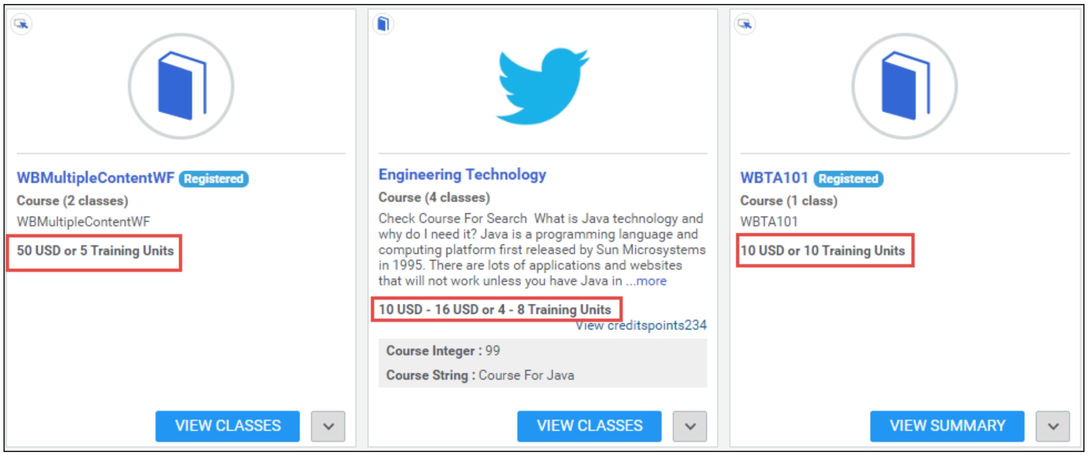


Figure 65: Price in TU and user's preferred currency

- Course details page
- Class details screen
- Subscription details screen
- Checkout flow > Select **Training unit** for **Show cost in**

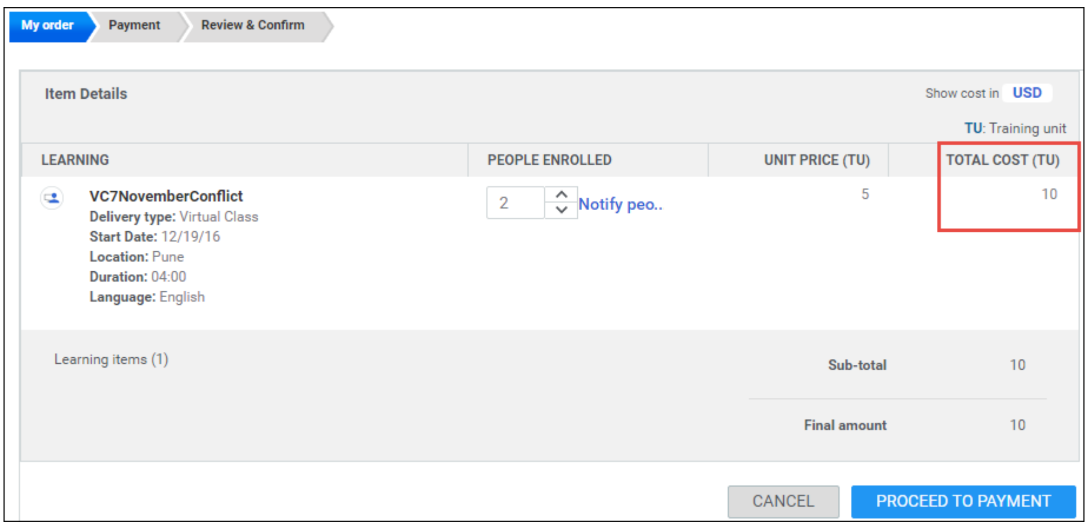


Figure 66: Select Training Units on Checkout flow

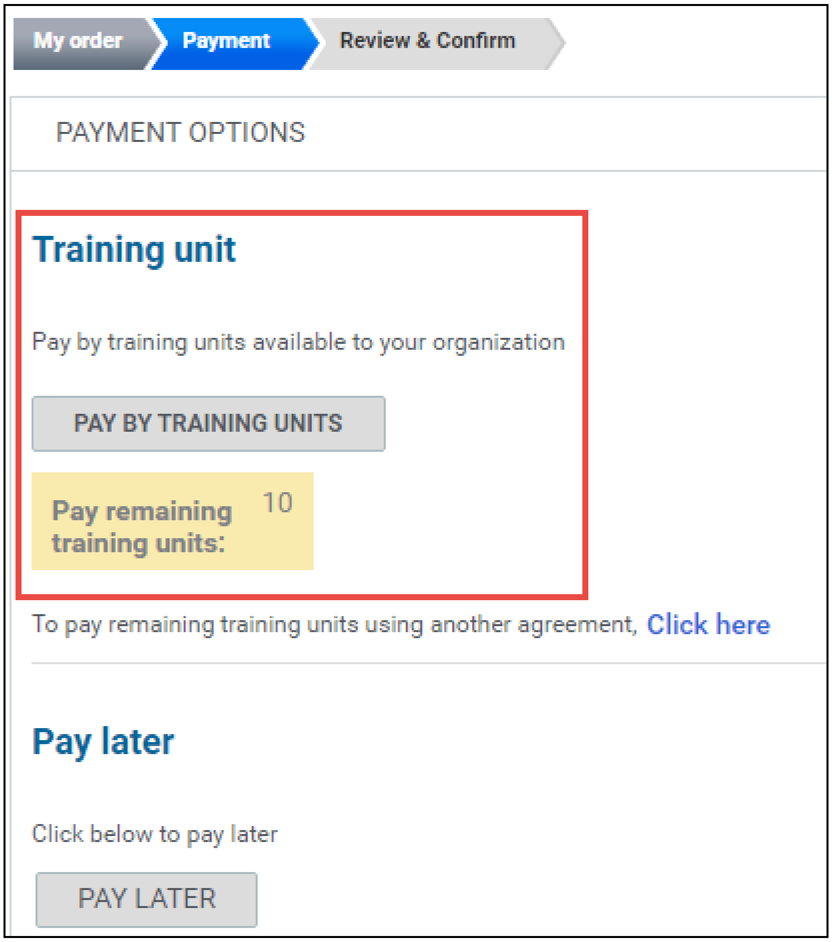


Figure 67: Pay in TU

Use case

The user can now purchase classes that do not have price defined in currency but defined only in training units.

Registrar to choose preferred currency for order and subscription

How did it work?

When a registrar places an order for a learner, the registrar had no provision to choose learner's preferred currency. There was a need to have same purchasing options as learners' for the registrar.

How does it work now?

The registrar can now place an order for order contact using order contact's preferred currency.

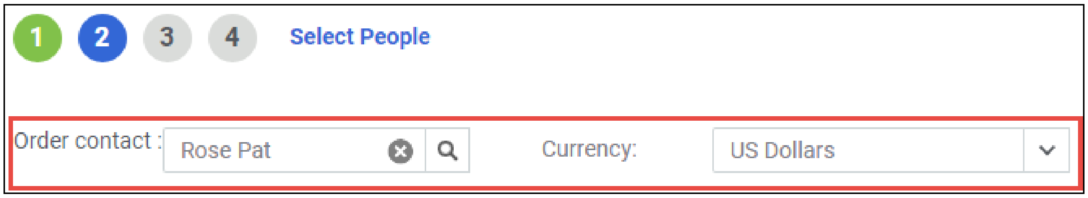


Figure 68: Currency dropdown for Orders

The currencies appear in the dropdown list based on the learner type and the selected settings. By default the **Currency** dropdown selects the default currency that is applicable to the order contact or organization.

- If the order contact is an internal user, then organization's currencies are shown in this dropdown.
- If the order contact is an external user, then:
  - Order contact's currencies are shown when he/she does not belong to any external organization.
  - Organization's currencies are shown when **Billing party** setting under **Ecommerce** is disabled.
  - Order contact's currencies are shown when **Billing party** setting is enabled.

On changing the currency, the catalog load courses and classes that are available in the selected currency. The registrar can then continue to place the order for the order contact.

The same **Currency** dropdown list is added for Subscriptions. The same rules (mentioned above) are applicable here.

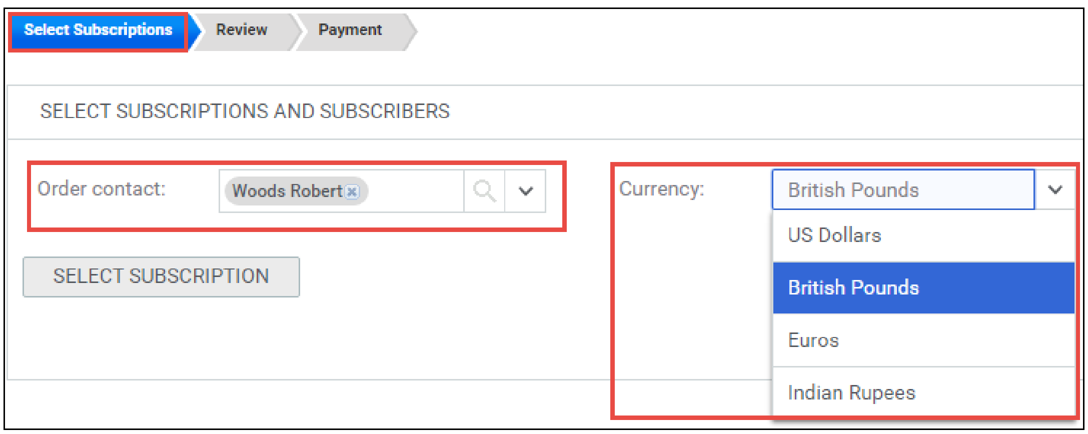


Figure 69: Currency dropdown for Subscriptions

Use case

The registrar now has the same purchasing options as a learner while placing an order/subscription.

Register for multiple classes using registration deeplinks

How did it work?

Prior to this update, the external learner could not register for multiple classes at once.

How does it work now?

The external learner can now register for multiple classes at once by adding class IDs or deliveryname along with class IDs in the existing deeplinks.

Examples

http://localhost/Saba/Web_spf/Social/common/externalordercart?offeringIds=

(class000000000201088,dowbt000000000001594,dowbt000000000001591, class000000000201087)

OR

http://localhost/Saba/Web_spf/Social/common/externalordercart?offeringIds=

(class000000000201088,web-based:WBT_INDEX10,dowbt000000000001591,instructor-led:ILT009)

On clicking the URL, a cart request is generated and it will redirect the learner to the checkout page. The learner can either proceed with the payment or cancel the order.

On proceeding for the payment if the included items show errors for all classes, then learner cannot checkout and have to close the request.

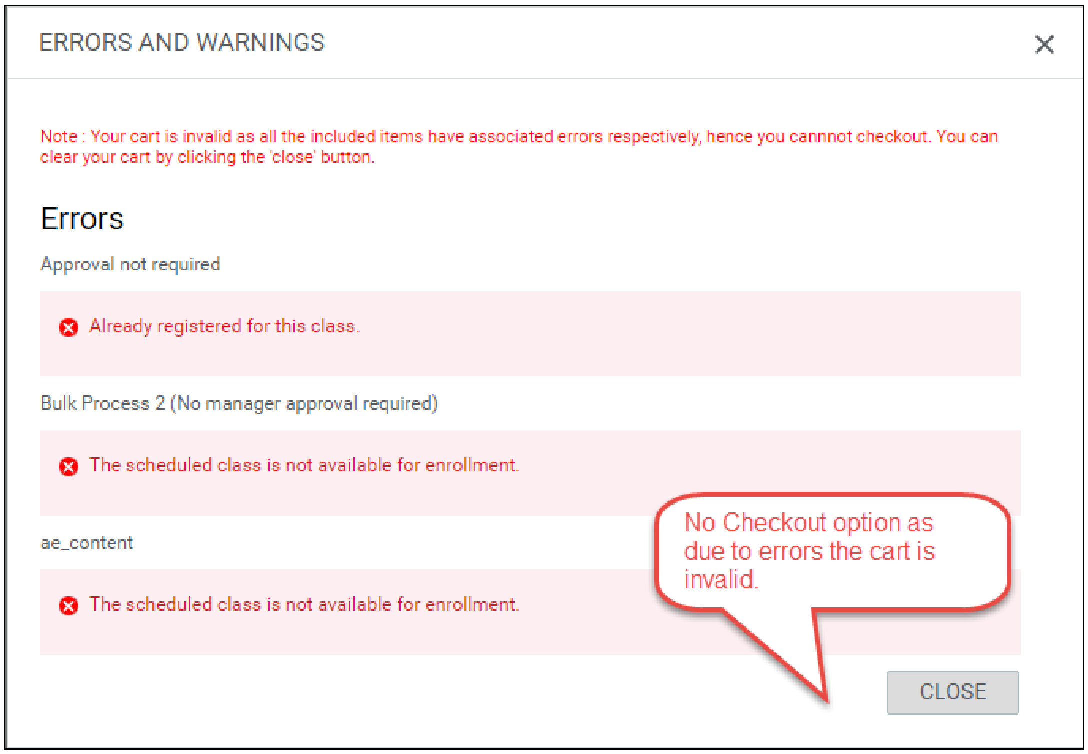


Figure 70: Cart with only errors

If at least one of the class is available, then the learner can checkout and proceed with the payment for that one class.

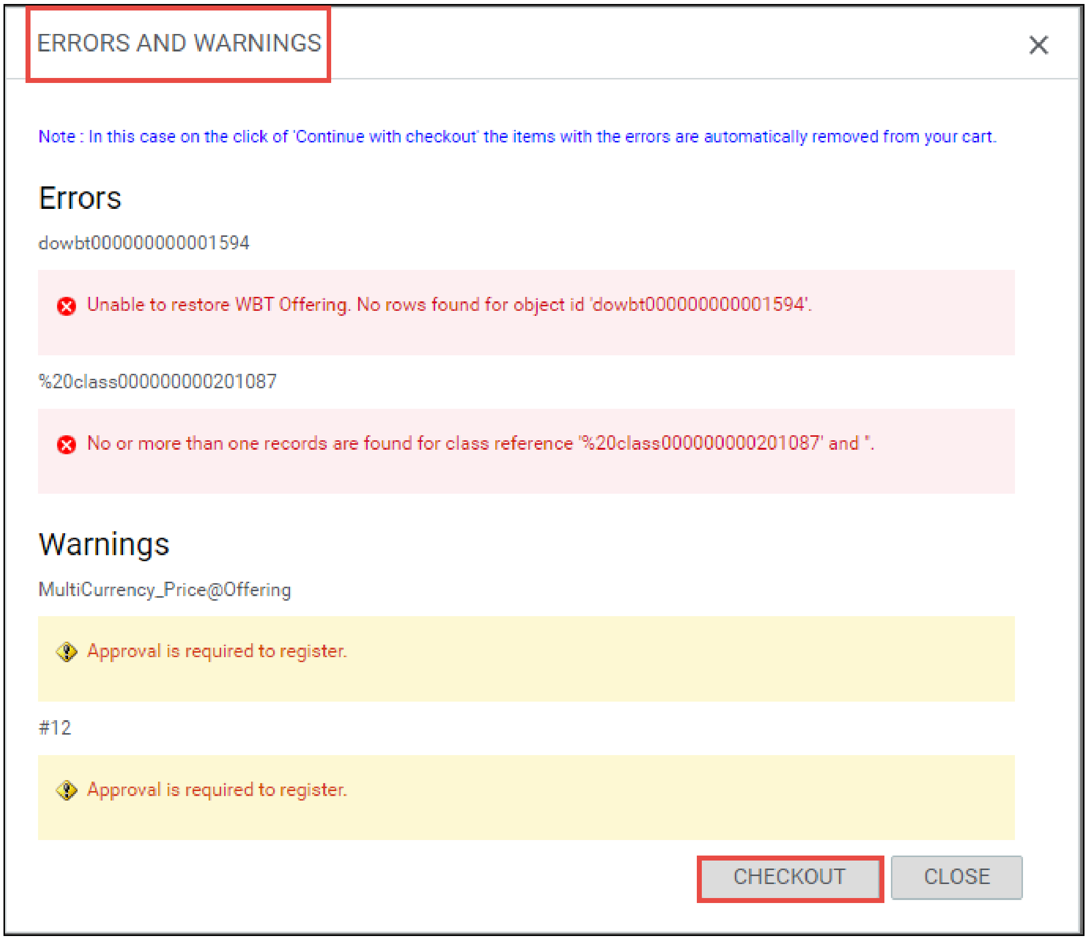


Figure 71: Checkout with the registration

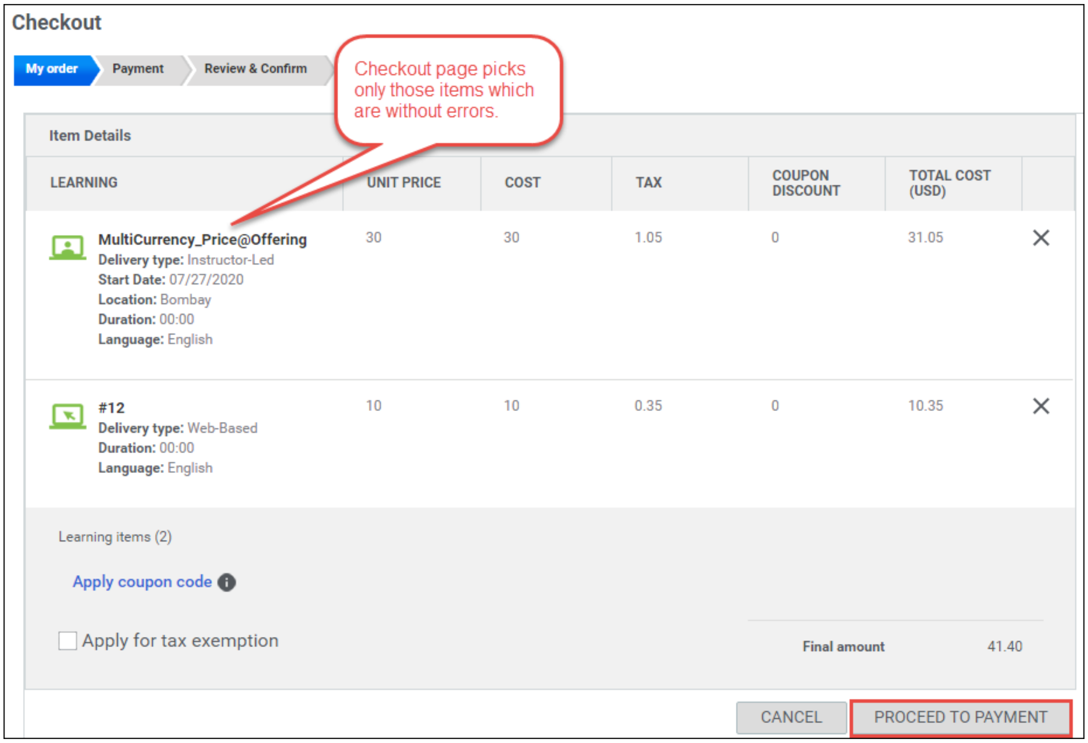


Figure 72: Checkout with valid items

The external learner can proceed to payment as the usual process.

Points to remember:

1. If the learner logs into Saba via Single Sign-On (SSO), then the Checkout cart is loaded directly or the learner has to log into Saba.
2. If the learner is an internal user, then proper error messages will appear and accordingly the learner will be redirected to the Home page.

Use case

This feature allow users to purchase multiple classes on an external site.

Type and Owner fields for subscriptions

How did it work?

Prior to this update, subscriptions were created for generic use, there was no distinction between subscriptions that can be used for specific purposes.

How does it work now?

With this update, the ecommerce administrator can add a type to a subscription, so that end users can search for a subscription based on their type.

On the New Subscription page, a **Type** field has been added that supports LOV. By default, an **Open** option has been added to the LOV that can be used if specific type isn't available. The administrator can use the picker to add new values to the LOV.

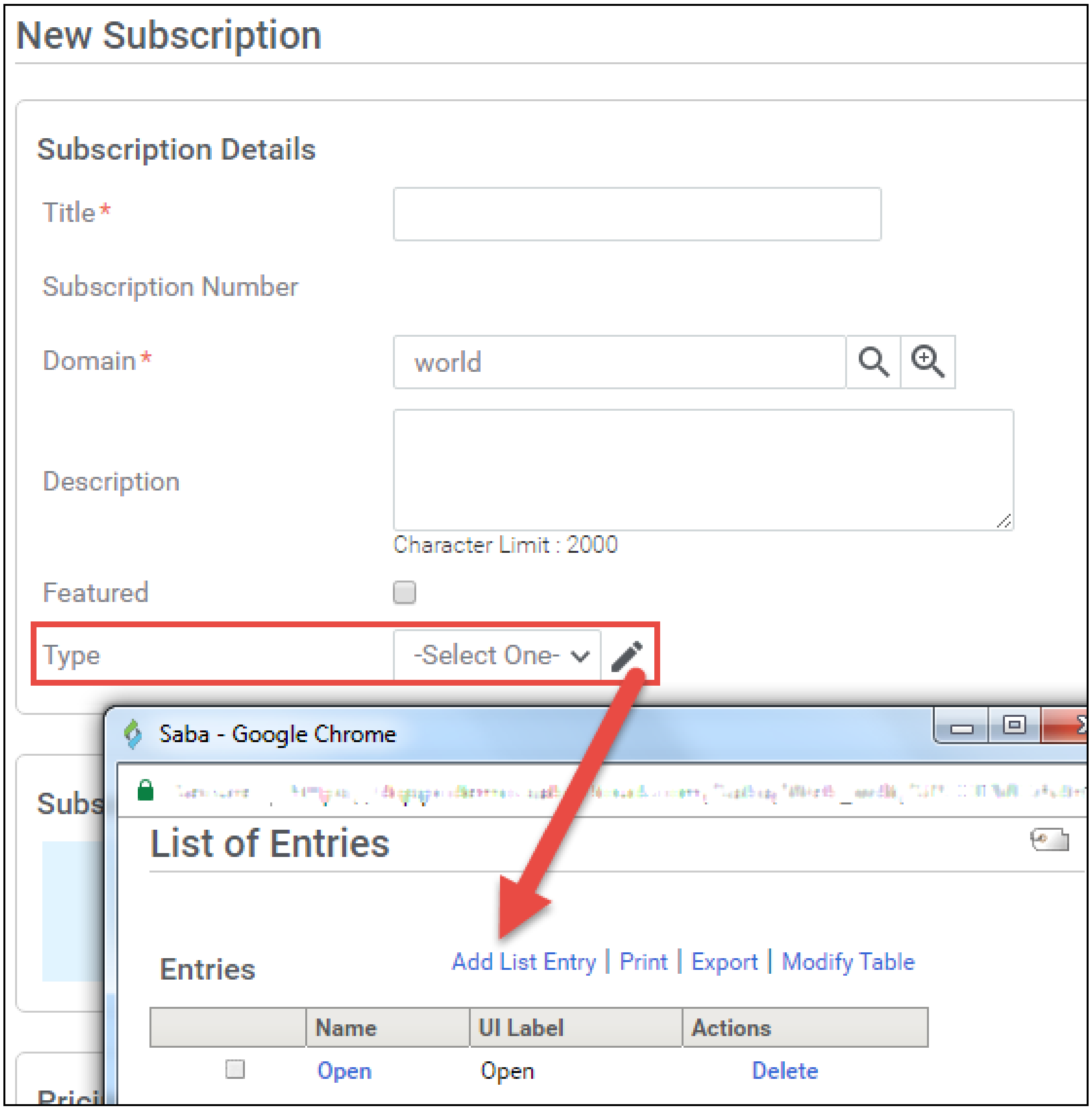


Figure 73: Type field in Subscription

This field is optional so administrator can create subscription without adding type. The **Type** field is added as search filter on:

- Subscriptions search page
- Subscription Order Search page
- Create subscription order flow by Registrar
- Guest catalog
- Global search

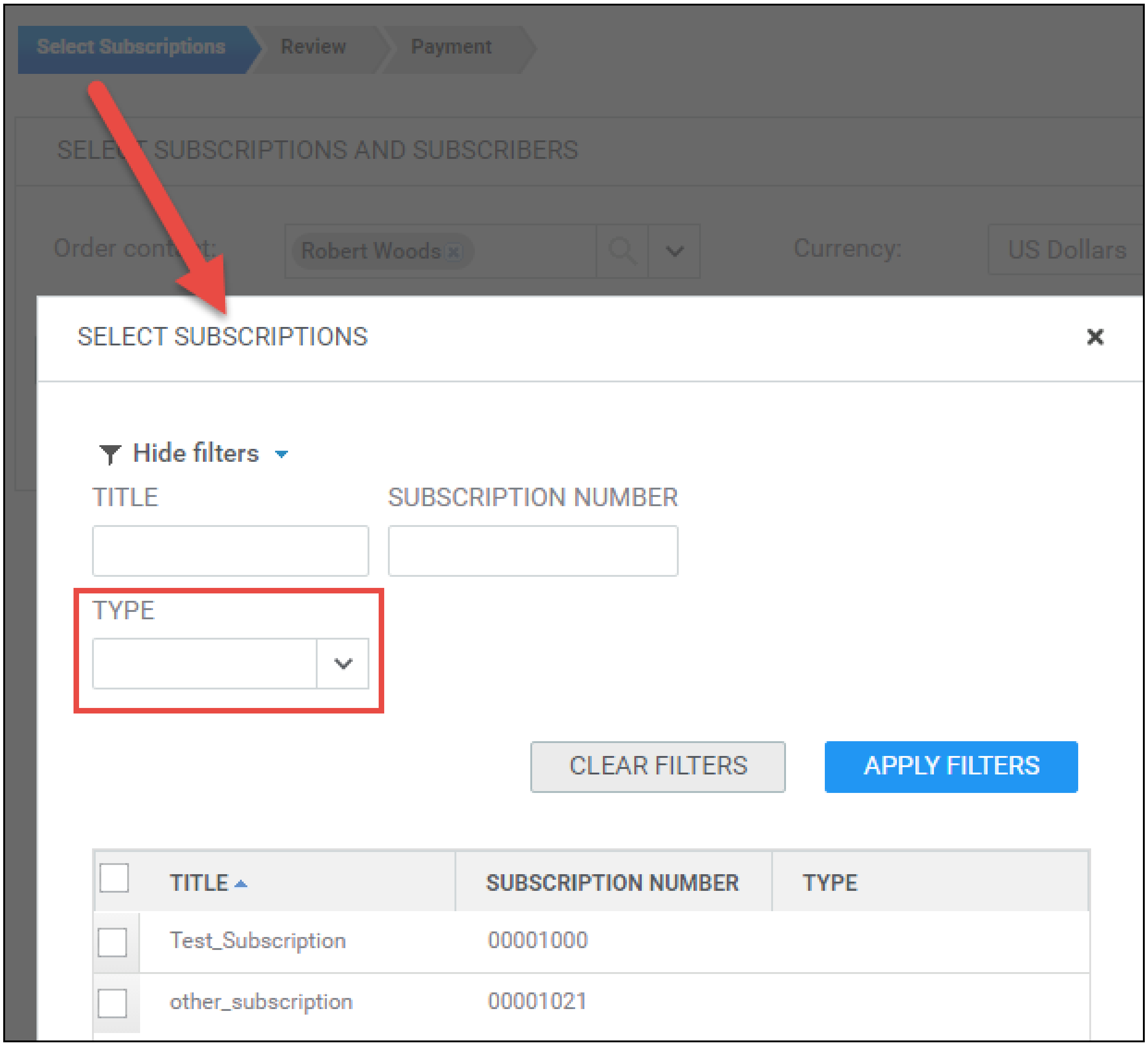


Figure 74: Type field in Subscription creation flow

The **@SubscriptionOrder_Type@** keyword is added to the **Learning Subscription Order Created** triggered notification which renders the subscription type in the notification. This notification can also be sent to the subscription owner. Hence, an **Owner** field has been added on the **Edit Subscription Details** page. This field is optional. The administrator can add multiple owners to the subscription. To support this, you can add owner as an recipient using the new named query **Owners of Subscription**.

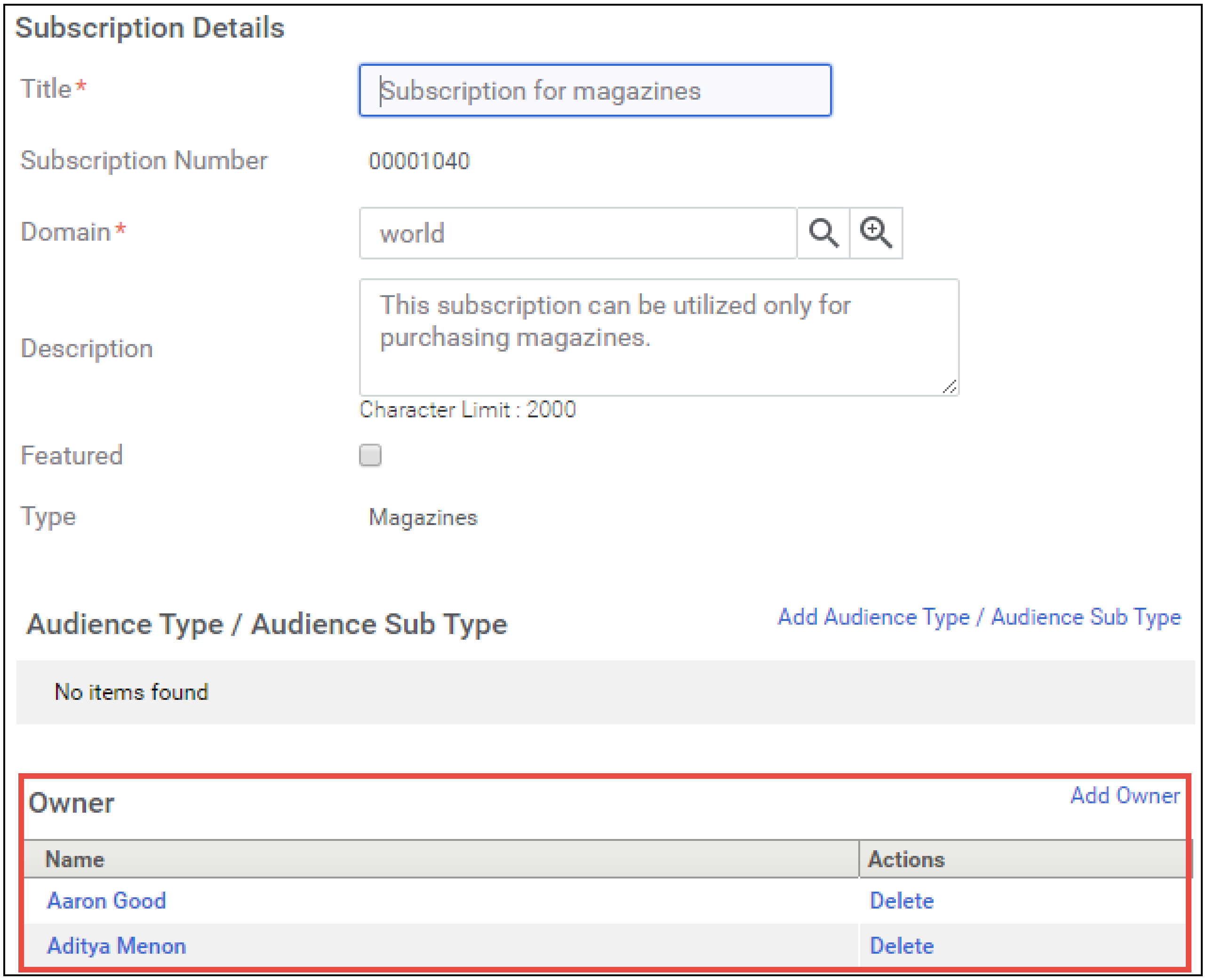


Figure 75: Owner field on subscription

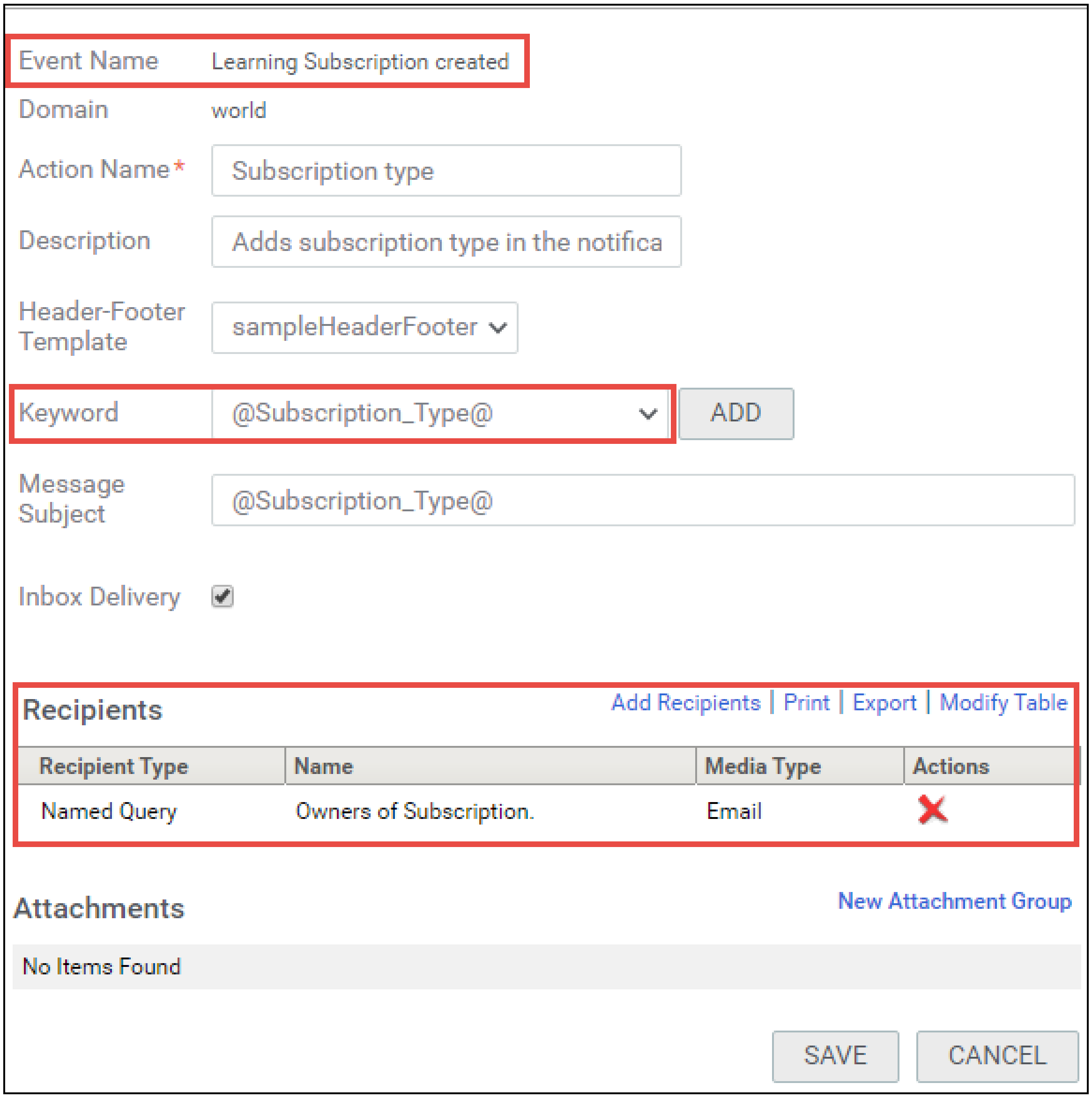


Figure 76: Learning Subscription created notification

Use case

Users can use subscriptions for a variety of reasons, hence having **Types** can help them differentiate between subscriptions and can easily use it based on their requirement.

Chapter 6

Learning

Topics:

Assessment

Support for adding subtopics to topics in tests

How did it work?

Prior to this update, assessment administrators in Saba Cloud did not have the ability to add subtopics to topics in test assessments.

How does it work now?

With this update, Saba Cloud provides support for adding subtopics to topics in test assessments. Subtopics in test topics allow assessment administrators to create nested subsets of questions. This provides finer control over randomized question selection.

Currently, this feature is not available for surveys.

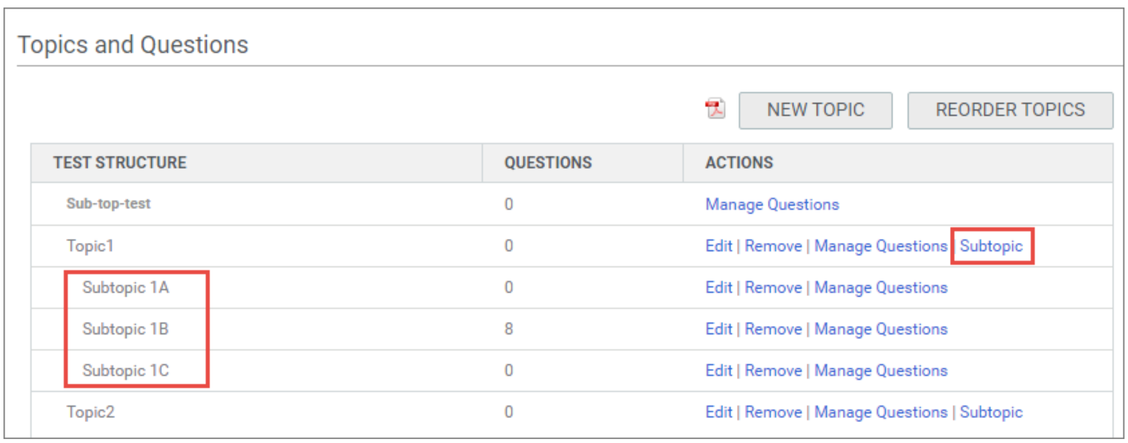


Figure 77: Adding subtopic to a topic in tests

To add a subtopic to a topic:

1. Click the **Subtopic** link for a topic in the **Topics & Questions** section of the test wizard.
2. Select from one of the following options:
   - Create New Subtopic with an empty folder
   - Create New Subtopic using an existing Question Pool folder
   - Create New Subtopic with dynamic link using an existing Question Pool folder
3. For a new subtopic, specify the name, subset and subset size.

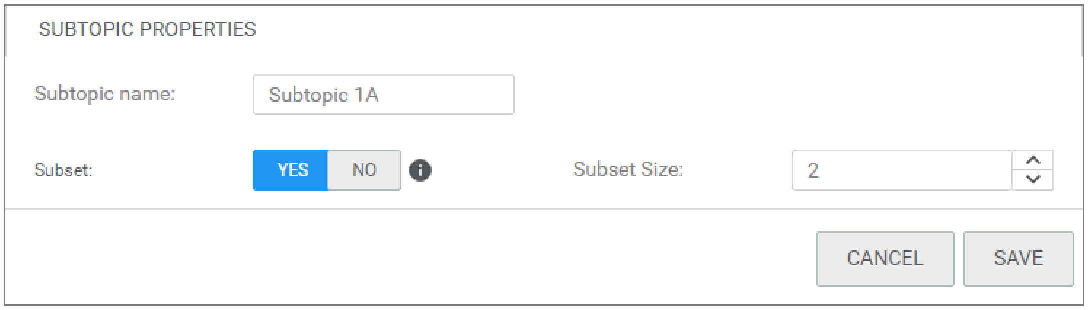


Figure 78: New subtopic properties

4. Click **Save**.

You can add one or more subtopics to a topic; however, Saba Cloud does not further allow adding subtopics to a subtopic.

Saba Cloud allows a subtopic to use a subset even if the parent topic also uses a subset. A subset within a subset works differently than a regular subset. A test using a contained subset will use up to the subset size of questions from the subtopic; it can end up using no questions from the contained subset.

Question order for questions in a subtopic is inherited from its parent topic. While reordering topics, Saba Cloud does not allow changing the parent of a subtopic.

If the **Show Scorecard** and **Break down by Topic** properties for a test are enabled, then the test scorecard displays subtopics as well.

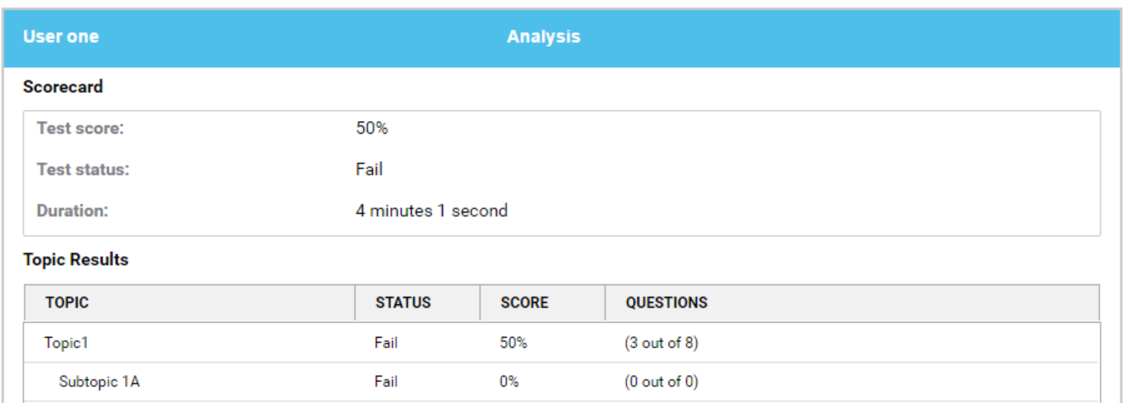


Figure 79: Scorecard displays subtopic scores

Use case

Question subset is a widely used feature. It prevents a user from getting the same questions with each attempt and it prevents two users who may be sitting next to each other from getting all the same questions. Subtopics in tests allow the administrator to better control question selection.

Export test and surveys to use in Saba Meeting

How did it work?

Prior to this update, Saba assessments could not be imported and used in Saba Meeting or Agenda Builder. There was no support to export assessments from Saba Cloud so that they could be imported into Saba Meeting.

How does it work now?

With this update, Saba Cloud provides the ability to export Saba test and survey assessments from Saba Cloud so that they can be imported into Saba Meeting or Agenda Builder. Only simple question types that are supported by the Agenda builder, are exported.

Assessment administrators can export an assessment by clicking the new **Export for Saba Meeting** link under **Actions**. Clicking this link downloads a file with a **.saz** extension, which users can either import into the Saba Meeting, open in the Agenda Builder tool, or import into the another Agenda in the Agenda Builder tool.

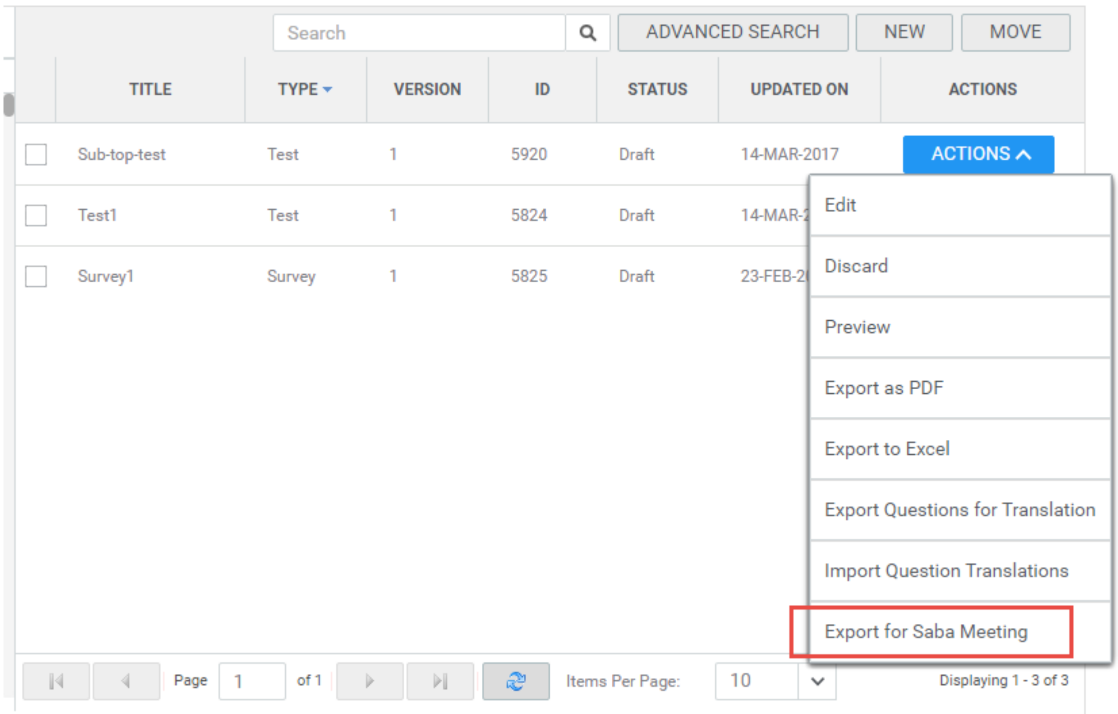


Figure 80: Export to Saba Meeting

If a test or survey contains only valid Agenda Builder questions, then the file is ready for immediate download. However, if the test or survey contains both valid and invalid Agenda Builder questions, then Saba Cloud displays a prompt asking if you want to continue with the download.

Saba Meeting supports only the following question types:

- Multiple Choice
- All That Apply
- Yes/No
- True/False
- Likert Scale
- Essay
- Fill in the Blank questions (provided they have a single blank to fill in and the answers do not use wildcards)

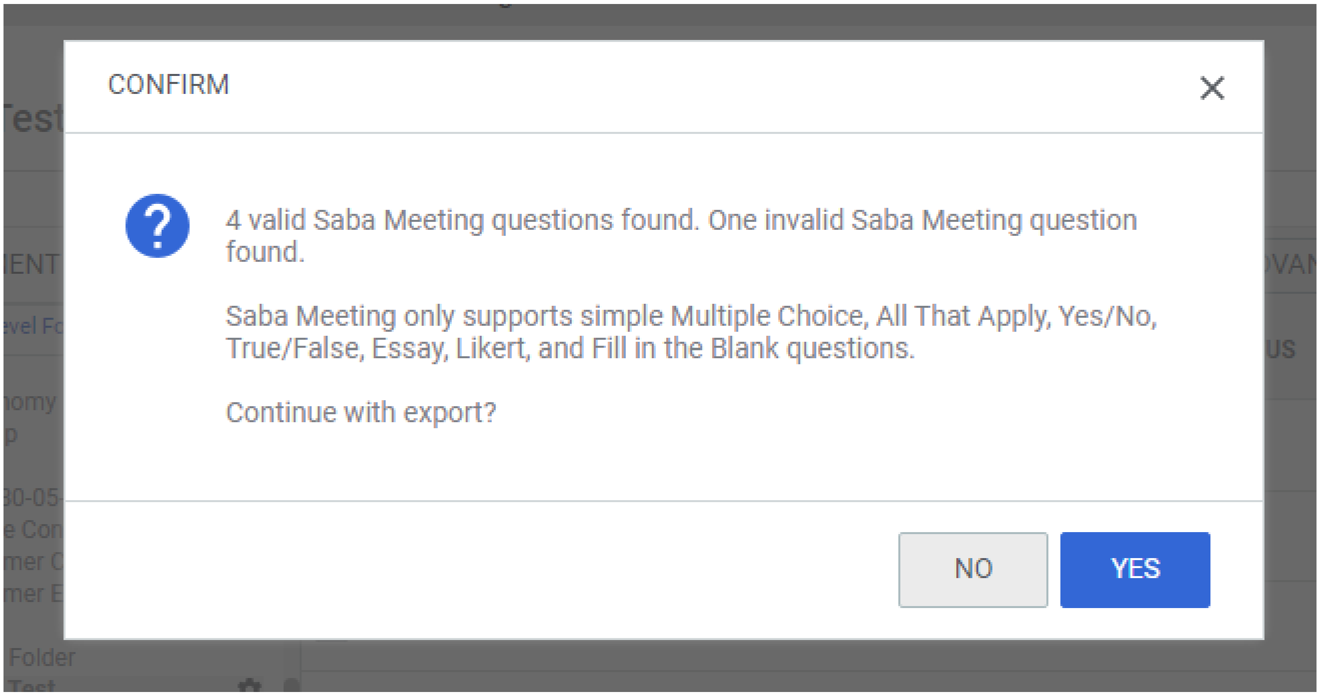


Figure 81: Warning prompt for valid and invalid questions during export

If a test or survey supports multiple languages, then Saba Cloud prompts you to select the language before proceeding with the export.

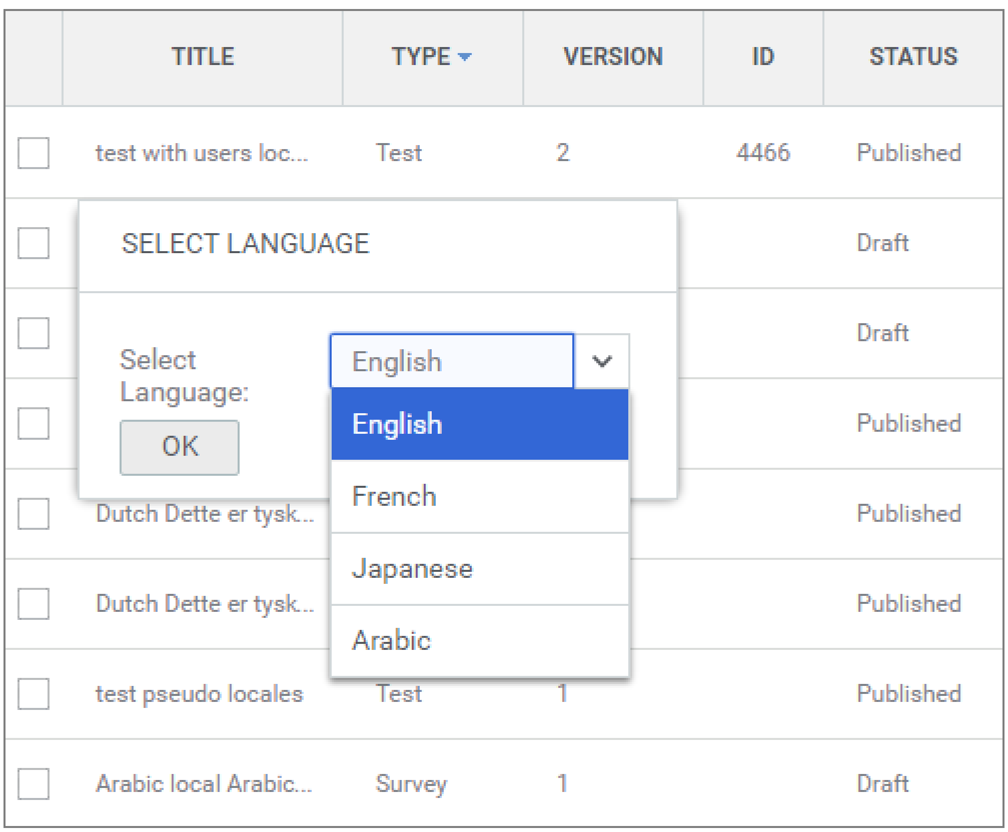


Figure 82: Select language during export

If the test or survey contains no valid Agenda Builder questions, then Saba Cloud displays an error message.

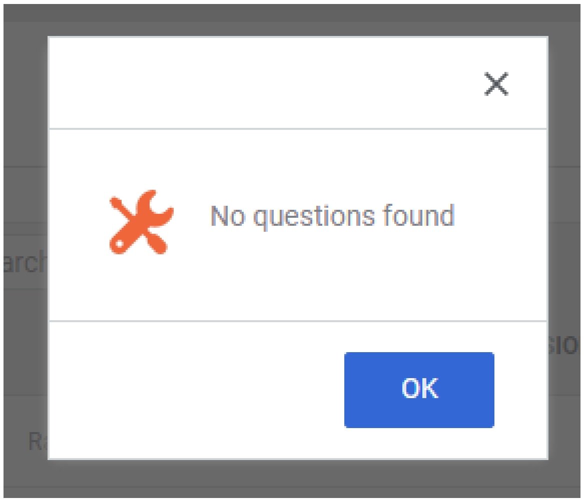


Figure 83: Error prompt for invalid questions during export

Use case

Agenda builder is a widely-used tool by Saba classroom users. The ability to import and open Saba assessments in the Agenda builder allows users to use Saba assessments in the Saba Meeting context.

Create assessment player themes

How did it work?

Prior to this update, Saba Cloud provided predefined player themes for test and survey assessments. There was no ability to define new themes and make them available to assessment authors while creating tests and surveys.

How does it work now?

With this update, Saba Cloud provides system administrators with the ability to define new player themes for test and survey assessments. Saba Cloud provides a single predefined theme *Saba Cloud Impact Theme*, which can be further copied and modified to create different themes as per requirements. The predefined theme cannot be edited or deleted.

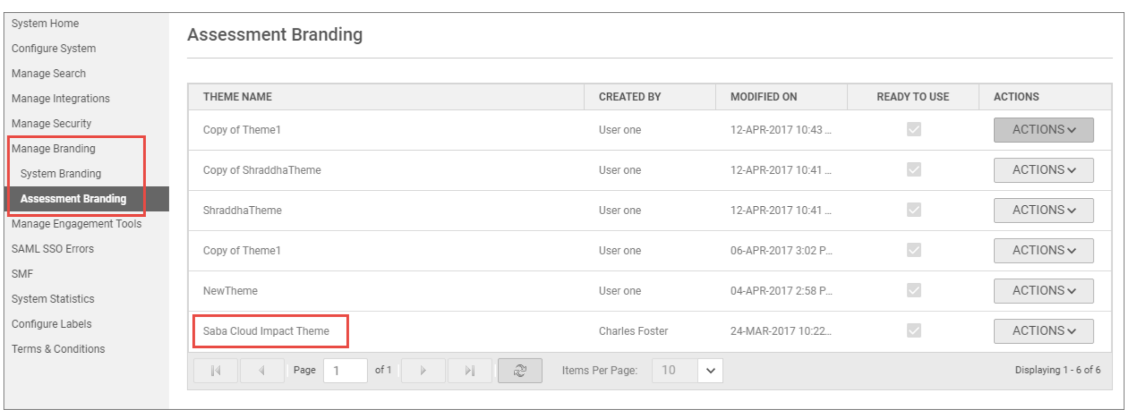


Figure 84: New Manage Assessment Branding menu

System administrators can create new themes for assessment player if they have the required privileges to access the **Manage Branding** menu.

By default, the following privileges are disabled for the "Menu visibility - System admin" component for "System admin" security role:

- Can access System > Manage Branding > System Branding
- Can access System > Manage Branding > Assessment Branding

To create a new player theme:

1. Click **System > Manage Branding > Assessment Branding**.
2. Click **Actions > Copy** for a theme. The theme editor opens.

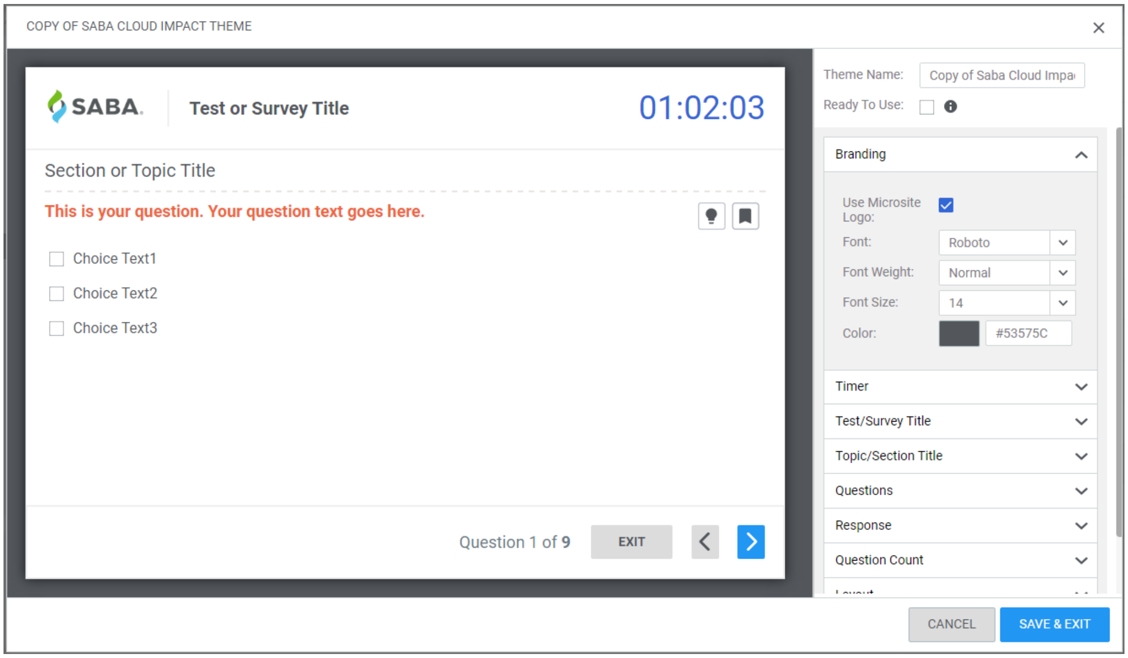


Figure 85: Assessment player theme editor

3. Specify the theme name, general attributes and attributes for different theme sections.

   Note: The section attributes override the general attribute values for the theme.

4. Click **Save & Exit**. Saba Cloud saves the theme.
5. Click **Actions > Preview** to preview the saved theme.

Based on the privileges you have, Saba Cloud displays one or more of the following actions for customized themes:

- Preview
- Copy
- Edit
- Delete
- Mark as Default

System administrators can mark any theme as the default theme for creating tests and surveys. The default theme cannot be deleted.

Saba Cloud makes the theme available to assessment authors for use while creating tests and surveys only if the theme is marked as "Ready to use". If a theme is ready to use, then authors can select a customized theme from the **Choose Theme** dropdown list. The default theme appears as the default selected theme in the **Choose Theme** dropdown list.

Note: The custom player themes are available for tests and surveys in Learning and Recruiting, and for custom surveys in Pulse 360.

When system administrators try to delete a custom theme and if the theme is used by tests or surveys, then Saba Cloud displays a warning message to them. If they still continue and delete the theme, then the tests and surveys using the deleted theme automatically switch to the default theme.

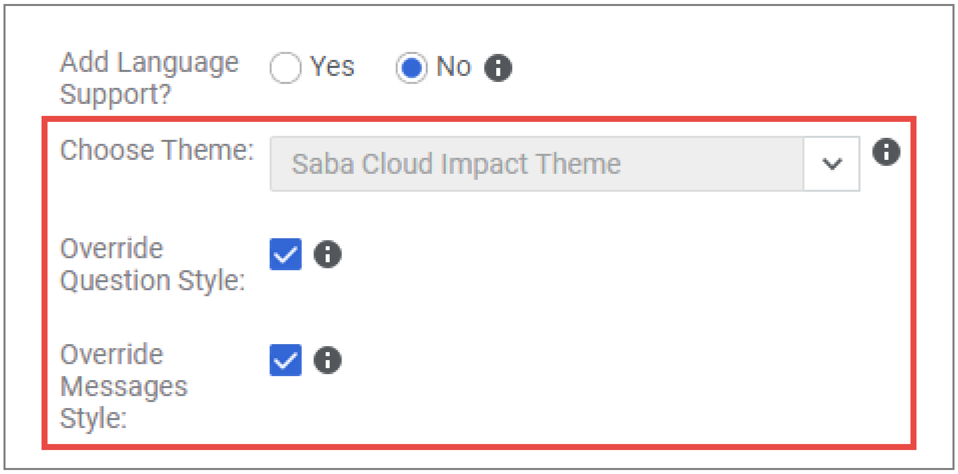


Figure 86: Select customized player theme

New Test/Survey Properties

This update also introduces the following new properties related to player themes for tests and surveys:

Table 11: New properties

Property Name	Property Description	Mandatory
Override Question Style	If this checkbox is selected, then the selected player theme style overrides the question style in the test or survey. If cleared, then the question style you define in the test or survey is retained. By default, this checkbox is selected.	No
Override Message Style	If this checkbox is selected, then the selected player theme style overrides the message style in the test or survey. If cleared, then the message style you define in the test or survey is retained. By default, this checkbox is selected.	No

System Branding

This update also adds the **System Branding** sub-menu under **Manage Branding** menu. If system administrators have the required access privileges, they can use this menu to customize the application branding.

Note: This sub-menu provides a different access point but the same capabilities as the existing **Configure Branding** functionality under **Microsites**.

Use case

There is a need to provide a more exciting visual experience for users taking test and survey assessments by defining customized player themes.

Navigate to unanswered questions

How did it work?

Prior to this update, if users missed or intentionally left out one or more questions while taking a test, then the assessment player only prompted users about missing out some questions; however, the player did not provide any means to navigate directly to the missed questions in the test.

How does it work now?

With this update, the Saba assessment player now allows users to directly navigate to unanswered questions while taking a test so that no questions are missed by users.

The following new test property is introduced to configure this behavior:

- **Show Unanswered Questions**

  Enable this property to allow users to directly navigate to unanswered questions in a test.

  By default, this property is disabled for a test.

  Note:

  - This field is available for configuration only if the **Advanced Assessment** service is enabled.
  - For **Basic Assessments**, this property is not available for configuration. However, the feature to view unanswered questions is available by default to users.

Further, if the **Advanced Assessment** service is enabled, then the **Show Unanswered Questions** property can be configured only if either **Show Question List** or **Allow Navigation** property is enabled for the test. If both the properties are disabled, then the **Show Unanswered Questions** property is disabled as well.

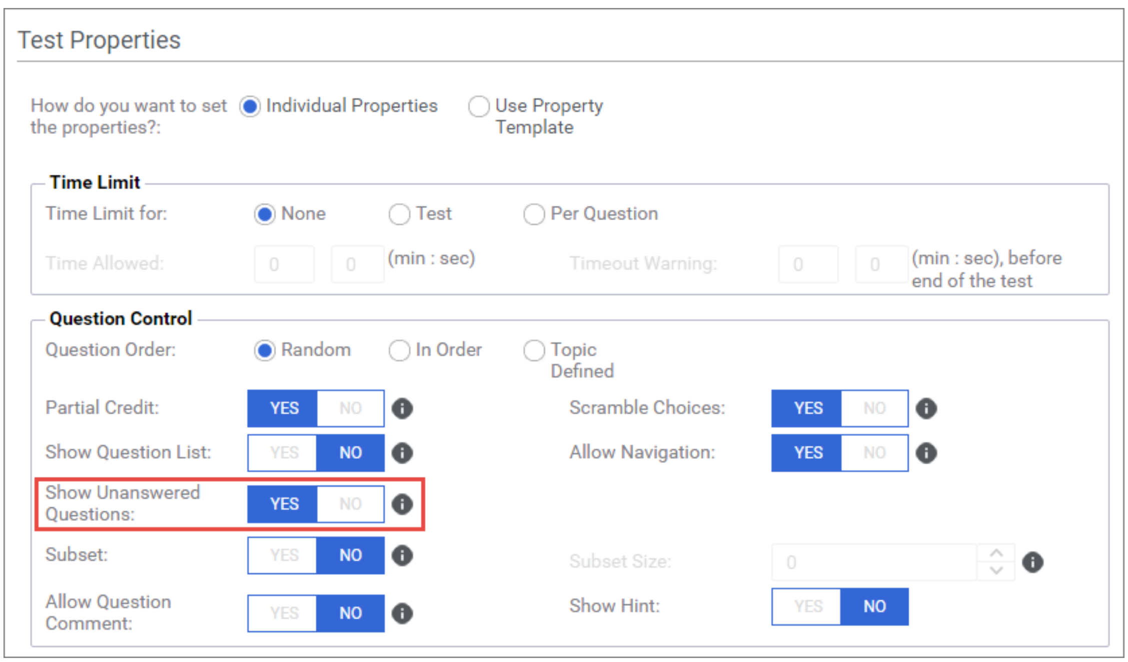


Figure 87: New property in tests

If the feature to view unanswered questions is enabled, then the test summary page displays the **View Unanswered Questions** button if there are any unanswered questions in the test. Clicking this button takes user to the first unanswered question. Every page of an unanswered question displays two new navigation buttons that allow users to navigate to the next and previous unanswered question in the test. When all unanswered questions are answered, then these buttons are not displayed.

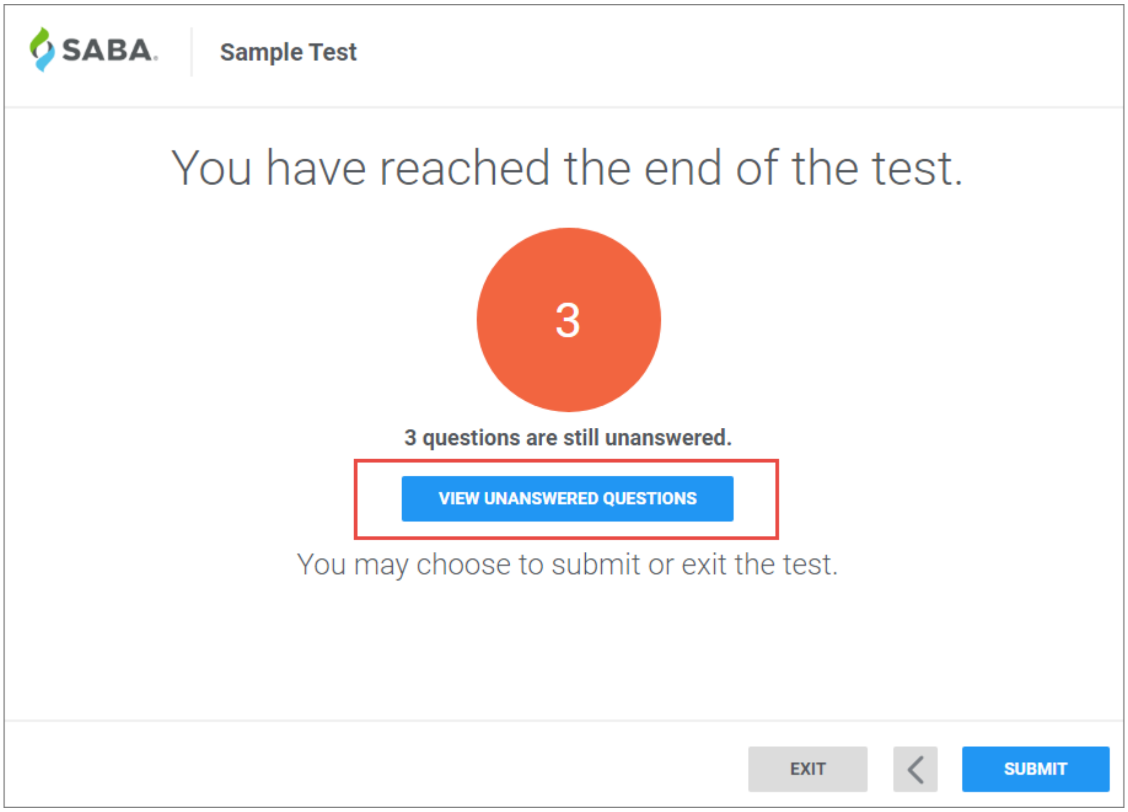


Figure 88: Assessment with unanswered questions

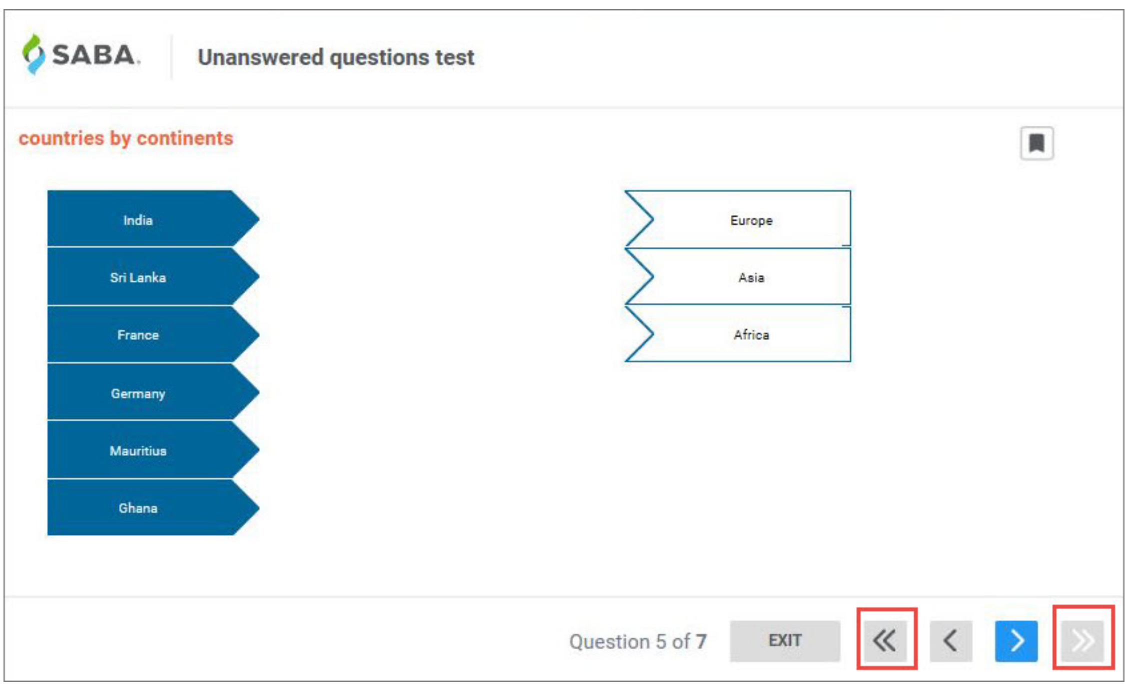


Figure 89: Navigating to unanswered questions

Use case

Users taking tests can skip questions that seem more difficult and move on to the next question, but may want to quickly return to them so that they do not miss out on the unanswered questions. The Saba assessment player needs to support the ability for users to easily move between such unanswered questions.

Learning Activity

Increased default results per page in global search

How did it work?

Prior to this update, the default results per page in global search were set to 12.

How does it work now?

With this update, Saba Cloud increases the default results per page in global search to 25. This improves the search results usability such that users can now navigate through lesser number of pages to get to the required search result.

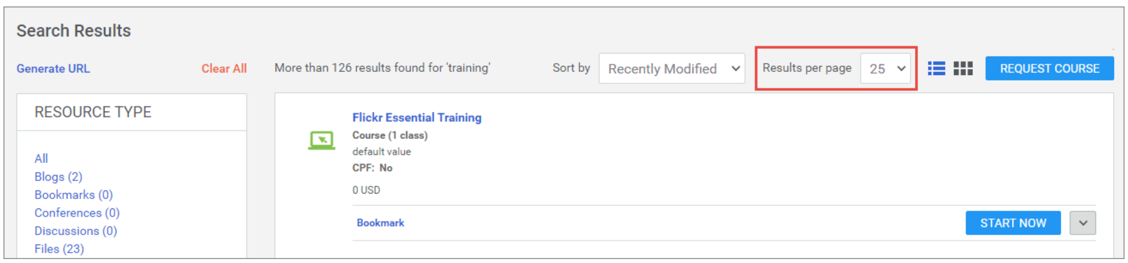


Figure 90: Results per page default

The new default value for the **Results per page** dropdown on the search page is applicable to all types of resources such as All, Learning Catalog, Files, Groups, and so on.

Use case

Users want to see more than 12 results per page in search results so that the pagination and the number of clicks to review search results is reduced.

New organization manager related named queries

How did it work?

Prior to this update, notification events did not include an organization manager named query for use as a recipient.

How does it work now?

This update enhances approval-related notifications in Saba Cloud, where the manager is a named query, to include an organization manager named query.

The following table lists the existing notification events that now support a new named query for organization manager.

Table 12: New Organization manager named queries

Named Query	Notification Event	Component
Organization manager of student	Order invoice payment approval pending	External Order
Organization manager of learner	Ad hoc transcript in pending approval state is rejected	Offering Action Profile
	Ad hoc transcript in pending approval state is approved	
	Ad hoc transcript in pending approval state	
Organization manager of the registered student	Instructor-Led Class Level is Pending for Ap~ proval	Registrations
	Web-Based Class Pending Approval Level is Approved	
	Web-Based Class Registration in Pending Level Approval State	
	Registration Pending Approval Reminder (X days)	
	Web-based class with CPF registration is in pending approval state	
	Virtual class with CPF registration is in pending manager approval state	
	Instructor-led class with CPF registration is in pending approval state	
	Blended class with CPF registration is in pending approval state	
	Automatic approval of CPF registrations - 30 days after creation	
	Blended Class Pending Approval Level is Ap~ proved	
	Blended Class Level is Pending for Approval	
	Virtual Classroom Pending Approval Level is Approved	
	Virtual Classroom Level is Pending for Approval	
	Instructor-Led Class Pending Approval Level is Approved	

Named Query	Notification Event	Component
	Blended Class Registration No Approval Re~ quired	
	Blended Class Pending Registration is Approved	
	Blended Class Registration in Pending Approval State	
	Instructor-Led Class Registration No Approval Required	
	Web-Based Class Registration No Approval Required	
	Virtual Classroom Reg No Approval Required	
	Instructor-Led Class Registration in Pending Approval State	
	Web-Based Class Registration in Pending Ap~ proval State	
	Virtual Classroom Reg in Pending Approval State	
	Instructor-Led Class Pending Registration is Approved	
	Web-Based Class Pending Registration is Ap~ proved	
	Virtual Classroom Pending Registration is Ap~ proved	
Organization manager of the reviewee	Feedback approval process is complete	Feedback
	Feedback approver is terminated	
	Approval required for the feedback	
	Approver is terminated	Review
	Performance review approval process is com~ plete	
	Approval required for the performance review	
Organization manager of new person	Approval Required for New User	Person, External
	Registration for direct reports(External) in pending approval state	

Named Query	Notification Event	Component
	Registration for direct reports(Internal) in pending approval state	Person, Internal
Organization manager of the plan's assignee	Plan approved or rejected	Plan
Organization manager of the person whose skills are being assessed	Notify Approver of Assessments Pending Ap~ proval	Approver Action
	Employee is Notified of Rejection by the Ap~ prover	
	Employee is Notified of Approval by the Ap~ prover	
Organization manager of the talent pool member	Approval from manager for nominee to be groomed	Talent Pool Candidate
Organization manager of the job requisition associated with the job offer	Job Offer is pending for approval after X days of its submission.	Job Offer
	Job Offer Pending Approval	
	Job Offer Approved	
Organization manager of the goal's assignee	Goal is pending approval	Goal Definition
	Goal submitted for approval	
	Goal Approved	
Organization manager associated with the job requisition	Job Requisition is pending for approval after X days of its submission.	Job Requisition
	Job Requisition Pending Approval	
	Job Requisition Approved	

Use case

Often, it is necessary to notify the organization manager in addition to the direct manager for such events. Further, this enhancement supports an additional enhancement, which adds the organization manager as an option in the approval flow.

Popular Learning replaced by Top Rated Learning section

How did it work?

Prior to this release, the **Popular Learning** section was displayed while browsing the Learning Catalog. This section displayed learning items based on consumption. However, consumption did not necessarily depict popularity since often it was required items such as compliance courses that were consumed more by users and displayed in this section.

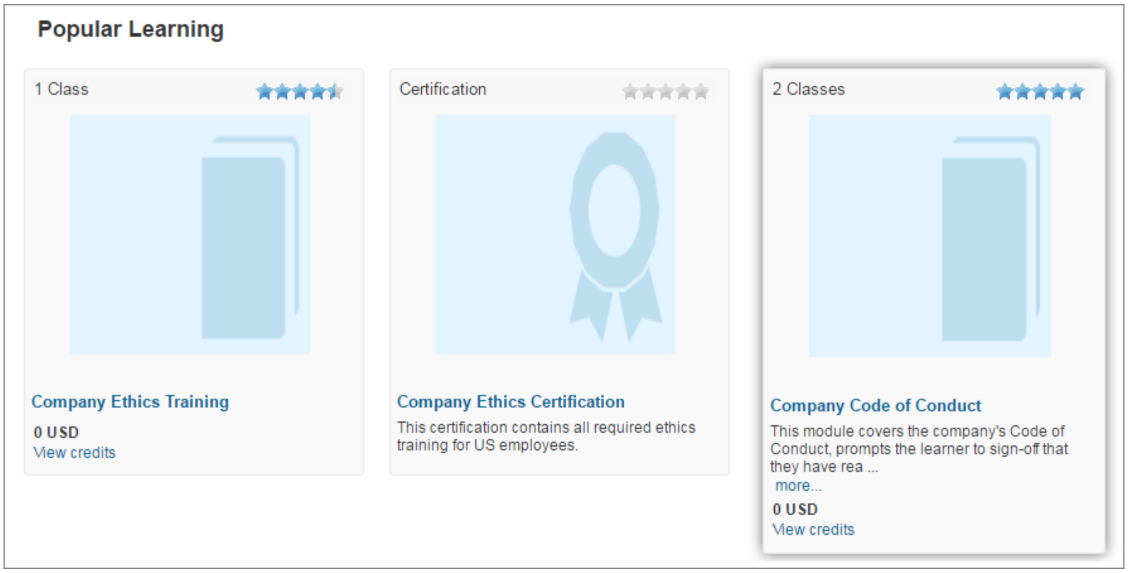


Figure 91: Popular Learning section

How does it work now?

With this update, Saba Cloud replaces the **Popular Learning** section with the new **Top Rated Learning** section.

This section displays only top-rated learning items. These are learning items that are rated the highest by users amongst all learning items. The highest rated items are displayed first in the list. If two learning items have the same rating, then the item's created date is used for sorting. If a learning item is older than 365 days, then it is not considered for display in this section.

To view this section, click **Browse** > **Learning Catalog**.

Figure 92: Top Rated Learning section

The **Top Rated Learning** section is not displayed while browsing the learning catalog if:

- The **Web 2.0 Actions for Learning Catalog** setting under **Learning** > **Catalog** service is disabled or,
- The **Rating** service under **Foundation** is disabled or,
- There are no learning items rated.

Popular Learning Events Portlet

With this change, the **Popular Learning Events** portlet on the **Home** is obsoleted. Hereafter, this portlet is not available for configuration. If previously configured, then this portlet cannot be viewed anymore.

Use case

The **Popular Learning** section displays learning items based on number of people that have consumed the item, and often the most consumed learning items are required items, such as compliance courses, which leads to inappropriate courses being categorized as popular. The definition of course popularity needs to be changed to overcome this issue.

Display recurring course notifications for recurring courses

How did it work?

Prior to this update, notifications enabled for a recurring course were not displayed in the recurring course's **Notifications** tab. Only course notifications were displayed.

How does it work now?

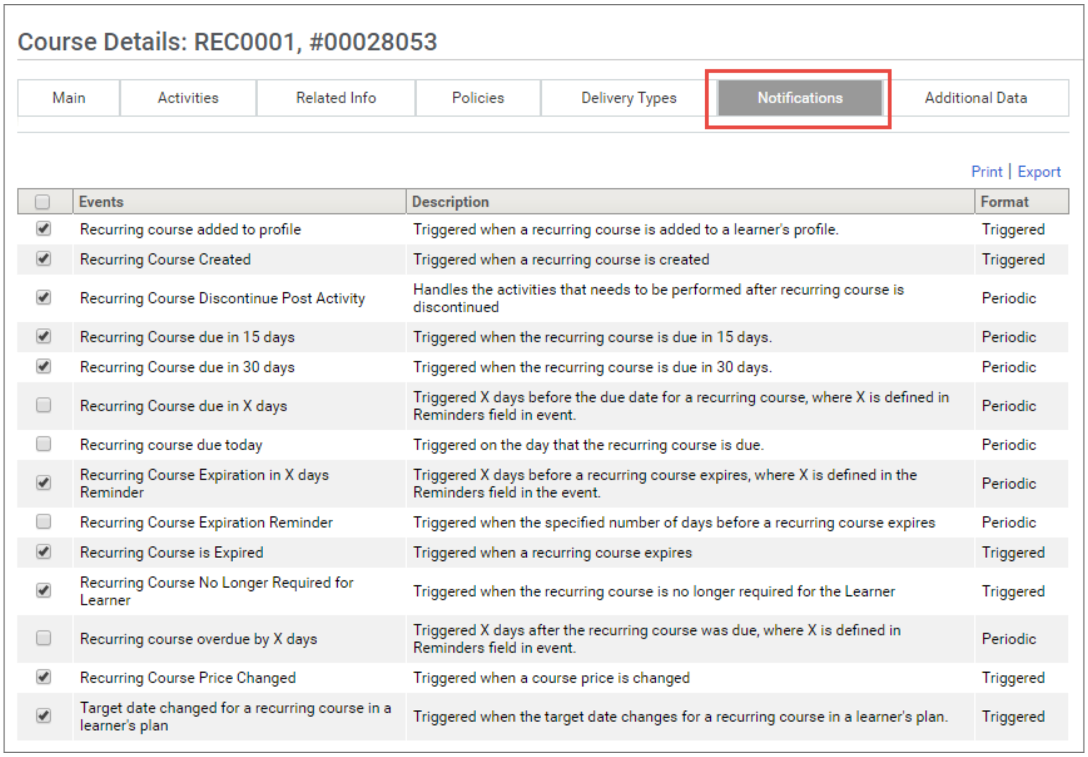
With this update, Saba Cloud now displays all recurring course notifications in the recurring course's **Notifications** tab.

If the system administrator enables or disables any recurring course notification at the system level, then the changes are reflected in the recurring course's **Notifications** tab till the time the learning administrator clicks the **Save** button in the tab. Once saved, any notification changes made at the system level are not reflected at the recurring course level.

Changes to notifications at the recurring course level override the settings at the system level. For example, if a notification is enabled at the system level but disabled at the recurring course level, then Saba Cloud does not trigger the notification for the recurring course where it is disabled, but triggers it for other recurring courses.

If a notification is disabled at the system level but enabled at the recurring course level, then Saba Cloud triggers the notification only for the recurring course where it is enabled, and not for any other recurring course.

Note: This works only for triggered notifications; periodic notifications always work only when they are enabled at both, the system and recurring course level.



Course Details: REC0001, #00028053

Main | Activities | Related Info | Policies | Delivery Types | Notifications | Additional Data

Print | Export

	Events	Description	Format
☑	Recurring course added to profile	Triggered when a recurring course is added to a learner's profile.	Triggered
☑	Recurring Course Created	Triggered when a recurring course is created	Triggered
☑	Recurring Course Discontinue Post Activity	Handles the activities that needs to be performed after recurring course is discontinued	Periodic
☑	Recurring Course due in 15 days	Triggered when the recurring course is due in 15 days.	Periodic
☑	Recurring Course due in 30 days	Triggered when the recurring course is due in 30 days.	Periodic
☐	Recurring Course due in X days	Triggered X days before the due date for a recurring course, where X is defined in Reminders field in event.	Periodic
☐	Recurring course due today	Triggered on the day that the recurring course is due.	Periodic
☑	Recurring Course Expiration in X days Reminder	Triggered X days before a recurring course expires, where X is defined in the Reminders field in the event.	Periodic
☐	Recurring Course Expiration Reminder	Triggered when the specified number of days before a recurring course expires	Periodic
☑	Recurring Course is Expired	Triggered when a recurring course expires	Triggered
☑	Recurring Course No Longer Required for Learner	Triggered when the recurring course is no longer required for the Learner	Triggered
☐	Recurring course overdue by X days	Triggered X days after the recurring course was due, where X is defined in Reminders field in event.	Periodic
☑	Recurring Course Price Changed	Triggered when a course price is changed	Triggered
☑	Target date changed for a recurring course in a learner's plan	Triggered when the target date changes for a recurring course in a learner's plan.	Triggered

Figure 93: Recurring course notifications in Notifications tab

Additionally, this update adds the following new notifications for recurring courses:

Table 13: New notifications for recurring courses

Notification Event	Type	Description
Recurring Course Created	Triggered	Triggered when a recurring course is created.
Recurring Course Discontinue Post Activity	Periodic	Handles the activities that needs to be performed after a re~ curring course is discontinued.
Recurring Course Price Changed	Triggered	Triggered when a course price is changed.

With the introduction of these new notifications, Saba Cloud stops triggering any course-related notifications for recurring courses.

Use case

Course administrators need to have the ability to view and disable recurring course notifications for recurring courses.

Completion of versioned recurring course via equivalent

How did it work?

Prior to this update, if an ILT class associated with the original version of a recurring course was marked as delivered, then users were not marked complete for another version, which is the equivalent, of the recurring course. This happened because the recurring course was assigned to users before completing the equivalent course and so equivalent course completion was not considered for recurring course.

How does it work now?

With this update, the completion behavior of recurring courses in Saba Cloud is enhanced as follows:

- If a learner is assigned a recurring course and the learner completes only the course's equivalent, then the original recurring course is also marked complete.
- If a learner is assigned a recurring course and if its equivalent is an ILT class and an instructor marks it complete and grants credits, then the original recurring course is also marked complete.

  Note: Assignment of equivalent course to learner is not mandatory. Irrespective of whether an equivalent course is assigned or not, and if a learner completes the equivalent course, then the recurring course is still completed because of its equivalent course completion.

Recalculation

If a course (regular or recurring) is assigned to a user, and the user completes the course, and then if the learning administrator tries to add the same course as an equivalent to a recurring course, then Saba Cloud opens a recalculate popup page with the following message:

"Adding or changing equivalent courses will affect completion status of the learners currently working on this recurring course. You can recalculate the completion status so that completion of the newly added equivalent is tracked. The recalculation occurs in the background for the recurring course."

When administrator clicks the **Recalculate Now** button for the recurring course, Saba Cloud triggers the completion of the recurring course by the newly-added equivalent course.

Use case

Saba Cloud needs to correctly handle different ways of completion of recurring courses by equivalents.

Enhanced session template creation work flow

How did it work?

Prior to this update, the creation of a new session template in a class took time and required multiple clicks.

How does it work now?

With this update, Saba Cloud enhances the session template creation work flow such that it reduces the number of clicks and improves overall usability.

System administrators can now configure the enhanced flow using the following new setting under **Classes** service:

- **Create new session template by default**

  If enabled, then the enhanced work flow for creating a new session template is enabled on the class details page.

  By default, this setting is disabled.

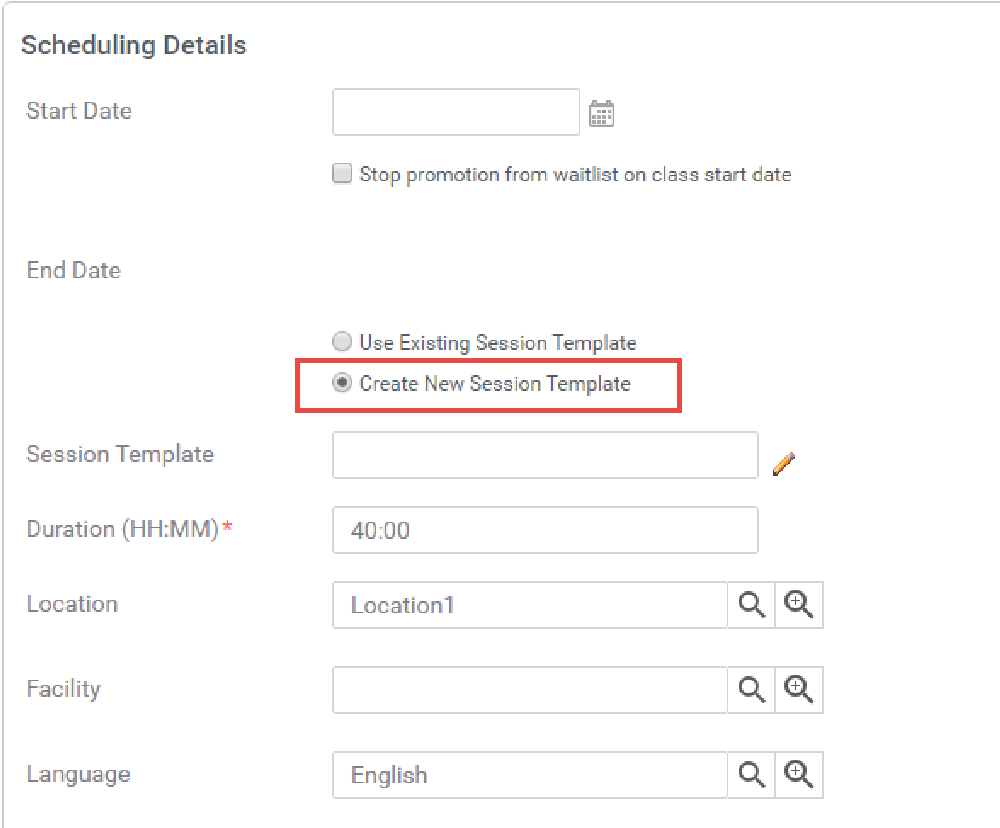


Figure 94: Default option when setting is enabled

If this setting is enabled for your domain, then while creating a new session-based class:

- The **Create New Session Template** option is selected by default in the **Scheduling Details** section.
- Filling the **Start Date** is not mandatory in this section. Instead, you can fill this date while creating a new session template by clicking the edit icon besides the **Session Template** field.
- Once a session is added, it is listed in the **Sessions** table on the same **New Session Template** popup page.
- Once a session is added to the template, you can modify the session on the same popup page using the **Update** button by selecting the session, until the class is saved.

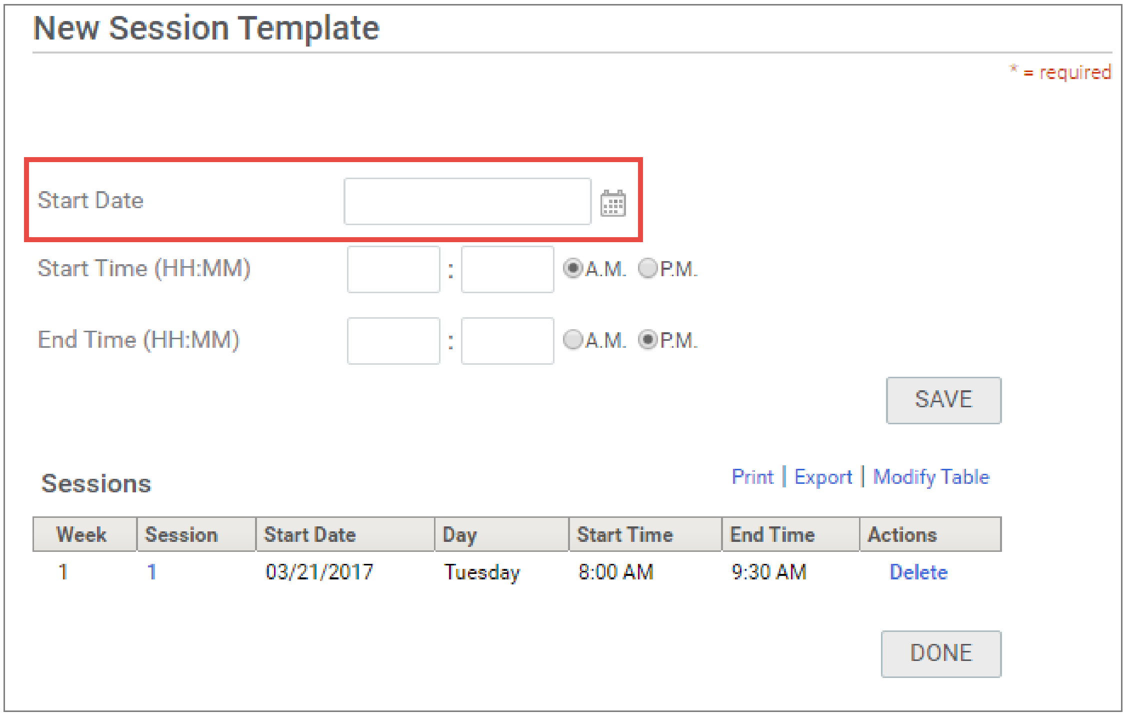


Figure 95: Default option when setting is enabled

After you add the sessions and click **Done**, the start date, session template and duration fields for the template are populated in the class details page.

Note: The Session Template name is auto-generated and cannot be modified.

Use case

There is a need to improve the usability of the session template creation work flow while creating session-based classes.

Enhanced option to print and export completion certificates

How did it work?

Whenever a user exports or prints the certificate of completion, different fonts appear in both the certificates.

How does it work now?

Saba application now supports both the version of phantomjs i.e., phantomjs 1.9.2 and phantomjs 2.1.1 to print and export the certificates. A new checkbox **Use enhanced option** is introduced on the **Import Template** tab of the certificate template which when enabled prints and exports the certificate using the advanced version of phantomjs. By default, this checkbox is disabled. If any template is using Google fonts and if the fonts are not rendering properly, then select this checkbox to generate the PDF and print the certificate using the advanced version of phantomjs.

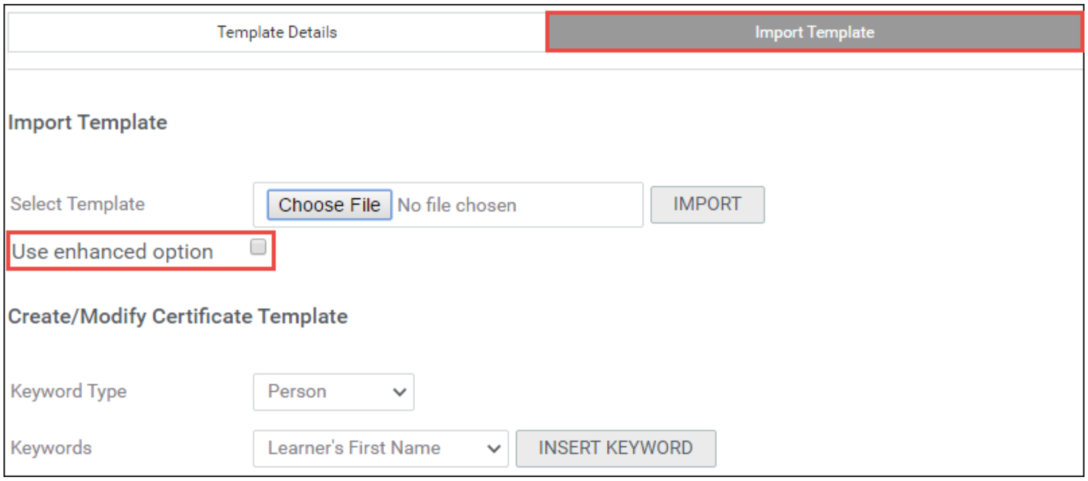


Figure 96: Enhanced option to print and export completion certificate

Use case

This enhancement now helps the catalog administrator export and print certificate of completion with advanced version.

Enhanced usability of search filters

How did it work?

Prior to this update, the global search filters were not intuitive. Users did not realize that they had to click **Apply Filter** link every time they selected a criteria to filter results and **Clear Filter** link to remove the filter.

How does it work now?

With this update, Saba Cloud enhances the usability of global search filters such that users now have to perform lesser clicks and the applied search filters are displayed prominently on the results page. To achieve this, the **Apply Filter** and **Clear Filter** links for applying and removing search filters respectively are removed. Instead, now when users select a filter checkbox, the filter is applied to search results and when users clear the filter checkbox, the filter is removed from the search results.

Each applied filter condition is displayed on top of the search results listing with a close (**x**) icon to remove the filter. Clicking the **x** icon for a filter, removes the filter and clears the corresponding filter checkbox in the filters pane.

Clicking the **Clear All** link clears all filters from search results and returns to the original search results.

To select multiple filters, click the **Multiple** link in the required filter pane. A popup screen appears where you can select multiple filter checkboxes and click **Apply**.

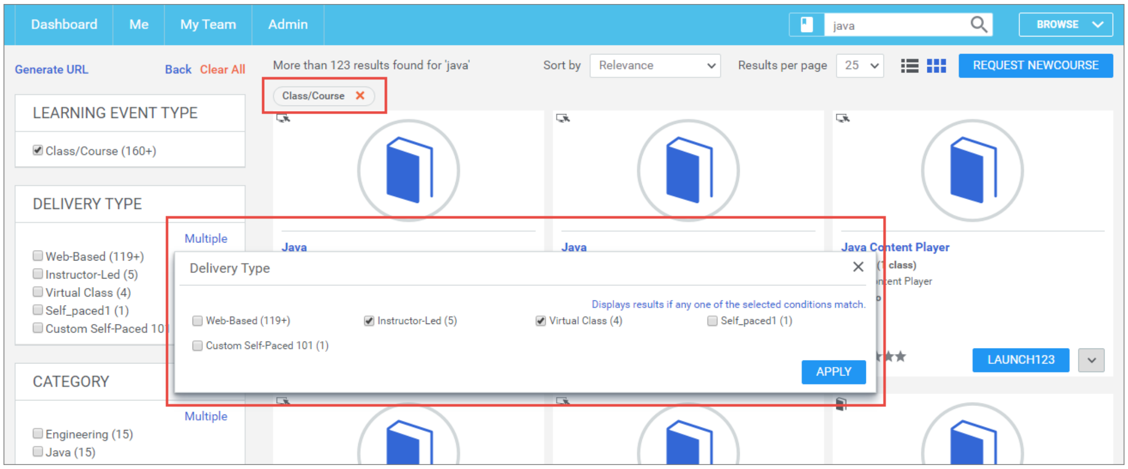


Figure 97: Search filters

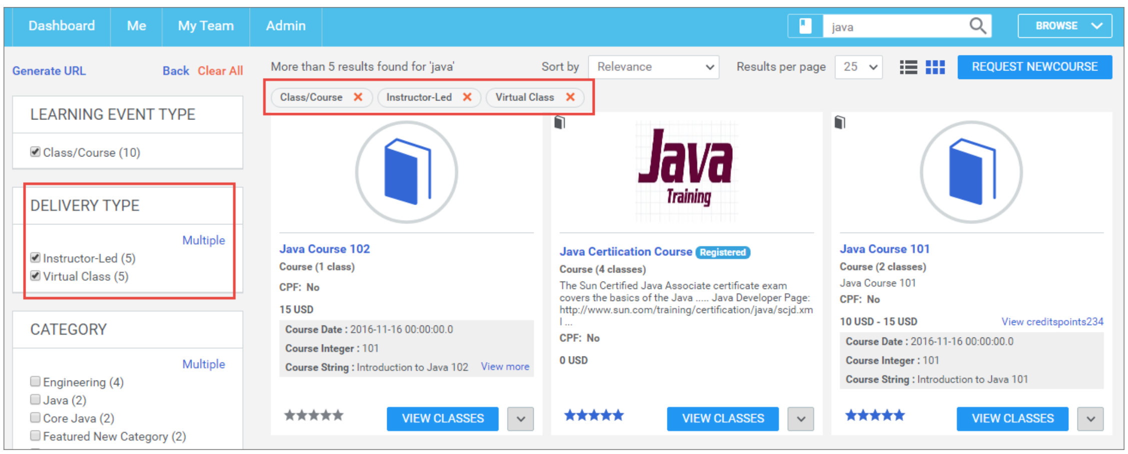


Figure 98: Multiple Search filters

If users arrive at the search results page from search, then the search term is not displayed as a filter though. If filters are applied to search results and if you perform a new search directly from the search text field, then all existing applied filters are removed automatically.

When a resource type is selected from **Resource Type** pane, only applicable conditions are displayed in the resulting pane; however, there can be more filter conditions displayed on top of the search results listing if they are already applied.

For Advanced Search

- If you apply new conditions from the Advanced Search filter, then all existing applied filters are removed automatically.
- When FOS service is enabled, and you select FOS from the advanced search filter, then its name is displayed in the top. If you search by the range without selecting FOS from the dropdown, then the range values are displayed with a Credits label.
- When you specify a start date from the advanced search filter, the date is displayed in the user-defined date format with >= operator. For example, if you specify the date as 20th March 2017, the date filter is displayed as **Start Date >= 20/03/2017**.
- The **Clear** button for clearing custom filters is removed. The **Clear All** link works for removing all filters.

Use case

When users click a search filter, it needs to apply immediately to the search results and the UI must be intuitive enough to indicate the applied filters.

Usability enhancements to bulk learning assignment wizard

How did it work?

N/A

How does it work now?

With this update, Saba Cloud enhances the usability of the bulk learning assignment wizard so that it incorporates new UI styling elements and makes the wizard easy-to-use and visually more appealing.

The wizard includes the following usability enhancements:

- Splits the first step of the wizard into two steps, where:
  - The new step 1 displays large icons for selecting one of the following primary actions - **Register**, **Add to Plan** and **Assign & Enroll**. By default, **Register** is selected. Selection is indicated by blue color.

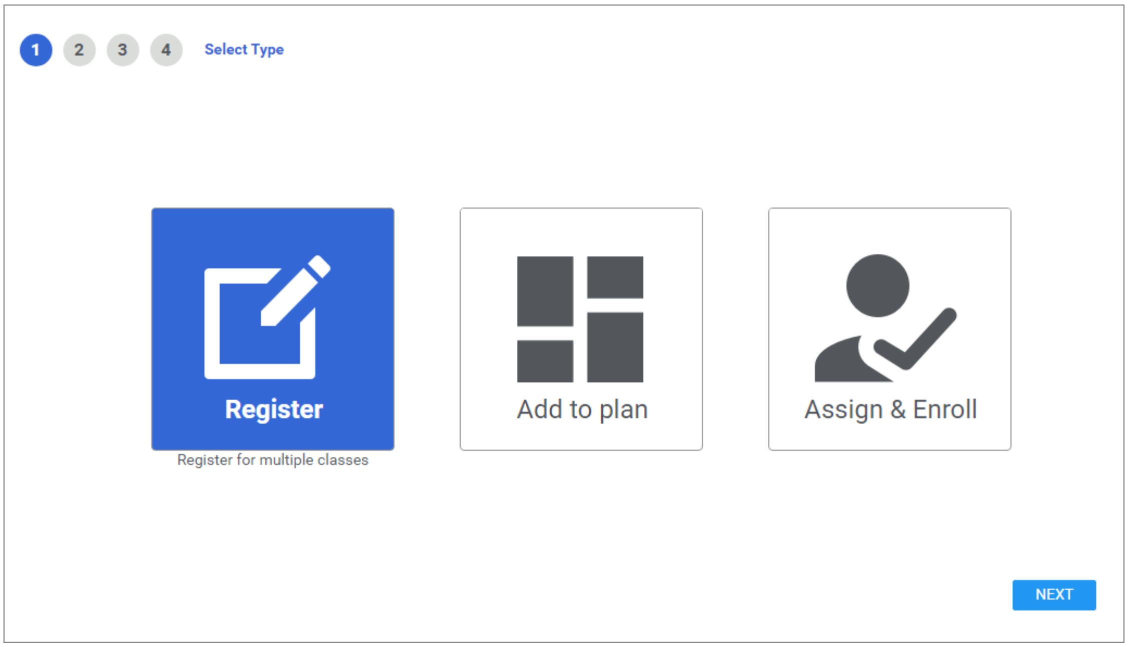


Figure 99: Step 1 of wizard

  - The new step 2 provides the order contact and class selection screen with enhanced UI styling elements such as the new icon for the **Action** column.

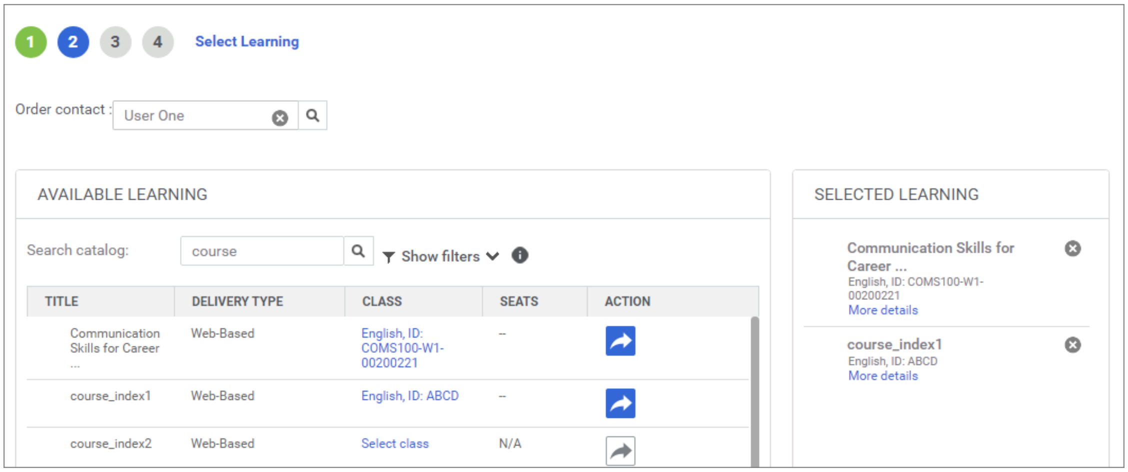


Figure 100: Step 2 of wizard

- In step 3 for people selection, the **Mandatory** column is moved adjacent to the **Action** column, and the Mandatory checkbox is replaced with a **Yes/No** toggle switch.
- In step 4 for review:
  - If there is no due date selected for a class, then the **Due Date** column displays the "No Due Date" text instead of a "-".
  - A new column **Mandatory Users** is added, which indicates the count of mandatory users.

The following flows are affected by these usability enhancements:

- My Team > Assign Learning
- My Team > <team member> > Plan > Add Learning
- Registrar Desk > New Order
- Instructor > Roster > Add Learners
- Me > Actions > Add Learning

Use case

There is a need to enhance the usability of the bulk learning assignment wizard to make it visually more appealing and simple to use.

Enhanced display of warning and error messages during registration

How did it work?

Prior to this update, warning and error messages displayed during registration followed a different UI styling. And there was no ability to bulk select and ignore different warning messages displayed during registration.

How does it work now?

With this update, Saba Cloud enhances the display style of warning and error messages that are displayed in the registration wizard for learning administrators, instructors, registrars, managers and learners. For example, warning messages displayed in scenarios such as when learner does not meet the class requirements or when there are no open seats available or when the learner needs manager approval. and so on.

Additionally, the enhanced warning message dialog box now allows bulk selection and ignore of warning messages. You can select one or more warning messages and click the **Continue** button to proceed with the selection.

If there are both warnings and errors on the same popup page, then Saba Cloud provides you the **Show errors only** checkbox that displays only errors and hides all warnings.

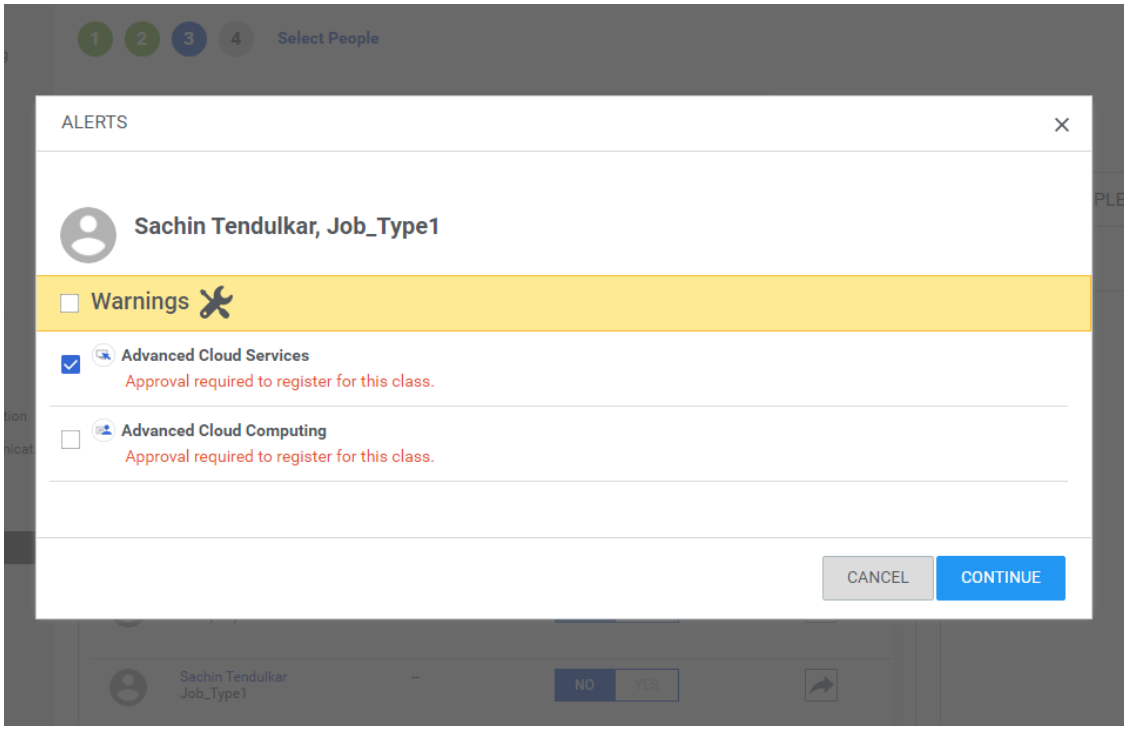


Figure 101: Enhanced warning message display during registration

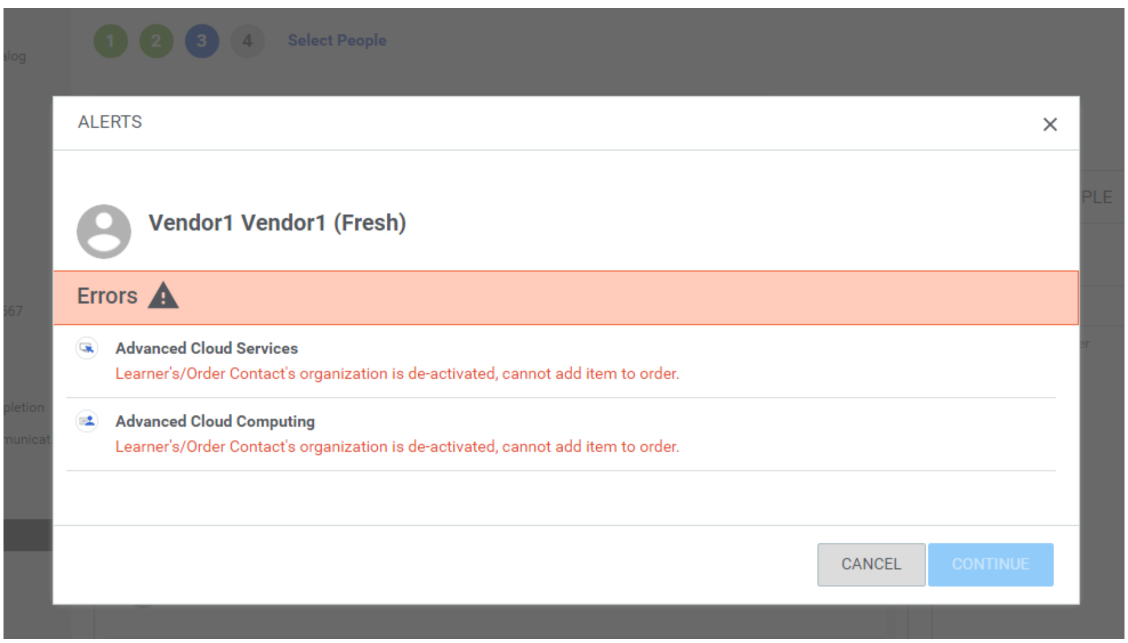


Figure 102: Enhanced error message display during registration

Affected flows include the following:

- My Team > Assign Learning
- Learning > Registrar Desk > New Order
- Instructor > Class Roster > Add Learner
- Me > Actions > Add Learning

Use case

There is a need to enhance the usability and styling of warning and error messages displayed during registration.

Enhanced display of certification and recurring course statuses

How did it work?

Prior to this update, when a certification or recurring course expired and there was a valid source for reassignment, the certification or recurring course was immediately assigned back to the learner. However, since there was no visual indication of this reassignment, it was difficult to track who missed their due dates.

How does it work now?

With this update, when a certification or recurring course moves to Assigned, Overdue or In Progress status after expiration, Saba Cloud provides a visual indicator to help learners identify such certifications and recurring courses. The indicator is the new **Expired on** date that is displayed along with the status of the learning activity that is reassigned. Additionally, for such certifications and recurring courses, the status is indicated with a red background color.

The new **Expired on** date is displayed on the following pages in Saba Cloud:

- My Learning portlet

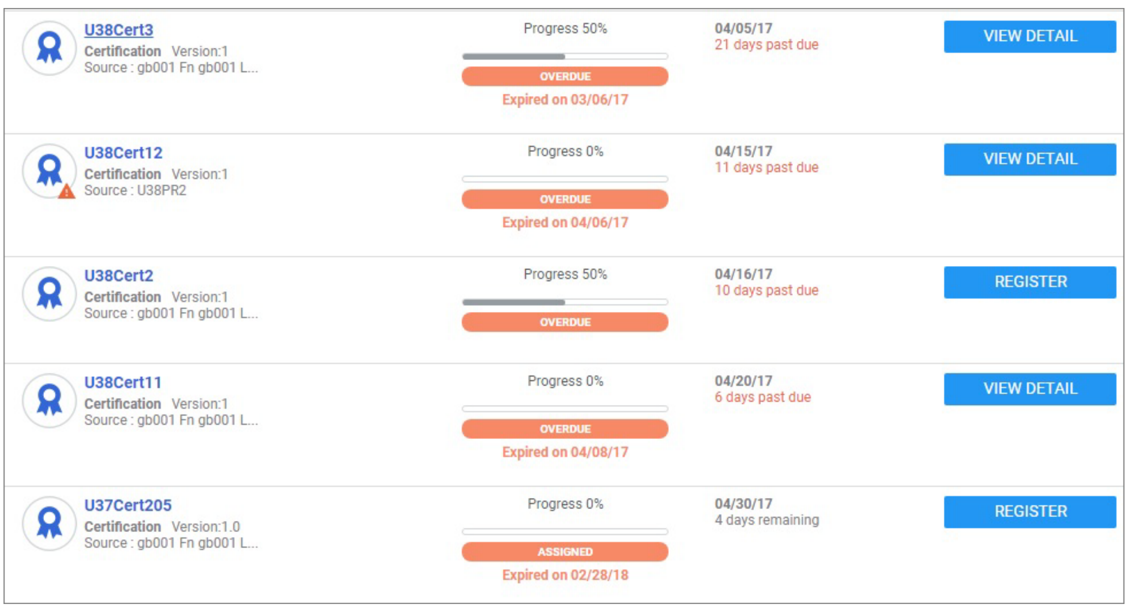


Figure 103: My Learning portlet

- Learner's Plan page

  Searching for certifications or recurring courses with *Expired* status or certifications with *Revoked* status returns even certifications or recurring courses that are expired and reassigned to learners.

  Selecting the *Expired* status filter returns the following:

  - Certifications or recurring courses having Assigned, Overdue or In Progress status after expiration
  - Certifications or recurring courses having only Expired status

  Selecting the *Revoked* status filter returns the following:

  - Certifications having Assigned, Overdue or In Progress status after revoke
  - Certifications having only Revoked status

Note: Certifications and recurring courses in Assigned, Overdue, or In Progress statuses are also displayed in the search results for status filters Assigned, Overdue and In Progress, like they used to prior to this update.

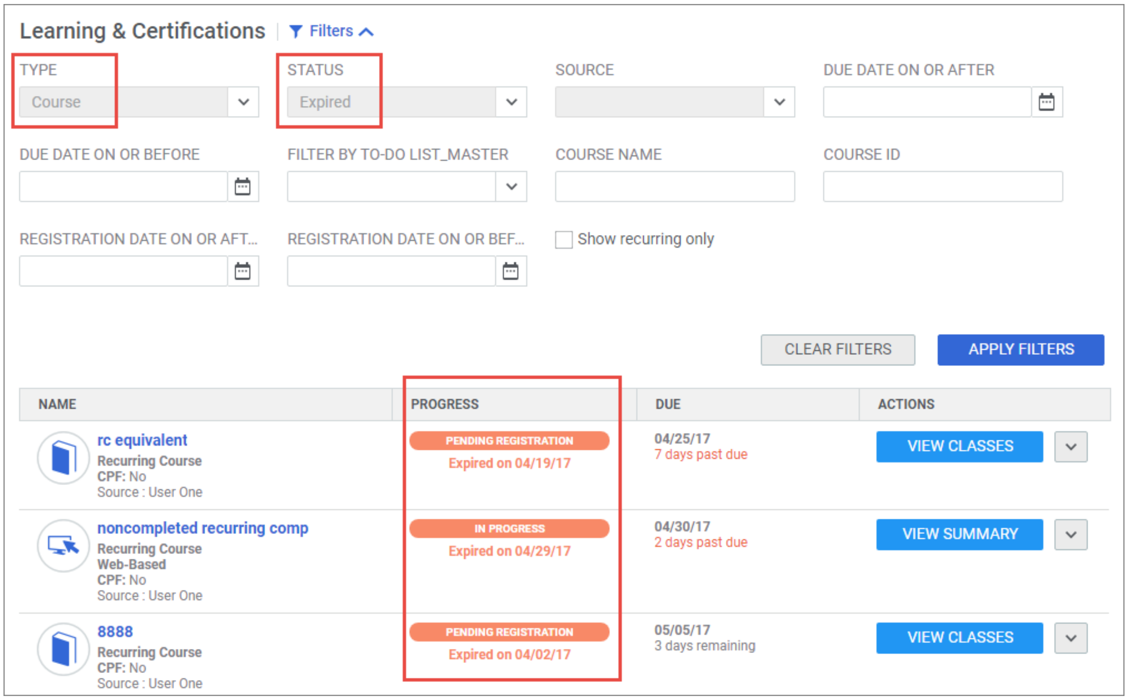


Figure 104: Learner's Plan page

- Certification/Recurring Course Details page for learners

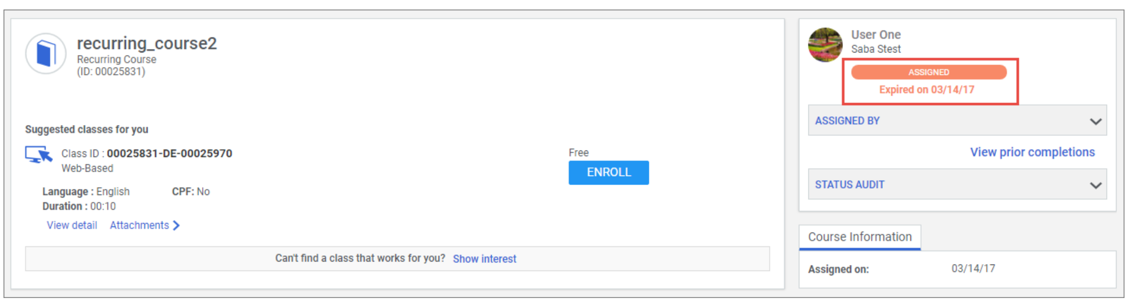


Figure 105: Certification/Recurring Course Details page

New Search Filters for People Administrators

Additionally, the following new search filters are added to the **Certifications** and **Recurring Courses** search pages for people administrators:

- **Show expired or reassigned learning events only**

  Selecting the checkbox displays only those certifications that are expired as well as reassigned after expiration.

- **Show expired or reassigned recurring courses only**

  Selecting the checkbox displays only those recurring courses that are expired as well as expired and assigned back to learners.

The search filters are not displayed by default. They need to be configured for display.

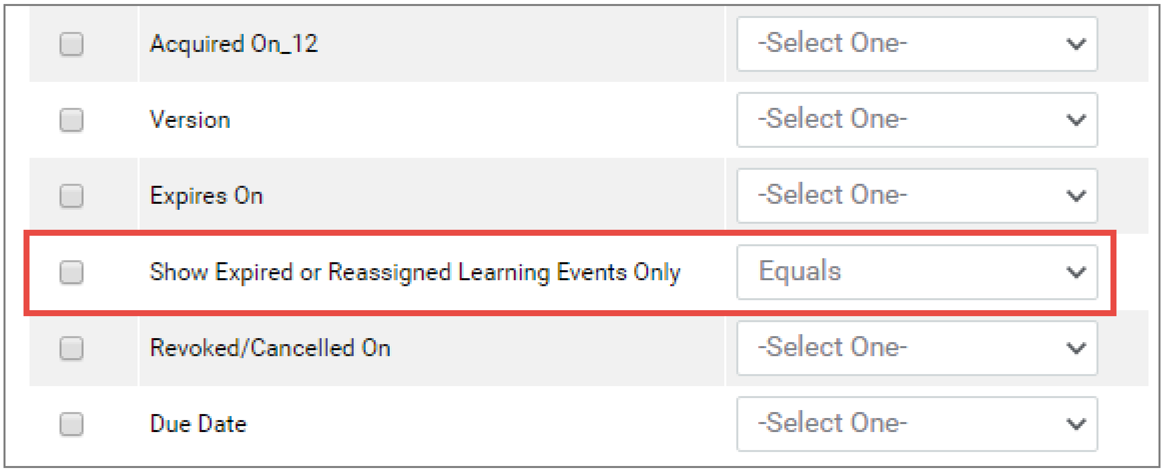


Figure 106: Enable display of new search filter

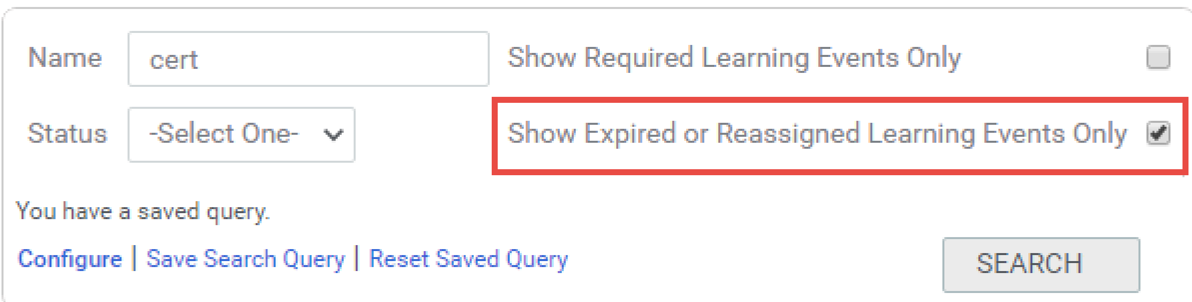


Figure 107: New search filter for certifications

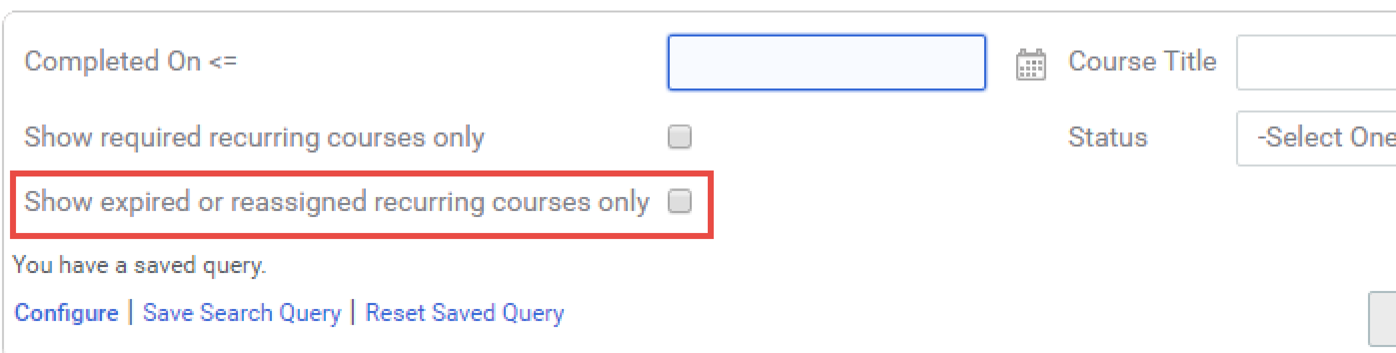


Figure 108: New search filter for certifications

Use case

There is a need to visually indicate the reassignment of a certification or recurring course to learners so that it helps them identify the learning events that require their attention, especially if they are importance for compliance.

Pagination for order items in orders and subscription orders

How did it work?

Prior to this update, the Order Items table on the Order Details page for orders and subscription orders did not provide pagination for order items. So, irrespective of the number of order items on the page, all were displayed on a single page leading to slowness during page load.

How does it work now?

With this update, Saba Cloud provides pagination for order items in the **Order Items** table on the **Order Details** page for both, orders and subscription orders.

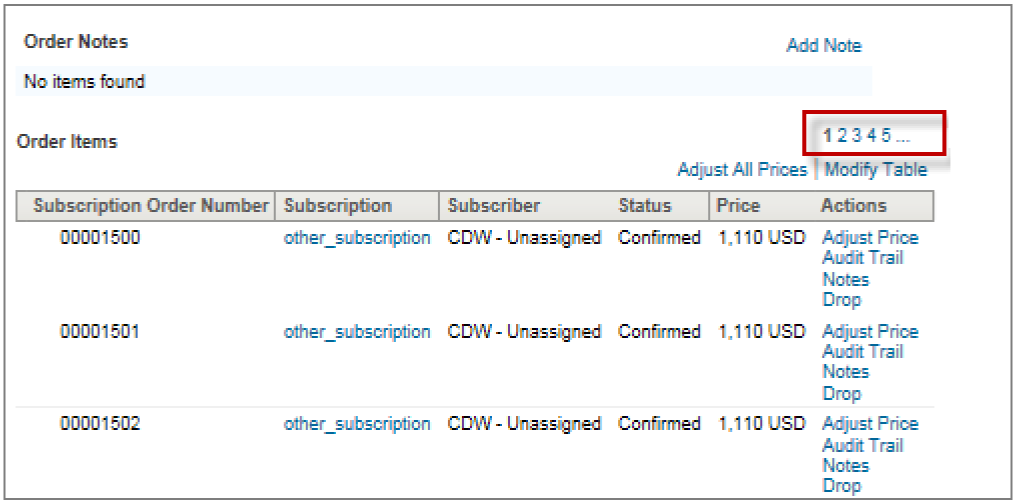


Figure 109: Pagination for Order Items table

The pagination is available for the **Order Items** table from the following flows:

- Learning > Order History > Orders
- Learning > Order History > Subscription Orders

  Note: The number of records displayed on the Orders and Subscription Orders page in the table follows the Saba Cloud pagination setting "The number of rows displayed per page for main window".

- Learning > Class Details > Results/Roster > Order Details

  Note: The number of records displayed on the Order Details page in the table follows the Saba Cloud pagination setting "The number of rows displayed per page for popup window".

Use case

Orders and subscription orders with large number of order items should not result in decreased page performance. Displaying a specific number of order items per page in the table helps reduce page load time.

Disable a class evaluation and add a new version

How did it work?

Prior to this update, Saba Cloud did not support the ability to update a class evaluation version or disable an existing version and add a new one to the class. The only way learning administrators could add a new version of an evaluation was to remove the previous version and then add the new version of evaluation. Resultantly, you could no longer view results of the previous version if you run a report to see evaluation results by class.

How does it work now?

With this update, Saba Cloud provides the ability to disable a class evaluation. Now, administrators and instructors can add a new version of the evaluation to the class without deleting the previous version.

Learning administrators and instructors can see the new **Disable** link for an evaluation in the **Evaluations** table under the class **Activity** tab. Clicking this link disables the corresponding evaluation. Disabled evaluations are still associated to the class. This preserves the link between evaluation results and the class for reporting purpose. However, disabled evaluations are not assigned to users taking the class.

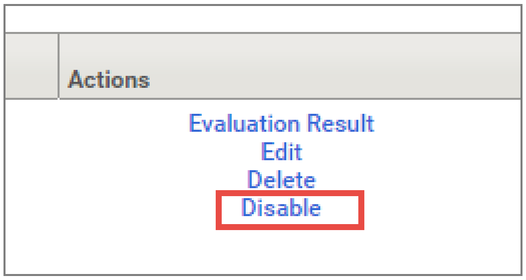


Figure 110: Disable link for a class evaluation

Once an evaluation is disabled, then administrators can add a different version of the same evaluation to the class.

Note:

- Irrespective of whether an evaluation version is active or disabled in a class, you cannot add the same version again to the class. Saba Cloud displays a duplicate evaluation error message.
- Once disabled, the evaluation cannot be activated again.

This update also adds the following new columns:

- **Active**

  Indicates whether an evaluation is active or not. "Yes" indicates that the evaluation is active, while "No" indicates that the evaluation is disabled.

- **Version**

  Indicates the version of evaluation added to the class.

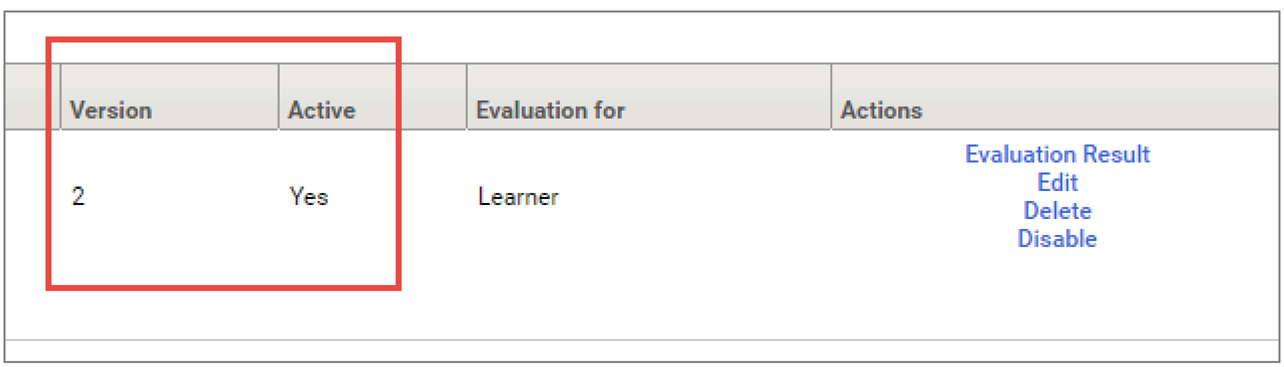


Figure 111: New columns for class evaluations

When you try to delete an evaluation in a class, Saba Cloud displays a popup with a message indicating that deleting an evaluation removes the association of all evaluation results with the class, and that you will no longer be able to see or report the results.

Use case

Learning administrators need the ability to version a class evaluation and view data from both before and after the versioning in a report.

Configure Roster Sign-in Sheet

How did it work?

Prior to this update, the roster sign-in sheet used by instructors or learning administrators to take attendance for the class, was not configurable. Thereby, administrators could not edit the sign-in sheet to make changes relevant to them.

How does it work now?

With this update, Saba Cloud provides learning administrators the ability to configure the roster sign-in sheet using the following new menu under **Manage Classes**:

- **Configure Roster Sign-in Sheet**

  Clicking the new menu opens the **Configure Roster Sign-in Sheet** page. From this page, administrators can configure different columns to display for printing the sign-in sheet PDF file from the class roster page. To include a field for display in the PDF, select the corresponding **Show** checkbox for the column.

  Note: This new menu is not available to administrators by default. It is displayed only if the privilege "Can access Learning > Manage Classes > Configure Roster PDF" is granted to them. By default, this privilege is granted to the Super User role on the "MenuVisibility-LearningAdmin" component.

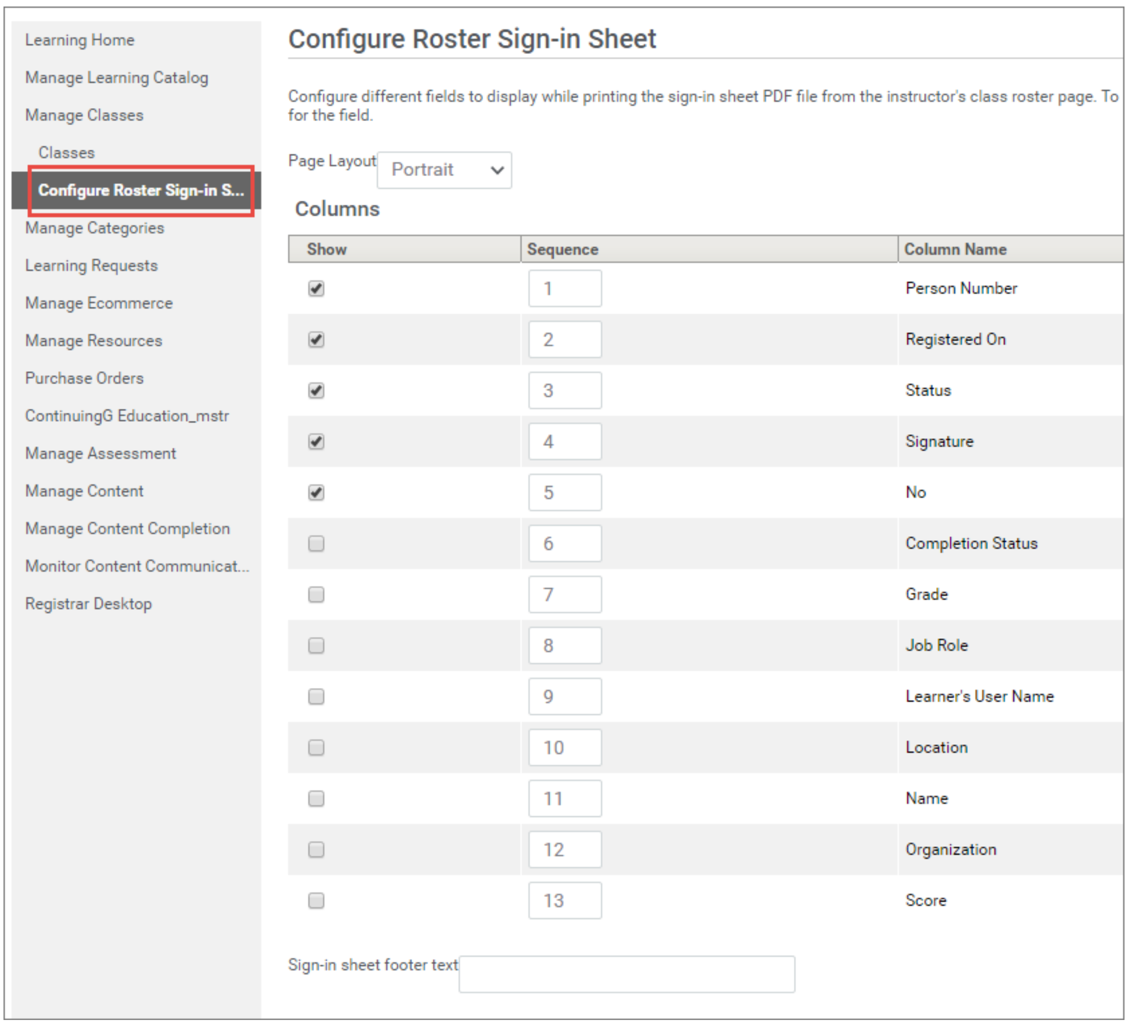


Figure 112: Configure Roster Sign-in Sheet

The following columns can be configured:

Table 14: Roster sign-in sheet columns

Column	Show (Default value)
No	Enabled
Name	Enabled
Person Number	Enabled
Registered On	Enabled
Status	Enabled
Signature	Enabled
Score	Disabled
Grade	Disabled
Completion Status	Disabled
Learner's User Name	Disabled
Location	Disabled (for session based classes only)
Organization	Disabled
Job Role	Disabled

Set the order of columns to be displayed in the PDF by specifying a number in the **Sequence** column. Note that Saba Cloud considers the sequence of a column only if it is enabled for display. The column sequence is auto-adjusted if two items are assigned the same sequence number, or if a disabled column is assigned a sequence number.

The **Page Layout** dropdown controls the orientation of the roster sign-in sheet. Select one of the following options:

- Portrait
- Landscape

The **Sign-in sheet footer text** allows adding of a customized footer text to the sign-in sheet.

Note: Prior to this update, the Roster Sign-in sheet was available only to future-dated session-based classes. With this update, the Roster Sign-in sheet is extended to past-dated session-based classes, WBT classes, and Blended classes without sessions.

Use case

Organizations have different requirements for a sign-in sheet used for marking class attendance. The ability to customize a sign-in sheet makes it very handy to create different sign-in sheets

Changes to mobile compatibility behavior of classes

How did it work?

Prior to this update, a class in Saba Cloud was considered to be compatible for consumption in mobile devices only if:

- The class contained at least one mobile-compatible content, or
- The class contained only ILT sessions, or
- The class contained no activities (empty class)

How does it work now?

With this update, the following learning activities in classes are considered as compatible for mobile devices:

- Tasks
- Checklists (associated with a class)
- Content marked as mobile-compatible
- Virtual class sessions

Classes with the following delivery types are considered as compatible for mobile devices:

- ILT class with any compatible learning activity listed above
- WBT class with any compatible learning activity listed above
- Blended class with any compatible learning activity listed above
- Virtual Classes

The following are considered not compatible, and so not displayed in mobile devices:

- ILT containing only sessions
- Empty courses
- Empty classes

With this change, the Saba Cloud mobile app will start displaying different results for classes. For example, classes with ILT sessions will be filtered out and not displayed.

Use case

Users can find classes that have at least one mobile-compatible content activity.

Content

Launch Saba Meeting app during playback

How did it work?

Prior to this update, Saba Meeting recording was played in the browser applet during playback. However, since Chrome discontinued support for NPAPI plugin, Saba Meeting failed to launch in Chrome browser. So when users could not playback a session recording from the following flows:

- **Me > Completed Learning** - Users found a transcript for a class with virtual sessions and clicked the **Playback** link for the session.

- **Me > Plan > Pending Actions** - Users, who registered for a virtual class or blended class but missed it, navigated to **My Plan**, found a past pending class virtual sessions and clicked the **Playback** link for the session.
- **Calendar** - Users clicked the Calendar icon and drilled down to view the list of sessions in the calendar, and then clicked the **Playback** link for the session.

How does it work now?

This update enhances the playback functionality of Saba Meeting recordings such that now Saba Meeting recording playback opens in the Saba Meeting App instead of the browser applet. This enhancement is applicable for all browsers.

The following user flows are affected:

- **Me > Completed Learning** - Find a transcript for a class with virtual sessions and click the **Playback** link for the session.
- **Me > Plan > Pending Actions** - Find a past pending class with virtual sessions and click the **Playback** link for the session.
- **Calendar** - Drill down to view the list of sessions in the calendar, and click the **Playback** link for the session.

The Saba Meeting app launch behavior during playback is controlled by the following:

- If the Saba Meeting app is enabled and a user has installed the app and accepted the plugin for this server, then the Saba Meeting app launches.
- If the Saba Meeting app is enabled but a user does not have the app installed and user is attending via Chrome, then the user is directed to the Saba Meeting app install page. Once the app is installed, the user continues to session playback.
- If the Saba Meeting app is *disabled* and only Saba Meeting browser client is available, then:
  - For Chrome users, a message is displayed that Saba Meeting app is disabled. Due to configurations, Saba Meeting cannot be launched.
  - For other browsers like IE, the recording launches using Java.

Use case

Users using the Chrome browser that does not support NPAPI plugin, should have the ability to playback Saba Meeting recordings seamlessly.

New Virtual Class Recording Player Template

How did it work?

Prior to this update, Saba Cloud launched Virtual Class recordings attached to classes and courses in the **Simple Content Player Template** because there was no dedicated player template to launch such content.

How does it work now?

With this update, Saba Cloud introduces the **Virtual Class Recording Player Template** for launching Virtual Class recordings attached to classes and courses.

Every Virtual Class recording attached with a class or course is launched in this template in the **New Window** launch mode. While adding a new virtual class recording to a class, the content is automatically imported into Saba Cloud and the **Virtual Class Recording Player Template** is automatically associated with it.

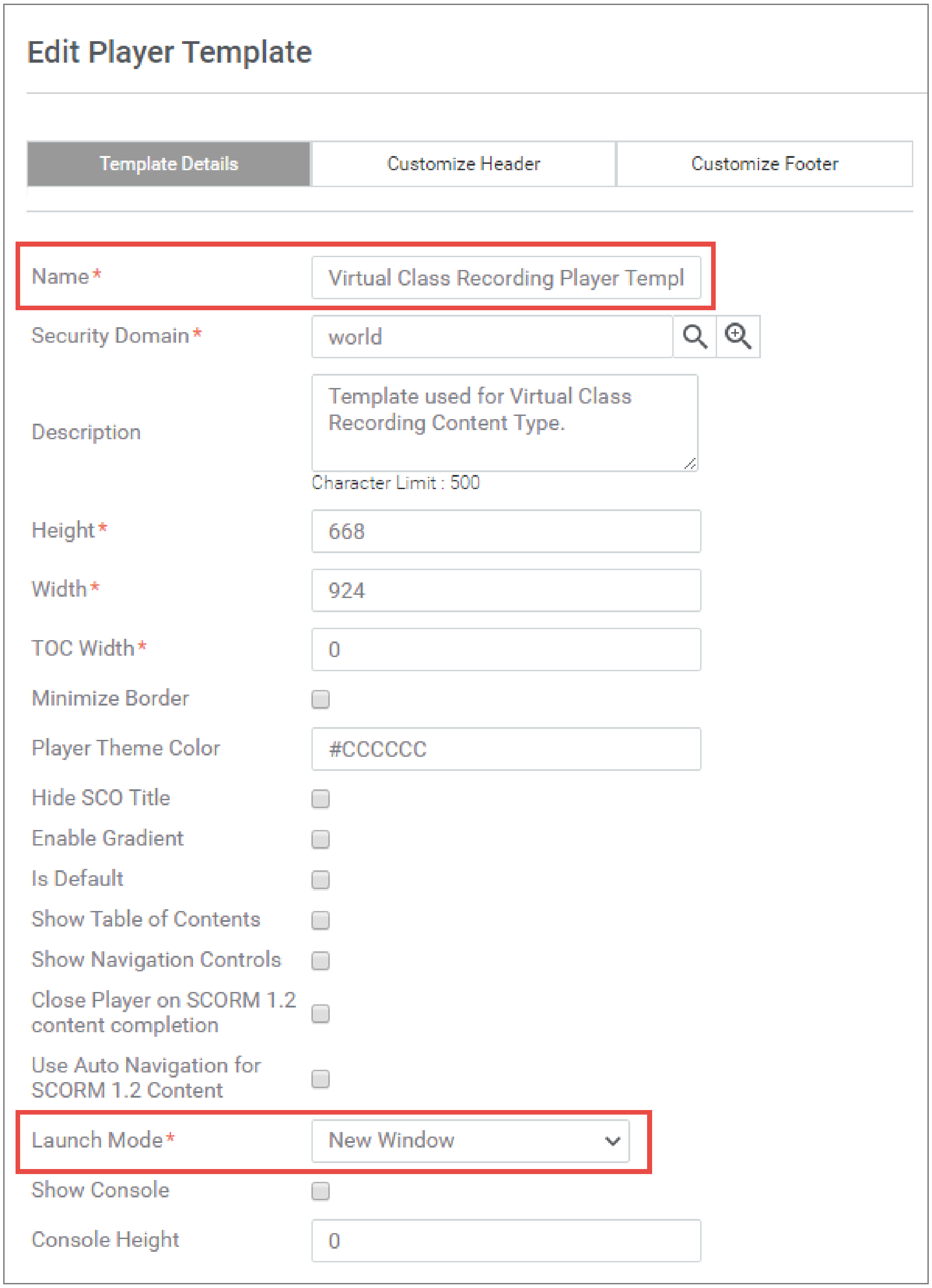


Figure 113: Virtual Class Recording Player Template

Note: Ensure that popups are allowed for the Saba Cloud site where content is being played using this template.

Affects existing configuration or data

Post this update, content player templates of all existing Virtual Class recording content type will be updated to use the new **Virtual Class Recording Player Template**.

Use case

There is a need to launch Virtual Class recordings in a dedicated content player template.

Support for Saba Publisher and Inspire 17

How did it work?

Prior to this update, Saba Cloud supported the following versions of content authoring tools:

- Saba Publisher 16
- Saba Inspire 16

How does it work now?

With this update, Saba Cloud supports the following newer versions of content authoring tools:

- Saba Publisher 17
- Saba Inspire 17

Use case

Saba Cloud needs to support the newer versions of content authoring tools so that Publisher and Inspire users can use the latest features.

Enhanced encryption for Saba Anywhere token

How did it work?

N/A

How does it work now?

This update enhances the security of the authentication token used for logging into Saba Anywhere. The token is now encrypted with a higher level of security before being displayed on the Saba Cloud **Downloads** page.

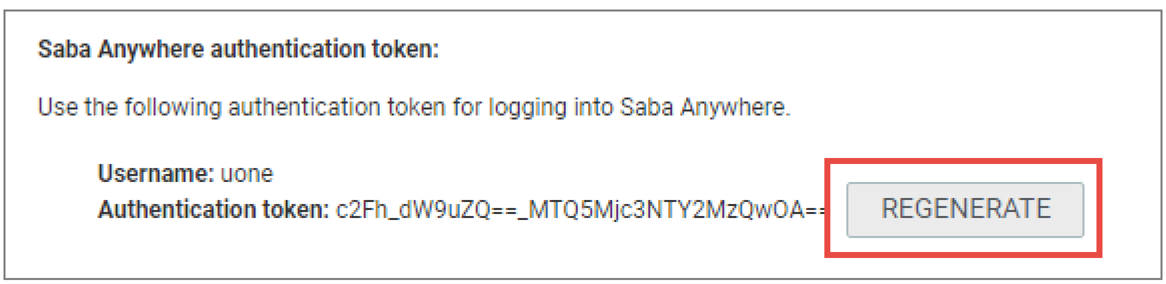


Figure 114: Authentication token

Change to existing configuration or data

After this update, users who are using Saba Anywhere must regenerate the authentication token before using it for logging into Saba Anywhere. Their existing tokens will cease to work for Saba Anywhere login.

Use case

Saba Cloud needs to enhance the security of the authentication token used for logging into Saba Anywhere.

Chapter
7

Marketplace

Topics:

Import Past Completions from Lynda.com into Saba

How did it work?

Until now, users were unable to see the results of the courses taken directly from Lynda.com prior to the activation of Lynda.com connector in Saba.

How does it work now?

Starting from this update, course completions taken from Lynda.com prior to activating in Saba, can be imported in their Saba account as well.

You need to provide the Admin user name, password and the course completion dates and click on the **Sync Transcripts** button on the Lynda.com connector settings page to import course completions to Saba.

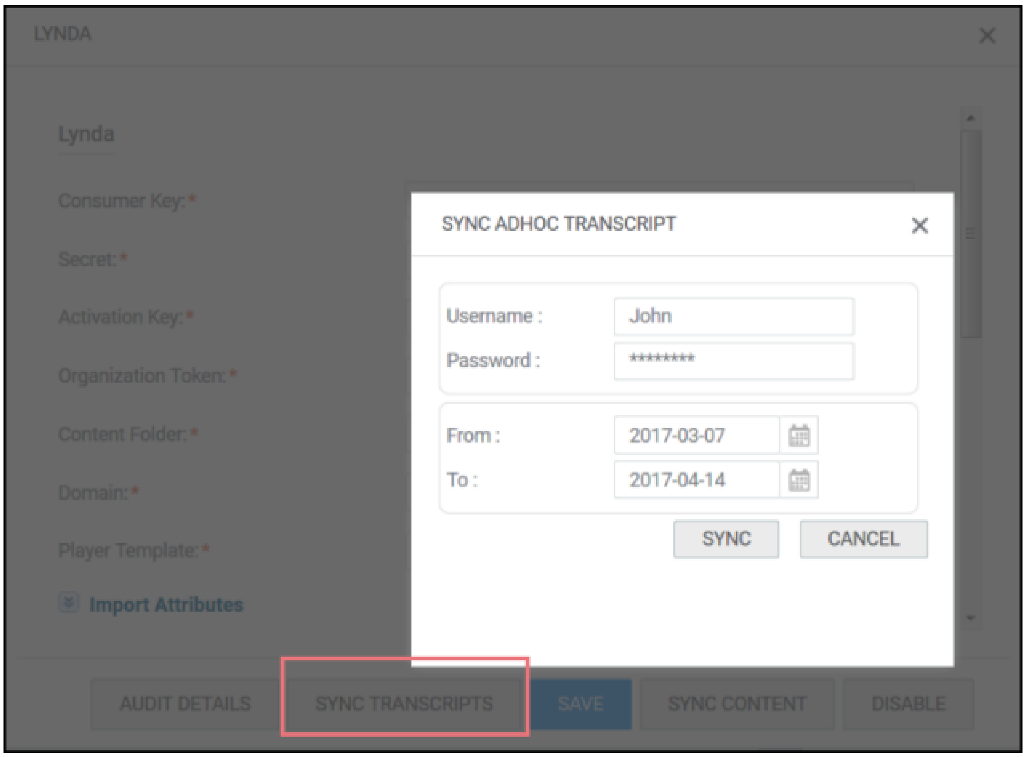


Figure 115: Adhoc transcript sync process

Note: When synchronizing the course completions, the course title from Saba should be the same as in Lynda.com with no version. For the same course, unless the completion date is different, only a single Ad hoc transcript will be created.

Note: After course completion and when synchronizing transcript, the score will display as **0**.

Use case

Users can import past completions from Lynda.com

Support for removing current positions when using Workday connector

How did it work?

Currently, the workday connector allows associating positions to people. However, when there is a change in position, it is not possible to remove existing positions and add new ones. New ones are added keeping existing ones untouched.

This can be a problem when people swap existing positions for new ones.

How does it work now?

Starting from this update, a new configuration option is added in **Workday Person Import** step which can be enabled by tenant Admins. This option will allow deleting existing positions before adding new ones. A DELETE_ALL_POSITIONS column is added to the Import file that allows the deletion of all positions when adding new positions.

To select the **Delete All Positions** from Workday connector in Marketplace:

1. Login to Saba Cloud as an Admin.
2. Select **Marketplace** and choose **Workday** connector.
3. Select **Configure mapping** from the Workday connector screen that launches.
4. Select **Refresh Components** option from the Upload or remove CSVS drop down option.
5. You can map the **DELETE_ALL_POSITIONS** to a value of **true** using the mapping functionality. The mapping values are **True** or **False**.

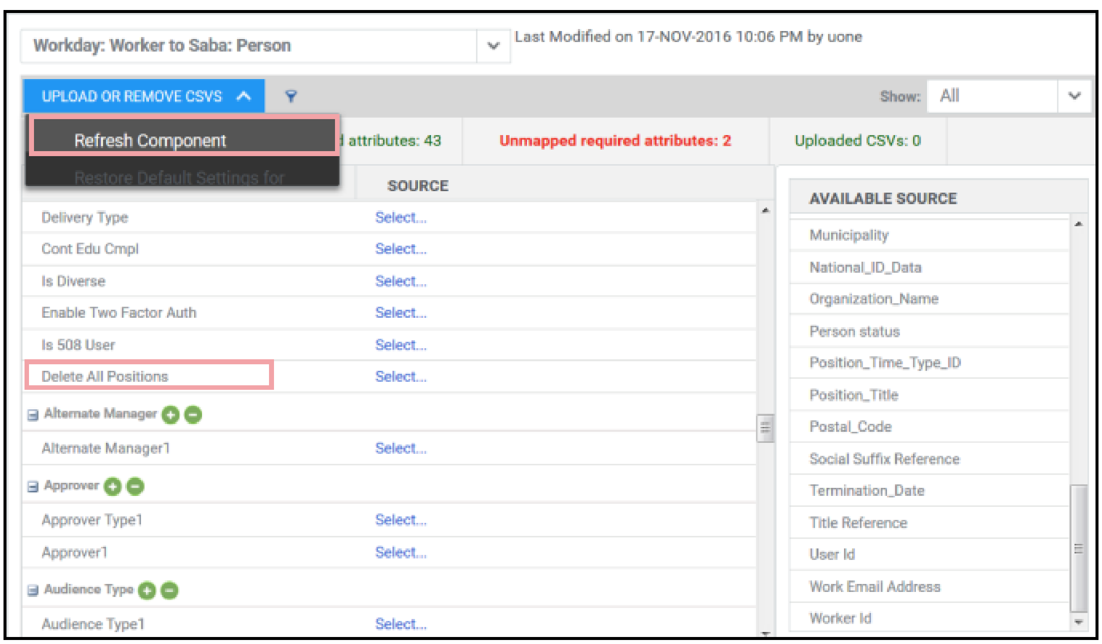


Figure 116: DELETE_ALL_POSITIONS option selected

Note: The **DELETE_ALL_POSITIONS** will not delete existing positions of a person, unless there is new position assigned from Workday data. This is to prevent any accidental deletion of position from users that may have been assigned from a different source.

Use case

Workday connector now allows the removal of existing positions from people data before adding new position details.

Ability to download Workday export logs from UI

How did it work?

Currently, when the export operation fails in Workday connector, it is a tedious and difficult task to check the log file for error details and such data.

How does it work now?

To make the process smoother, an enhancement is added to the Export Monitor step. A new link **Download logs** is added under the Action column. This allows the user to download logs for a specific record.

Object Type	Status	Progress	Previous Run Time	Next Run Time	Action
Certification	COMPLETED	Completed Successfully no rows to migrate	2017-03-06 16:08	2017-03-06 17:14	Download Logs
Competency	COMPLETED	Completed Successfully no rows to migrate	2016-11-27 23:11		Download Logs
Training	IN_PROGRESS	Processed 108 out of 148 Success: 0 Failure: 108	2017-03-06 16:20	2017-03-06 17:20	

Figure 117: Download log files

The download option is only available for objects that are of completed status.

When you click on the link, a zip file will be downloaded that will contain two csv files.

- The file which contains the orginial data exported
- The log file which will contain all the fields of the original file and additional fields like the exportStatus and exportMessage values.

Use case

Users can now download and view the export logs on Workday connectors from the UI.

Additional field added for Workday integration steps

How did it work?

Additional fields were needed for Workday integration for certain scenarios.

How does it work now?

Starting from this update, a new integration field called the **Field and Parameter Criteria Data** is introduced to the **Workday Configure Import** step for **Location/Organization/Job and Job family** import fields. Using this, users can bring in additional fields similar to **Person Import** parameter.

You may access the field from:

Admin>**Marketplace**>**Workday**>**Integration UI**

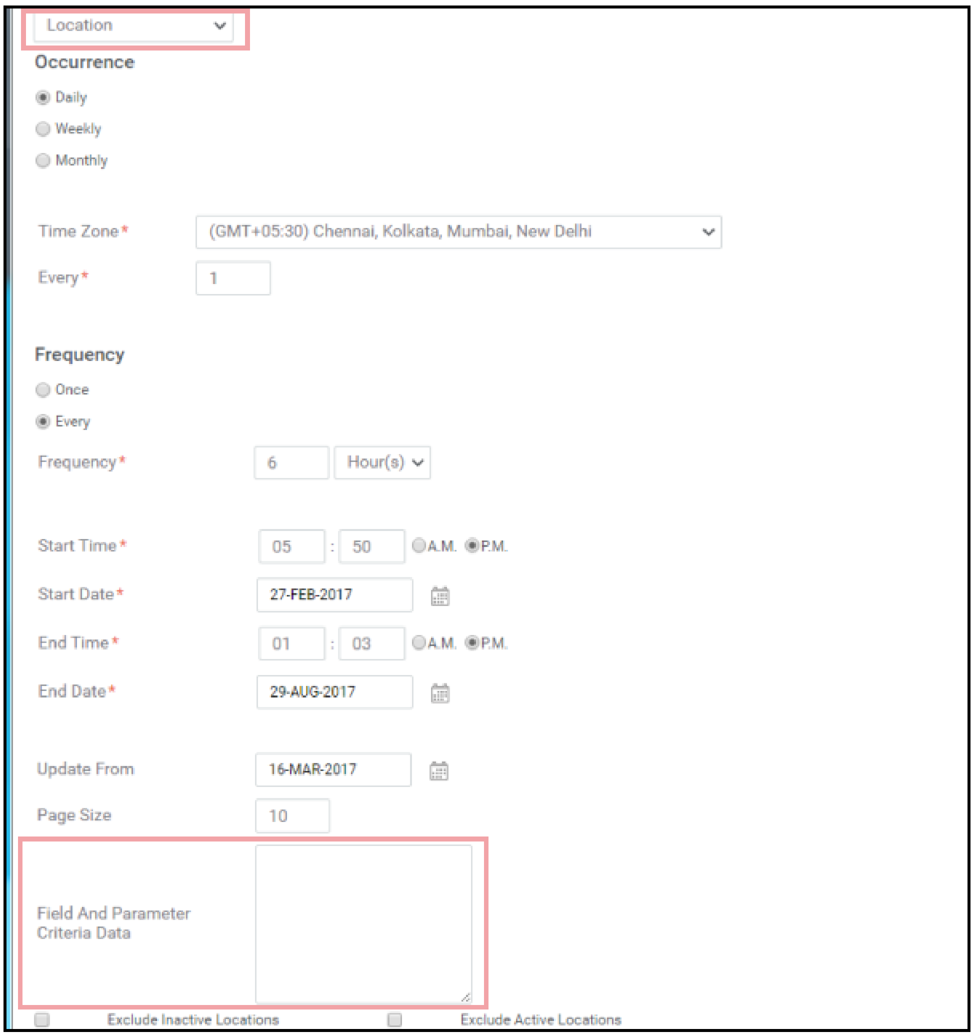


Figure 118: Field and Parameter Criteria Data

Use case

A new configuration field called **Field and Parameter Criteria Data** is added to Workday integration with Saba Marketplace. This will enable users to bring in additional fields when integrating with Saba marketplace.

UI enhancement for Workday data mapping screen

How did it work?

Data mapping screen in Workday configuration needed a few enhancements.

How does it work now?

This has been addressed in this update. The following changes are implemented on the Workday mapping screen:

A new icon **Reset Mapping** is added to the legends display.

The status bar now indicates if there are unpublished changes by the following text: **There are unpublished changes in this view**.

The **Publish** button is highlighted when there is anything new or modified and needs to be published.

Admin>**Marketplace**>**Workday**>**Integration UI**

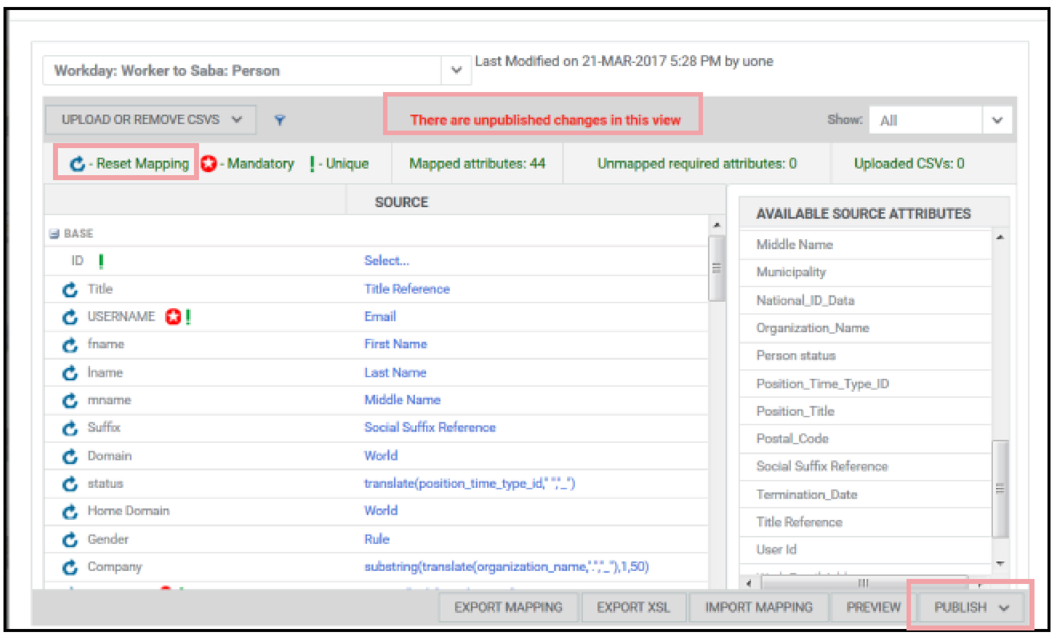


Figure 119: Workday mapping UI changes

The **Publish** button will be disabled when there are no changes or modifications and the message displayed will be: **No modifications done yet**.

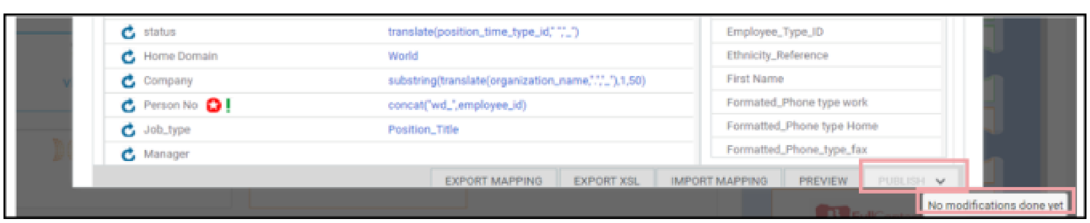


Figure 120: Publish button disabled when no modifications are done

Another new feature named **Revert to Last Published** is added to the **Publish** button. When you select this drop down icon from the **Publish** button, all unpublished changes will be discarded and the mapping will be reverted to the last published state.

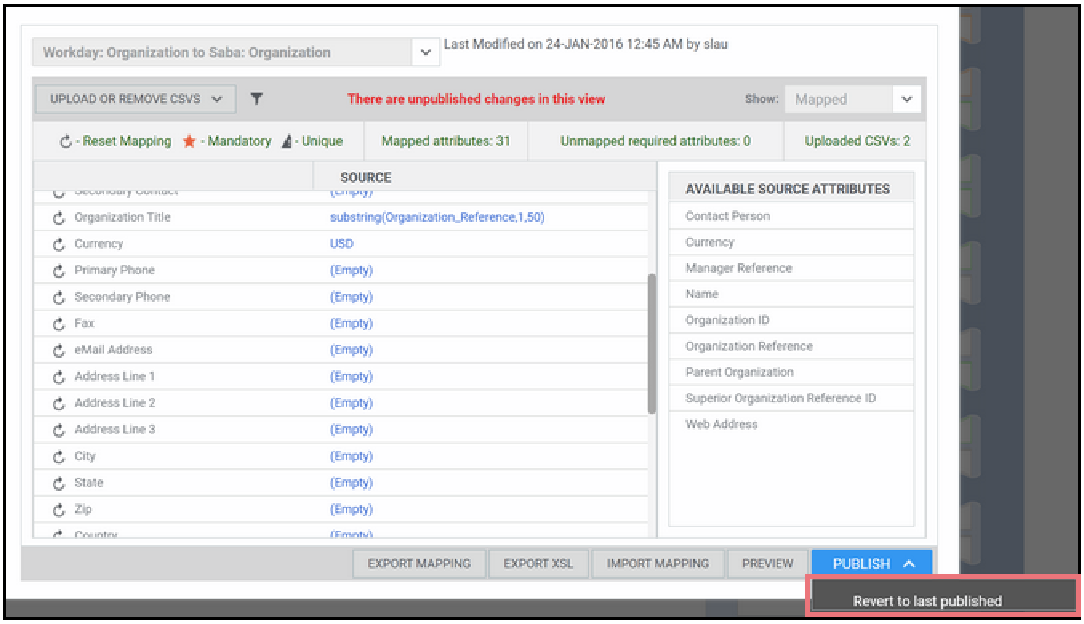


Figure 121: Revert to last published mapping

Use case

Enhancements to Workday data mapping screen improves user experience.

Use Saba user name to create WebEx account

How did it work?

When creating a WebEx user account for current and new Saba users, their first and last names were being used instead of the Saba user name. This was creating conflicts with their user names for Single-Sign-on.

How does it work now?

From this update, when creating a WebEx user account, in the sign up screen, enter one of the following in the **New Instructor Mapping** text entry field:

NAME: First name, Last name

EMAIL: Email ID of the user

USERNAME (Saba): Saba user name will be used.

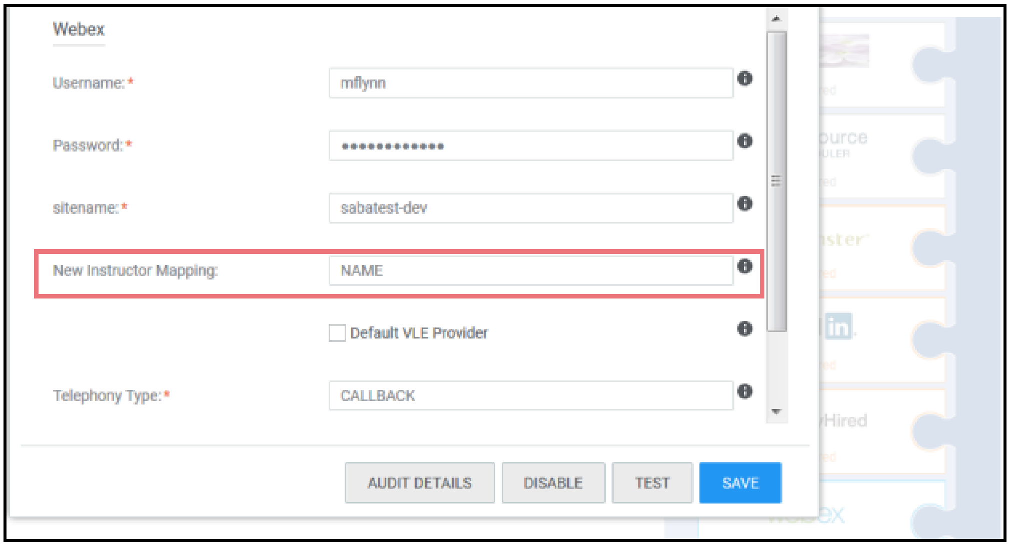


Figure 122: WebEx user account

In the Telephony Type field, the field values are: NONE, CALLIN, CALLBACK, and OTHER (uppercase only).

For existing users, new user account will not be created nor will there be any changes to the user name.

Use case

Saba user name can be used to create WebEx user accounts.

Chapter 8

Performance

Topics:

Create note via email

How did it work?

Prior to this update, the user could create a note only by navigating to **ME** > **Check-Ins** > **Actions** > **Add Note** or by adding note directly within the category.

How does it work now?

With this update, a user can now create a note via inbound email as well.

Prerequisites:

1. User's email address must exist in the Saba Cloud application and available in the profile.
2. Ensure that the email is drafted in the desired format.

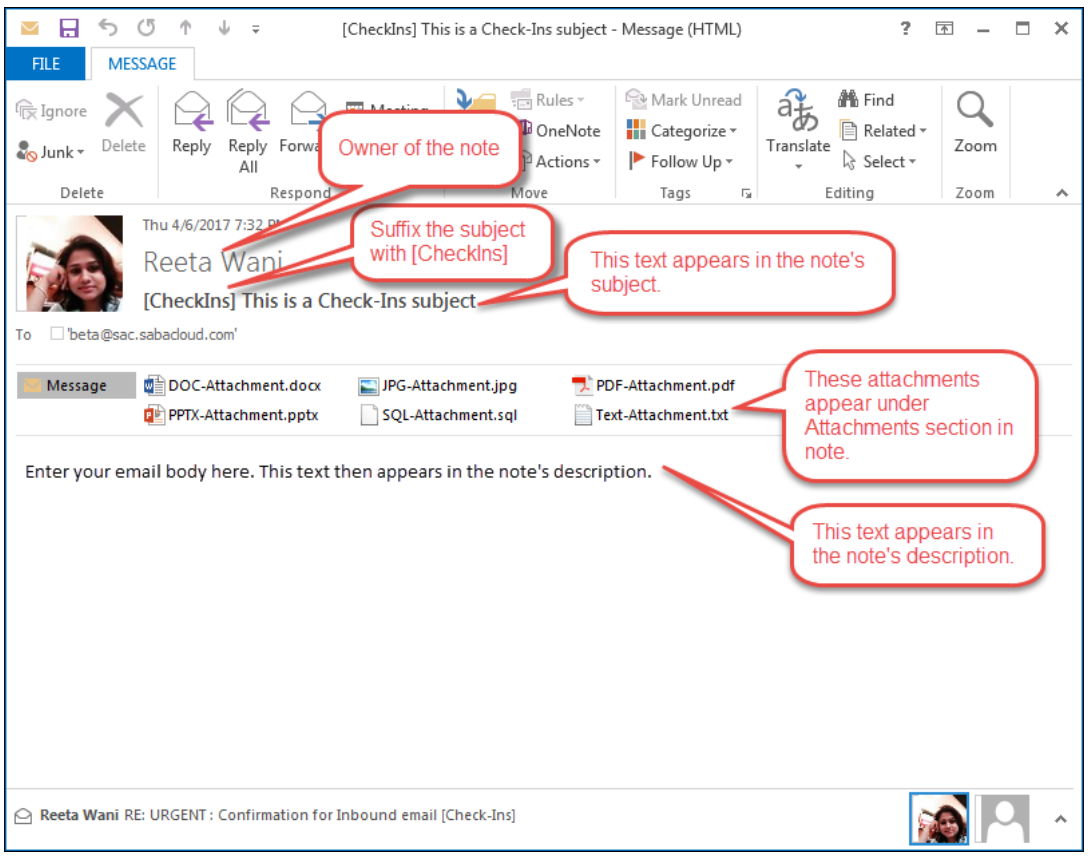


Figure 123: Email format for note

The user can also draft and send a test note from the application itself by navigating to **ME** > **Check-Ins** > **TIM** and clicking the link mentioned in the message.

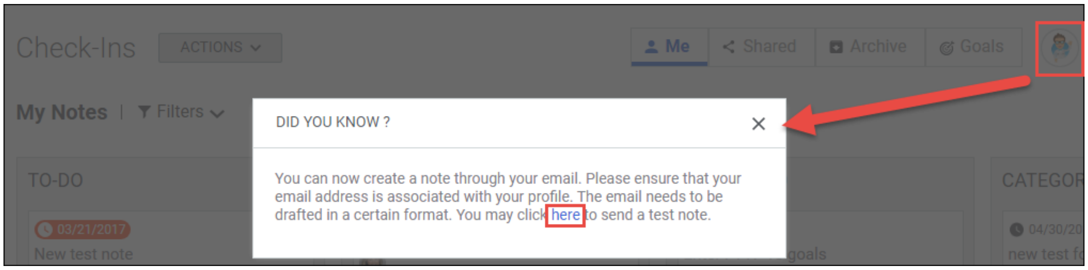


Figure 124: Draft and Send test note

Once the email is sent, the note instantly gets created in the Saba Cloud application for that user and appears in the **first available category**. Simultaneously, an email notification is also sent to that user.

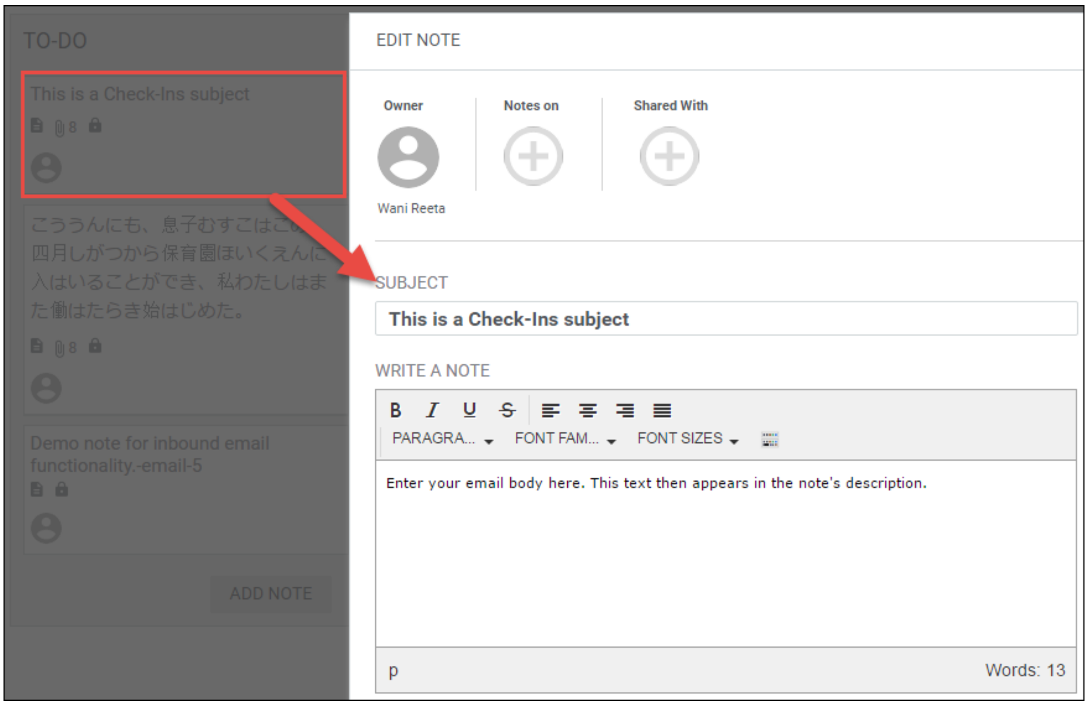


Figure 125: Note created via email

The Subject, Description, and attachments are retained from the email. The Owner of the note need to enter other details like:

- Notes on
- Shared With
- Due date
- Privacy of the note
- Related to
- Add more attachments
- Comments

Note: Note doesn't retain the formatting of the email body.

Use case

Users can now create note in Check-Ins by sending an email.

Enhancements to Check-Ins

How did it work?

There was a need to add some filters and reorganize the existing filters to make the Check-Ins page more usable.

How does it work now?

The following usability changes have been made to the Check-Ins page:

1. New filter **Notes** has been added. This filter has the following values:
   - My Notes - Display notes that are created on the logged-in user and notes by the logged-in user without Notes On user.
   - Notes on Others - Display notes that are created by the logged-in user on others i.e. where the logged-in user is a owner.
   - All (default view) - Display notes that are created by logged-in user for self and on others.

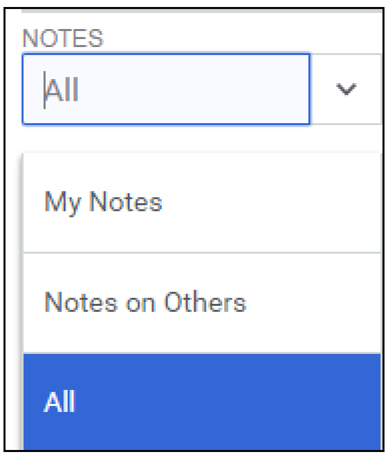


Figure 126: Notes filter

2. Existing filters are reorganized

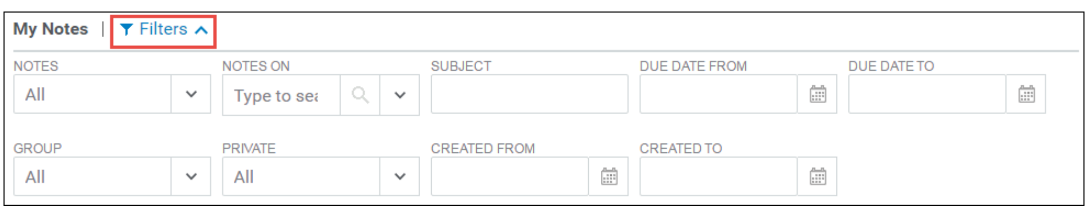
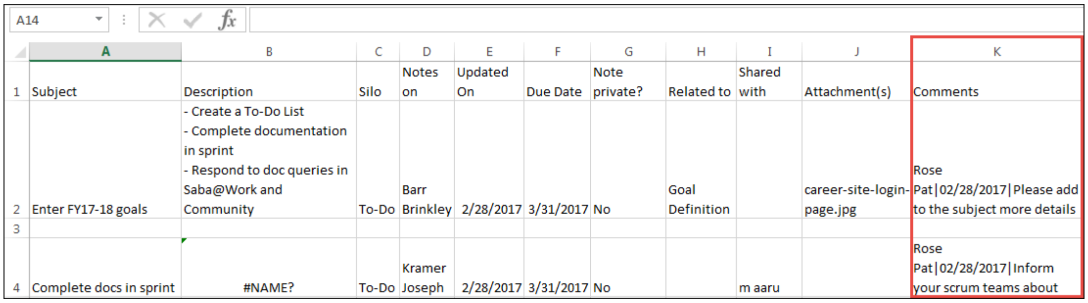


Figure 127: Filters

3. Comments are now shown in the exported notes.

Tip: To export notes, click **Actions** > **Export Notes** > select the desired notes > click **Export Notes** button. The selected notes are exported.



	A	B	C	D	E	F	G	H	I	J	K
1	Subject	Description	Silo	Notes on	Updated On	Due Date	Note private?	Related to	Shared with	Attachment(s)	Comments
2	Enter FY17-18 goals	- Create a To-Do List - Complete documentation in sprint - Respond to doc queries in Saba@Work and Community	To-Do	Barr Brinkley	2/28/2017	3/31/2017	No	Goal Definition		career-site-login-page.jpg	Rose Pat|02/28/2017|Please add to the subject more details
3											
4	Complete docs in sprint	#NAME?	To-Do	Kramer Joseph	2/28/2017	3/31/2017	No		m aaru		Rose Pat|02/28/2017|Inform your scrum teams about

Figure 128: Comments in exported notes

4. Note's owner can now delete notes. To delete a note:
   a. Hover on **Actions** corresponding to the note and click **Delete**.
   b. Click **Yes** to confirm. The note is permanently deleted from the system.

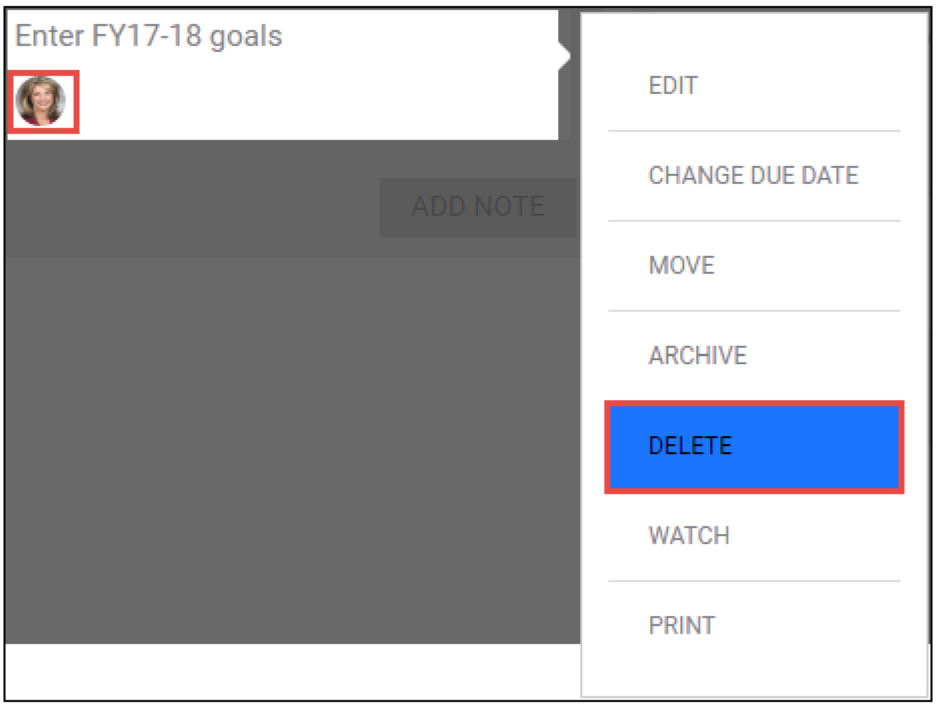


Figure 129: Delete notes

5. Added the following new notifications.

Table 15: New notifications

Notification name	Description
Comment is added on a note	This is a triggered event and the notification is triggered when any user comments on a note. This notification is sent to all the stakeholders who are watching the note. This notification is enabled by default.
Overdue Notification	This is a periodic event and the notification is fired only once to the notes on user when the note has passed the due date. This notification is designed to be sent next day after the due date. This notification is enabled by default.

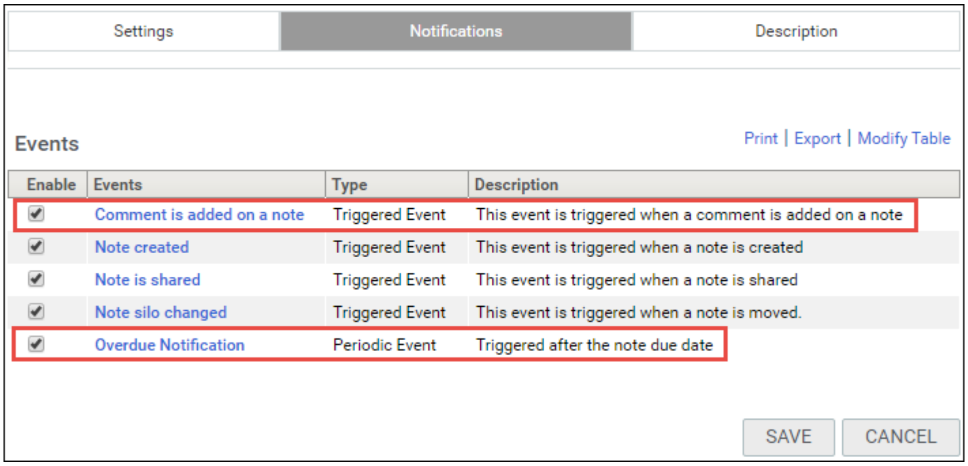


Figure 130: Check-Ins Notifications

6. Silent auditing feature has been introduced when any of the following fields are added or updated:
    - Subject Line
    - Note Description
    - Due Date
    - Comments (add, edit, delete)

    Note: The audit tracking is not available on the UI.

7. The term **Silos** is now changed to **Categories**.

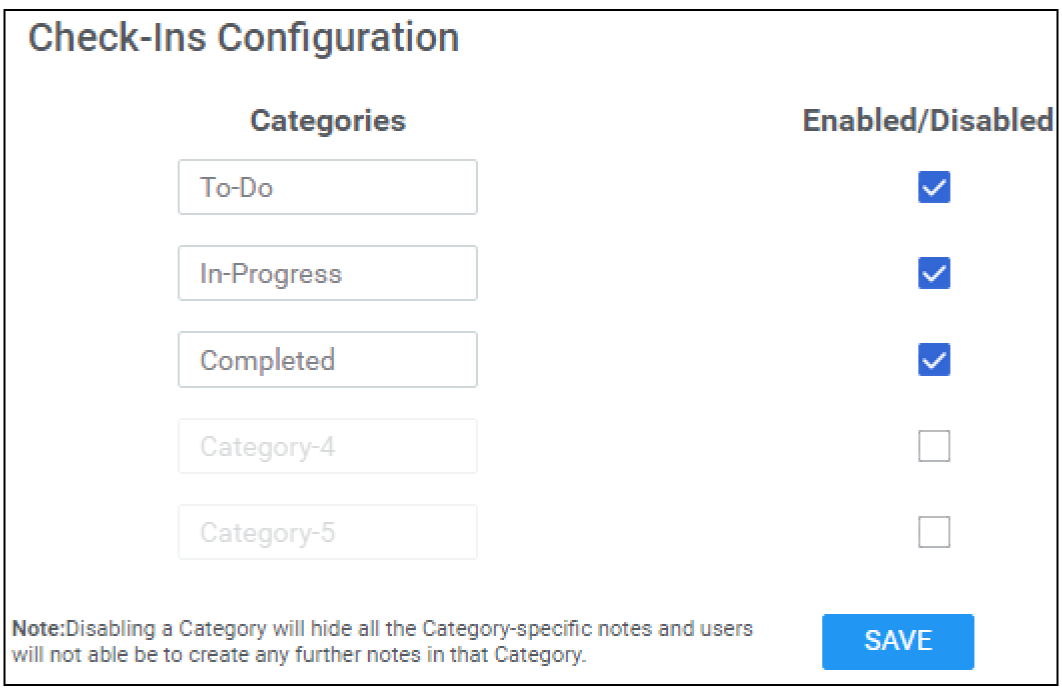


Figure 131: Categories

Use case

This enhancement improves the usability of check-ins.

Enhancements to Review page

How did it work?

There was a need to improve the usability of Reviews page.

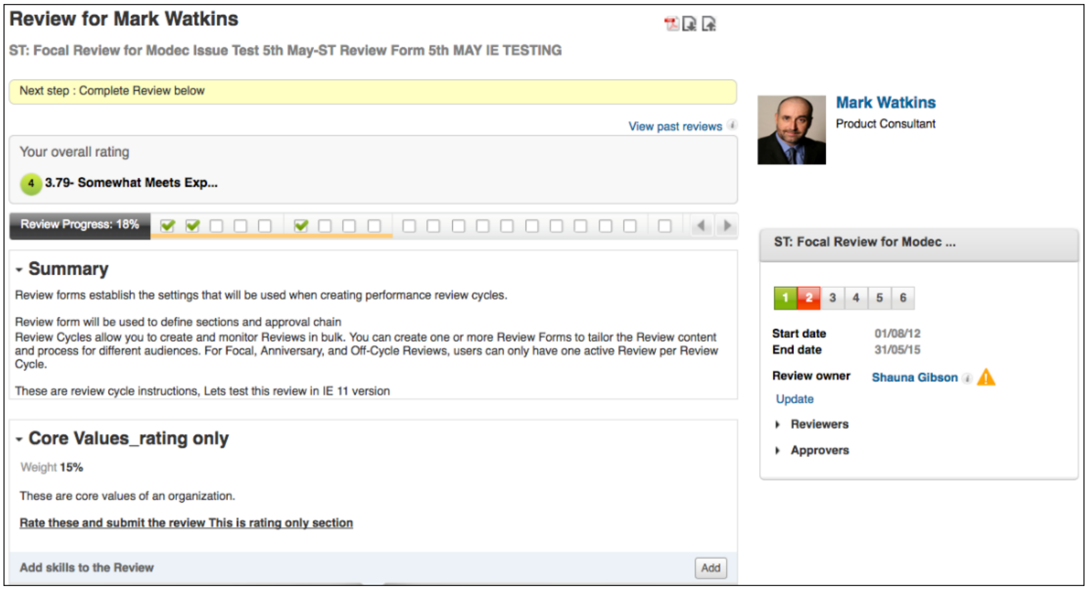


Figure 132: Old reviews page

How does it work now?

The following usability changes have been made to the Reviews page:

1. Review header, progress bar, past reviews

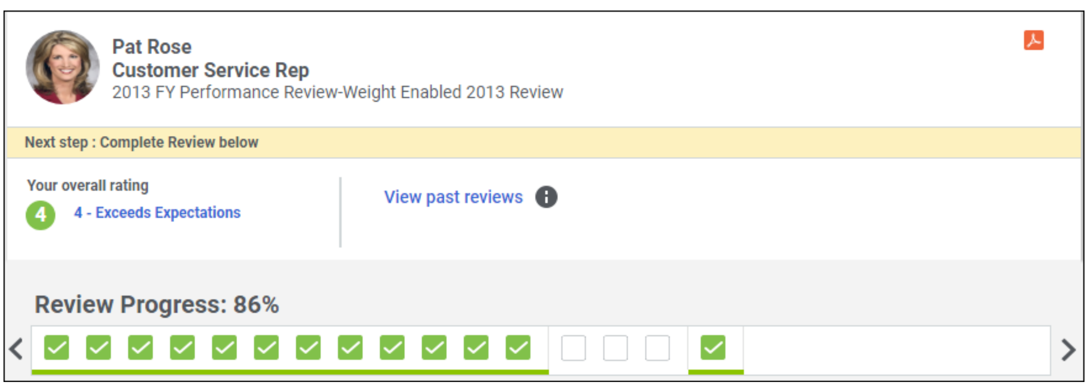


Figure 133: Review header & Progress bar

2. Rating scale

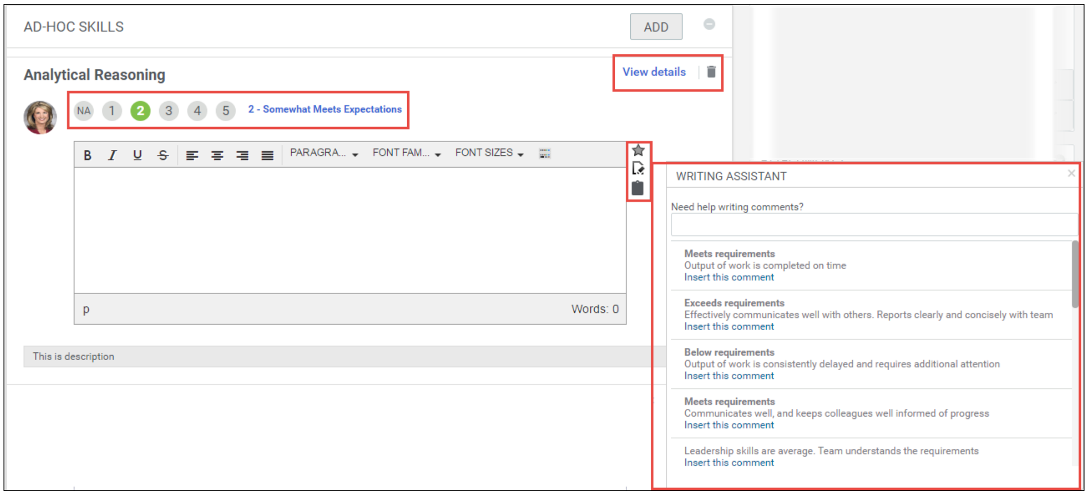


Figure 134: Rating scale

3. Review comments

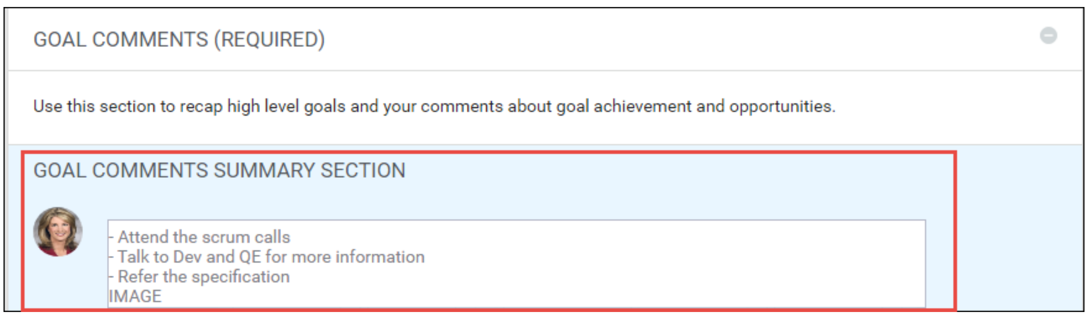


Figure 135: Review comments

4. All the sections on right side of the review are updated to match with the new UX. The **People** section shows members whose review is still in Pending state. The **Status** widget shows green when step is completed, orange when it is delayed, and black when its due. **Reviewers** and **Approvers** sections allows the review owner to add reviewers and approvers in draft state and delete users when not required.

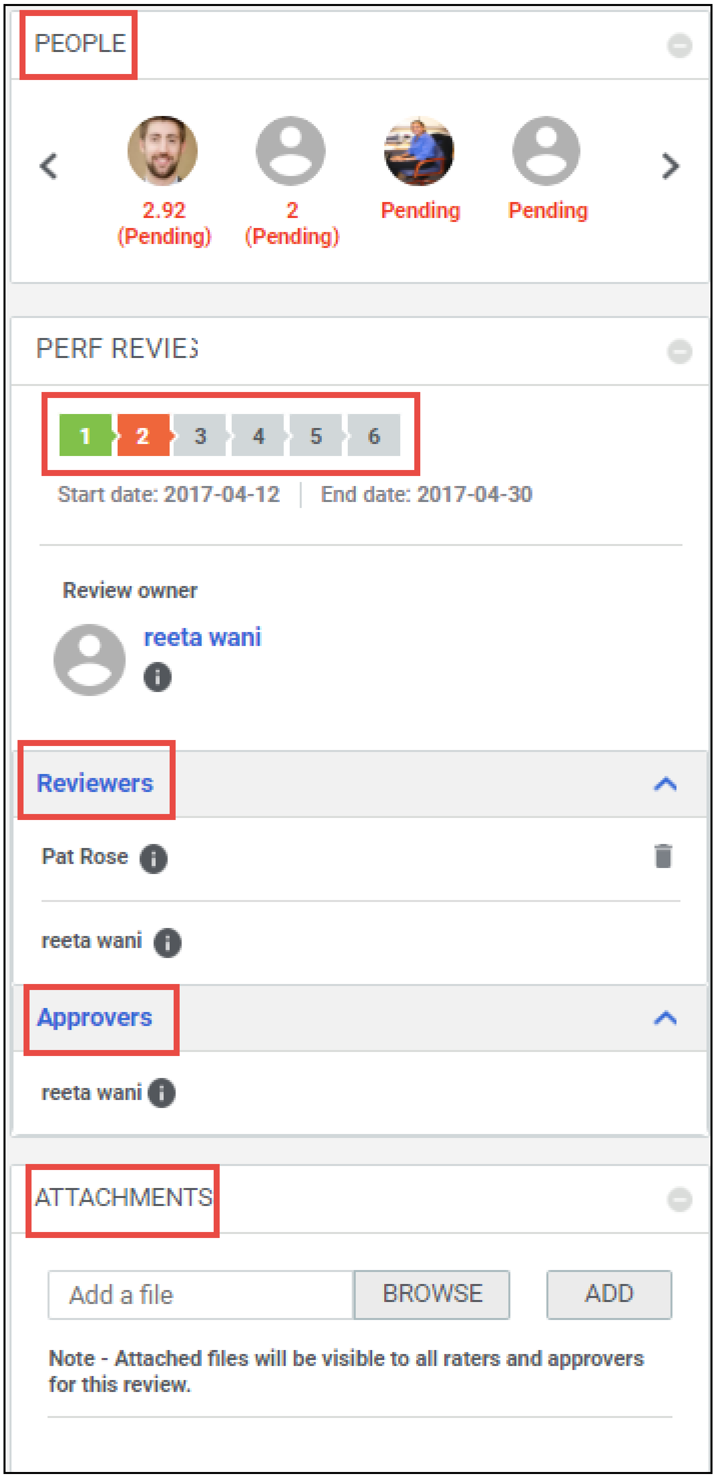


Figure 136: Review comments

5. MRA feedback review

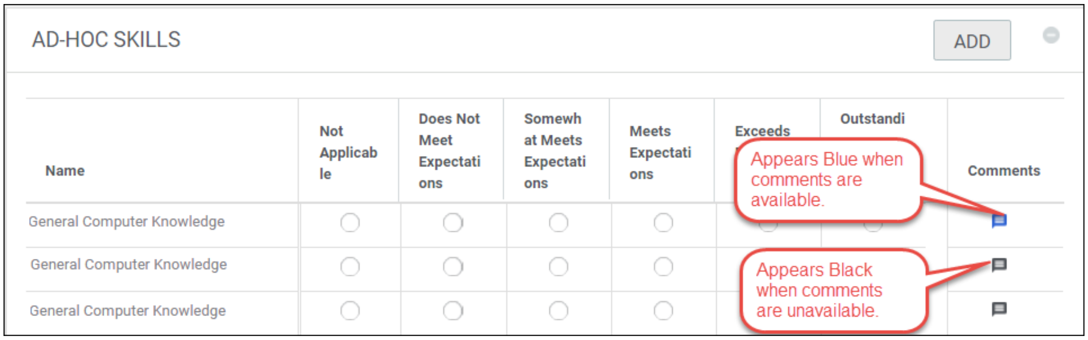


Figure 137: MRA

6. Footer

Figure 138: Footer

7. Entire goal name is visible without any truncation.

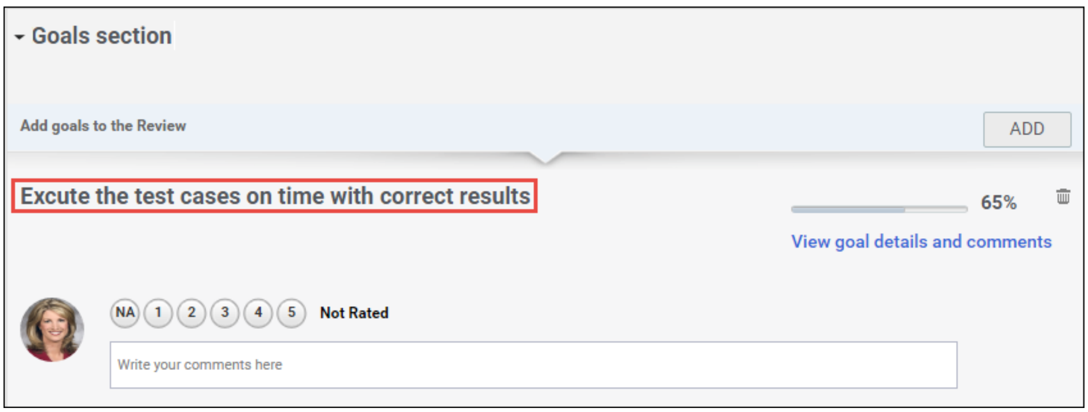


Figure 139: Goal name

8. The entire description of a rating scale is visible in the Feedback review.

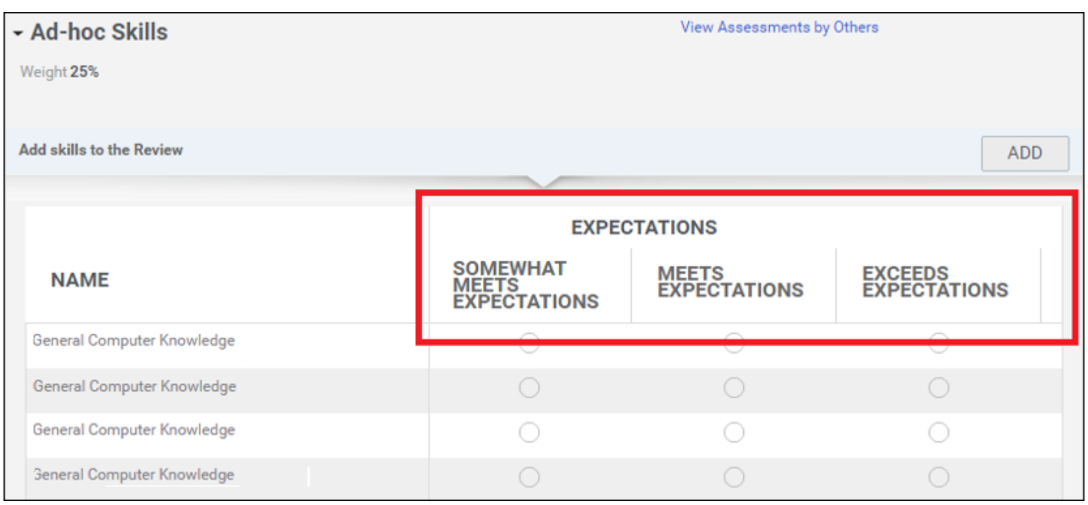


Figure 140: Full description of rating scale

9. Reviewee's and approver's comments are visible without using any scrollbars.

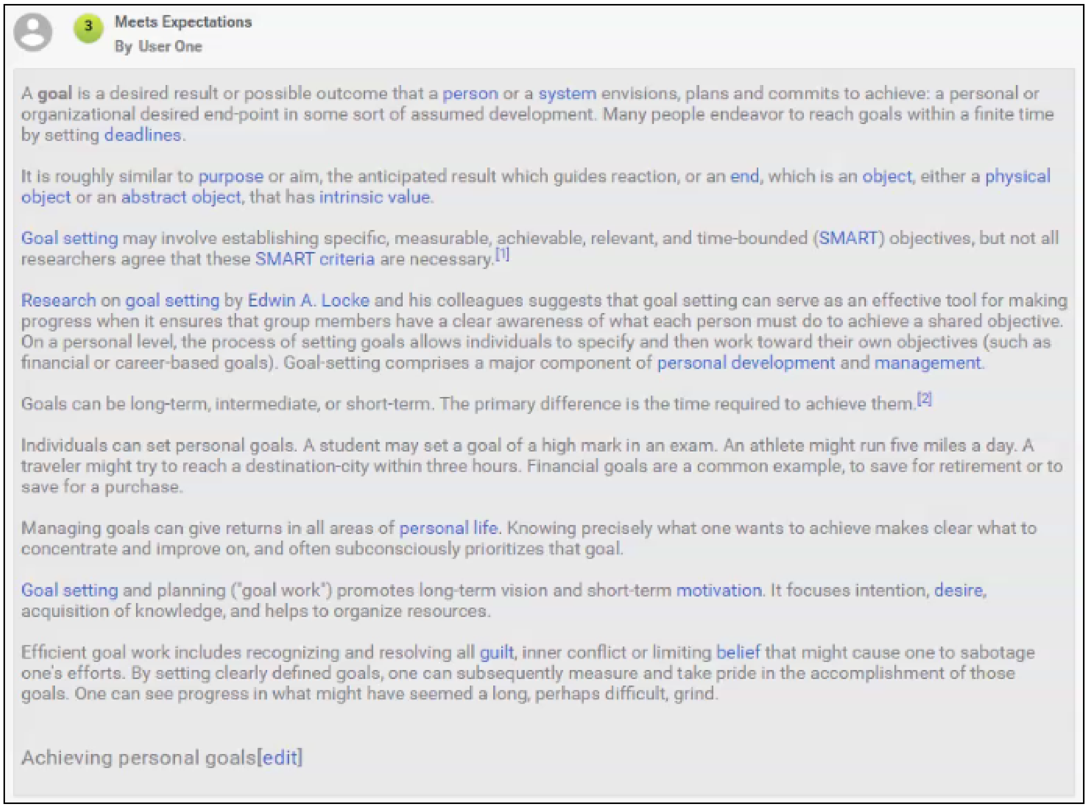


Figure 141: Comments section

10. Ability to insert the goal comments in bulk. On the review, click **View goal details and comments** link and click **Insert All** on **Goal Details and Progress** or **Past Review Comments** tab to insert all the comments in bulk in the review.

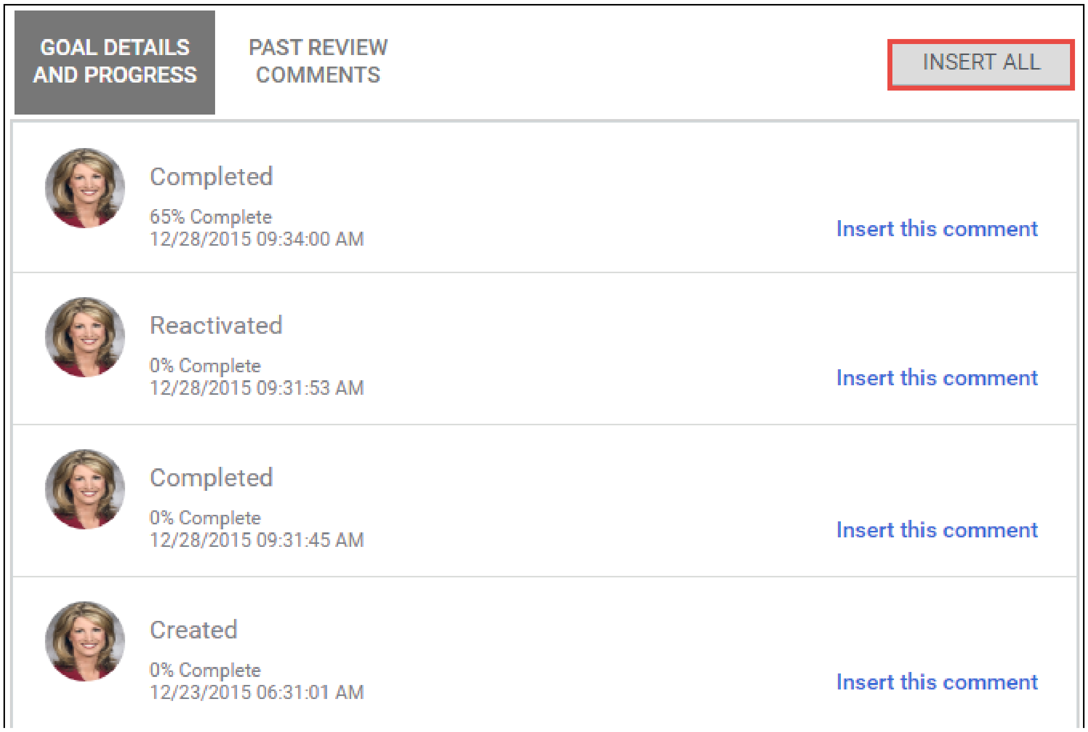


Figure 142: Insert goal comments in bulk

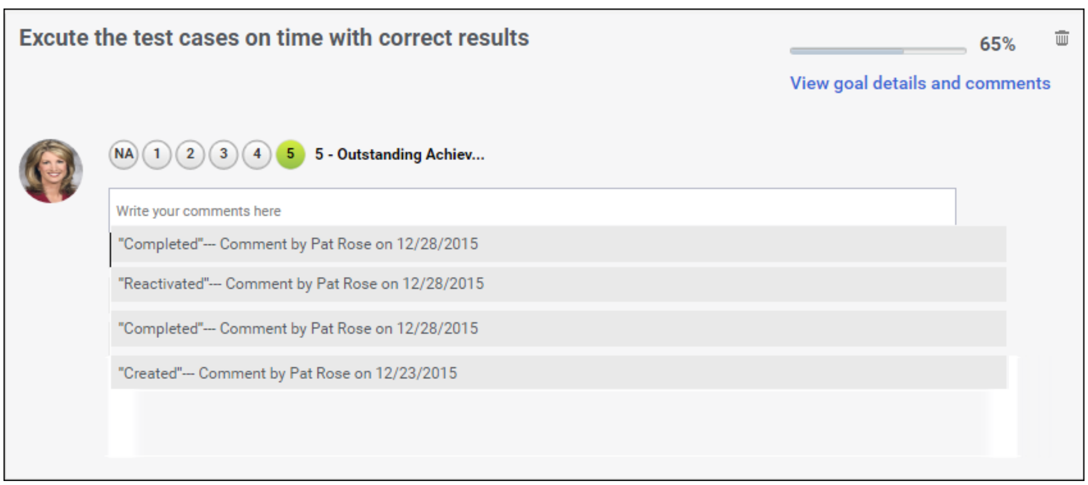


Figure 143: Bulk comments

The inserted comments are in same order as they appear in the tab.

Use case

This enhancement improves the usability of reviews for end users.

Enhancements to Skills page

How did it work?

There is a need to update the Skills page to make it more usable.

How does it work now?

The following enhancements are made to the Skills page:

1. Proficiency levels and corresponding descriptors appear under the skill description.
2. If learning items are associated with the skill, then the proficiency level defined in the course appears next to the learning item. If learning items are not associated with the skill, then the **Learning** section is hidden.
3. **Last Assessment Date** appears under **Status**.

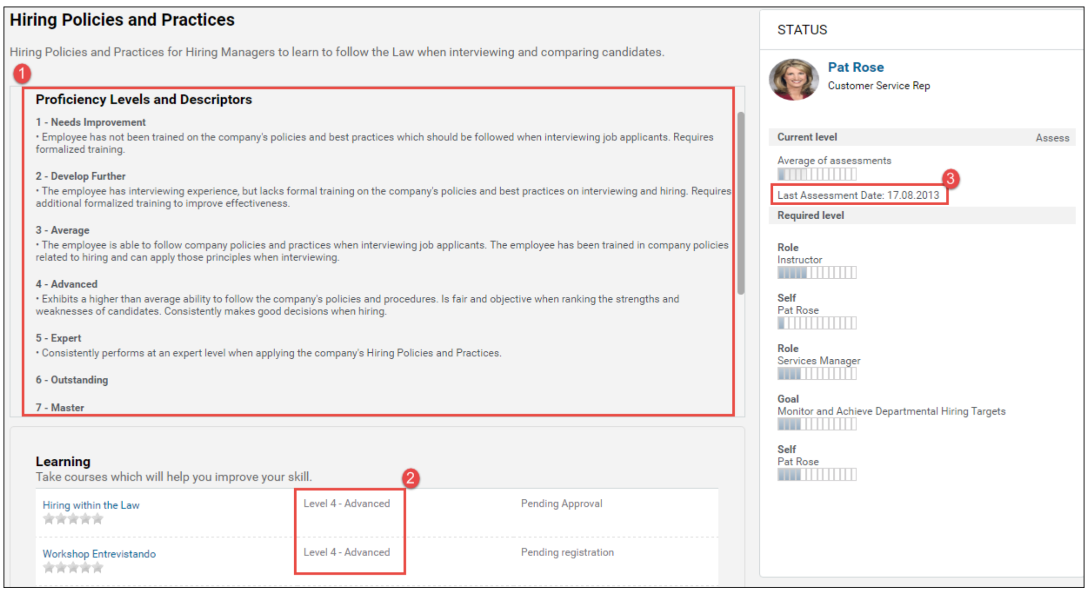


Figure 144: Updated Skills page

4. Click **Assess** link to assess the skill and notice that proficiency levels and its corresponding descriptors are mentioned besides **Current proficiency** level.

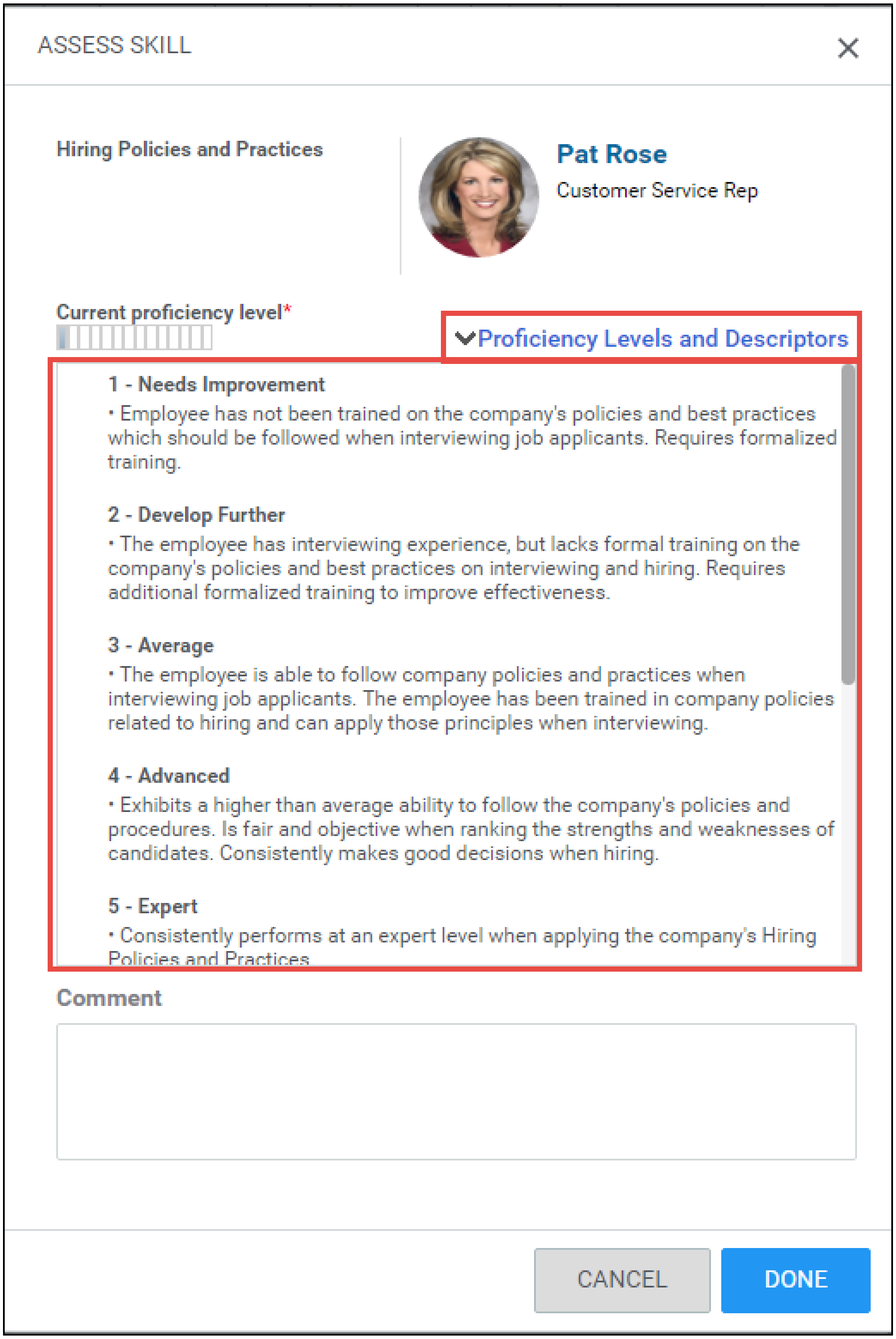


Figure 145: Proficiency levels and descriptors on Assess Skill page

5. On searching and adding skills, the following skills details appear:
   - **a.** Skill Name
   - **b.** Description
   - **c.** Proficiency Levels and Descriptors

d. Learning Items
e. Attachments

Use case

The above enhancements on the skill details page improves the usability of skills.

Hide review sections

How did it work?

Prior to this update, there was no provision to hide any review sections from any users associated with the review.

How does it work now?

The performance administrator can now mark a section as private and make it visible only to managers, review owners, and approvers after the review has been released. A new policy **Mark Section Private** has been introduced for the **Narrative** and **Additional Info** sections which marks the section as private and makes it visible only to **Manager**, **Review owner** and **Approver** once the review is released. By default this policy is disabled. To enable this policy, navigate to **Admin** > **Performance** > **Performance Home** > **New Review Form** > **Review Sections** tab > **Policies** section.

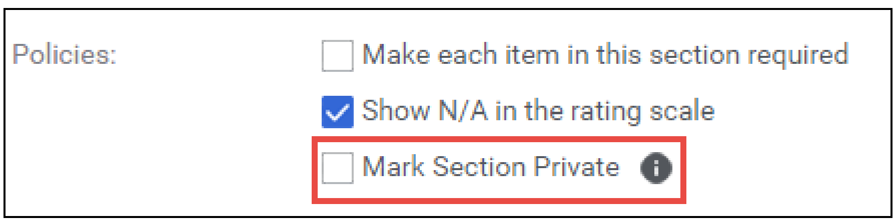


Figure 146: New policy to mark the section as private

On selecting this policy, the selected resources below the **This section accepts** are cleared except for the **Manager** and the checkboxes are disabled.

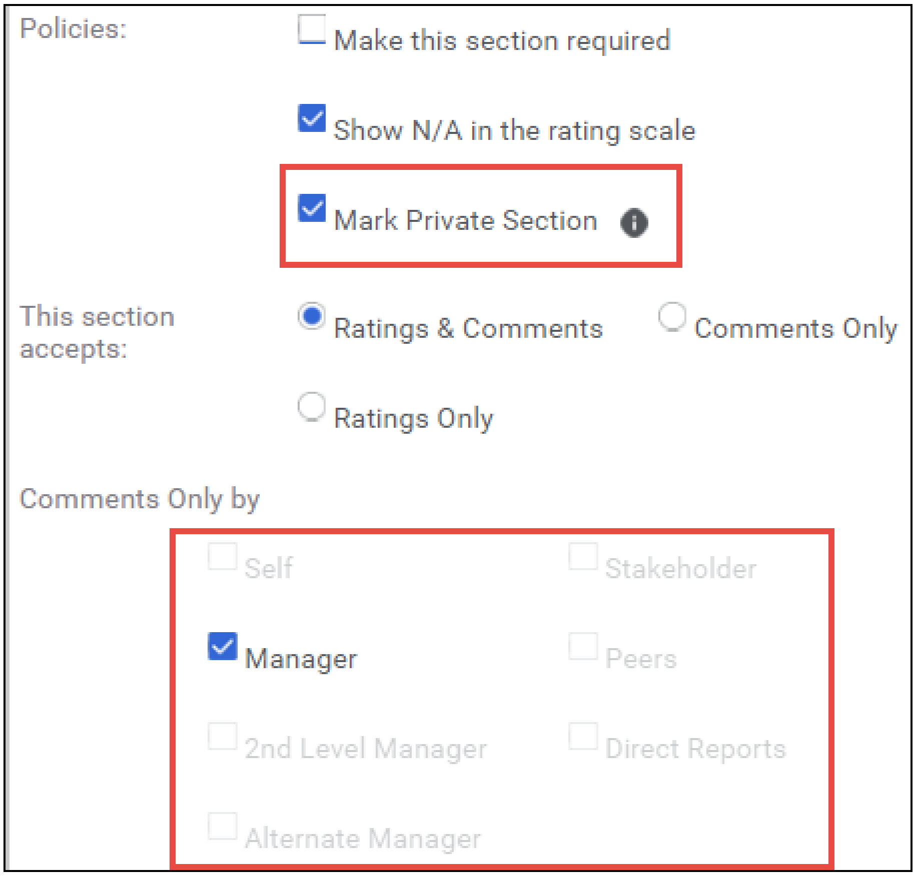


Figure 147: Section marked private

Once the review is released, this section is visible to manager, review owner, and approver.

Use case

This enhancement on the review form would allow admin to hide a section from certain raters to collect confidential information.

Improved search ability for skills

How did it work?

There is a need to improve the search feature for skills to have better user experience.

How does it work now?

The end user can now search for and add the desired skills to the plan by using **Skill Group** filter. Navigate to **My Plan** > **Actions** > **Add Skill** > type the skill name and perform Search or use **Skill Group** filter to narrow your search. The selected skills appears on the right.

Note: The end user can also assess the skill in the **Selected Skills** section.

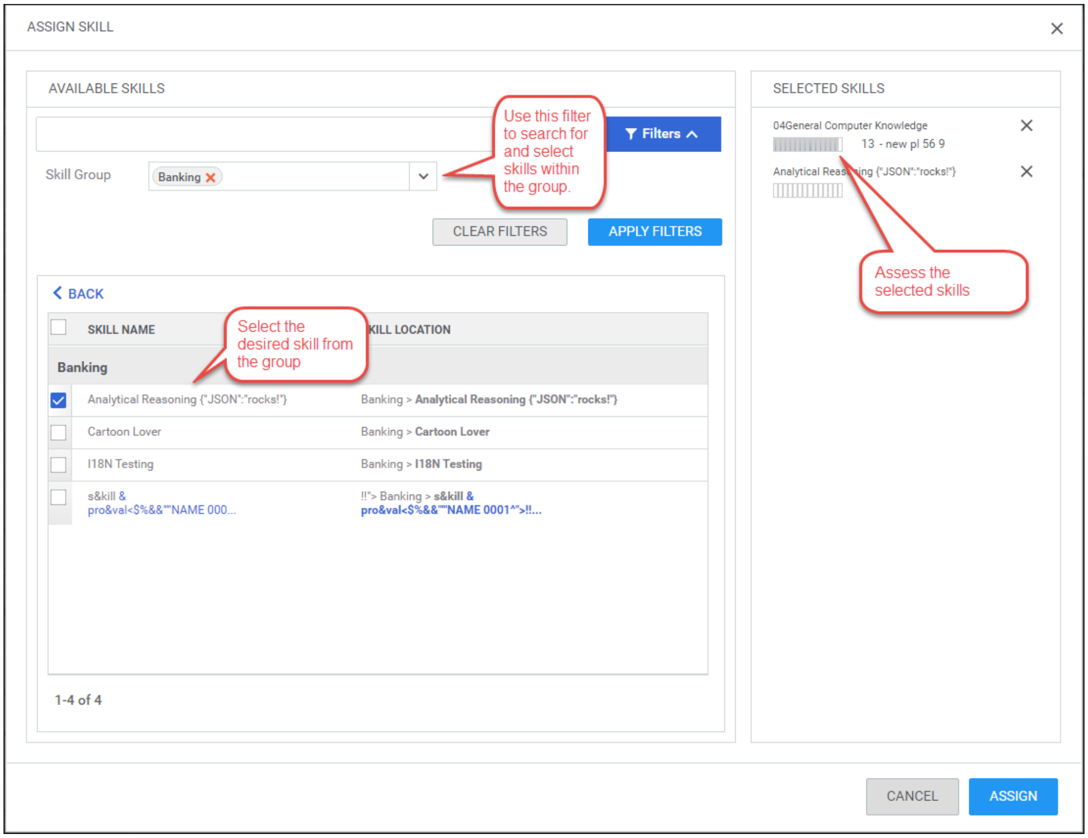


Figure 148: Add skills

Use case

This enhancement provides users with greater ability to search skills and see the history of BI assessment.

Override overall rating score in pending approval state

How did it work?

Prior to this update, the performance administrator and review owner could override the overall rating score only when the review is in active, complete and disapprove state.

How does it work now?

The performance administrator can now override the overall rating score through UI and RDI when the review is in **Pending Approval** state.

To override the overall rating score through UI:

1. As a performance administrator, navigate to **Admin** > **People** > **Manage People** > **Reviews**.
2. Search for the desired review with **Pending Approval** status.
3. Open the review and click **Override?**.
4. Change the final ratings.
5. Add comments.
6. Click **Submit**. The rating score is updated.

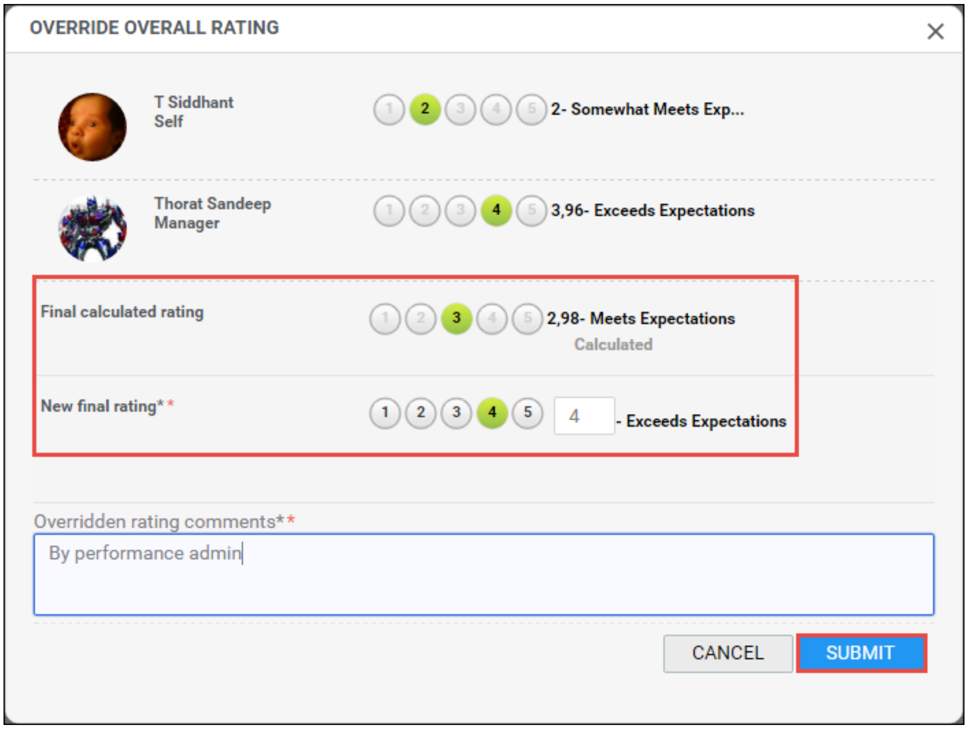


Figure 149: Override overall ratings

To override the overall rating score through RDI:

1. As a system administrator with performance admin privileges, navigate to **Admin** > **System** > **Manage Integrations** > **Integration Studio**.
2. Use the **Review Overall Score** object name and override the overall score for reviews in Pending Approval state.

The override action is audited and tracked in the audit trail. Click the **Audit Trail** icon on the review to view details.

Use case

Only the performance admin can now update the review score even when the review is in pending approval state.

Chapter 9

Pulse 360

Topics:

Display Pulse survey folders in logged in locale

How did it work?

While creating a pulse survey, Saba Cloud always displayed the following folders in English to the Pulse administrators, irrespective of the locale they were logged in:

- Me
- Management
- Company

How does it work now?

With this update, Saba Cloud displays the following folders to the Pulse administrators in the locale they are logged in:

- Me
- Management
- Company

Use case

The text on the Saba Cloud UI needs to be translated in the locale the users are logged in.

Enhanced ability to manage members in a Pulse survey

How did it work?

Prior to this update, Saba Cloud did not provide a consolidated view for managing members in Pulse custom survey.

How does it work now?

This update enhances the ability to manage members in a Pulse custom survey by adding the following new link under **Actions** on the **Launch & Monitor Custom Surveys** page:

- **Manage Members**

  Clicking this link for a survey opens a page that displays all members of the selected survey.

  Note: The **Add Members via Smart List** and **Add Members Manually** are no more available under **Actions**.

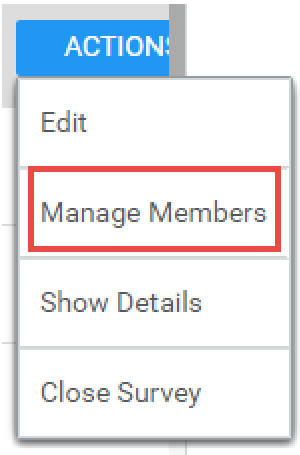


Figure 150: Manage Members link

You can add or delete members in the survey from this page using the following options:

- **Set Smartlist Criteria**

  Click this link to view members added via smartlist. You can add more members to the survey by creating new smartlists.
- **Add Members**

  Click this link to view members added manually. You can add more members manually to the survey.
- **Remove**

  Select one or more members and then click this link to remove selected members from the smartlist. If you remove survey members that were added via smartlist, then the same members are is not added again when the smartlist runs. You need to add the members manually.

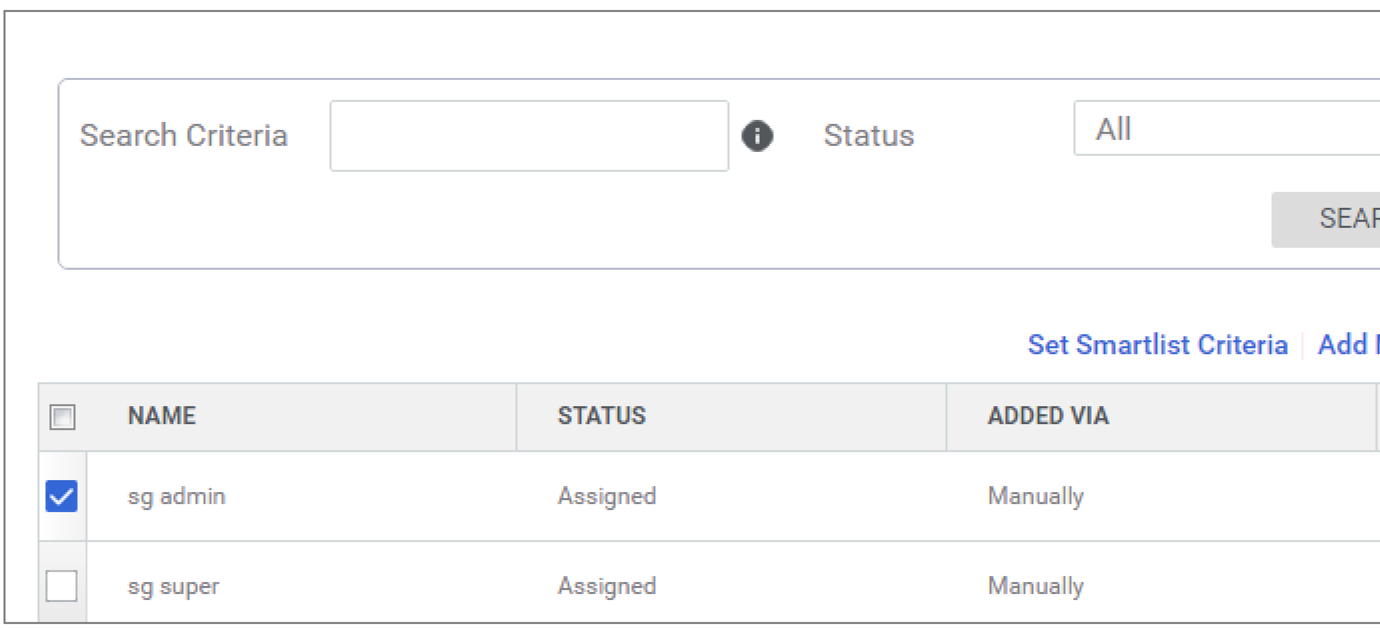


Figure 151: Manage members page

Administrators can also navigate to the page for managing survey members from the **Survey Analysis** page by clicking the new **Check Members** link.

Note that the count on the Survey Analysis page does not include smartlist members until the smartlist is processed.

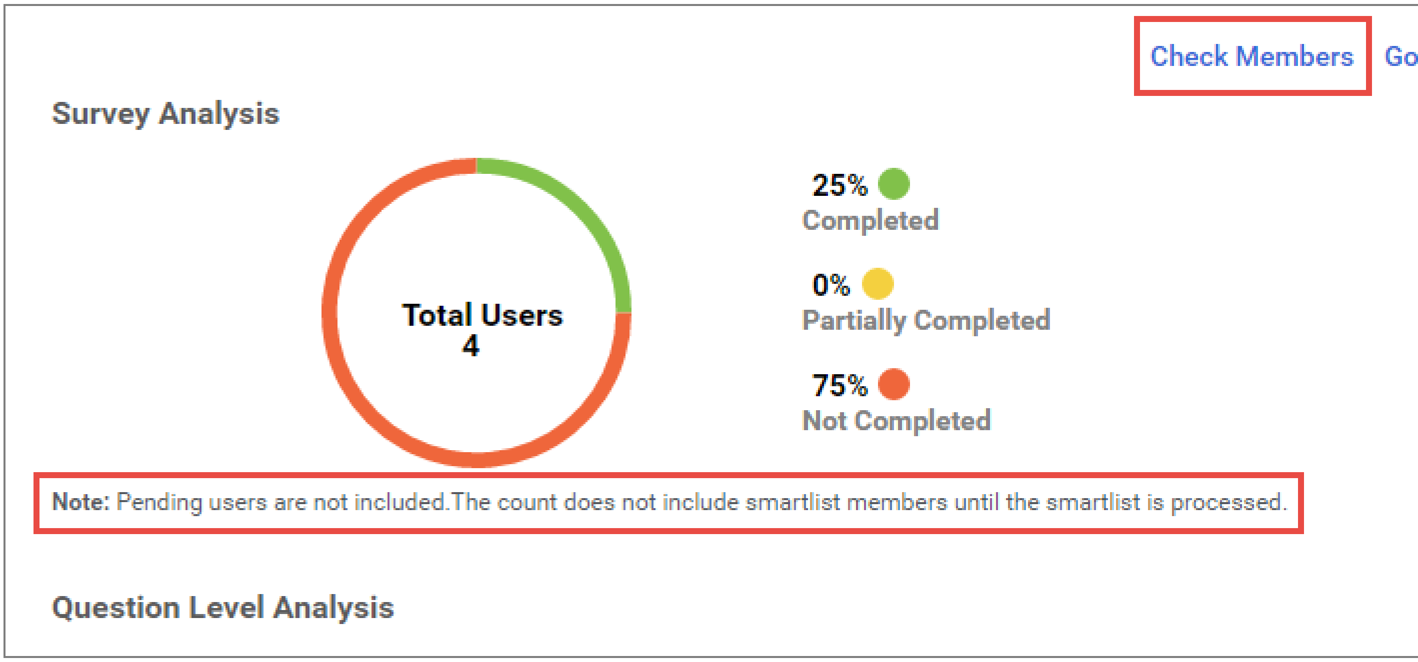


Figure 152: Check Members link

Use case

There is a need to provide easy access to view and add members in a Pulse custom survey so that usability is improved.

Enhancements to pulse questions and dashboard

How did it work?

Prior to this update, all questions on the **How's it going?** portlet were mandatory for user.

How does it work now?

The following enhancements have been made to the current functionality of Pulse 360:

1. New columns **Response Required** and **Enable Question** has been added to the survey on Configure Pulse Questions page. The pulse administrator can mark the question as mandatory by selecting the **Response Required** checkbox corresponding to that question. The pulse administrator can display questions on the **How's it going?** portlet by selecting the **Enable Question** checkbox corresponding to that question. By default, all the questions are marked as mandatory and enabled. The questions that are not enabled are strike out on Configure Pulse Questions page.

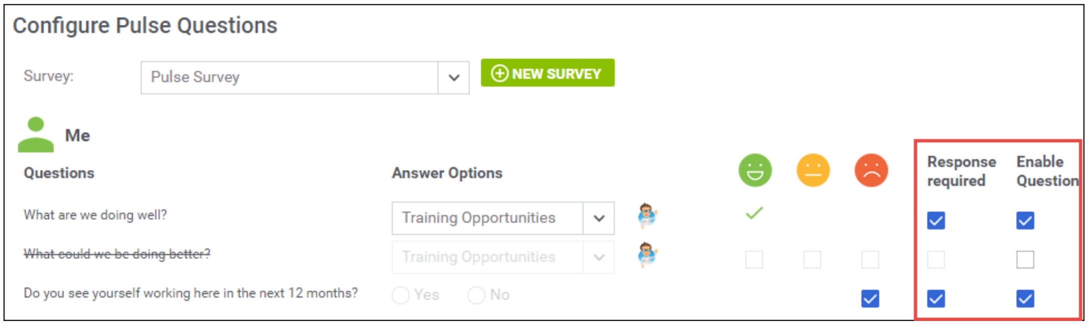


Figure 153: New options for pulse questions

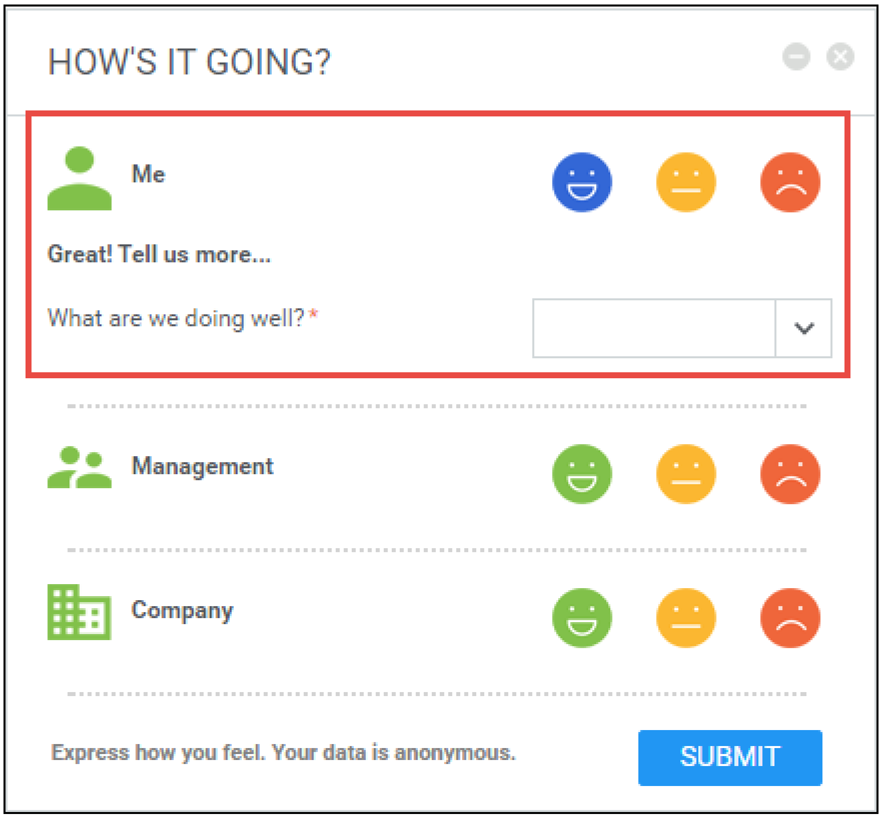


Figure 154: How's it going? portlet

2. Trending Charts label added for trending chart options in **Filters** under **Pulse 360** > **Dashboards** > **Pulse**. Also, **Time-Bound** label is updated to **Time-Based**.

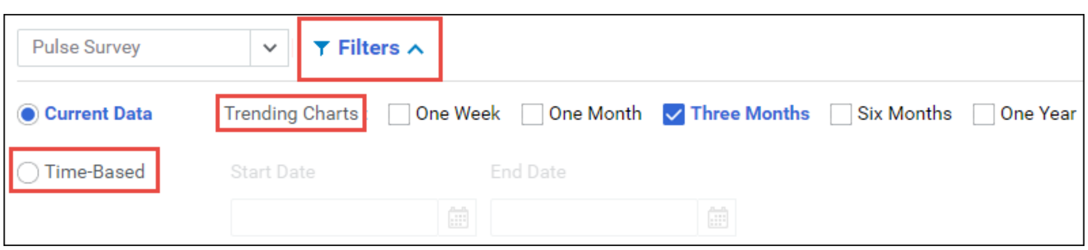


Figure 155: Filters

3. Display volume and response count on the Trending Chart.

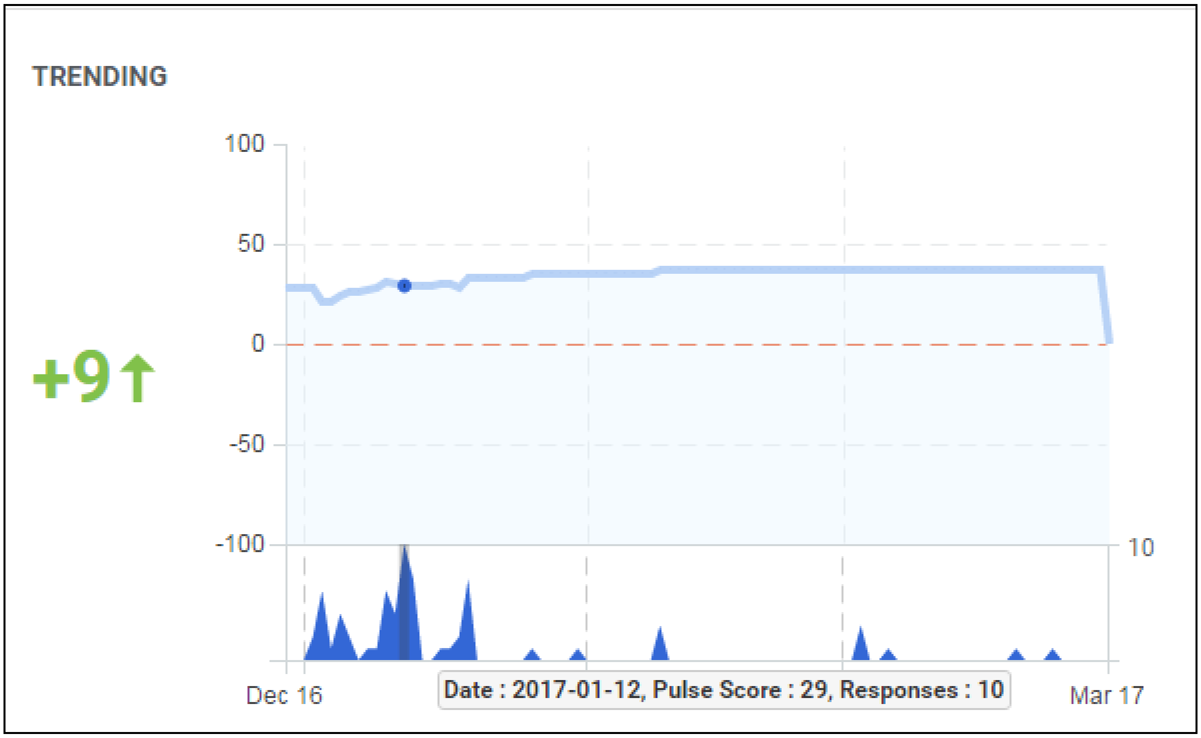


Figure 156: Volume and response count

4. Pulse administrator and manager can now add and view notes by navigating to **Admin** > **Pulse 360** > **Dashboards** > **Pulse** > **Actions** > **Add/View Notes**. This option appears only if **Check-Ins** service is enabled.
5. **None** option added to the **Select which user type that can Pulse (Internal, External, Both or None)** setting of **Pulse Survey**. Select this option when you don't want any users to pulse.

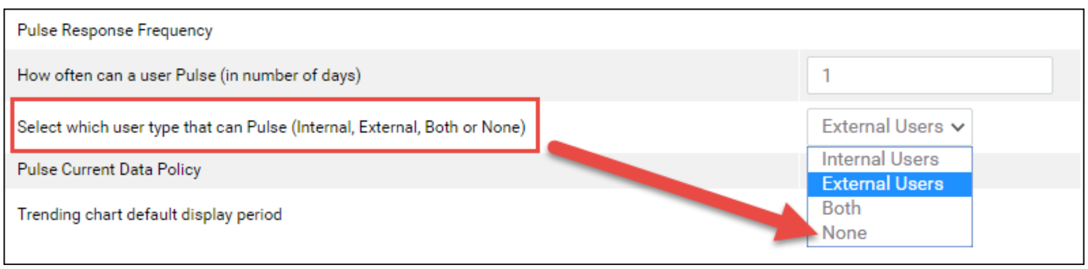


Figure 157: Updated setting in Pulse Survey

6. Organization manager can now access Pulse dashboard.
7. Updated TIM Action messages.

Table 16: Updated TIM Messages

Question	Response	Updated TIM Action
ME > What could we be doing better?	Manager Recognition and Praise	Did you know you can leave an Impression for someone? Why not leave an Impression for your manager – and give a nudge to leave an Impression for you too!

Question	Response	Updated TIM Action
ME > What are we doing well at?	Training Opportunities	Great! Why not rate the courses you have taken? Click here to start rating them.
Management > What are we doing well at?	Talent Recognition	Great! Feedback is contagious! Let your peers know that they are doing great work. Leave an Impression or two!
Management > What could we be doing better?	Company Vision/Strategy	Not sure about our company's vision? Take a look at these videos from our CEO.

Use case

This enhancement improves the usability of pulse surveys and dashboard.

Chapter 10

Recruiting

Topics:

- Enhancements to approval chain
- Enhancements to hiring team view
- Jobs menu appears in new tile style header menu
- Job board mapping fields
- Rejection templates
- Upload background image for Career site login page
- Updated candidate profile page
- Updated learning flows in career site

Enhancements to approval chain

How did it work?

There was a need to improve the usability of the approval process where an user on behalf of the approver should be able to approve or reject the requisition/offer and view the previous comments and related information.

How does it work now?

A user can now approve or reject the requisition/offer on approver's behalf and also view the previous approver's comments. The current approver and approver on behalf can also view each other's comments that were made while approving or rejecting the requisition/offer. The approver or approver on behalf must navigate to the desired requisition, go to Approvals details section, and click **View Comments** to see the comments entered by the approvers in chain. The name of the approver and approver on behalf is painted below the comment.

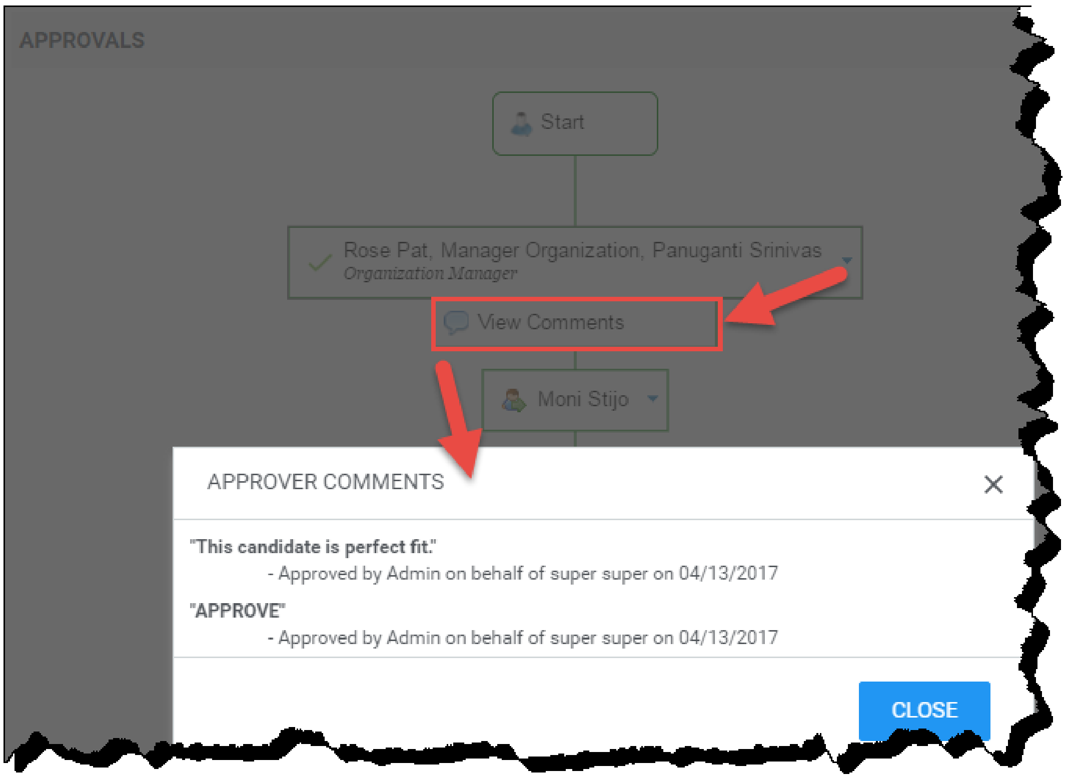


Figure 158: Approver's comments

If an approver has rejected any requisition or offer and it is resubmitted for approval again, the approver can view their previous comments on the same popup before taking the desired action (approve/reject).

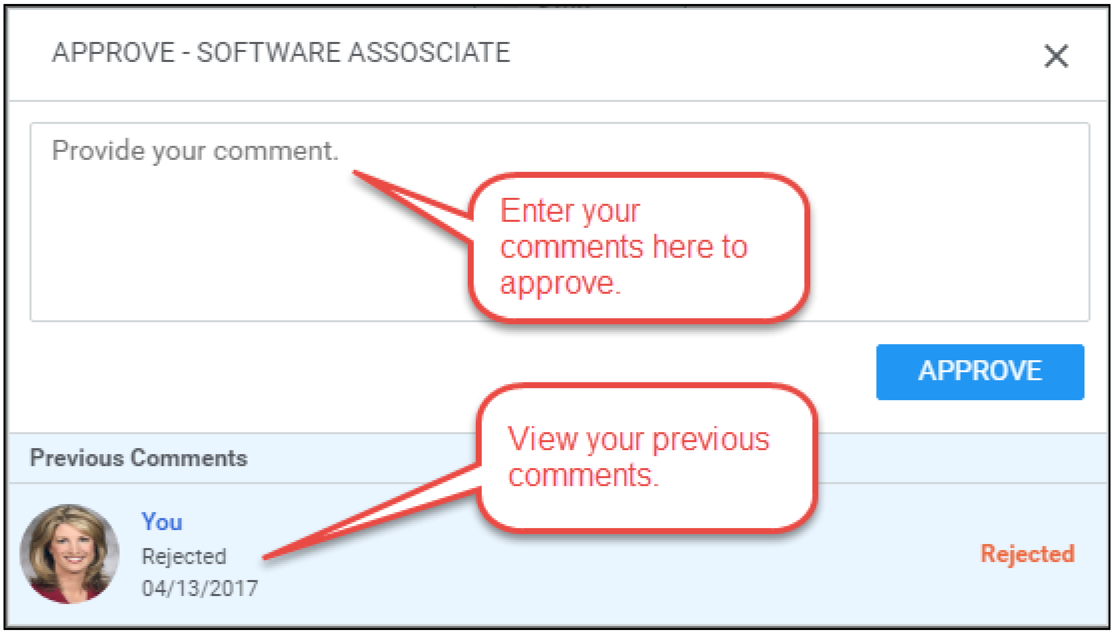


Figure 159: Viewing previous comments while taking Approve/Reject action

Use case

If a manager rejects a requisition or job offer, the workflow sends it back to the originator. If the originator then re-submits the requisition or offer, the approving manager has no indication that they have seen it before and made any comments. This enhancement proves to be very helpful since the approvers can now see all the previous actions and comments in the process.

Enhancements to hiring team view

How did it work?

There was a need to improve the hiring team view to make it more usable.

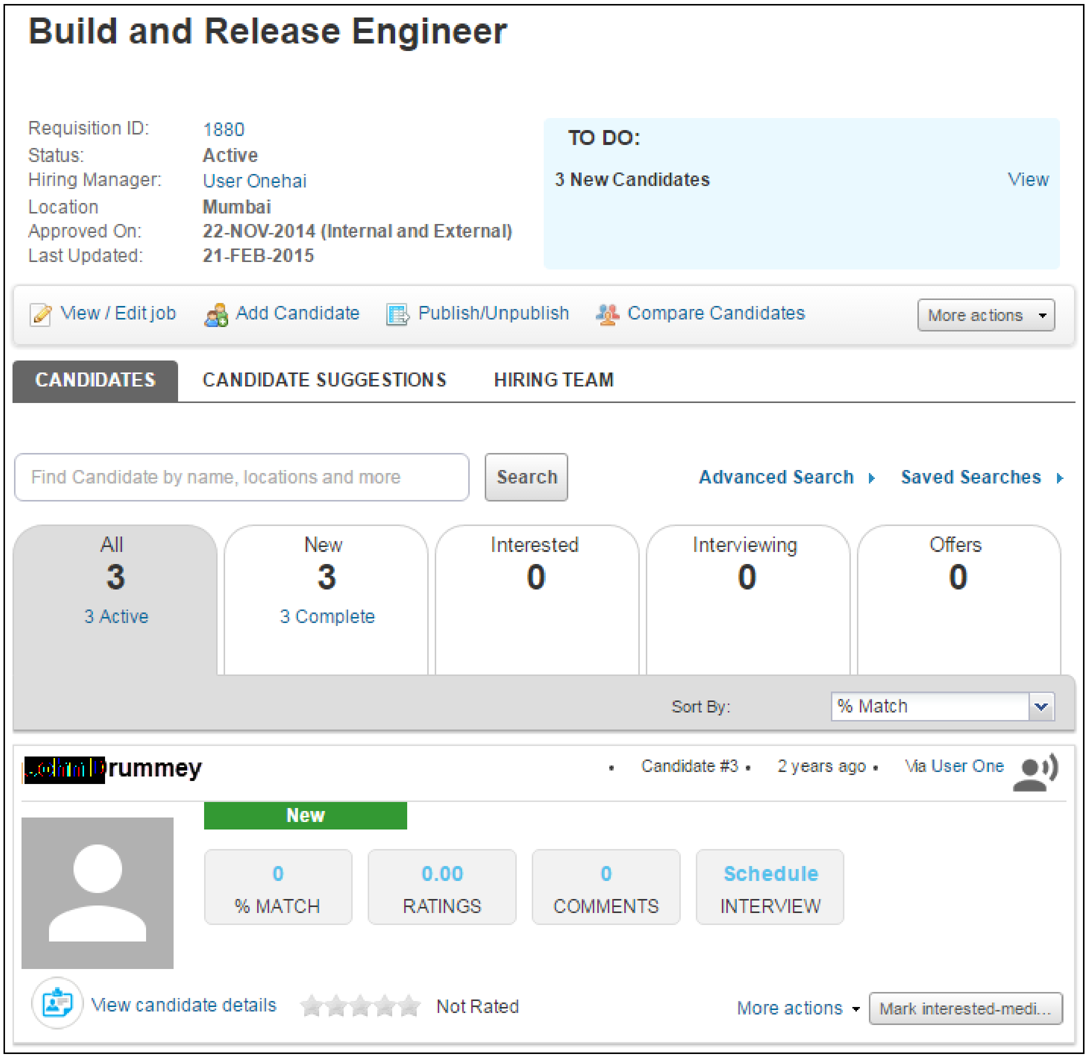


Figure 160: Hiring Team view

How does it work now?

The following usability changes have been made to the Hiring team view:

1. The **Requisition ID** is not linked to the corresponding job requisition. The administrator and hiring team members must use **View / Edit job** to access the job requisition.

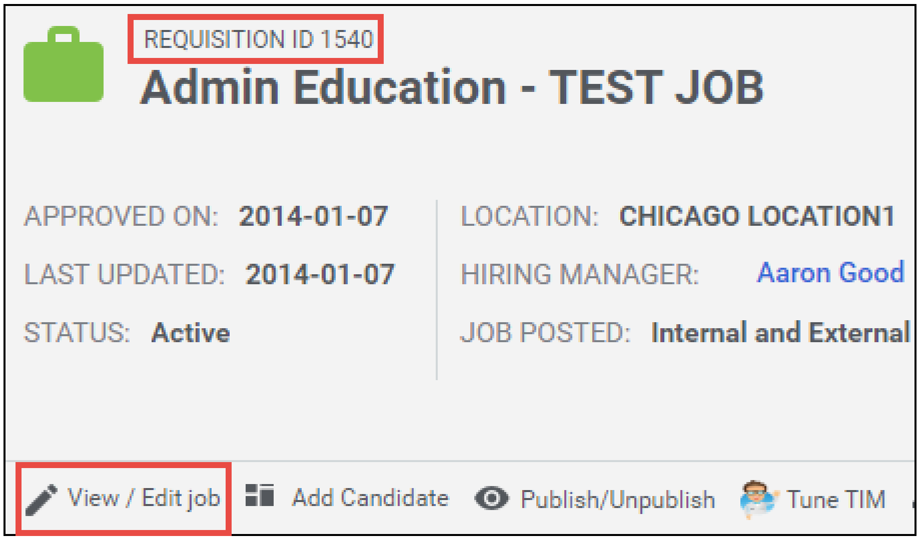


Figure 161: Requisition ID

2. Tune TIM option added on the hiring team view that helps the recruiting administrator and hiring team member to get the best possible suggested candidates.

   Tip: You can also access the **TIM Tuner** from the Candidate Suggestions tab and through Compare Candidates.

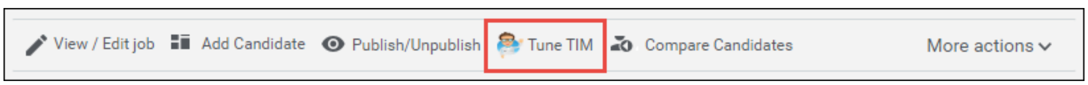


Figure 162: TIM Tuner

3. The **More Actions** dropdown list populates only the set of actions that needs to be performed on a candidate. The candidate's status related actions like marking the candidate as interested, rejected, and so on are moved out of this dropdown list to **Change Status** dropdown list.

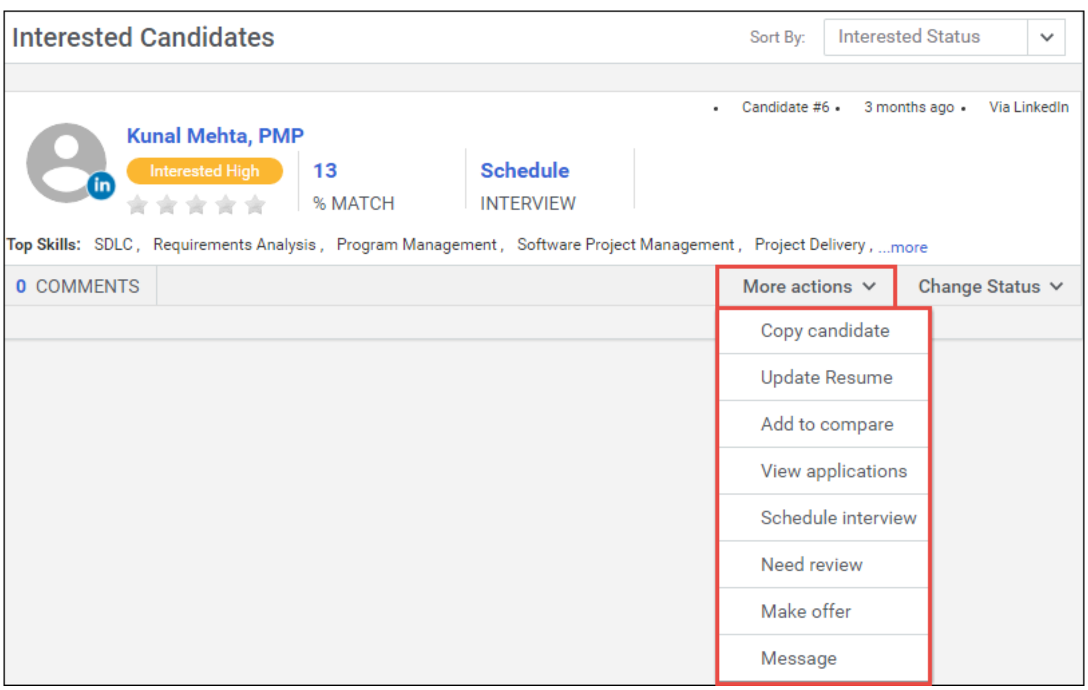


Figure 163: More actions dropdown list

4. The candidate's status related actions are moved to the new **Change Status** dropdown list. Based on the candidate's current status, this dropdown list displays the other applicable statuses.

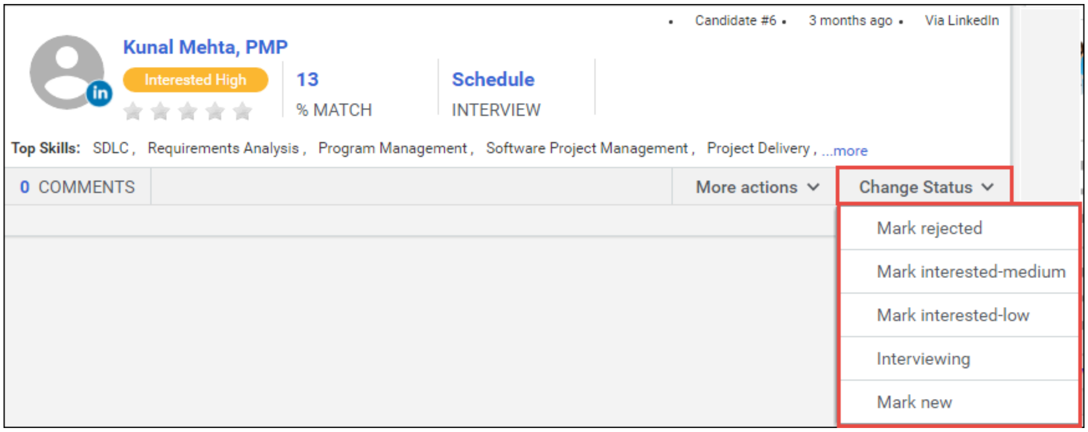


Figure 164: Change Status dropdown list

5. The layout of **Hiring Recommendations** portlet has been updated.

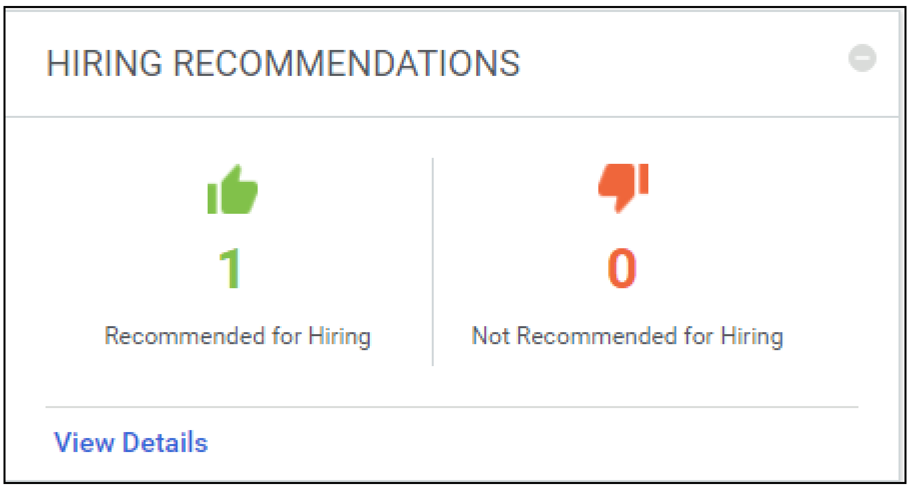


Figure 165: Hiring Recommendations portlet

6. The candidate can now be rated only through the stars provided beneath the candidate status. Click the stars to open the **Rate** popup, rate the candidate based on his/her **experience** and **potential**, add comments, and click **Rate**.

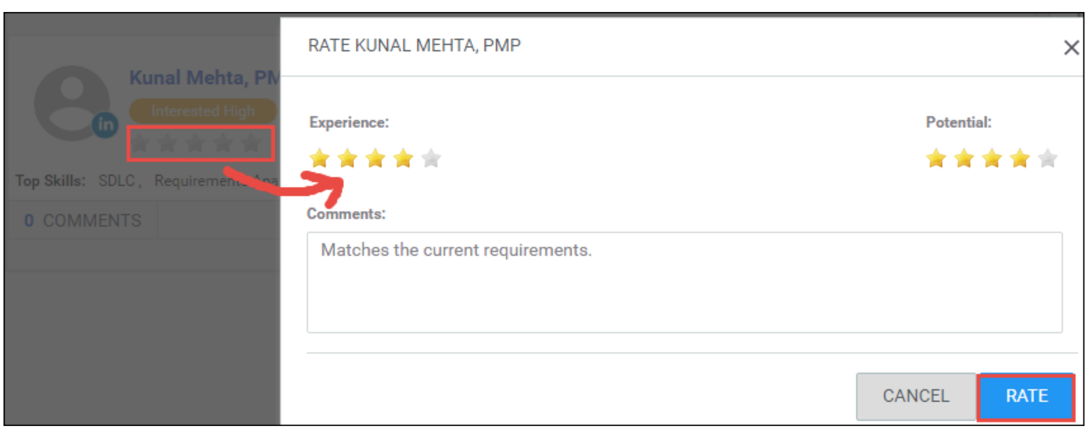


Figure 166: Rate candidate

7. Hiring team members can click the candidate name and/or the profile picture and access the candidate details page. Also, use **Comments** to add any comments for the candidate. The number denotes the current count of comments.

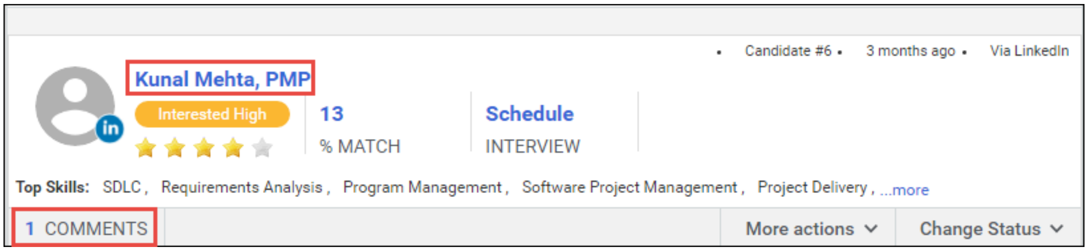


Figure 167: Comments

Use case

This enhancement improves the usability of hiring team view.

Jobs menu appears in new tile style header menu

How did it work?

Prior to this update, the **Jobs** menu was part of **My Team** and **People** menus.

How does it work now?

The **Jobs** menu now appears in the new tile style header menu.

Note: The **Jobs** menu will continue to appear under **My Team** and **People** menus.

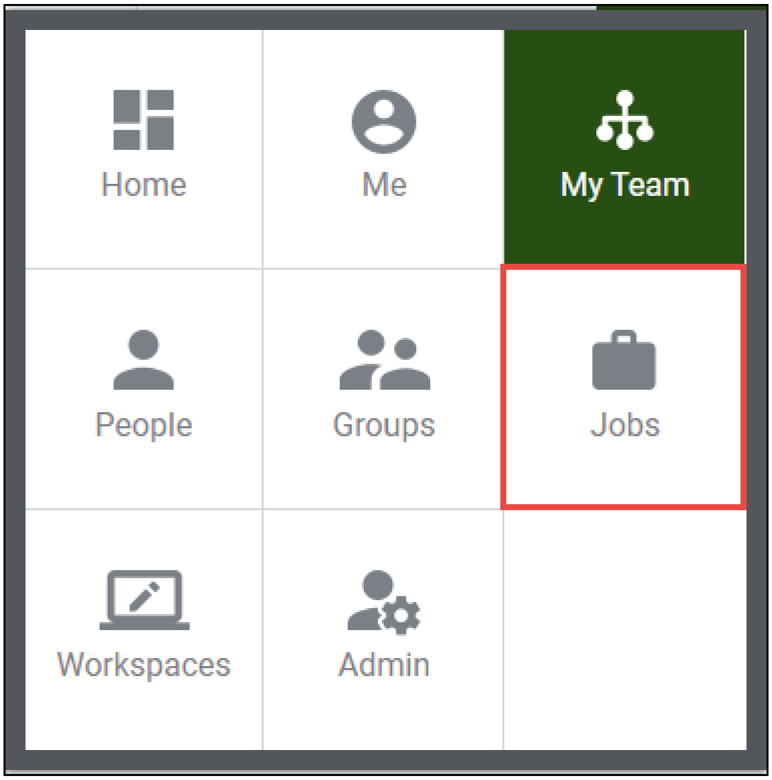


Figure 168: Jobs menu

This menu appears in this style only when the setting **Enable new tile style IA** is enabled in **System** > **Configure System** > **Services** > **Foundation** > **User Interface**. By default, this setting is disabled. To enable, please contact your system administrator.

Use case

This feature now helps the end user quickly access popular items from the **People** tab.

Job board mapping fields

How did it work?

Prior to this update, recruiting administrator could use only LinkedIn specific values to map with the requisition values while posting the job to the selected job boards.

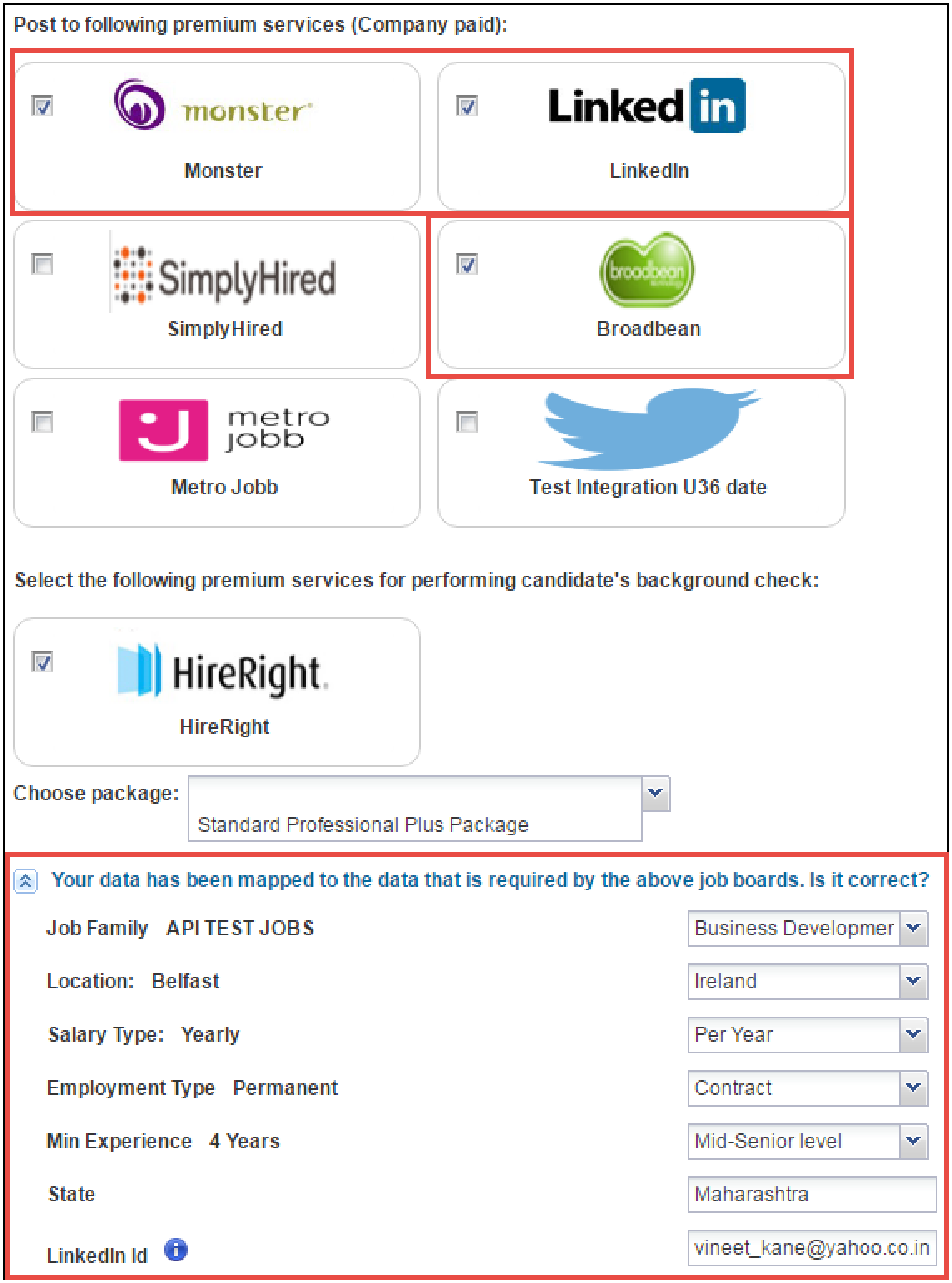


Figure 169: Old view of job board mapping

How does it work now?

With this update, the recruiting administrator, hiring manager, and recruiter can now map the requisition values with the values expected by the selected job board to post the job.

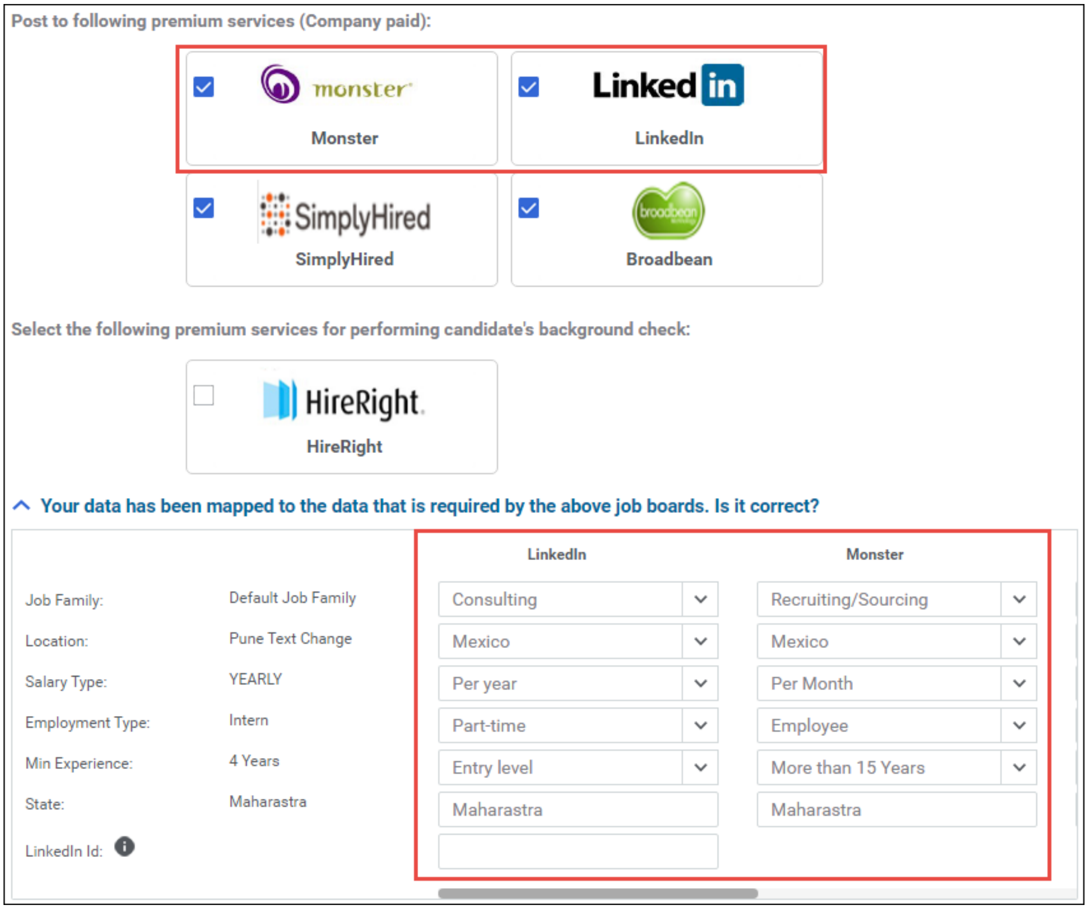


Figure 170: Monster & LinkedIn job board mapping fields

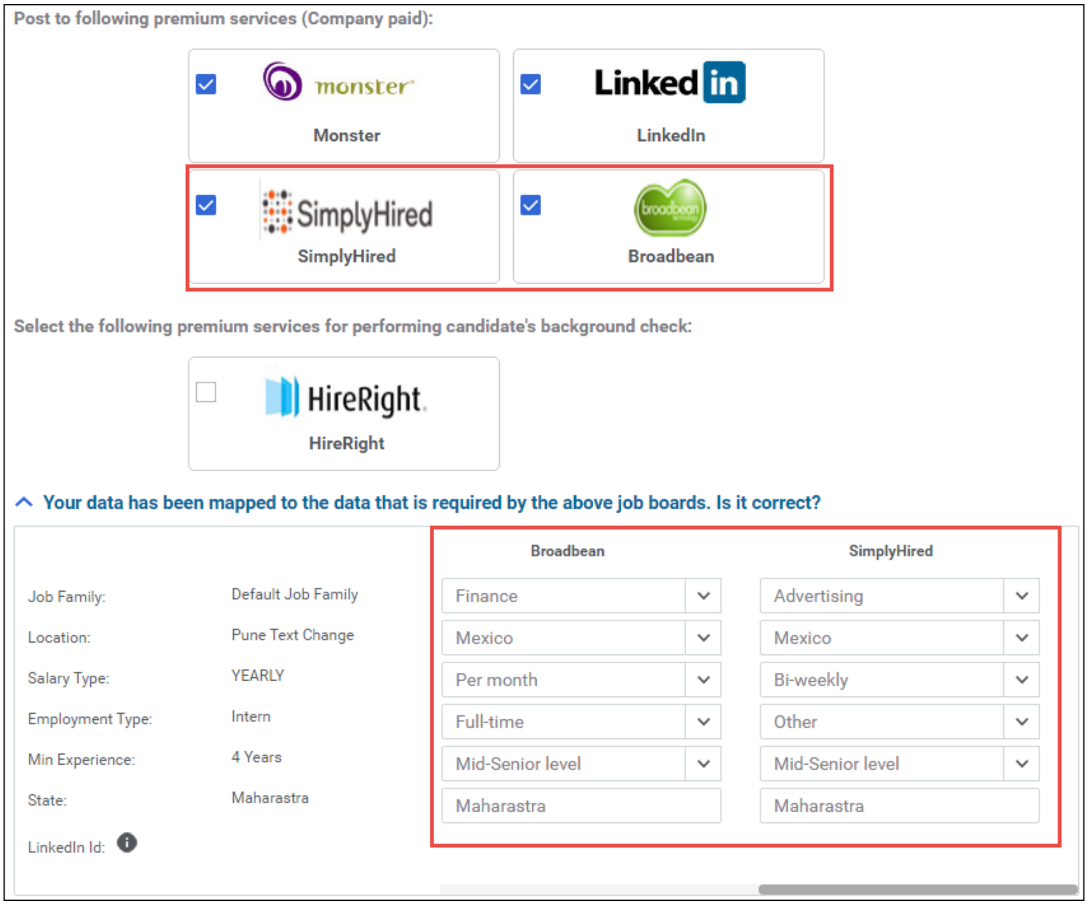


Figure 171: SimplyHired & BroadBean job board mapping fields

On selecting the desired job board(s), the corresponding section appears under **Your data has been mapped to the data that is required by the above job boards. Is it correct?**. The administrator needs to select the desired values to map with the requisition's values. After mapping the values for a requisition, the job board remembers the last selection and populates the same values for next requisition.

Note: Use the scroll bar to map the values if more than two job boards are selected.

Use case

The administrator, hiring manager and recruiter can now map the values from Saba Cloud application to the ones requested by the external job boards such that the jobs are posted in the right segments.

Rejection templates

How did it work?

Prior to this update, the recruiting administrator, hiring manager, and recruiter could specify the rejection reason and reject a candidate. A standard notification was sent to the candidate stating the reason, but there was no provision for users to edit the rejection emails before sending them.

How does it work now?

The hiring manager and recruiter now has the provision to select a rejection template and edit it as per the requirement so that personalized emails are triggered to the candidate.

The system administrator can now create candidate rejection templates that will be used in the notification.

To create a template:

1. Navigate to **System** > **Configure System** > **Notification Templates**.
2. Click **New Template**.
3. Enter the details.

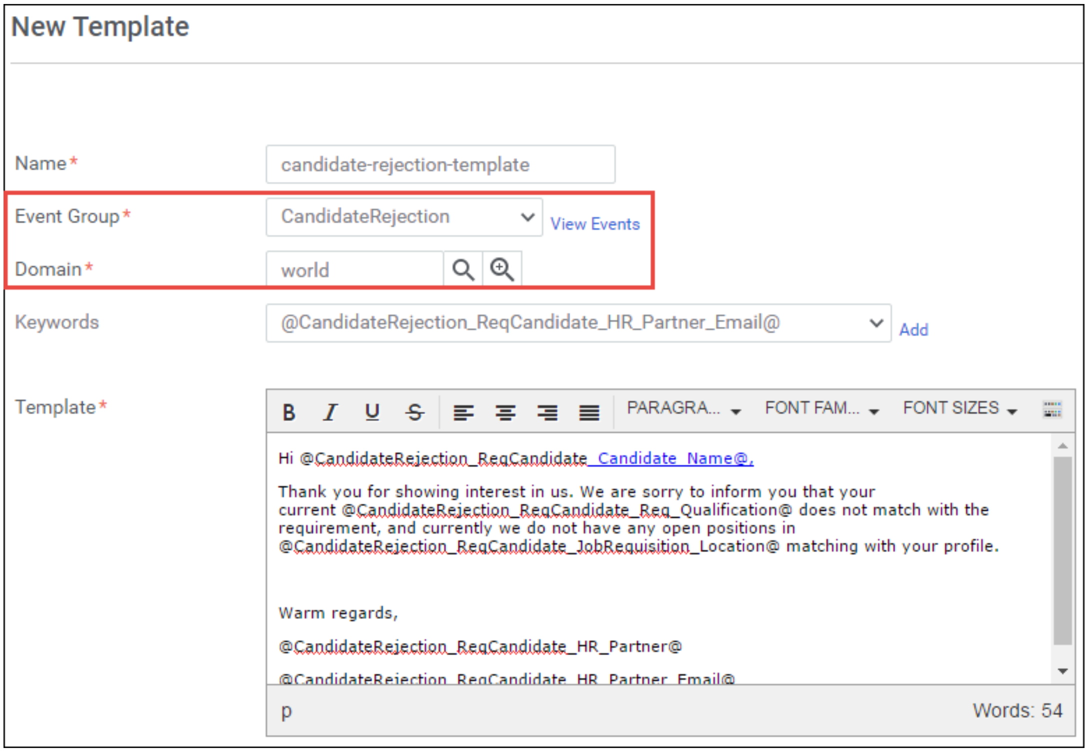


Figure 172: Rejection template

4. Click **Save**. The template is created successfully.

As a hiring manager or recruiter, go to desired hiring team of the requisition and reject the candidate.

To reject a candidate using existing templates:

1. Navigate to the Hiring Team of the desired requisition.
2. Click **Mark rejected** from the **Change Status** dropdown list corresponding to the candidate.
3. In the **Reject Candidate** popup:

   a. Select the appropriate reason from the **Specify Reason** dropdown list.

      Note: You can also create and select new reason by clicking the icon next to the **Specify Reason** dropdown.

   b. Select the newly created or any existing rejection template from the **Select Template** dropdown list.
   c. Click **Use this template** to see the content in the **Email Body**.

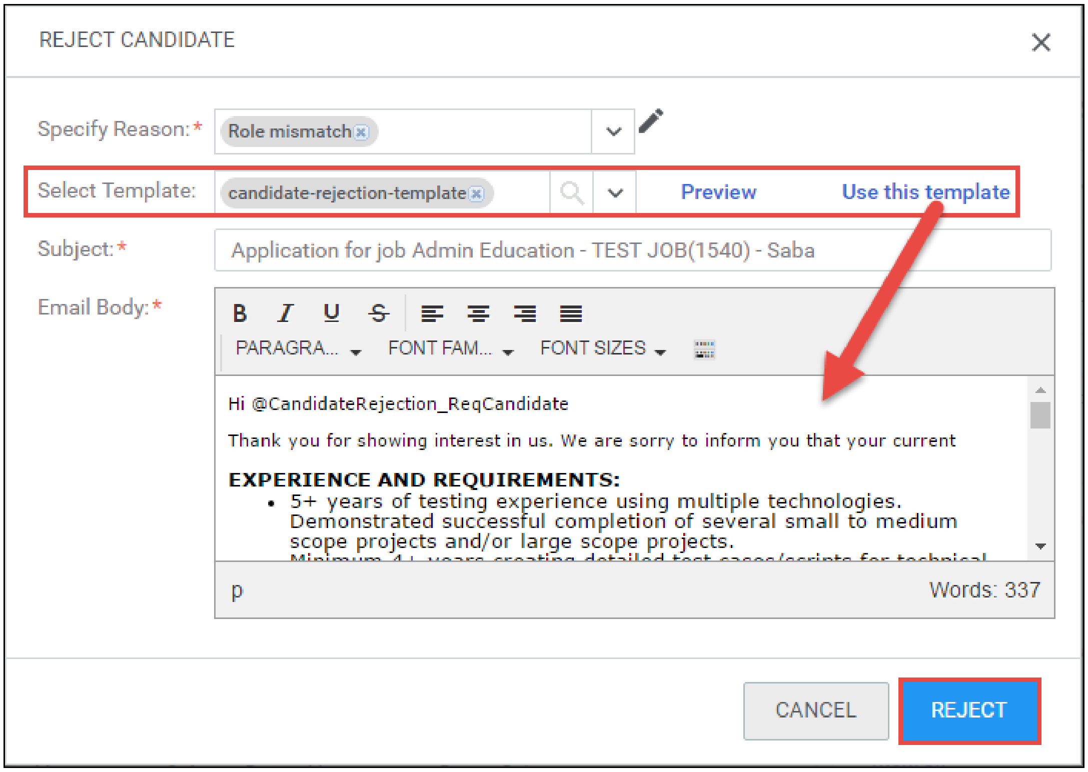
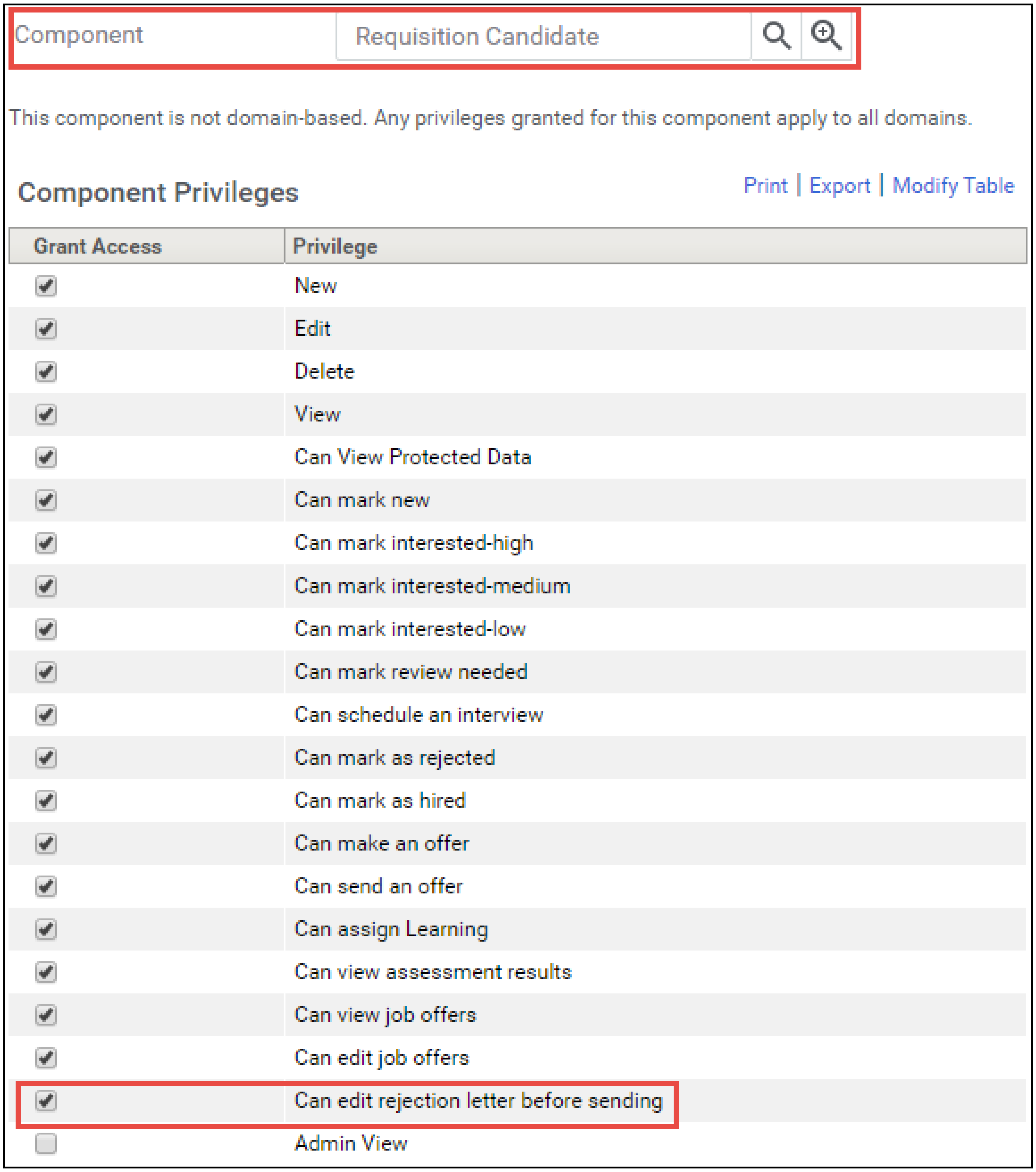


Figure 173: Reject candidate

d. Edit the Subject and Email Body content as per your requirement. The user can edit these fields only when **Can edit rejection letter before sending** privilege is enabled on the **RequisitionCandidate** component.


Component | Requisition Candidate

This component is not domain-based. Any privileges granted for this component apply to all domains.

Component Privileges

Print | Export | Modify Table

Grant Access	Privilege
☑	New
☑	Edit
☑	Delete
☑	View
☑	Can View Protected Data
☑	Can mark new
☑	Can mark interested-high
☑	Can mark interested-medium
☑	Can mark interested-low
☑	Can mark review needed
☑	Can schedule an interview
☑	Can mark as rejected
☑	Can mark as hired
☑	Can make an offer
☑	Can send an offer
☑	Can assign Learning
☑	Can view assessment results
☑	Can view job offers
☑	Can edit job offers
☑	Can edit rejection letter before sending
☐	Admin View

Figure 174: Edit rejection template privilege

e. Click **Preview** to view the notification that will be sent to the candidate.

Note: Click **Print** to print the notification.

f. Click **Reject**. The candidate is marked as rejected for that requisition and notified accordingly.

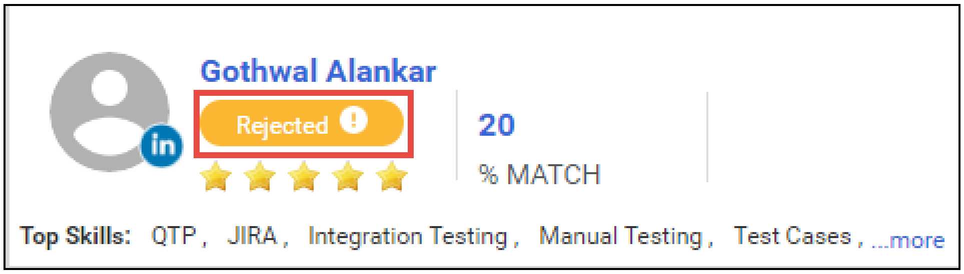


Figure 175: Reject candidate

Use case

This feature helps user to customize rejection emails as per their requirement so that emails look less harsh and not monotonous.

Upload background image for Career site login page

How did it work?

Prior to this update, the recruiting admin could change the branding of each career site by doing the following:

1. Upload company logo
2. Main navigation background color
3. Selected item background color
4. Main navigation text color
5. Selected item text color
6. Header background color
7. Login Screen Text Message

There was no provision to upload a background image for Career site Login page.

How does it work now?

The recruiting admin can now upload a background image for each Career site Login page. To do so, the admin must navigate to **Admin** > **Recruiting** > **Manage Career Sites** > **Career Sites** > *<career-site-name>* > **Edit Theme** and click **Choose File** to upload an image or enter an image URL.

Note: The supported file formats include JPG, PNG, and GIF.

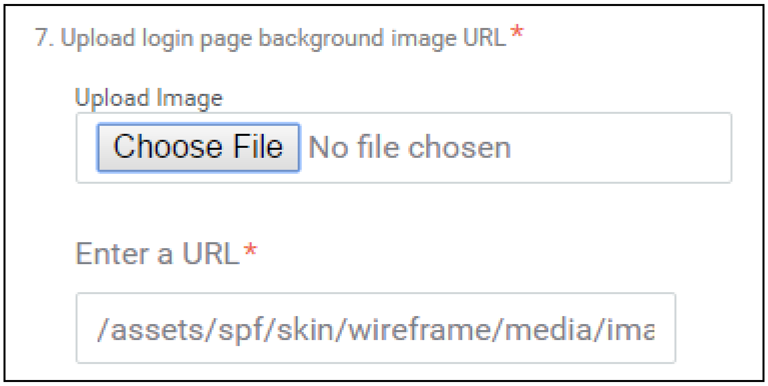


Figure 176: Upload background image

On uploading the image and saving the details, the new image appears on the Career site Login page. Go to the respective Career site and click the **Sign in!** link next to **Have an account?** to view the background image on the Login screen.

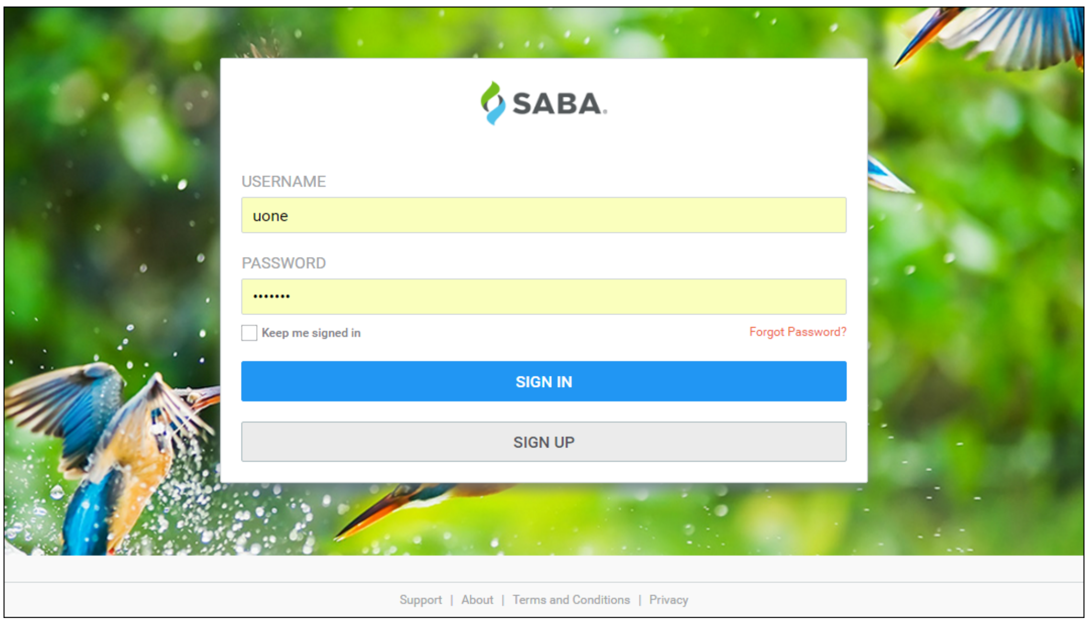


Figure 177: Career site Login page

Use case

The individual career sites now have individual branding for their login page.

Updated candidate profile page

How did it work?

Prior to this update, the candidate profile page looked like this:

- Candidate's My Profile view

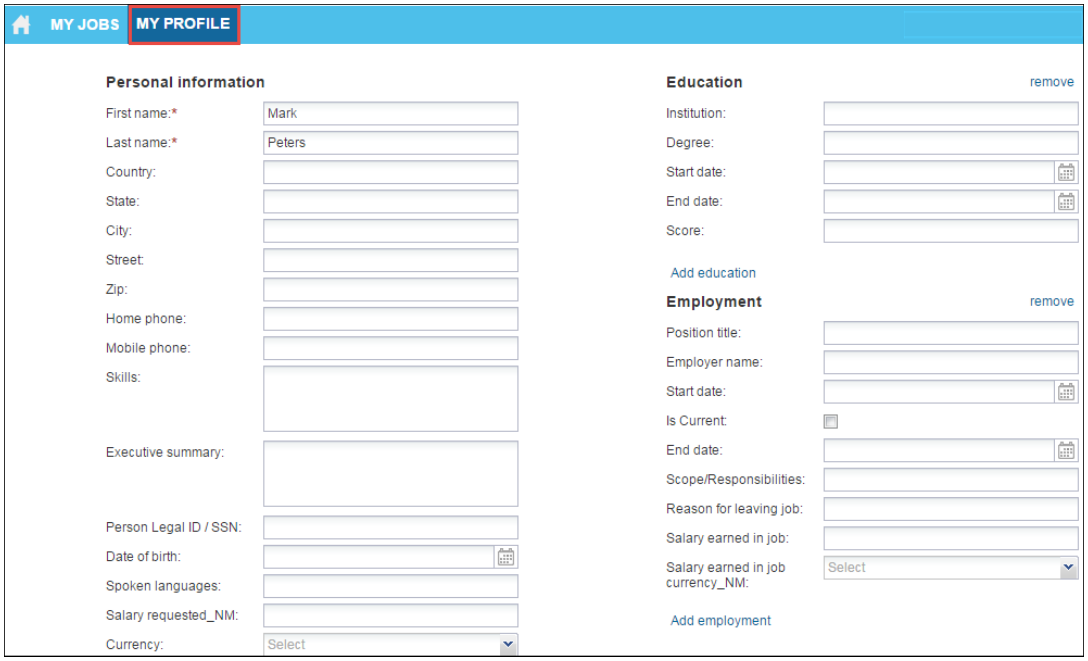


Figure 178: Candidate's My Profile view

- Candidate Edit Profile view

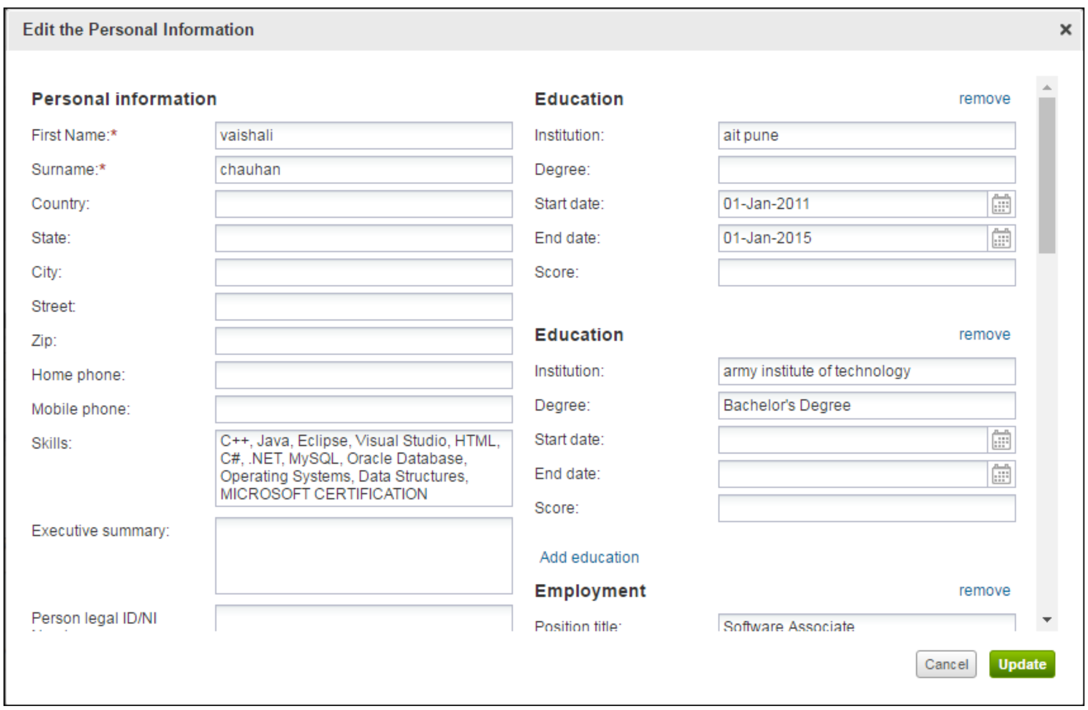


Figure 179: Candidate's Edit Profile view

- Paste Resume view

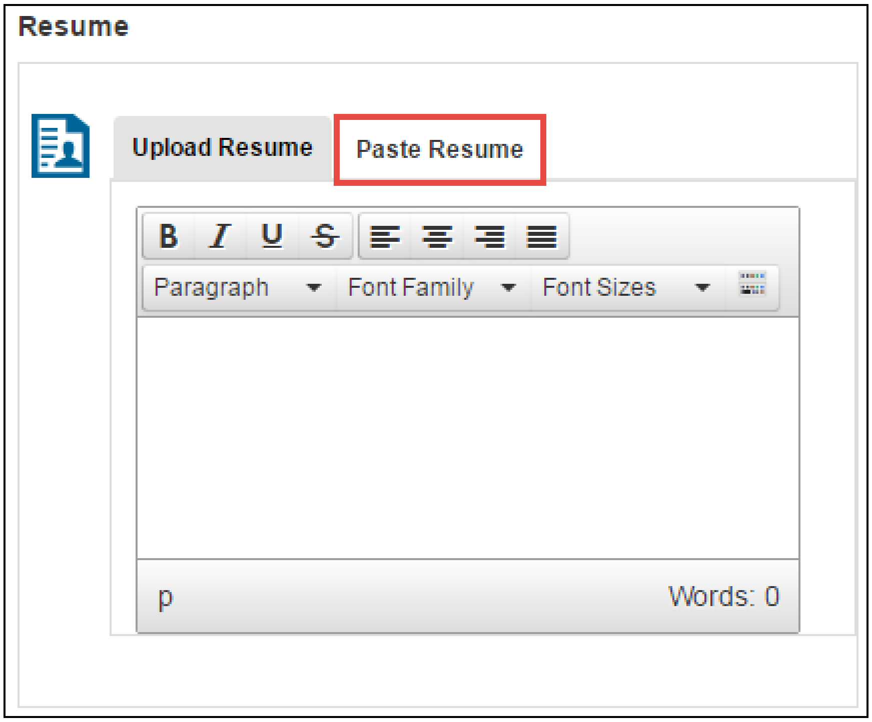


Figure 180: Paste Resume view

How does it work now?

The candidate's profile pages are now updated and looks like this:

- Candidate's My Profile view

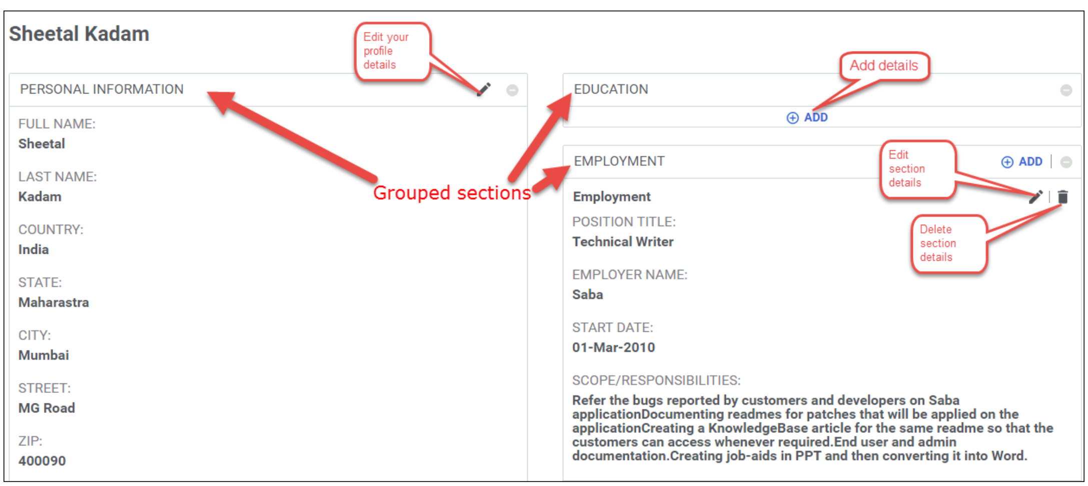


Figure 181: Candidate's My Profile view

- Candidate's Edit Profile view

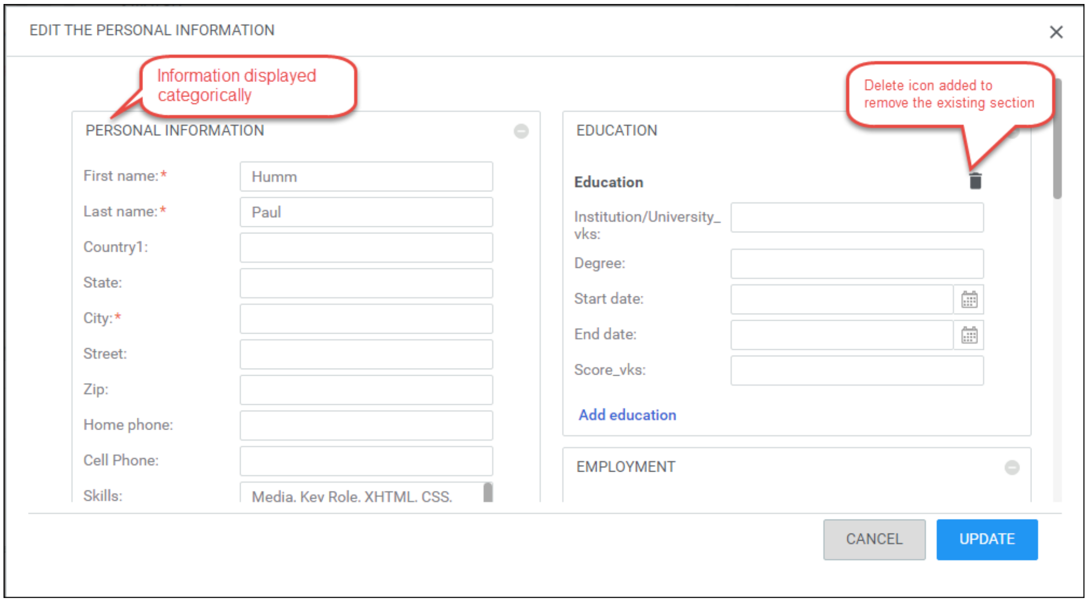


Figure 182: Candidate's Edit Profile view

The same view also appears in:

- Career Site > Applicant form fill > Step 2
- Career Site > Applicant form fill > Step 4
- My Team/People > Jobs > Hiring Team page > Candidate > Candidate Details page > Profile tab > Edit profile
- Admin > Recruiting > Manage Candidates > Candidates > Search for desired candidate > Profile tab > Edit profile

- The **Paste Resume** view is removed. The candidate can now only upload their resumes.

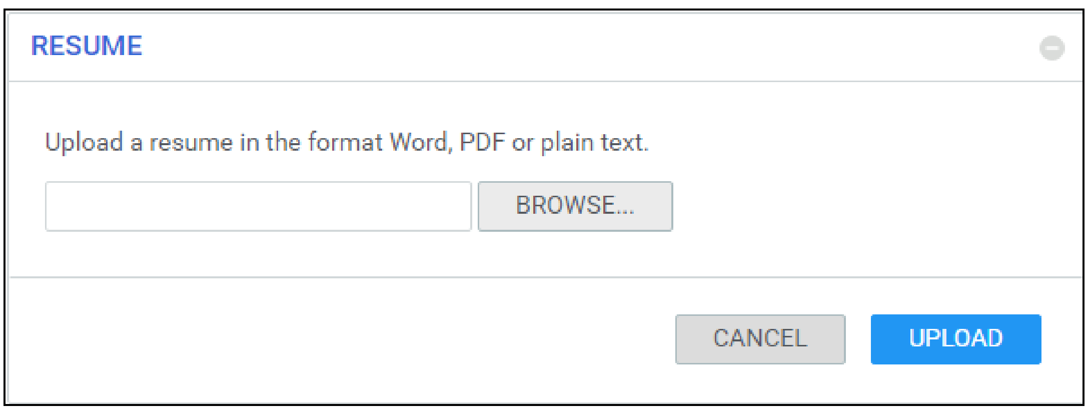


Figure 183: Upload Resume view

Use case

This enhancement improves the candidate's usability.

Updated learning flows in career site

How did it work?

The candidate faced the following issues on the career site:

1. Receives error on viewing a course and adding a course to completed.
2. **View All** link in the **My Learning** portlet under My Jobs was not functional.

How does it work now?

With this update, the above issues are resolved by:

1. Removing **Add to complete** link from courses. Also, the candidate can view the courses or any other learning activity provided they are created on Recruiting domain and has Recruiting audience type.
2. **View All** link removed from the **My Learning** portlet.

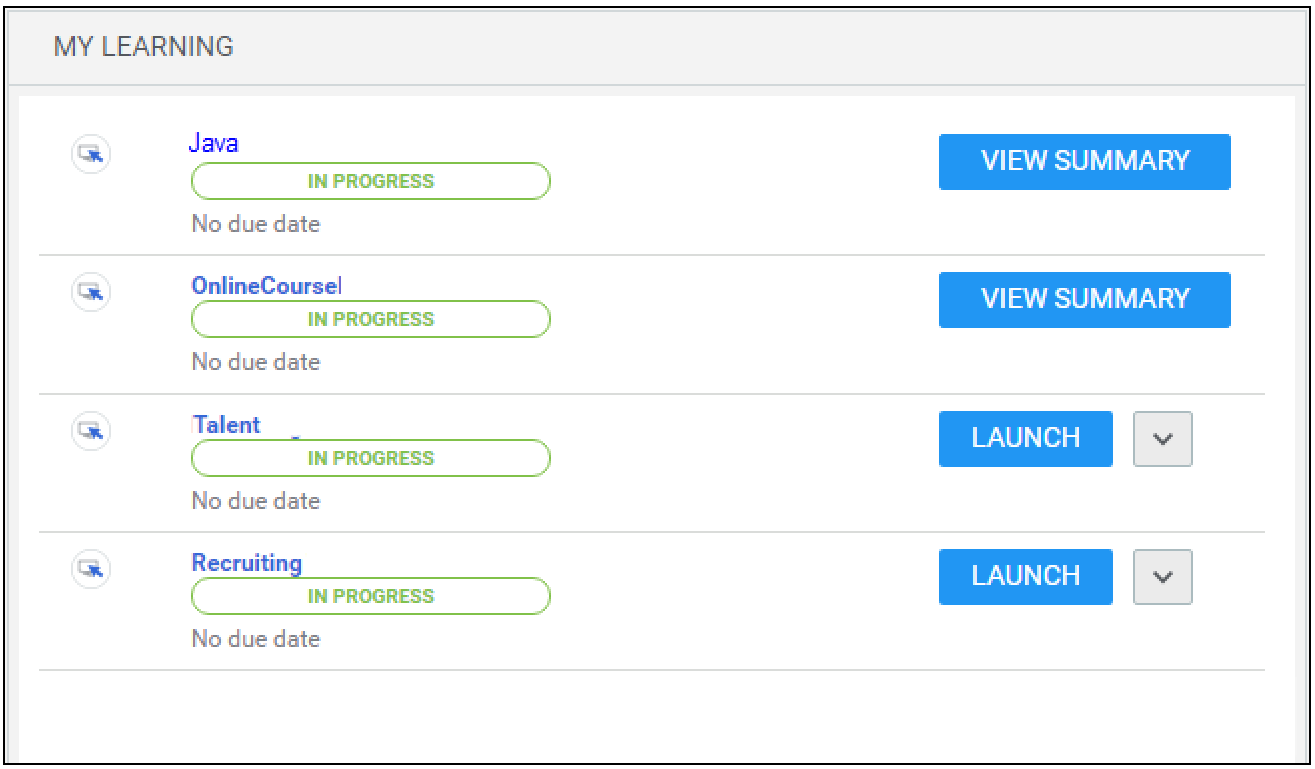


Figure 184: My Learning portlet

Use case

This enhancement improves the learning flow in the Recruiting making it more usable for candidates.

Chapter 11

Saba Discovery

Topics:

Learning Experiences service renamed to Saba Discovery

How did it work?

Prior to this update, the service was named as **Learning Experiences**.

How does it work now?

With this update, Saba Cloud renames the **Learning Experiences** service to **Saba Discovery**.

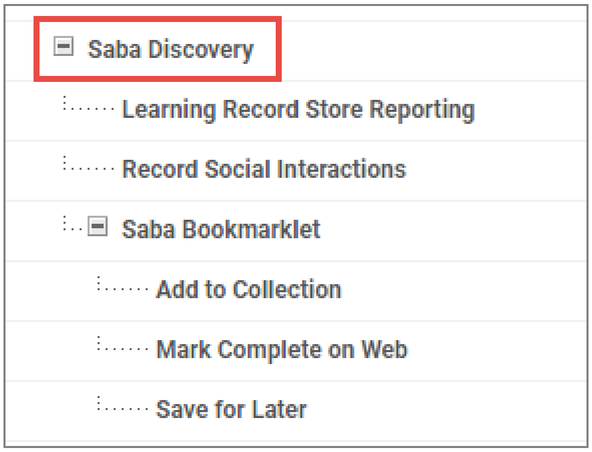


Figure 185: Saba Discovery service

This change does not affect the behavior of this service.

Additionally, the **Learning Activity** tab in the **Activity Stream** of learners is also renamed to **Saba Discovery**.

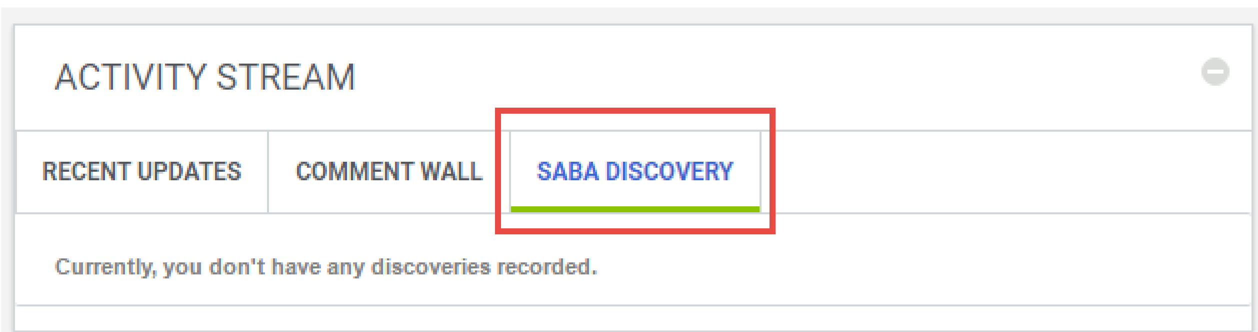


Figure 186: Saba Discovery tab under Activity Stream

Use case

Not applicable.

Enhanced Saba Bookmarklet functionality

How did it work?

N/A

How does it work now?

The **Saba Bookmarklet** feature has been enhanced to enable easy access and better usability.

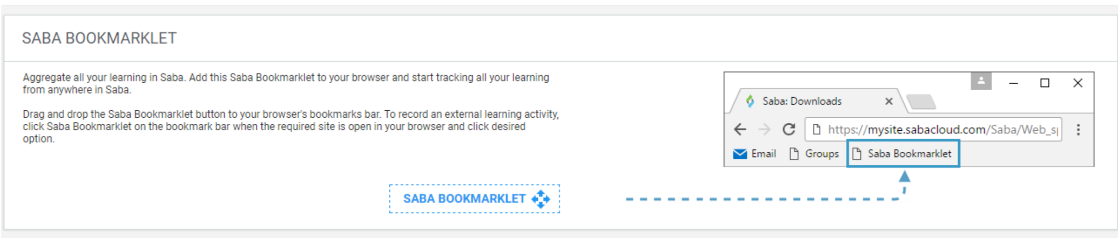
The changes to the **Saba Bookmarklet** feature are in the following areas:

- Download
- Home Activity Stream
- Learning Activity Tab

  The **Bookmarks** service under Foundation and **Saba Bookmarklet** service under **Saba Discovery** needs to be enabled.

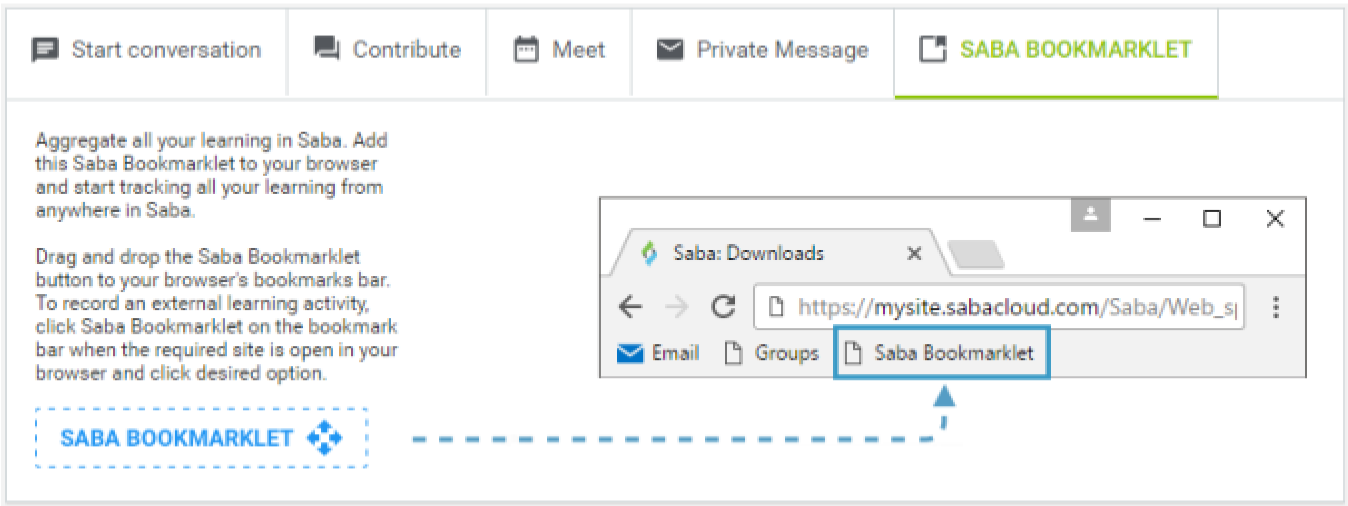
Downloads

The **Saba Bookmarklet** icon has been changed to synchronize with the other pages.



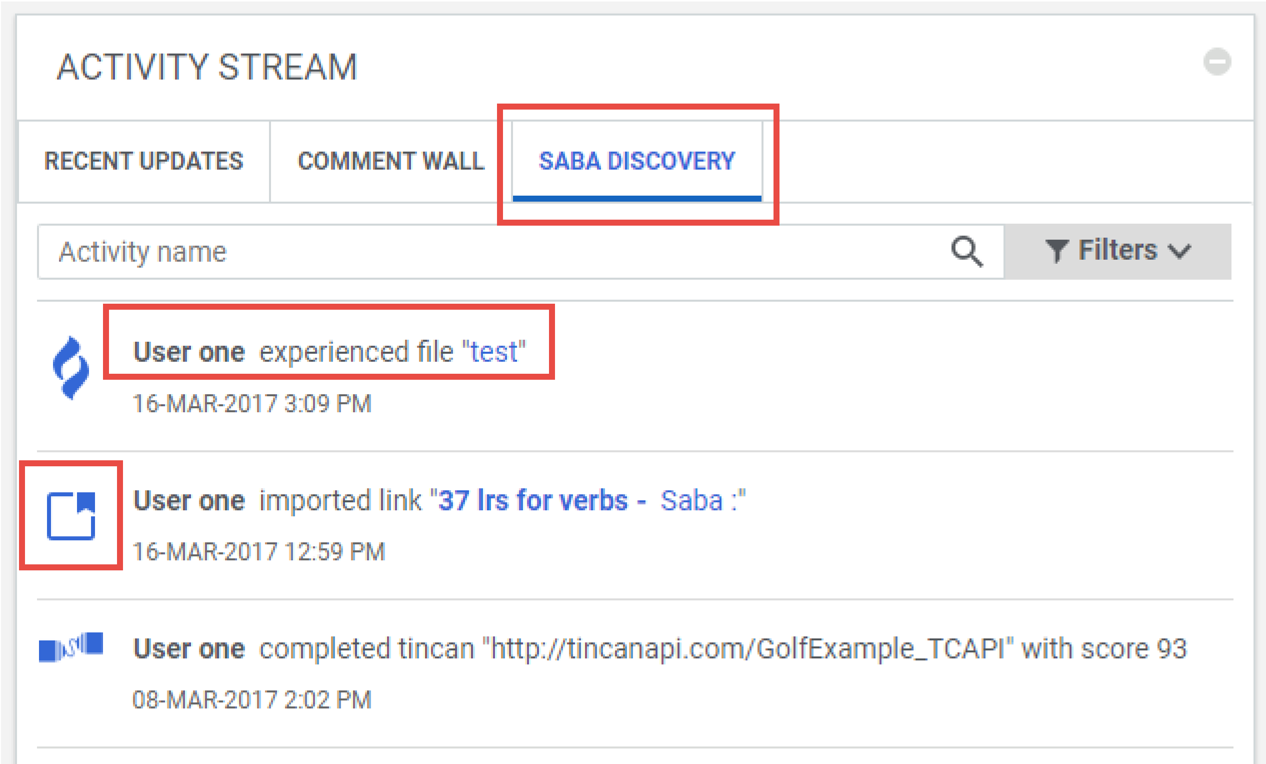
Home Activity Stream

When both **Quick Share** and **Saba Bookmark** services are enabled in Saba Cloud, then, the **Saba Bookmarklet** tab will show on the **Home**.



Learning Activity

In the **Activity Stream** page, under **Saba Discovery** tab, the search results now display unique icons to identify the displayed records by the associated groups, namely, LRS, Social and Tin Can.



Use case

Saba Bookmarklet functionality has been improved for better visibility and functionality under Downloads, Home (Activity Stream) and Learning Activity.

Chapter 12

Social

Topics:

- Reassign resources to different users
- Ability to close outdated ideas and issues

Reassign resources to different users

How did it work?

This is a new feature that has been added to Saba Enterprise Cloud's Social module.

How does it work now?

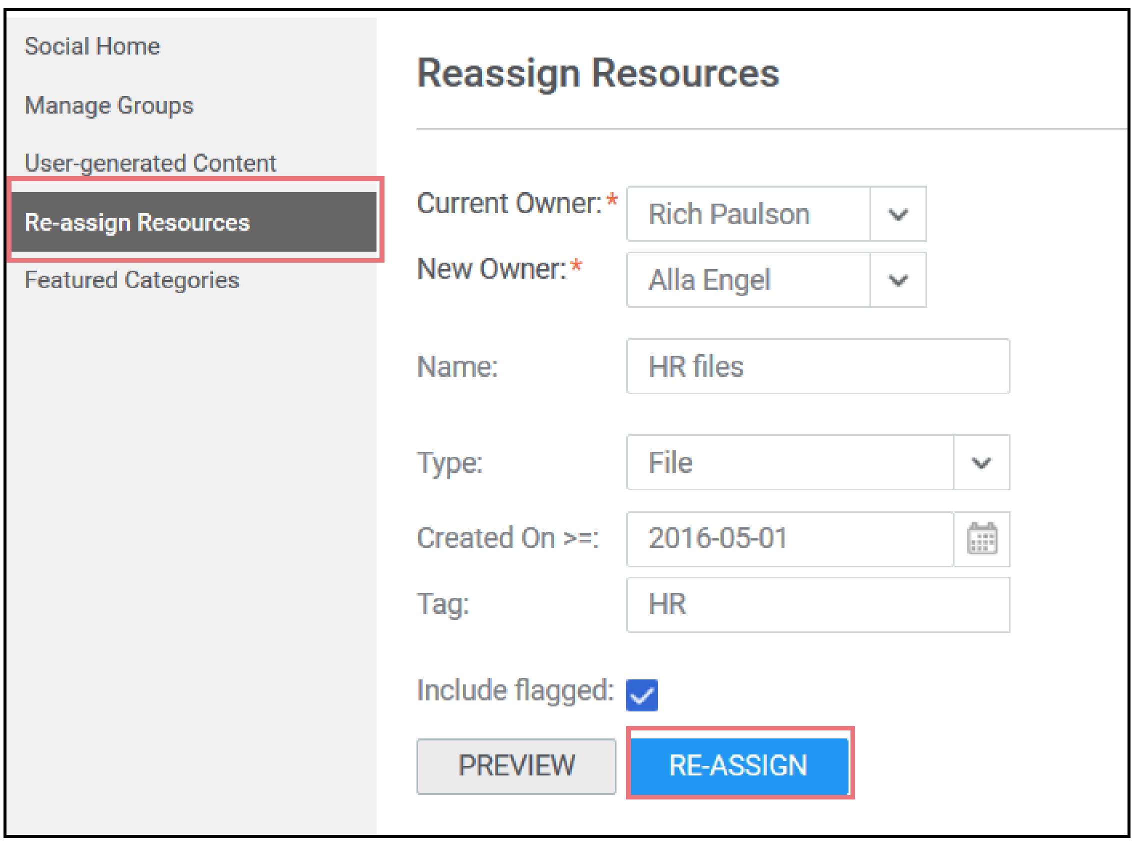
If an employee leaves or has moved to another job, the resources that they owned can now be assigned to another user.

The Administrator can run a report to view all the files and other resources owned by the user and assign them to another user or allocate them to different users.

To reassign resources

1. From Saba Cloud navigate to **Admin>Social>Reassign resources**
2. Select the type of resource and enter the name and click on **RE_ASSIGN**.

Note: To access the Reassign Resources option, you need the **Can Access Collaboration >Re-assign Resources** privilege under the **Visibility-SocialAdmin** component. The default setting for this privilege will be OFF.

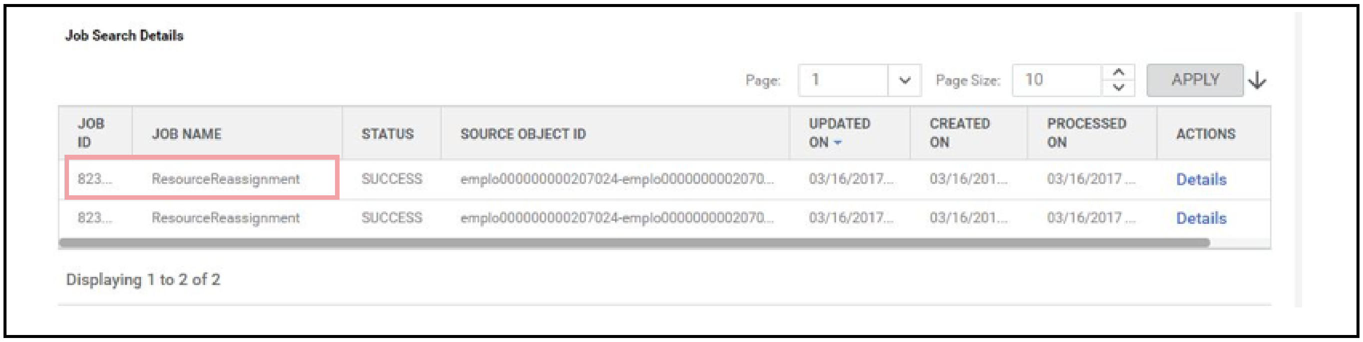


To view and sort through all the resources before allocating, click on **PREVIEW**.

SMF Job:

When you click on **REASSIGN** the SMF job to reassign resources will get triggered. (This operation runs in the background)

To search for a job, use the Event filter **Reassign Social Resources** in SMF dashboard.



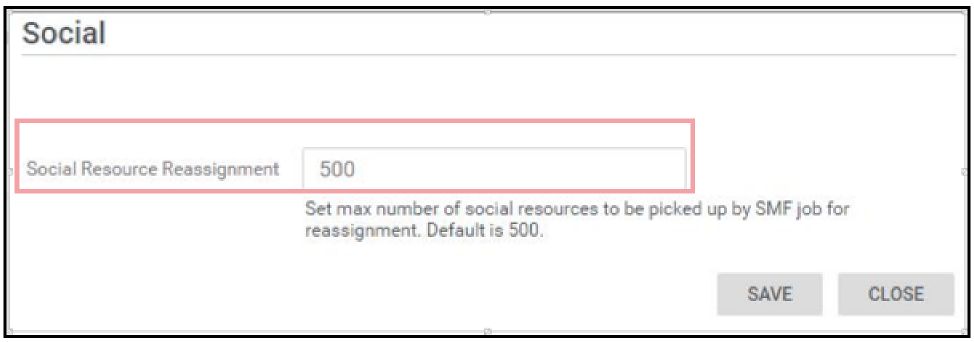
A default limit has to be set for the maximum number of resources to be picked up by the SMF jobs.

This is configured under **System Settings** and has to be handled by the Saba Administrator.

Login to Saba Cloud as an administrator and navigate to:

System>Sites>SabaSite>Social>Social Resource Reassignment

Enter the maximum number of resources to be picked up by the SMF job for reassignment. The default value is 500.



Use case

This feature enables the Social Administrator to transfer all resources associated to a user who is leaving the company or transferring to a different position.

Ability to close outdated ideas and issues

How did it work?

This is a new feature that has been added to Saba Cloud's Social module.

How does it work now?

Starting from this update, a Social Administrator can set up certain criteria to manage postings on Saba Community and based on the set criteria, able to close ideas and Issues that do not meet the criteria.

For example:

- Ideas that have gone past certain period (past X number of days)
- Ideas with lower than minimum votes.

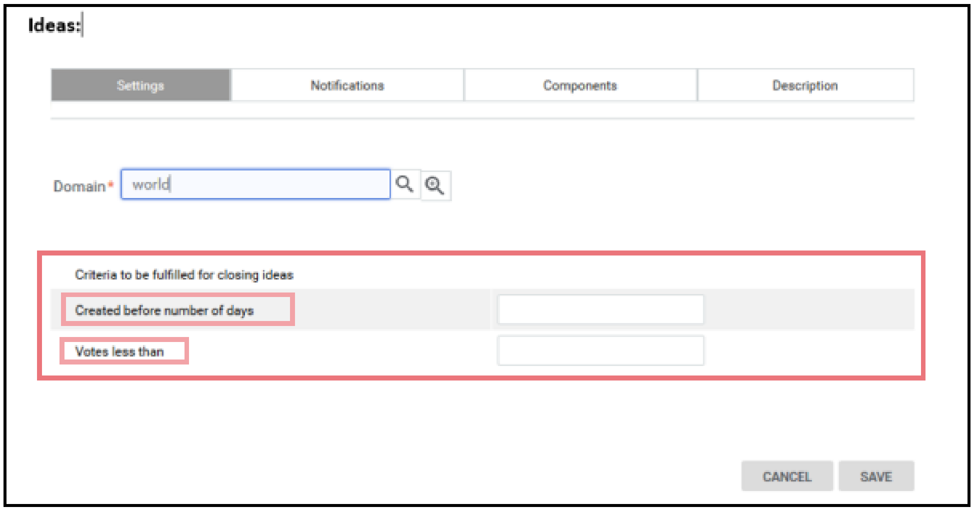


Figure 187: Ideas

- Issues That have gone past certain period (past X number of days).
- Issues with lower than minimum votes.

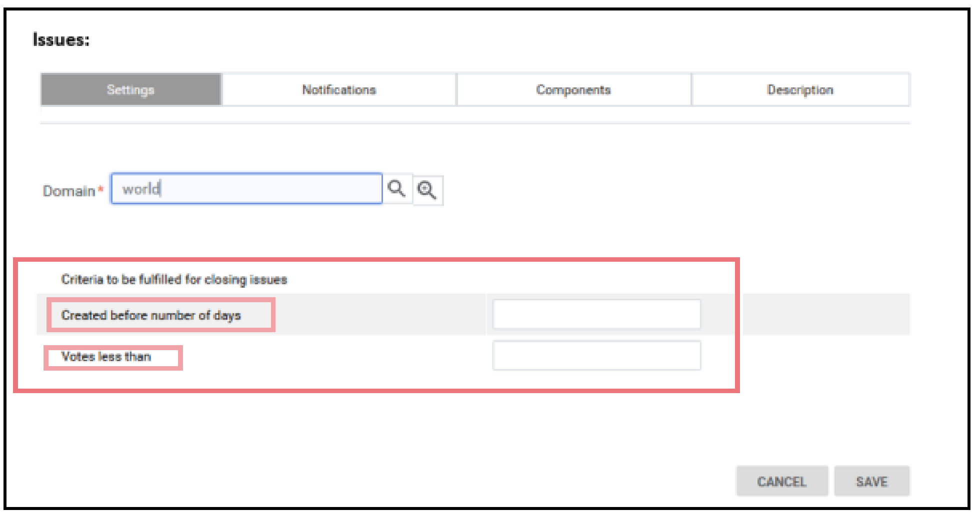


Figure 188: Issues

User can set these criteria based on their preferences. By default these are set for World domain and NULL values.

Note: These criteria are governed by AND condition. System admin has to specify BOTH criteria:otherwise, it will not work for both issues and Ideas.

The criteria for Idea and Issues are tied up with existing Social Periodic Notification which is - **Social Status Update**. Once the notification gets triggered based on the frequency that is set, Ideas and Issues get automatically closed based on the criteria specified.

Once the ideas and issues are closed they will not be available to the owner from the following portlets:

Table 17: List of portlets

Portlets
Shared with you

Portlets
Top 10 ideas
Most commented
Recently added
Ideas I'm leading

Use case

This feature enables the Social Administrator to automatically close ideas and issues that are outdated or not needed based on certain set criteria.

Chapter 13

System

Topics:

- Add Organization Manager to approval flow
- New smart list criteria fields
- Smart list return correct records for expired certifications
- Enhancements to the search services page
- Enhancements to the notifications interface
- New notifications in prescriptive rules
- Impact analysis for prescriptive rules
- New settings to calculate and update job start date
- Personalized From field for notifications
- Display source object details for SMF jobs
- Support 2048 bit RSA key
- System wide BCC support for emails
- Restrict access based on IPs
- Configurable FROM address for Two Factor Authentication emails
- Optimized global search results
- Change in the locale ID for the Greek locale
- Workspaces menu appears in new tile style header menu
- Data Integration
- REST API

Add Organization Manager to approval flow

How did it work?

Prior to this update, the Organization Manager was not available as an option to add to different approval flows of Saba Cloud such as order approval, job requisition approval, review approval and so on. This limited the Organization Manager's capabilities as an administrator.

How does it work now?

This update adds the **Organization Manager** as an approver option to the following approval flows of Saba Cloud:

- Order approval flow
- Goal approval flow
- Review approval flow
- Job requisition approval flow
- Job offer approval flow

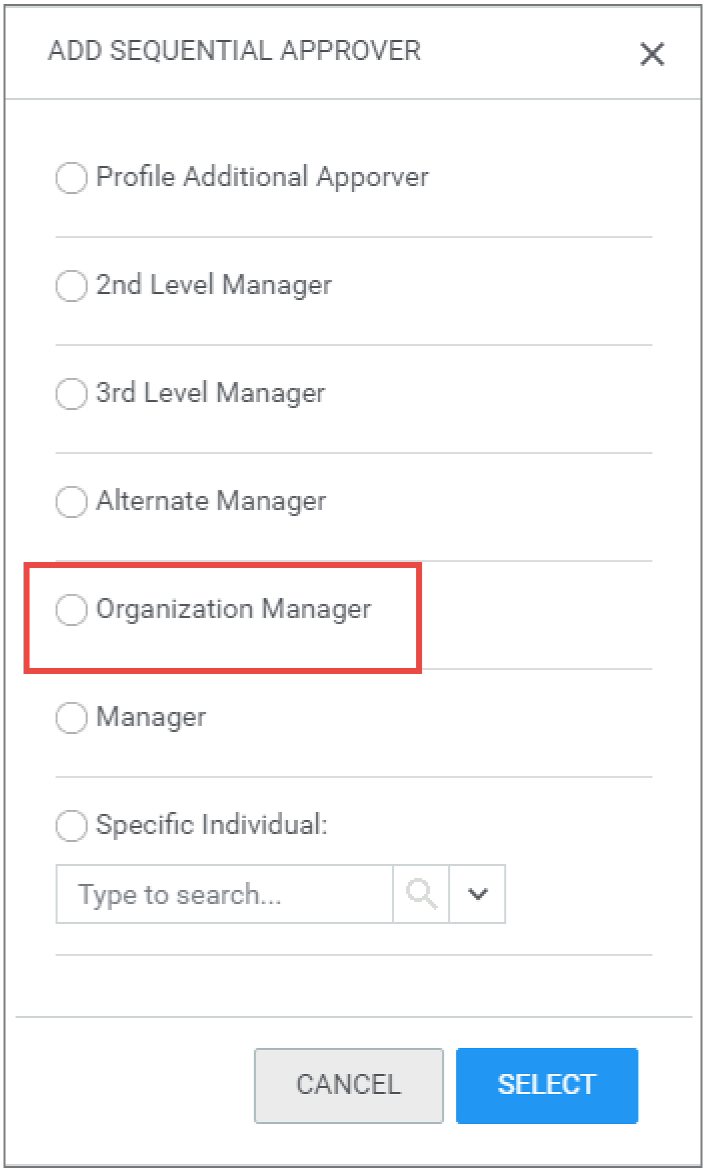


Figure 189: Organization Manager approver option

Order Approval Flow

The new **Organization Manager** option is now visible while adding an approver for orders from the following areas:

- **System** > **Configure System** > **Services** > **Orders** > **Settings**, and enable the "Learner registrations for classes must be approved by the approvers in the sequence defined below" setting.
- **Learning** > **Manage Learning Catalog** > Search and edit a course **>** **Policies** tab, and select the "Approval Required to Register" option.
- **Learning** > **Manage Classes** > **Classes** > Search and edit a class **>** **Policies** tab, and select the "Approval Required to Register" option.

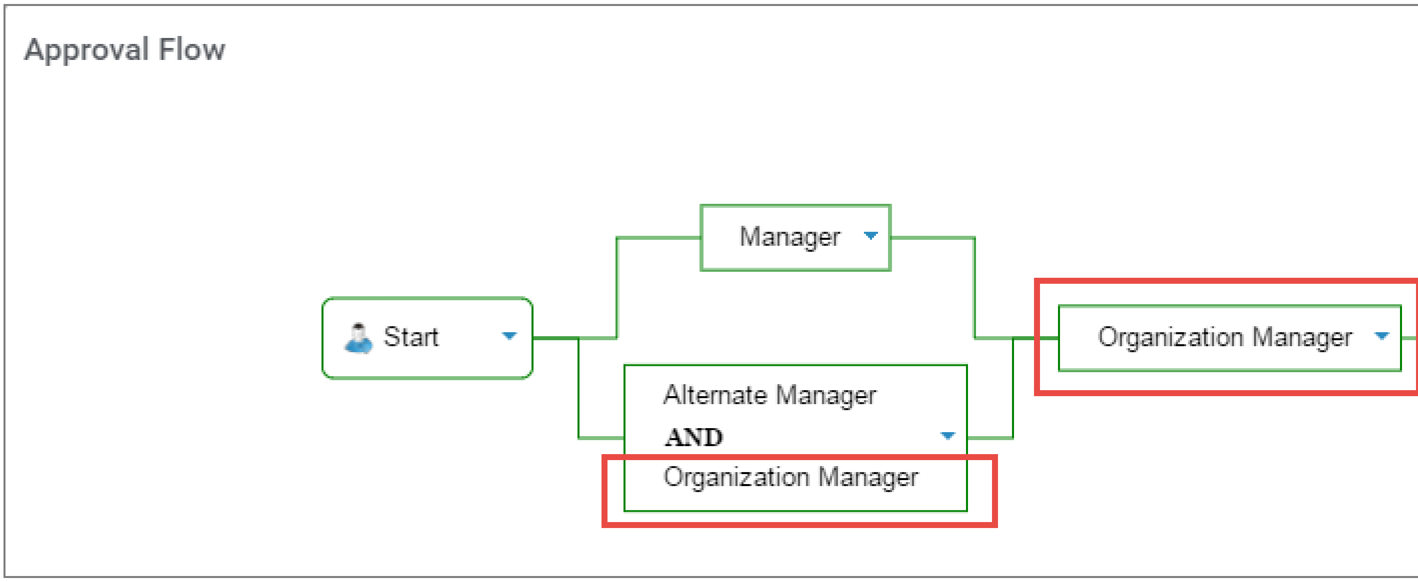


Figure 190: Organization Manager added to the order approval flow

Goal Approval Flow

The new **Organization Manager** option is now visible while adding an approver for goals from the following areas:

- **Performance > Manage Goal Attributes > Goal Approval Chain**, and select the **Custom approval flow** check box.

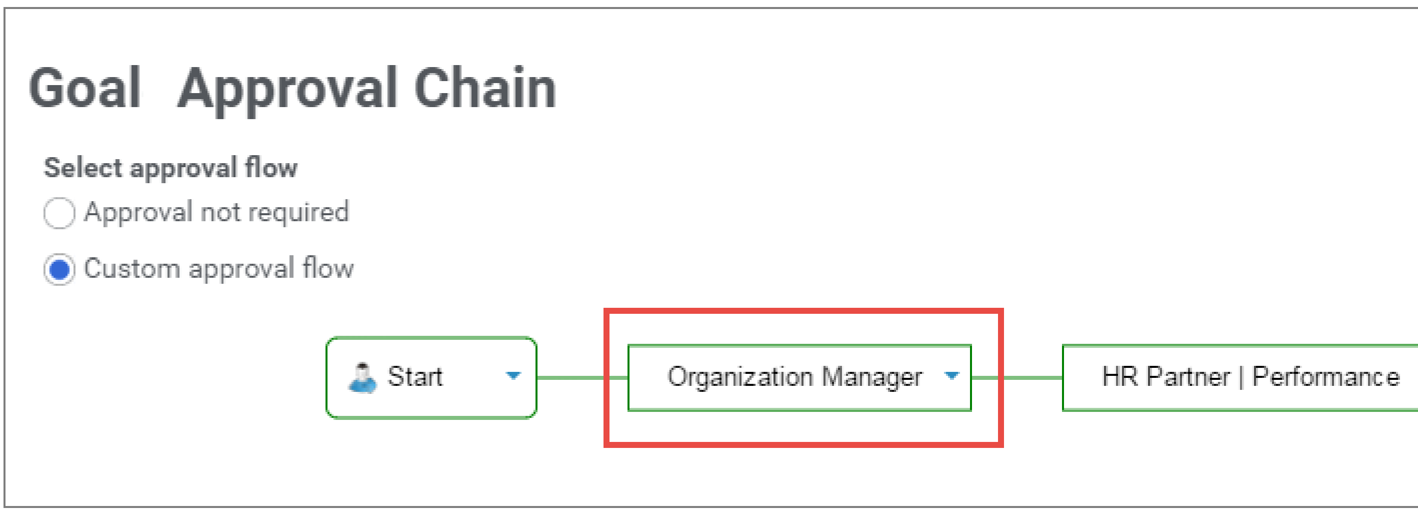


Figure 191: Organization Manager added to the goal approval flow

Reviews Approval Flow

The new **Organization Manager** option is now visible while adding an approver for review cycle from the following areas:

- **Performance > Manage Reviews > New review cycle**, and click the **Define Approval Chain** link in **Approval Chain** step in the wizard.

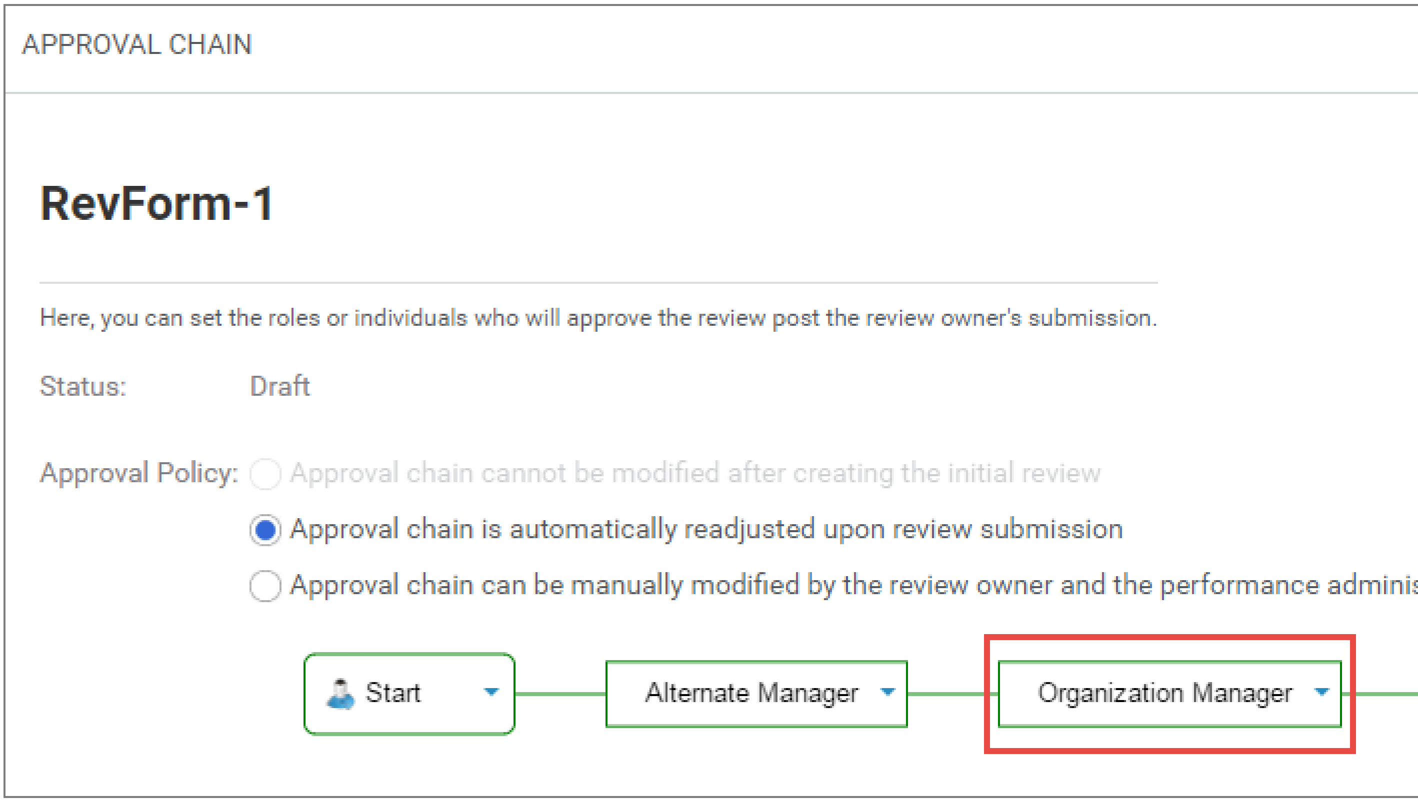


Figure 192: Organization Manager added to the review approval flow

Job Requisition Approval Flow

The new **Organization Manager** option is now visible while adding an approver for job requisition from the following areas:

- **Recruiting** > **Manage Job Requisitions** > **New Job Requisition**

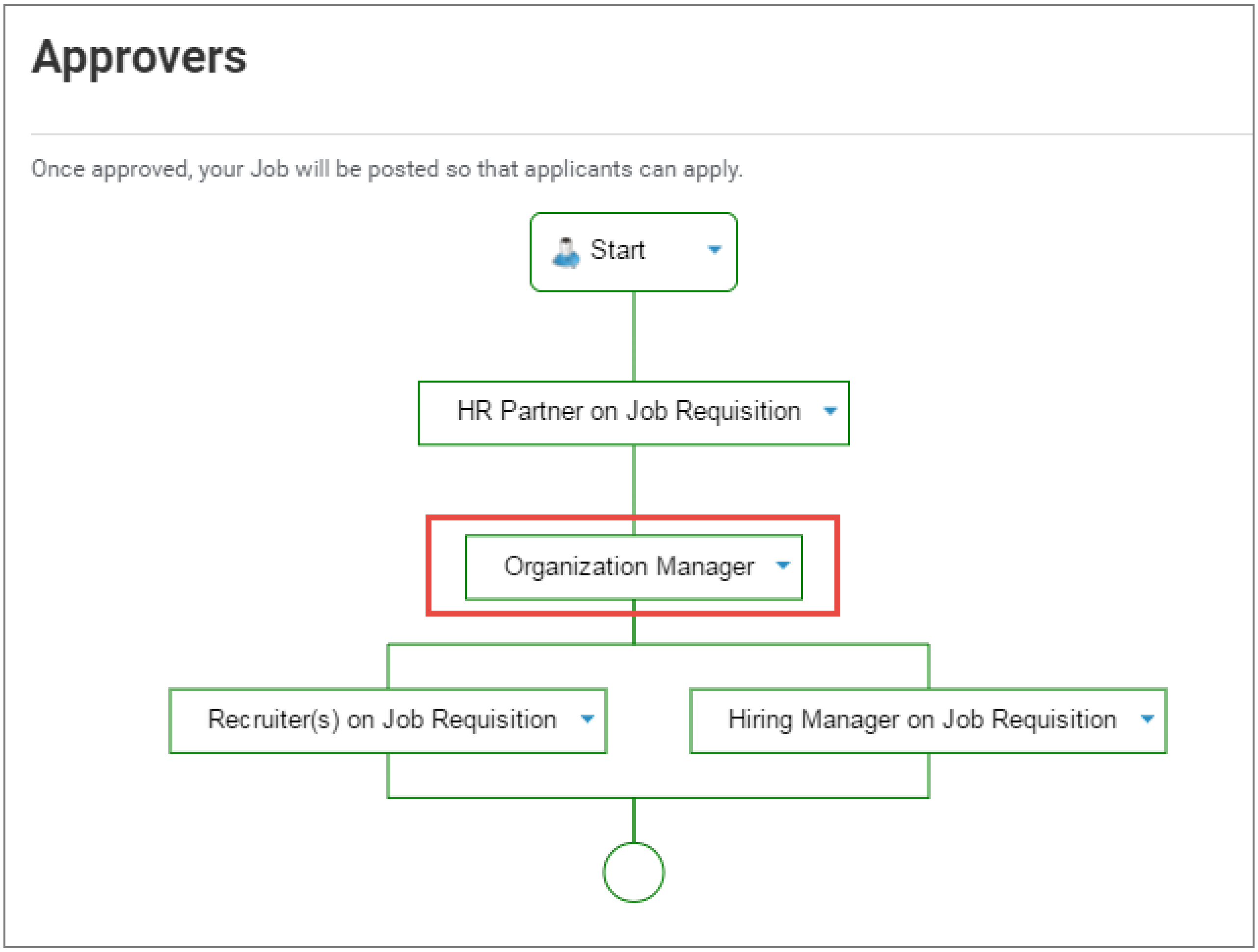


Figure 193: Organization Manager added to the job requisition approval flow

Job Offer Approval Flow

The new **Organization Manager** option is now visible while adding an approver for job offer from the following areas:

- **Recruiting** > **Manage Job Offers** > **New Job Offer Template**

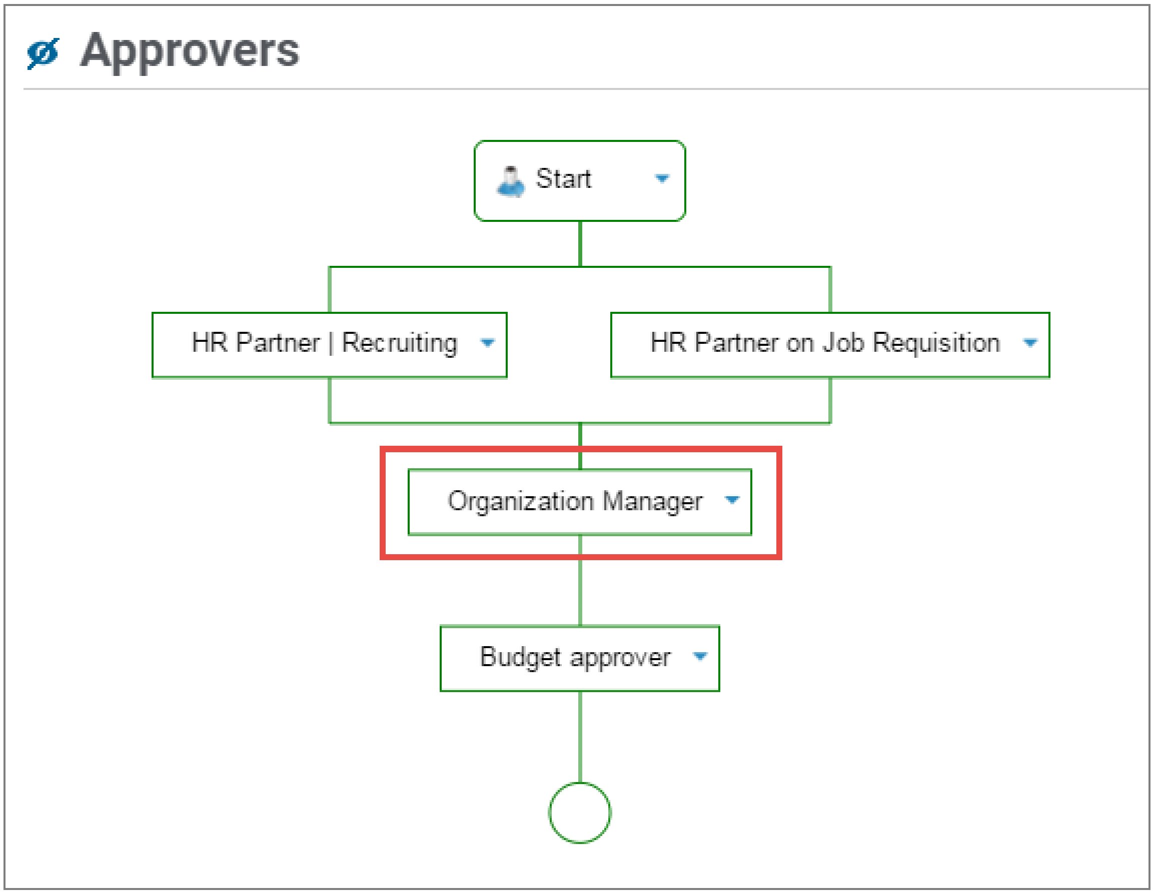


Figure 194: Organization Manager added to the job offer approval flow

The users with the Organization Manager role can view the items that are pending their approval from the **My Team** page and either approve or reject them as appropriate.

Use case

To enhance the administrative capabilities of the Organization Manager, the Organization Manager needs to be a part of different approval flows in Saba Cloud.

New smart list criteria fields

How did it work?

There was a need to introduce some fields in smart list along with the CSV input picker support for the new fields.

How does it work now?

With this update, the following fields and their corresponding attributes are now introduced in the smart list:

- Job/Career
    - Job Code
- Organization

    - Cost Center Number
    - Organization Number*

- Profile

    - Business Card Title

        Note: The user will not be able to successfully preview the smart list criteria if the business card title includes special or umlaut characters.

    - Job Level (for example, individual contributor, Manager, Director, etc)
    - Is marked as resource
    - Home Domain

        Note: The user will not be able to successfully preview the smart list criteria if the home domain title includes special or umlaut characters.

    - Security Role - This attribute works only for the domain-based security roles.

Note: In the above fields, the **Job Code**, **Cost Center Number**, **Organization Number***, and **Home Domain** attributes support CSV input picker to add multiple comma-separated entries.

Use case

By introducing more attributes it improves the usability of smart list.

Smart list return correct records for expired certifications

How did it work?

While retrieving records for expired certifications, the smart list fetches those users who have re-certified for an expired certification whose current status is other than **expired**.

How does it work now?

With this update, the smart list behavior is updated and it doesn't return users who have recertified for an expired certification and whose current status is other than **expired**.

Note: This is applicable only for **internal** certifications and when filtering records as per the current status.

Use case

The smart list now return correct records for expired certifications.

Enhancements to the search services page

How did it work?

Prior to this update, the ability to search services required clicking the Search link to expose the search options. Many system admins were not aware of the existence of the search services functionality because the search link was not noticeable. Additionally, navigating through the tree structure required expanding and collapsing individual top level services.

How does it work now?

In this update, it will no longer be required to click the search link to access the search panel. Instead, the search box and checkboxes are now shown at the top of the services tree structure with a Search button which makes the search functionality more readily available.

For easier navigation of services there is now an expand or collapse all button. The top level services, i.e. Collaboration and all other services, are now collapsed by default. The Services tree view displays all services in a single page and not across two pages when expanded. Performing the search takes the user to the existing services search results page, and a Back link appears on the Search Services page which returns the user to the main tree view page with the Search panel at the top.

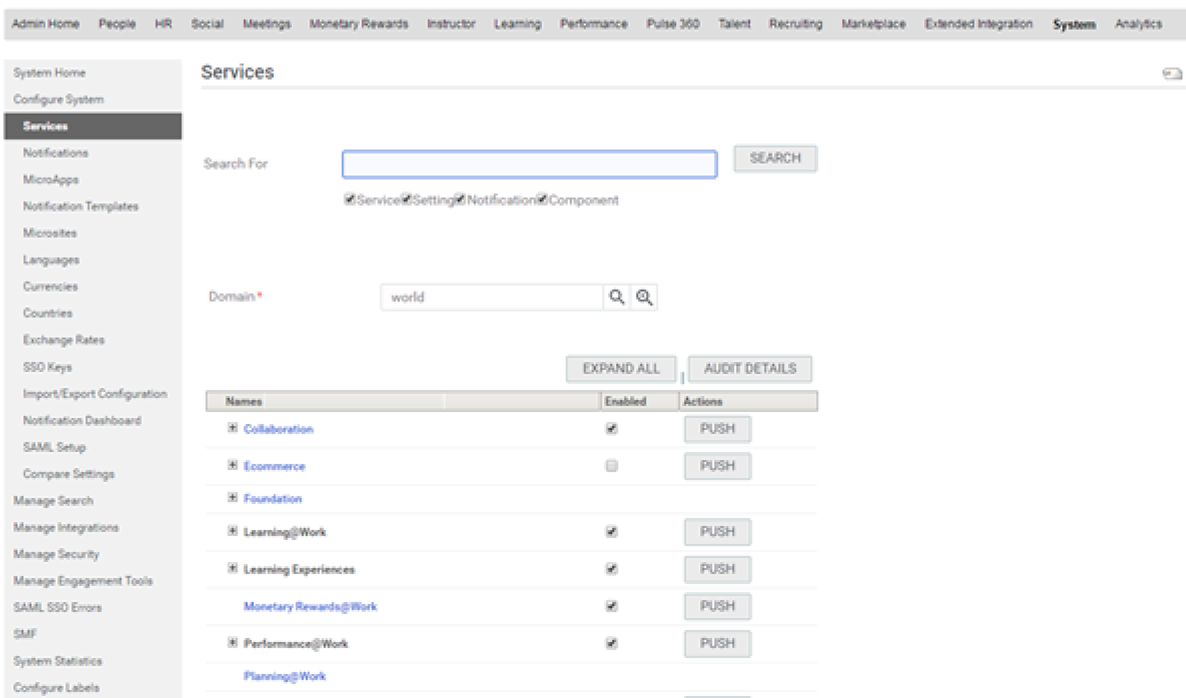


Figure 195: Search services

Use case

The navigation changes to the tree structure, as well as eliminating the need to click the search link to access the search panel will make the functionality more readily available and obvious. provide better ease of use for the system admin.

Enhancements to the notifications interface

How did it work?

N/A

How does it work now?

With this update, Saba Cloud provides the following enhancements to the notifications user interface:

- MIME type and file extension match

  Checks if the selected MIME type and the attached file are in sync. So, you cannot select the MIME type as PDF and upload a JPG file as attachment.

- Keyword is not enabled by default

  When you add a Text attachment to a attachment group, the Keyword checkbox is enabled by default. If you chose not to enable it, then the keyword is not enabled.

- MIME type selection in URL attachments in now disabled

  The MIME type selection option is not displayed for URL. Currently, only text/HTML is displayed in the attachment list.

- Attachment name of URL

  The attachment name is now fetched from the URL itself, but the name field is editable.

- Leader attachment in absence of group

  Leader attachment is decided as per creation time stamp. The first attachment created for a group is shown as the leader.

To view these changes, go to **Admin** > **System** > **Configure System** > **Notifications**.

Use case

There is a need to enhance the notifications user interface.

New notifications in prescriptive rules

How did it work?

Prior to this update, there was no ability to track prescriptive rules that are stuck or missing.

How does it work now?

With this update, the two new notifications are added in prescriptive rules that tracks the prescriptive rules that are stuck and missing.

Table 18: New notifications

Notification Name	Description	Default Behavior
Detect stuck prescriptive rules	This periodic notification detect stuck and slow rules. Currently, the people administrator cannot configure recipients for this notification.	Enabled

Notification Name	Description	Default Behavior
Re-create missing pre~ scriptive rule cron sched~ ules	This periodic notification identifies the missing prescriptive rule cron jobs and re-creates them in SMF schema. It then identifies missing schedule and posts **Periodic Event Modified** message to SMF such that it will re-create the missing cron job.	Enabled

Note: Saba recommends to keep these periodic events always enabled.

Use case

This improves the reliability of prescriptive rules.

Impact analysis for prescriptive rules

How did it work?

When any requirement is added or updated, there is no impact analysis on the prescriptive rule page to track whether how many records will be impacted by each requirement.

How does it work now?

With this update, the people administrator can now track how many records are impacted by the addition, deletion, or updation of requirements in the prescriptive rule. The **Estimate Impact** button added on the **Member Selection** and **Requirements** tab of the rule, opens the window with an estimation of how the requirement is processed for the members:

- count of assignments to be created, removed, or updated as a result of processing the rule with the currently saved member list

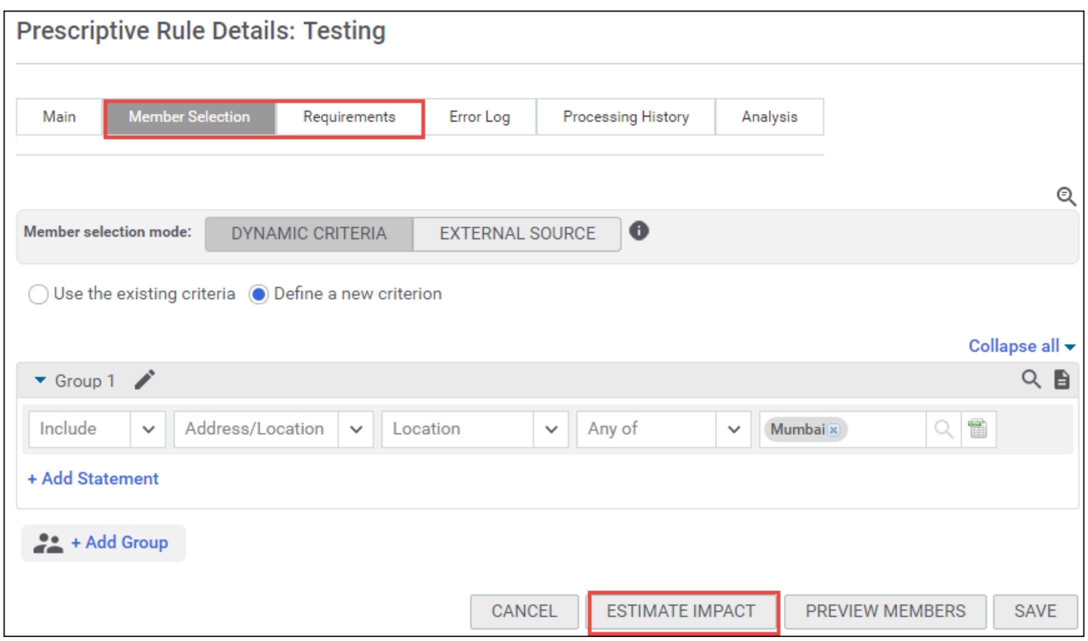
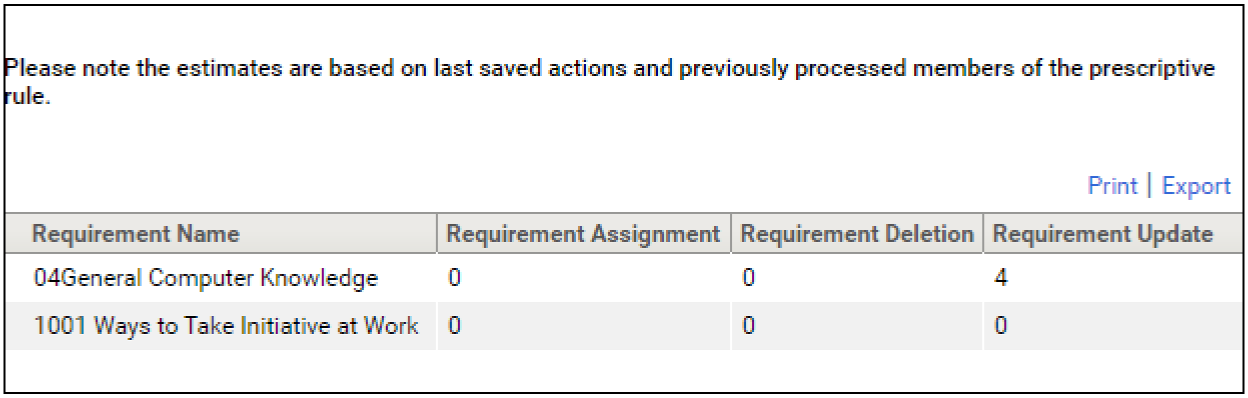


Figure 196: Estimate Impact button



Please note the estimates are based on last saved actions and previously processed members of the prescriptive rule.

Print | Export

Requirement Name	Requirement Assignment	Requirement Deletion	Requirement Update
04General Computer Knowledge	0	0	4
1001 Ways to Take Initiative at Work	0	0	0

Figure 197: Impact analysis

The **Estimate Impact** button is shown for prescriptive rules that are in **Active** and **Draft** state.

Use case

Administrators can now identify records that will be affected by changes before the rule is processed.

New settings to calculate and update job start date

How did it work?

Prior to this update, Saba Cloud application considers the person's job start date entered in the system and not the actual job start date. There was no provision for people administrator to update the job start date directly on the person's profile and hence had to use data import feature.

How does it work now?

With this update, the following settings are introduced in the **User Profile** service under **Foundation**. By default these settings are enabled.

- Create Internal Work History for Organization change
- Create Internal Work History for Manager change
- Create Internal Work History for Location change
- Create Internal Work History for Job change

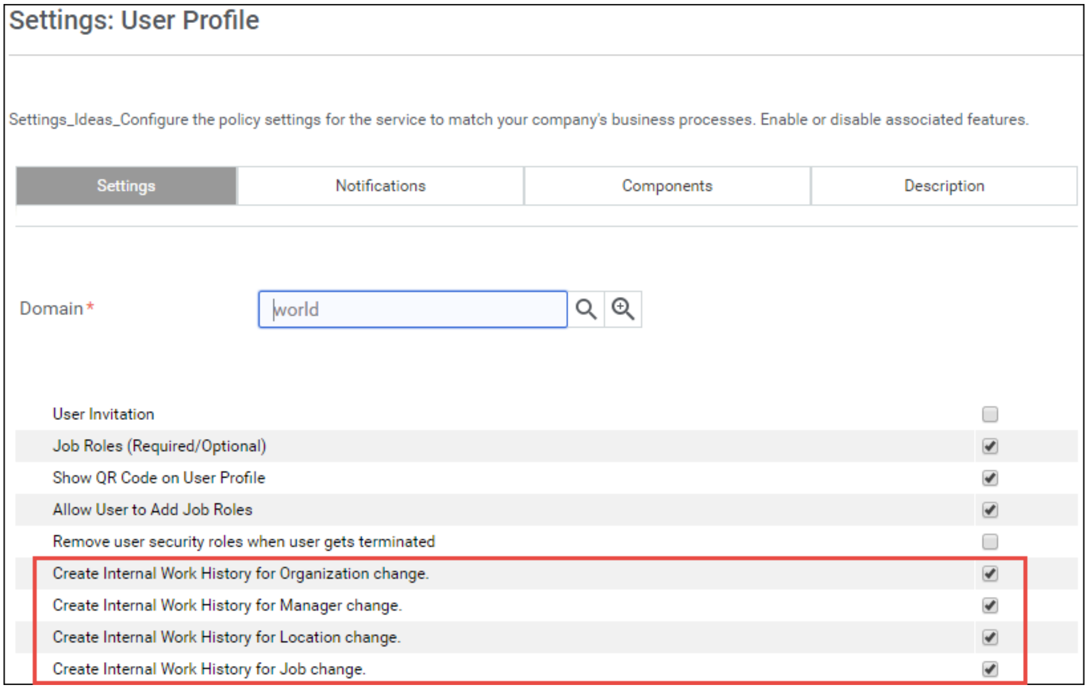


Figure 198: New settings in User Profile

Whenever a user's organization, manager, location, or job is changed in the system, the internal work history gets automatically created on the profile and that current day is considered as job's start date.

If the user has already started with the new job but it is updated in the application later, then the corresponding internal work history gets created with the current date allowing the people administrator to update the correct job start date in the application.

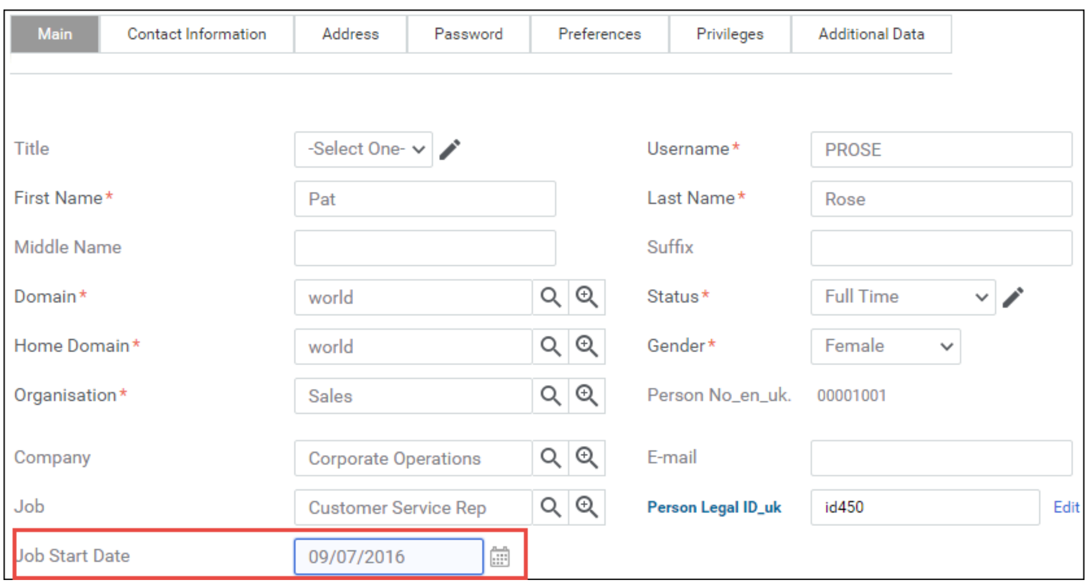


Figure 199: Edit job start date

Use case

The user's internal work history can now be created automatically in the profile on updating their organization, job, location, and manager. The people administrator can now also update the job start date of the current job.

Personalized From field for notifications

How did it work?

Prior to this update, the **From** field of notifications contained a generic email address. So when users received a notification email from another user, they could not see the user's name, instead saw the generic name.

How does it work now?

With this update, the **From** field of a notification event now supports the ability to include user identity so that Saba Cloud can send personalized notification emails. This support is available only for pre-defined and copied event actions.

To support this feature, the following site-level properties are introduced under **System** > **Microsites** > **<*sitename*>** > **Web Variables**:

Table 19: New site-level properties

Property Name	Description	Default Value
Enable Personalized From	This property allows you to configure a personalized **From** field in notification emails. If set to "true", then the **From** field in notification emails supports user identities; that is, the user name of the user who performs the action that results in the email notification is populated in the "From" field of the email. If set to "false", then it supports generic identity.	false
Personalized From	The **From** field is a free form text field. The string specified in this field is appended to the user name in the "From" field for all notification emails sent out by Saba Cloud on behalf of the users.	N/A

For example, if the feature is enabled and the string in **Personalized From** field is set to (SABA) and if you want to add this to the notification event "Item flagged" where the "From" field is set to keyword "@FlaggedBy@", then if an item is flagged by John Doe, then the email received displays **John Doe (SABA)@***<domain-specific-email-id>*.

The personalized From field support is available for the following social notifications:

Table 20: List of Social events and keywords

Event Name	Supported Keywords
Someone shared something with me	@Recommendation_RecommendedBy@
New resource contributed	@Contribution_Actor@
New discussion started	@Community_Discussion_Posted_By@
Reply posted to discussion	@DiscussionMessage_Username@
New blog entry posted	@BlogPost_BlogAuthor@

Event Name	Supported Keywords
Video added to a video channel I am following	@Channel_Content_Submitted_By@
New Workspace page created	@LivePage_PageAuthor@
Edit a page (workspace page)	@LivePage_PageAuthor@
Bookmarked something	@KAList_owner
Resource Rated/Reviewed	@Actor_Name@
Recommend a group	@RecommendationGroup_RecommendedBy@
Send Group Notice Email To Members	@GroupNotice_SENT_BY@
Started Following me	@Trusted_Advisee_Name@
Private Saba Impression Created	@Saba_Impression_Manager@
Saba Impression Created	@SabaImpression_Creator@
Item Flagged	@Flagged_By@

Use case

There is a need to personalize the **From** field in notifications for one-to-one social emails.

Display source object details for SMF jobs

How did it work?

The SMF **Job Dashboard** displayed only the source object IDs for SMF jobs. However, it did not display any more details about the source objects.

How does it work now?

With this update, the SMF **Job Dashboard** displays more details about the source objects that are processed by SMF jobs.

The **Source Object ID** column in the **Job Search Details** table now displays the IDs as clickable links. Clicking the link displays a **Source Object Details** popup page with additional details about the particular object.

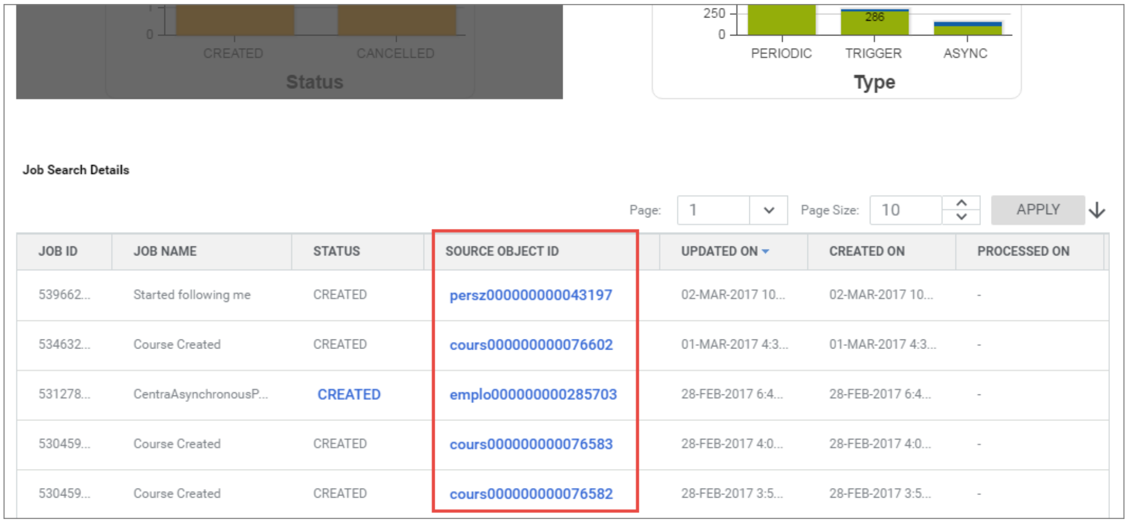


Figure 200: Source Object ID links

Currently, the **Source Object Details** popup page displays details for the following source object types:

- Internal Person
- External Person
- Domain
- Notification Event ID
- Notification Event Function ID

To view the source object details, system administrators can navigate to **System > SMF > Job Dashboard**, and click the required ID link in the **Source Object ID** column in the **Job Search Details** table.

If details of an object are available, then they are displayed in the **Source Object Details** popup page.

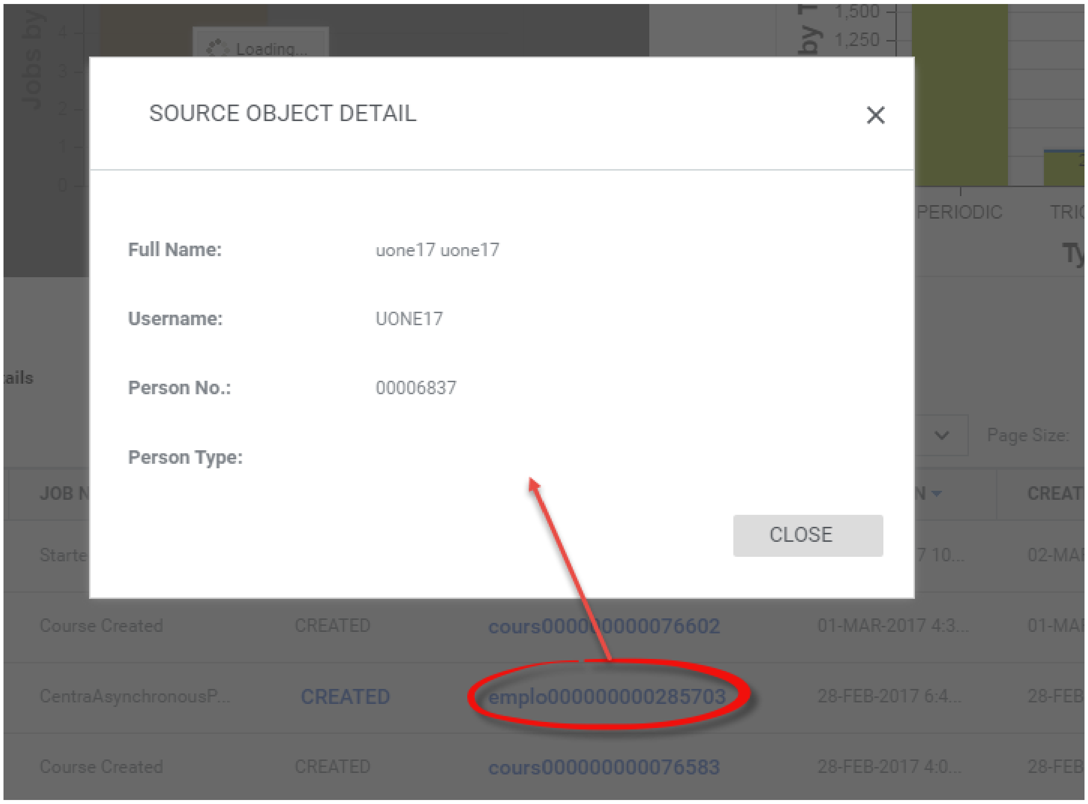


Figure 201: Source Object Details - Available

If details of an object are not available or if an object is not supported, then no link is displayed for the source object ID.

Use case

There is a need to provide administrators with more details about source objects being processed by SMF jobs.

Support 2048 bit RSA key

How did it work?

Customer requires a private key to sign the authentication token which was a 1024 bit RSA private key.

How does it work now?

Saba Cloud now provides support for 2048-bit key for customer site key pair generation. With this update, user can now generate 2048-bit Customer's private key and download the same for signing at their end. Accordingly, Saba will be verifying the incoming token from customer using the corresponding public key generated for that customer.

Note: By default this feature is disabled. To enable the feature, submit a support request. For assistance, contact Saba Support.

The "admin" user can enable the **Use 2048-bit RSA Key for SSO /JWT** property under **System** > **Sites** > **<Site Name>** > **Security**. By setting this property to **true**, Cert SSO and JWT will use 2048-bit RSA keys instead of 1024-bit RSA keys.

Use case

This enhancement will allow customers to choose between 1024 bit RSA and 2048 bit RSA as per their security requirements for SSO.

System wide BCC support for emails

How did it work?

System wide BCC emails were not supported.

How does it work now?

Saba Cloud now provides the ability to configure a set of comma separated email IDs (recipients) that will receive a BCC of all the system wide emails that are sent out. This includes:

1. Both triggered as well as periodic notifications.
2. All notification events that you've created.
3. All the pre-defined notification events for which the system is sending emails to the people included in there through named queries or as adhoc email entries.

Note: By default this feature is disabled. The system admin can enable it under **System** > **Configure System** > **Microsites** > **Site Properties** > **Web Variables** > **Enable BCC**.

After this is enabled, the system admin can configure the **BCC Email Addresses** under **System Administration** > **Configure System** > **BCC Settings**.

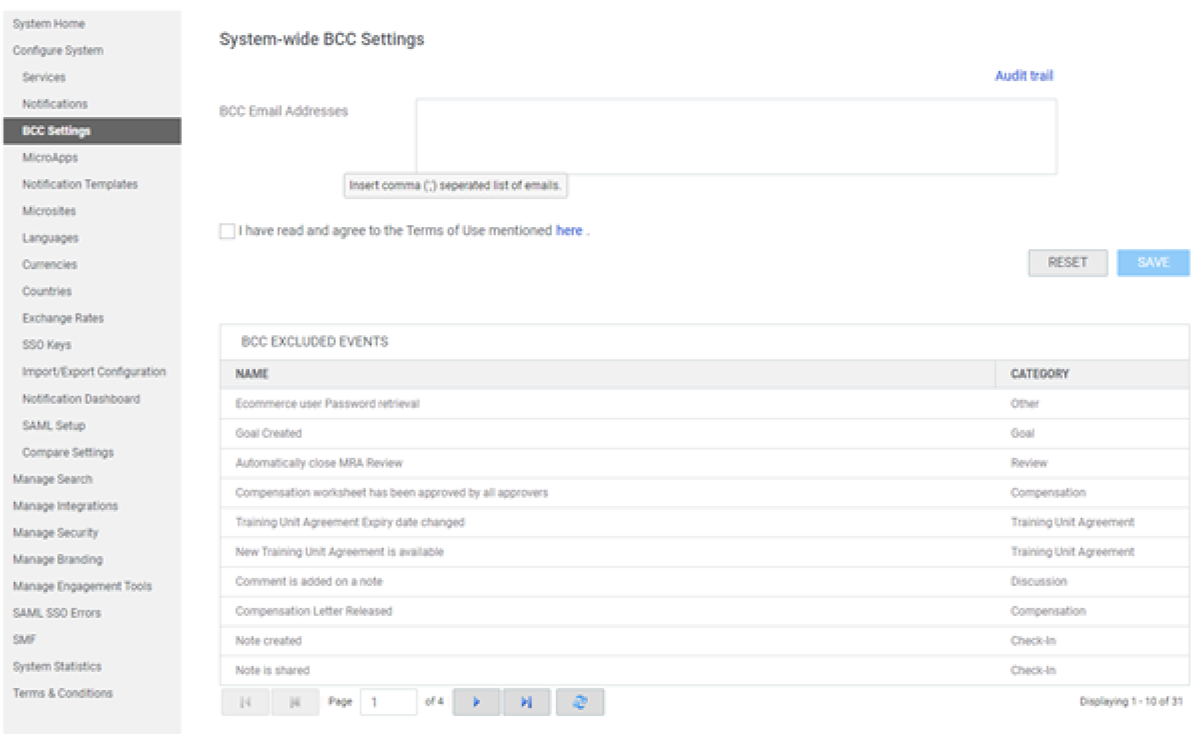


Figure 202: BCC Settings

You can enter more than one email address by separating them by a comma. After you add the required email addresses and agree to the terms and conditions click SAVE. After you save the changes, the system will start sending BCCs of each notification email sent out from the application.

Note: Emails for the events listed under **BCC Excluded Events** will not be sent as BCCs to the configured recipients.

You can also view the audit trail of the terms and conditions agreements (i.e. each time it is agreed/disagreed) by clicking the **Audit Trail** link.

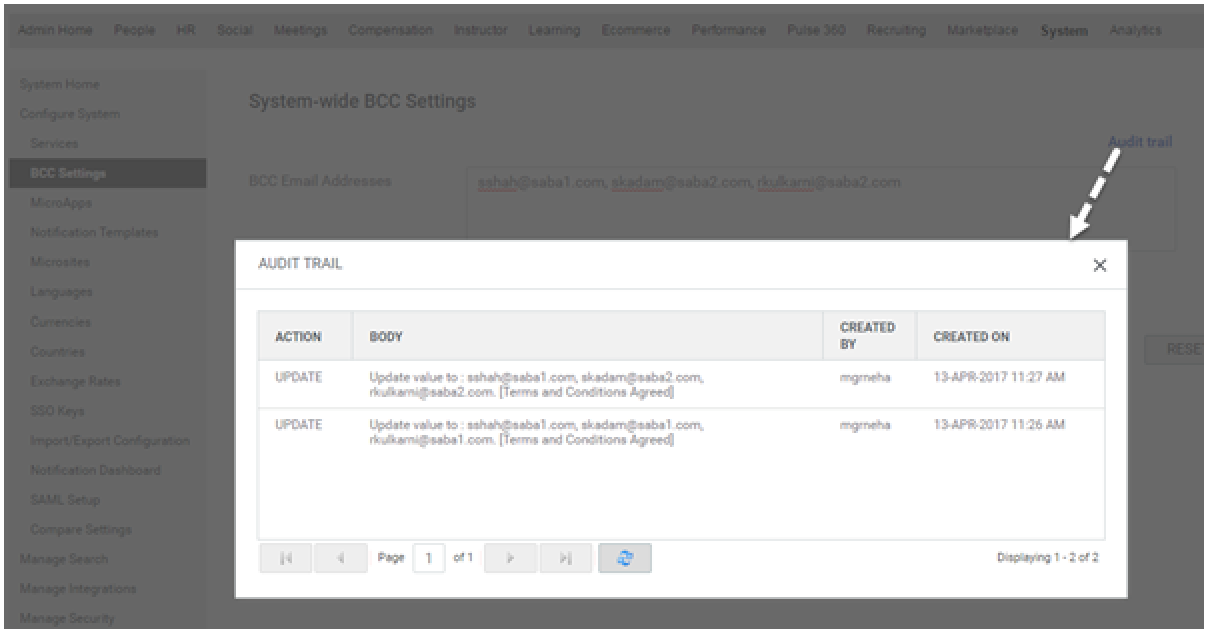


Figure 203: BCC Settings - Audit Trail

Use case

This allows the checking for inconsistencies in case a user does not receive an email and is not able to complete a business requirement citing lack of information from the Saba application.

Restrict access based on IPs

How did it work?

It was not possible to restrict access based on IPs.

How does it work now?

Saba Cloud now provides the ability to restrict access based on IPs at microsite level.

The system admin can now whitelist or blacklist IP addresses for a microsite and also provide different set of IP ranges. To do so, navigate to **System** > **Configure System** > **Microsites** > <***MicrositeName***> > **Site Properties** > **Security**.

You can choose the IP validation mode such as Black list or White list and then add the IP ranges accordingly.

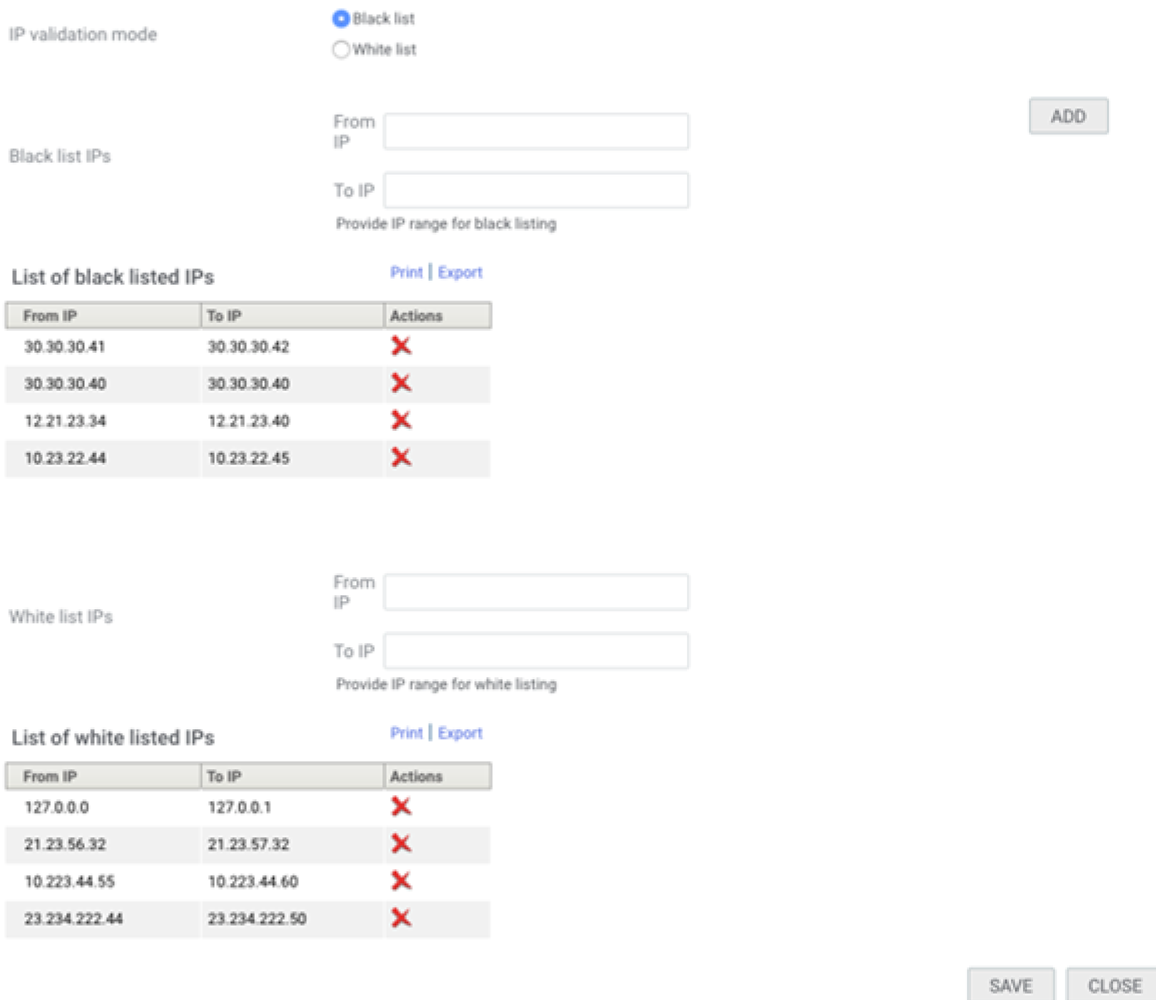


Figure 204: Whitelist/Blacklist IPs

In the white list mode, the system will allow only those clients whose IPs have been added in the range, if not the system will throw an Unauthorized error. In the black list mode, the system disallows all those clients whose IPs have been added in the range.

Note: For the "admin" user: While adding the IP ranges for a site, there is an option (checkbox) to copy the same IP range for all the microsites. If checked, the IP range will be added for all the Microsites. Similarly, while removing any IP range added under the site, the "admin" user can confirm, if the same IP range has to be removed for the microsites as well, if present.

If an IP range is added under **System** > **Meta Configuration** > **Meta Web Variables** > **Whitelist IP's**, then blacklisting those IPs using **System** > **Configure System** > **Microsites** > <***MicrositeName***> > **Site Properties** > **Security** will not have any impact.

Use case

This provides enhanced security and a way to restrict access on basis of IPs.

Configurable FROM address for Two Factor Authentication emails

How did it work?

It was not possible to configure the FROM address for Two Factor Authentication emails. It always used to default to authentication_automation@saba.com.

How does it work now?

Saba Cloud now provides the ability to configure the FROM address for Two Factor Authentication emails. The "admin" user can set the **'From' address for Security Code mail** under **System > Sites > <*SiteName*> > Two Factor Authentication**. This is the **From** address of Security code email. It defaults to authentication_automation@saba.com, if it is not configured.

Note: To set the FROM address for Two Factor Authentication emails, submit a support request. For assistance, contact Saba Support.

Use case

N/A

Optimized global search results

How did it work?

Prior to this update, when users performed a keyword search in global search, the results were not displayed in an optimal way. For example, if users search for Java 101, then results with both Java and 101 are returned but item with title "Java 101" was not always displayed at the top of the search list.

How does it work now?

This update enhances the relevance score of search results in global search so that they are displayed in a more logical order based on the keywords you specify. The optimized global search gives preference to search results with all words in the search string over those with some words.

The optimized search is available by default.

For example, if users search for Java 101, then an item with the title "Java 101" appears at the top of the search results in addition to items containing both Java and 101 strings in their titles.

Use case

Users need to experience accurate search results so that they can easily find resources they are searching for.

Change in the locale ID for the Greek locale

How did it work?

Prior to this update, the locale ID for the Greek locale was **el_El**.

How does it work now?

With this update, the locale ID for the Greek locale is rectified to **el_GR**..

Use case

The older locale ID was incorrect and is now rectified.

Workspaces menu appears in new tile style header menu

How did it work?

Prior to this update, we didn't had IA tile view. The **Workspaces** tab is available under Groups tab.

How does it work now?

The **Workspaces** menu now appears in the new tile style header menu. This menu appears in this style only when the setting **Enable new tile style IA** is enabled in **System > Configure System > Services > Foundation > User Interface**. By default, this setting is disabled. To enable, please contact your system administrator.

Note: The **Workspaces** tab continues to remain accessible from the **Groups** tab.

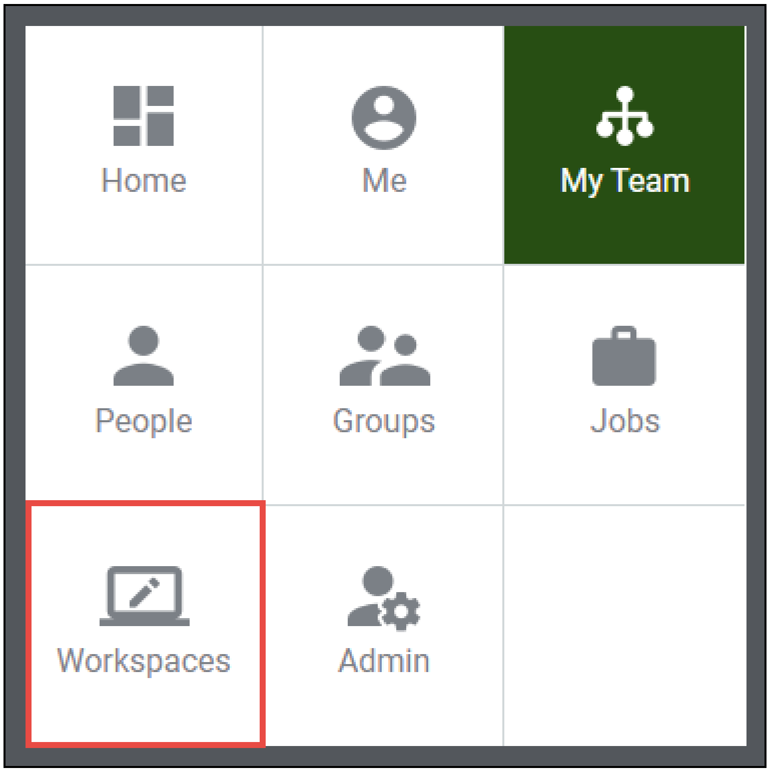


Figure 205: Workspaces menu

Use case

This feature now allows user quick access to **Workspaces** tab.

Data Integration

Display SMF Job ID on UI Import monitoring page

How did it work?

The SMF job ID was not displayed on the page to monitor UI imports.

How does it work now?

With this update, Saba Cloud adds the **SMF JOB ID** column to the table on the **Import Monitoring : UI Import** page. This column displays the ID for the SMF job that is monitored from this page.

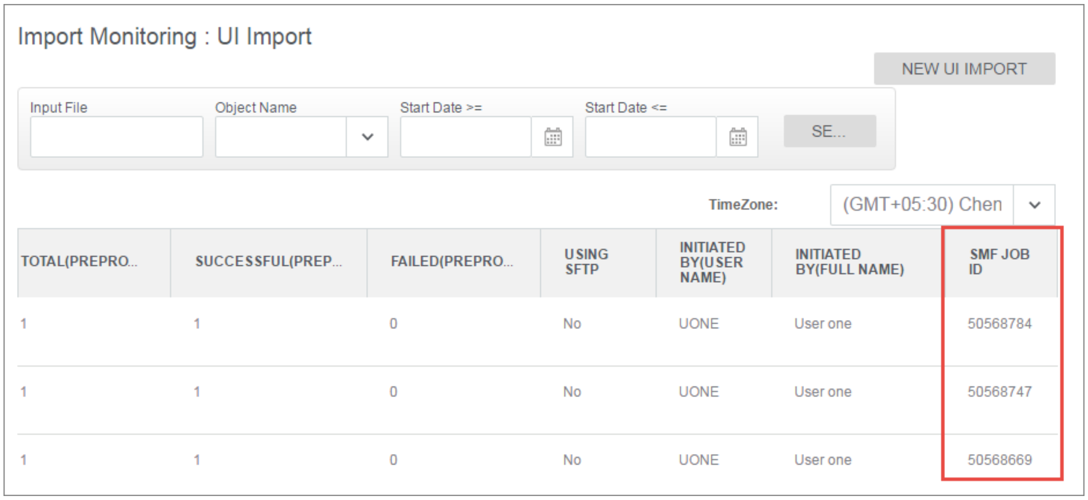


Figure 206: SMF JOB ID column

To view the new column, navigate to **System > Manage Integrations > Integration Studio**, and click the **Monitor UI Import** link.

Use case

There is a need to debug issues related to imports and have a better understanding of the SMF job with an import job.

Ability to associate evaluations to certification and curriculum using Data Import

How did it work?

Currently, Data Import only allows associating Evaluations to Courses.

How does it work now?

With this update, Evaluations can also be associated to Certifications and Curricula.

Table 21: New Data Fields in CSV file

Sr. No	Data Import Field	Description
1	EVALUATION	Evaluation name to be associated with the Certification
2	EVAL_VERSION	Version of an Evaluation to be associated with the Certification
3	EVAL_FOLDER_PATH	Complete path of the parent folder of the evaluation. This will be used to identify the content uniquely as we can have same name of content under a different folder. The path should be tilda (~) separated. Any other folder should not have ~ character in its name.
4	EVAL_EXPIRE_SCHEDULE	Evaluation Expiration Schedule type.

Sr. No	Data Import Field	Description
		Possible values are : NO_EXPIRATION EXP_AFTER_AVAILABILITY
5	EVAL_EXPIRE_NO_OF_DAYS	Expire Evaluation after total number of days of avail~ ability.

Use case

This update ensures that Data Import can be used to associate Evaluations to Certifications and Curricula.

Enhancement to Skip omitted column functionality

How did it work?

The SKIP Omitted Columns option in the DI objects enabled users to automatically SKIP (rather than NULL out) columns that are not included in the CSV file. This feature considers CUSTOM fields as text type by default. When a CUSTOM field data type is changed (to Date or Number) and the column is omitted from the import file, the import operation fails.

How does it work now?

With this update, the DI feature is modified to generate correct skip values for custom fields according to their data types.

For example:

When a CUSTOM field data type is changed (to Date or Number) and the column is omitted from the import file, the framework will set the skip value as '9999-01-01 or 9999999 which are valid SKIP values for Date and Number data type.

Use case

DI feature needed to be enhanced to ensure SKIP Omitted Columns feature was generating correct skip values for custom fields.

Scheduled Jobs will pick up and trigger according to timezone settings

How did it work?

In rare cases, timezone was not handled accurately in Scheduled Data Import Jobs and Connector based imports. As a result, imports sometimes did not trigger at scheduled times.

How does it work now?

Timezone related issues are now fixed. Also, the job search results view will show the last triggered time and the next trigger time. This will be based on the timezone selected from the timezone drop-down list.

- For Data Import scheduling, the user selected time zone will be displayed. For existing jobs, current timezone will be displayed until the job is updated by the user; existing functionality will not be impacted.
- User selected time zone will be maintained even during the edit phase.
- For jobs with a six or twelve hour interval, actual start time will be honored. This will happen for new jobs or after editing for current job.

  For example:

  If the start time is set at 4 P.M and the interval is set at 12 hours, the job will run at 4 P.M. and 4 A.M. and for 6 hour interval, the job will at 4 P.M., 10 P.M., 4 A.M. and 10 A.M.
- Daylight Saving Time schedule will be maintained correctly since user timezone is used. However, this will only be reflected when the job is updated by the user.

Note: Prior to updating a job, the Previous Fire Time and the Next Fire Time is visible to the user on the UI. After updating the job, the Previous Fire Time will not be shown in the first iteration because the schedule was just updated. When the job is executed once, the Next Fire Time and the Previous Fire Time values would be shown to the user. Similarly, the Previous Fire Time or the Next Fire Time values will not be shown immediately after a job is created but will be shown after a delay.

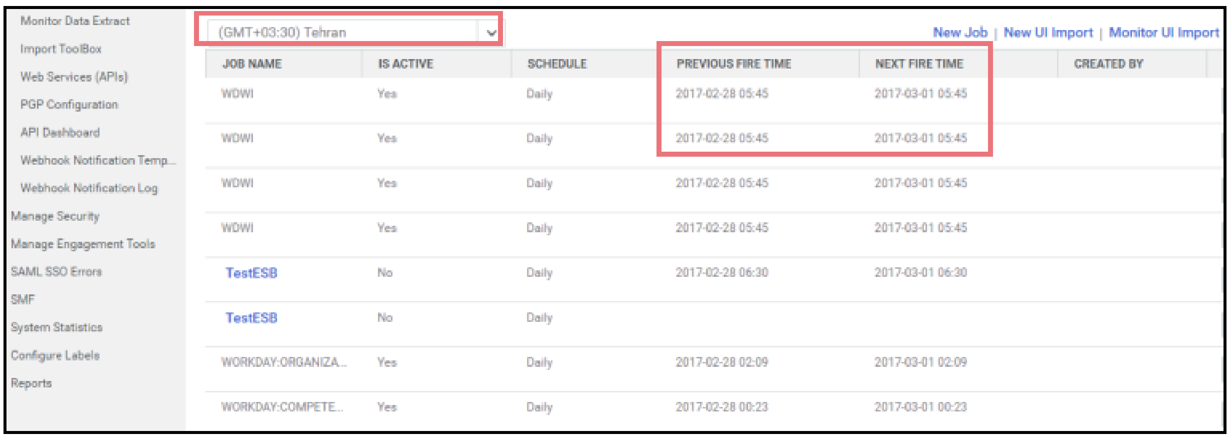


Figure 207: Timezone selection

Use case

Scheduled job imports pickup the timezones selected by specific users and is triggered according to these settings. This ensures accurate Data import at regular and scheduled intervals.

Data import jobs created by Migration_Admin

How did it work?

Currently all DI imports are run by ADMIN users. Hence the CREATED_BY column name displays as ADMIN.

How does it work now?

With this update, DI can be run by MIGRATION_ADMIN user and so the created by column will display as MIGRATION_ADMIN.

For existing tenants, import operations (for objects listed below) will continue to be run by the ADMIN user and for new tenants the default option will be MIGRATION_ADMIN.

Both new and existing customers will have the option to switch from one mode to the other.

Note: To change your options, please contact **Saba support**. When switching options, MIGRATION_ADMIN will be provided with **Super User** privileges.

Use case

Data imports can now be run by MIGRATION_ADMIN and ADMIN users.

This applies to the following objects:

- SKUOrder
- VC Offering
- Mapping Roles to person
- Student Certification
- ContentInventory
- Person, DIF
- Review Cycle
- Review Score
- Checklist
- Domain
- JobFamily
- Profile Picture
- Student Curriculum
- PriceList
- Purchase Order
- Training Unit
- Person Competency
- Registrations
- Person-Role-SmartList Association
- Training Unit Agreement
- Qualified Instructor
- Currency Exchange Rate
- Delivery Mode
- User List of Values
- Inventory
- Held Skills
- MRA
- Internal Work History
- Class Attendance
- EmployeeCompensation
- Compensation Plan Eligibility
- Bulk Content Import
- Session Template
- Job Requisition
- Job Candidate
- Document Management
- Social Content Import
- Goals
- Attachment Import
- Person, CPF
- Blended Offering
- Compensation Profile
- Position

- Incumbents
- Review Overall Score
- Profile Merge

Content vendor field can be populated using Bulk Content Import

How did it work?

In the past, Content Vendor field was not getting populated when using the RDI method. Content Integrations like SMAPI and LAB require that a specific Vendor be populated.

How does it work now?

With this update, correct mapping of Content Provider and Delivery Vendor is available in Bulk import. The values provided for Content Provider and Delivery Vendor fields are accepted and applied correctly.

Note: If Content Provider value is not provided in the Content Provider column, the Delivery vendor value will be applied - to ensure backward compatibility.

Use case

Correct mapping of Content Provider and Delivery Vendor is now available in Bulk import.

Ability to select SFTP servers by Administrators

How did it work?

In the past, Administrators were allowed to enter their custom setting for the SFTP server fields and the IP number fields. This can lead to some security related issues.

How does it work now?

With this update, this has been addressed.

The SFTP Server /Host and the SFTP Port number will always be from a given list provided and configured by Saba Administrators.

Existing customers can select from their currently configured ones or pick from the provided list.

To select the SFTP Server/Host:

For Existing Connections:

Login as **superuser** and navigate to:

Admin>**System**> **Manage Integrations**>**Integration Studio**>**Edit Jobs**

Under **CONNECTIONS**, click on the **<Connection Name>** link to launch the **EDIT CONNECTION** screen.

For New Connection:

Navigate to:

Admin>**System**> **Manage Integrations**>**Integration Studio**>**Configure**

Under **CONNECTIONS**, click on **New Connection**.

For specifying the SFTP Server/Host, select your option from the drop down list.

The SFTP port number will be automatically populated by Saba once the SFTP Server/Host is selected.

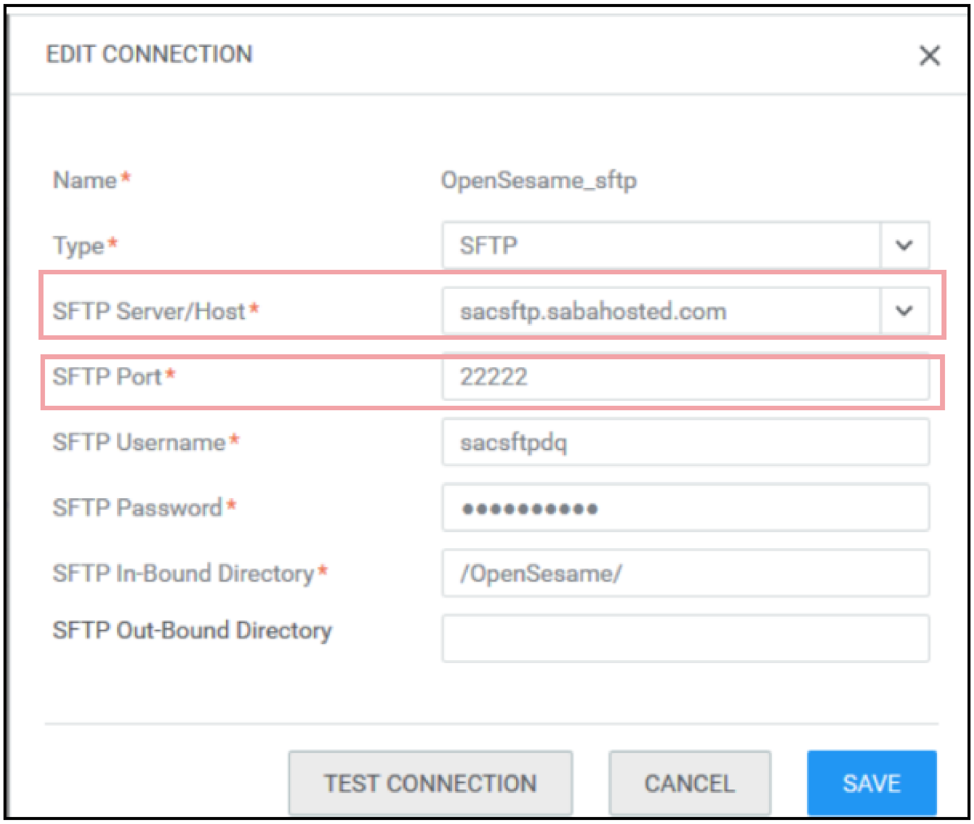


Figure 208: SFTP host and Port selection

Use case

The Server/Host and the SFTP Port numbers used by the users will always be from a given list provided and configured by Saba Administrators.

Bulk Content Import to support Unique ID

How did it work?

In the past, **Bulk Content Import** during configuration of Import Settings, did not have the **UNIQUE ID** option. It used to be the following default values: **CONTENTTITLE**,**VERSION**,**CONTENTFOLDER**,**CONTENTFORMAT** and it was not configurable.

How does it work now?

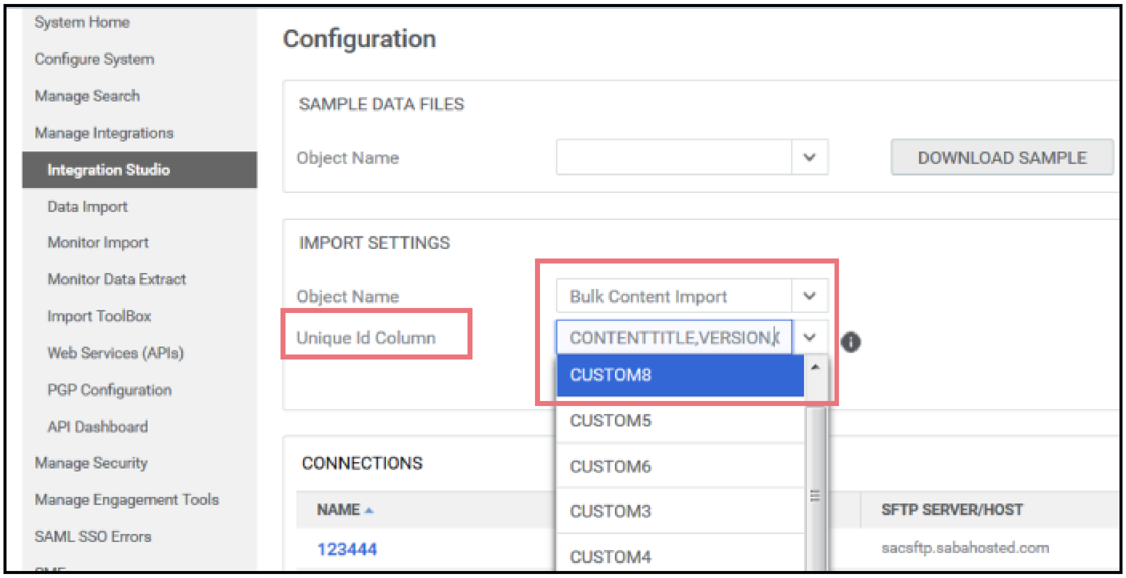
With this update, this has been addressed. Now when you configure Import Settings, you will have the UNIQUE ID option available as a drop down selection.

Navigate to:

Admin> **System**>**Manage Integrations**>**Configuration**>**Import Settings**.

Select the **Bulk Content Import** option from the drop down list of objects.

The **UNIQUE ID** column will be available.



Note: The unique ID set or selected cannot be used for the NULL/BLANK value on the CSV file during Import. Otherwise, the Import step will fail.

Use case

Bulk Content Import feature now supports the **UNIQUE ID** option.

Organization Manager related enhancement to Organization Imports

How did it work?

A new functionality, **Inherit to Child Organizations** was added to the application, and to support the functionality, the Organization internal/external RDI needed enhancement.

How does it work now?

With this update, a new field **IS_ORG_ADMIN_INHERIT** has been added in the Organization internal/external imports to support the **Inherit to Child Organizations** functionality. Organization association table is modified to add a new column **IS_ORG_ADMIN_INHERIT**.

Use case

The Organization internal/external RDI needed enhancement to support the **Inherit to Child Organizations** feature.

Enhancement to Training Unit Agreement Import step

How did it work?

Until now, **Custom fields and Agreement number** field were not supported in Training Unit Agreement import step.

How does it work now?

With this update, the following fields are added to the import CSV file for the Training Unit Agreement import step.

- **AGREEMENT_NO** has been added to the import CSV file where the agreement number for each record will be stored. This will replace the current method of storing the auto-generated number.

User needs to ensure that the **AGREEMENT_NO** provided is unique. If a duplicate number is entered, the system will throw an error.

Note: Auto-generation flag should be turned off to accept the agreement number from the import CSV file.

- CUSTOM0 to CUSTOM9 custom fields are added. They will be populated with corresponding data.

Use case

Custom fields and Agreement number field are now supported during Training Unit Agreement import.

Enhancement to data import file to allow multiple evaluators for checklists

How did it work?

Previously, Saba Cloud supported one Evaluator per Checklist.

How does it work now?

With this update, we support multiple evaluators for checklists. The RDI is enhanced accordingly.

Use case

Checklist feature now supports multiple evaluators.

Disable download logs button after 30 days

How did it work?

Until now, when logs are removed for downloads the links still remained active misleading administrators and users to attempt a download.

How does it work now?

With this update, this has been addressed. **Download logs** button is disabled 30 days after job completion and the links are disabled as well.

Navigate to:

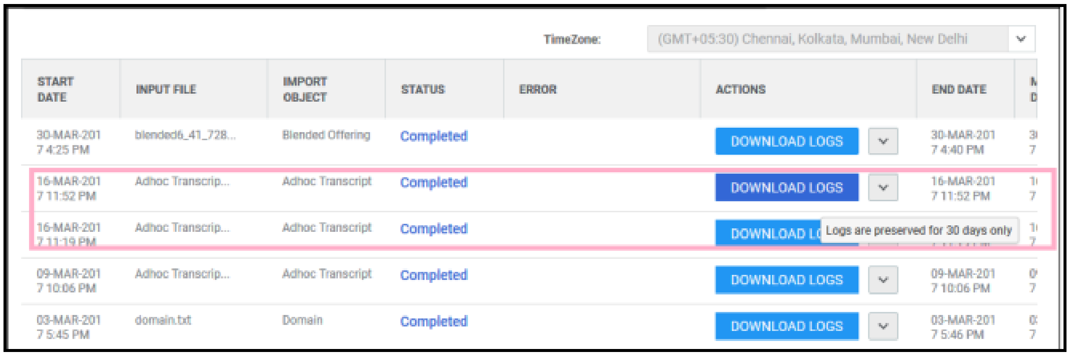
System>**Integration Studio**>**Monitor UI Import**

Or

System>**Integration Studio**>**<Import Job Name>Monitor** button

Clicking the **Download Logs** button will be disabled after 30 days and mouse hover will show following message:

Logs are preserved for 30 days only



Note: The Logs will be disabled 30 days after the server end date passed irrespective of the end date in the timezone.

Use case

Download log button and UI will be disabled 30 days after job completion.

Bulk Content_IsSCORING setting during bulk content import

How did it work?

In the past, during bulk content import, the Bulk Content_IsSCORING setting from the CSV file uploaded was not always getting applied.

How does it work now?

With this update, this has been addressed.

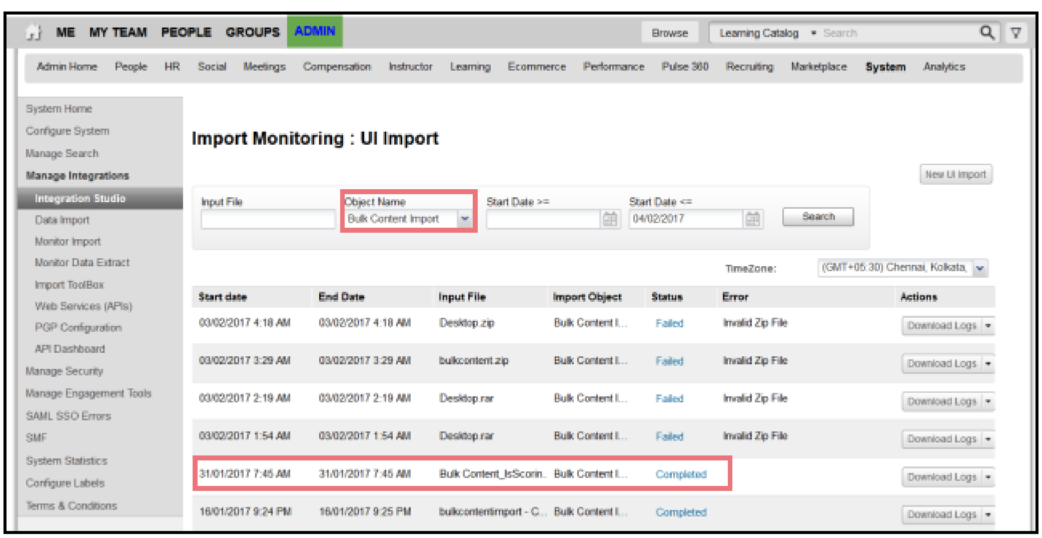
If the Bulk Content_IsSCORING setting on the CSV file was TRUE, then it is applied as TRUE in Saba Cloud.

If the Bulk Content_IsSCORING setting on the CSV file was FALSE, then it is applied as FALSE in Saba Cloud.

If there was no value on the setting, then the value from the Content will be applied.

To Monitor the completion of the import process, navigate to:

System>Integration Studio>Monitor UI Import



Use case

Bulk Content_IsSCORING setting is getting applied as set on the CSV file.

DMS Import and Equivalents

How did it work?

Until now, during RDI import for adding new course details, the MARK_VERSION_EQUIVALENT parameter was not recognized and so the OLD version of the course was not Marked as Equivalent of the new version.

How does it work now?

With this update, this has been addressed. Now, the parameter is getting recognized and the OLD version of the course gets marked as Equivalent of the New version.

Use case

The MARK_VERSION_EQUIVALENT parameter is now recognized during the RDI Import process and as a result the OLD version of the course is now Marked as EQUIVALENT of the NEW one.

Transition from the Old RDI interface to the new one

How did it work?

Until now, the old RDI interface was available along with the New RDI interface for data imports.

How does it work now?

Going forward, the old interface will no longer be available for existing and new customers: only the NEW interface will be available for all customers. The new RDI interface has been on Saba for over 2 years and it is more likely that users have been using the new interface already.

Use case

N/A

REST API

Updated REST APIs

Organization APIs to support cascading down and partial updates

How did it work?

The following REST API supported assigning organization manager for an organization but did not allow adding/removing a single association without impacting other associations and inheriting child organizations in the OrgManager association:

- GET DETAILS OF AN ORGANIZATION

- CREATE A NEW INTERNAL ORGANIZATION
- UPDATE DETAILS OF AN INTERNAL ORGANIZATION
- CREATE A NEW EXTERNAL ORGANIZATION
- UPDATE DETAILS OF AN EXTERNAL ORGANIZATION

How does it work now?

These APIs are now updated to:

- Add one or more associations without impacting the existing associations. For example, add one or more budget approvers without impacting the current set of budget approvers.
- Remove a single association. For example: removing one budget approver without knowing the full list of approvers.
- Replace just one association and leave others unchanged.
- Cascade down the organization manager to all child organizations.

  Note:

  The Cascading feature is only applicable for organization manager association.

To support these functions, the following new attributes/fields are available for use in the input JSON:

- **inheritToChildOrg:** Boolean field that will enable the ability to cascade down the Org manager to all child organizations.

  Note:

  To use this flag, you must either pass partialUpdate=true or include all the childOrgs. This is only applicable to orgManager association and not to any other associations.

- **partialUpdate:** Boolean field that will enable the ability to add or remove one or more associations without impacting the existing associations.

  Note:

  If this field is not passed or when "partialUpdate": false, the default behavior will be as before i.e. the existing associations will be removed.

- **action:** Can be add or delete. **add** adds the corresponding association to the organization. **delete** deletes the corresponding association from the organization.

Note: The action and partialUpdate fields are only valid in case of Organization Update or while adding/deleting individual associations. If partialUpdate is set to true but the action is not provided then the default action is add. In case of partial update, if the attribute is not passed or the attribute is passed as a null value or an empty array, no action is taken.

For example:

```
Association{
 orgManager:null    //No action will be taken
}
Association{
 orgManager:{}    //No action will be taken
}
```

GET DETAILS OF AN ORGANIZATION

Return Values

```
{
  "contact_id": null,
```

```
  "billAddr1": "",
  "billAddr2": "",
  "billCity": "",
  "billState": "",
  "billZip": "",
  "billCountry": "",
  "objectives_administrator": null,
  "currencies": [
    {
      "id": "crncy000000000000167",
      "displayName": "US Dollars"
    }
  ],
  "learning_vendor": false,
  "learning_manufacturer": false,
  "vertical": null,
  "city": "",
  "zip": "",
  "business_typ": "",
  "phone2": "",
  "phone1": "",
  "web_server": "",
  "fax": "",
  "email": "",
  "is_active": true,
  "addr1": "",
  "addr2": "",
  "addr3": "",
  "vat_no": null,
  "currency_id": {
    "id": "crncy000000000000167",
    "displayName": "US Dollars"
  },
  "description": "Test_Org_Temp",
  "name": "Test_Org_Temp_1",
  "parent_id": null,
  "state": "",
  "number": "00002146",
  "country": "",
  "customValues": {
    "ExCustom6": null,
    "ExCustom7": null,
    "ExCustom4": null,
    "ExCustom5": null,
    "custom0": null,
    "ExCustom8": null,
    "ExCustom9": null,
    "custom9": null,
    "custom3": null,
    "ExCustom21": null,
    "custom4": null,
    "custom1": null,
    "custom2": null,
    "custom7": null,
    "ExCustom2": null,
    "ExCustom25": null,
    "custom8": null,
    "ExCustom3": null,
    "ExCustom24": null,
    "custom5": null,
    "ExCustom23": null,
    "custom6": null,
```

```
    "ExCustom1": null,
    "ExCustom22": null
  },
  "securityDomain": {
    "id": "domin000000000000001",
    "displayName": "world"
  },
  "id": "cmpny000000000002106",
  "associations": {
    "childorg": [
      {
        "displayName": "bk_ext_org2",
        "id": "cmpny000000000001745"
      }
    ],
    "continueeducation": [
      {
        "displayName": "CE_Plan_FOS_OFF",
        "id": "cepln000000000001280"
      }
    ],
    "budgetapprover": [],
    "organizationAdmin": [],
    "organizationManager": [
      {
        "inheritToChildOrg": true,
        "displayName": "alt_mgr_fname alt_mgr_lname",
        "id": "emplo000000000027755",
        "inheritedFromParent": false,
        "username": "BD_ALT_MGR"
      }
    ]
  }
}
```

CREATE A NEW INTERNAL ORGANIZATION

Request Body (uses "inheritToChildOrg": true)

```
{
  "contact_id": null,
  "billAddr1": "billAddr1",
  "billAddr2": "billAddr2",
  "billCity": "billCity",
  "billState": "billState",
  "billZip": "billZip",
  "billCountry": "billCountry",
  "objectives_administrator": null,
  "currencies": [
    {
      "id": "crncy000000000000167",
      "displayName": "US Dollars"
    }
  ],
  "aa_id": null,
  "vertical": null,
  "city": "city1",
  "zip": "11223311",
  "phone2": "12345",
  "phone1": "11223344",
  "web_server": "",
```

```
  "fax": "12312",
  "email": "abc@gmail.com",
  "cost_center_no": "cc1234",
  "addr1": "add1",
  "addr2": "add2",
  "addr3": "add3",
  "currency_id": {
    "id": "crncy000000000000167",
    "displayName": "US Dollars"
  },
  "description": "desc",
  "name": "test_InternalOrg_2",
  "parent_id": {
    "id": "bisut000000000000001",
    "displayName": "Root"
  },
  "state": "state1",
  "number": "00022226",
  "country": "country1",
  "customValues": {
    "custom0": null,
    "custom9": null,
    "custom3": null,
    "custom4": null,
    "custom1": null,
    "custom2": null,
    "custom7": null,
    "ExCustom2": null,
    "custom8": null,
    "ExCustom3": null,
    "custom5": null,
    "custom6": null,
    "ExCustom1": null
  },
  "securityDomain": {
    "id": "domin000000000000001",
    "displayName": "world"
  }, "associations": {
    "childorg": [
      {
        "displayName": "bk_ext_org2",
        "id": "cmpny000000000001745"
      }
    ],
    "continueeducation": [
      {
        "displayName": "CE_Plan_FOS_OFF",
        "id": "cepln000000000001280"
      }
    ],
    "budgetapprover": [],
    "organizationAdmin": [],
    "organizationManager": [
      {
        "inheritToChildOrg": true,
        "displayName": "2nd_level_fname 2nd_level_lname",
        "id": "emplo000000000027755"
      }
    ]
  }
}
```

Return Values

```
{
  "id": "bisut000000000200041",
  "displayName": "test_InternalOrg_2",
  "href":
"http://<hostname-api.sabacloud.com>/v1/organization/bisut000000000200041"
}
```

UPDATE DETAILS OF AN INTERNAL ORGANIZATION

Request Body (uses partialUpdate, inheritToChildOrg and action)

```
{
 "associations": {
 "partialUpdate" : true,
    "childorg": [
      {
        "displayName": "bk_ext_org2",
        "id": "cmpny000000000001745",
        "action" : "add"
      }
    ],
    "continueeducation": [
      {
        "displayName": "CE_Plan_FOS_OFF",
        "id": "cepln000000000001280",
        "action" : "add"
      }
    ],
    "budgetapprover": [],
    "localLearningRegistrar": [],
    "organizationManager": [
      {
        "inheritToChildOrg": true,
        "displayName": "2nd_level_fname 2nd_level_lname",
        "id": "emplo000000000027753",
        "action" : "add"
      }
    ]
  }
}
```

CREATE A NEW EXTERNAL ORGANIZATION

Request Body (uses "inheritToChildOrg": true)

```
{
  "contact_id": null,
  "billAddr1": "",
  "billAddr2": "",
  "billCity": "",
  "billState": "",
  "billZip": "",
  "billCountry": "",
  "objectives_administrator": null,
  "currencies": [
    {
      "id": "crncy000000000000167",
      "displayName": "US Dollars"
    }
```

```
  ],
  "learning_vendor": false,
  "learning_manufacturer": false,
  "vertical": null,
  "city": "",
  "zip": "",
  "business_typ": "",
  "phone2": "",
  "phone1": "",
  "web_server": "",
  "fax": "",
  "email": "",
  "is_active": true,
  "addr1": "",
  "addr2": "",
  "addr3": "",
  "vat_no": null,
  "currency_id": {
    "id": "crncy000000000000167",
    "displayName": "US Dollars"
  },
  "description": "Test_Org_Temp",
  "name": "test_External_Admin_2",
  "state": "",
  "country": "",
  "customValues": {
    "ExCustom6": null,
    "ExCustom7": null,
    "ExCustom4": null,
    "ExCustom5": null,
    "custom0": null,
    "ExCustom8": null,
    "ExCustom9": null,
    "custom9": null,
    "custom3": null,
    "ExCustom21": null,
    "custom4": null,
    "custom1": null,
    "custom2": null,
    "custom7": null,
    "ExCustom2": null,
    "ExCustom25": null,
    "custom8": null,
    "ExCustom3": null,
    "ExCustom24": null,
    "custom5": null,
    "ExCustom23": null,
    "custom6": null,
    "ExCustom1": null,
    "ExCustom22": null
  },
  "securityDomain": {
    "id": "domin000000000000001",
    "displayName": "world"
  },
  "associations": {
    "childorg": [
      {
        "displayName": "bk_ext_org2",
        "id": "cmpny000000000001745"
      }
    ],
```

```
    "continueeducation": [
      {
        "displayName": "CE_Plan_FOS_OFF",
        "id": "cepln000000000001280"
      }
    ],
    "budgetapprover": [],
    "organizationAdmin": [],
    "organizationManager": [
      {
        "inheritToChildOrg": true,
        "displayName": "2nd_level_fname 2nd_level_lname",
        "id": "emplo000000000027755"
      }
    ]
  }
}
```

Return Values

```
{
  "id": "cmpny000000000200504",
  "displayName": "test_External_Admin_2",
  "href":
"http://<hostname-api.sabacloud.com>/v1/organization/cmpny000000000200504"
}
```

UPDATE DETAILS OF AN EXTERNAL ORGANIZATION

Request Body (uses partialUpdate, inheritToChildOrg and action)

```
{
 "associations": {
 "partialUpdate" : true,
    "childorg": [
      {
        "displayName": "bk_ext_org2",
        "id": "cmpny000000000001745",
        "action" : "add"
      }
    ],
    "continueeducation": [
      {
        "displayName": "CE_Plan_FOS_OFF",
        "id": "cepln000000000001280",
        "action" : "add"
      }
    ],
    "budgetapprover": [],
    "organizationAdmin": [],
    "organizationManager": [
      {
        "inheritToChildOrg": true,
        "displayName": "2nd_level_fname 2nd_level_lname",
        "id": "emplo000000000027753",
        "action" : "add"
      }
    ]
  }
}
```

Use case

This enhancement allows the customers to now fully use the APIs in sync with the UI.

Recurring completion API to include additional fields

How did it work?

Currently, when using the Recurring completion APIs, the fields mentioned below are not available for completed recurring completions:

- FIND DETAILS OF RECURRING COURSE COMPLETIONS
- FIND DETAILS OF RECURRING COURSE COMPLETIONS (Using POST - Range based search)

How does it work now?

These APIs are now updated to include the following fields:

1. offering_temp_id
2. delivery
3. deliveredby_no
4. deliveredby_name
5. assigned_on
6. due_date
7. expiration_date
8. recert_window
9. duration
10. flags
11. completionMode
12. completedByContent
13. expiration_date

These fields will now be available in the response JSON of these APIs.

Note: These fields will only be available with **includeDetails=true**.

Return Values (using includeDetails=true)


```
{
   "facets":[

   ],
   "startIndex":1,
   "results":[
      {
         "assignedBy":"User One",
         "assigned_on":"2016-07-22T04:39:41UTC",
         "assignedStatusDescription":"Assigned",
         "completed_on":null,
         "person":{  F1
            "id":"emplo000000000019079",
            "username":"UONE"
         },
         "due_date":"2016-07-23T04:39:41UTC",
         "course":{
            "id":"cours000000000002152",
```

```
            "course_no":"00002104",
            "title":"9/20/2013 recurring course1",
            "version":null
         },
         "expiration_date":"2016-12-09T18:30:00UTC",
         "assignedStatus":"400"
      },
      {
         "created_by":"uone",
         "start_date":"2016-07-29T04:14:13.000+0000",
         "time_interval":0,
         "end_date":"2016-10-20T05:54:13.000+0000",
         "updated_on":"2016-10-20T05:54:17.000+0000",
         "updated_by":"uone",
         "created_on":"2016-07-29T04:14:14.000+0000",
         "score":null,
         "target_date":"2016-07-29T06:14:13.000+0000",
         "delivery_type":"eqcat000000000000005",
         "offering_temp_id":{
            "displayName":"test-recurring1",
            "id":"cours000000000203226",
            "course_no":"00201084",
            "version":null
         },
         "delivery":{
            "id":"eqcat000000000000005",
            "displayName":"Web-Based"
         },
         "delivered_by":"emplo000000000019079",
         "deliveredby_no":"001000",
         "deliveredby_name":"User One",
         "assigned_on":"2016-08-24 17:58:06",
         "assignedBy":null,
         "due_date":null,
         "recert_window":null,
         "duration":0,
         "completionMode":0,
         "completedByContent":0,
         "expiration_date":"2016-12-09T18:30:00UTC",
         "action_no":"00105488",
         "completion_date":"2016-10-20T05:54:13.000+0000",
         "action_status":"200",
         "grade":"",
         "learner_id":null,
         "flags":1,
         "registration":null,
         "added_to_profile_on":"2016-07-29T04:14:13.000+0000",
         "offrng_start_date":null,
         "archived":0,
         "credits":null,
         "location":null,
         "party_id":{
            "id":"emplo000000000019079",
            "displayName":"User One"
         },
         "start_time":null,
         "end_time":null,
         "status":200,
         "id":"ofapr000000000121389",
         "customValues":{
            "custom0":null,
            "custom1":null,
```

```
            "custom2":null
         }
      }
   ],
   "totalResults":2,
   "hasMoreResults":true,
   "itemsPerPage":10
}
```

Use case

N/A

Enhancements to the TUA APIs

How did it work?

The following REST APIs has some limitations:

1. CREATE A NEW TRAINING UNIT AGREEMENT REST API didn't allow creating a new TUA with custom fields
2. CREATE A NEW TRAINING UNIT AGREEMENT and UPDATE DETAILS OF A TRAINING UNIT AGREEMENT didn't accept user-provided agreement number

How does it work now?

These APIs are now updated to allow creating a new TUA with custom fields and also accept user-provided agreement number, in case the auto-generation of the agreement number is disabled.

CREATE A NEW TRAINING UNIT AGREEMENT

Overview

Allows creating a new training unit agreement.

Requires OAuth

No

Method

POST

URL

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

Calling Options

Table 22: Calling Options

Name	Description	Sample Value	Data Type	Required?
owner_id	Organization for Training Unit Agreement	{"id": "cmpny000000000001001","displayName": "ExtOrganization"}	string	Yes

Name	Description	Sample Value	Data Type	Required?
order_contact	Order contact for Training Unit Agreement	{"id": "per~sn0000000000200327","dis~playName": "aaa"}"	string	No
expiration_date	Expiration date for Training Unit Agreement		string	No
agreement_no	Agreement Number for Training Unit Agreement **Note:** Can be passed in case the auto-gener~ation of the agreement number is disabled.		string	No **Note:** agree~ment_no is a required field when auto-gener~ation is disabled.
trainingunit_id	Trainingunit for Training Unit Agreement	{"id": "tun~it0000000000001020","dis~playName": "Train~ing_unit_1"}	string	Yes
no_unit	No of units for Training Unit Agreement	1	string	Yes
currency	Currency	{"id": "crncy0000000000000001","dis~playName": "US Dol~lars"}	string	Yes
paymentType	Payment Type for Training Unit Agreement **Note:** Acceptable val~ues: • creditCard • paypal • invoiceMe	creditCard	string	Yes
paymentTransactionId	Payment Transaction ID for Training Unit Agreement	axxccssxx1001	string	No
invoiceRequest	Payment using InvoiceMe for Training Unit Agreement	{"details":"Payment by invoice","cus~tom0":"abc","cus~tom1":"def","cus~tom2":"Ok","cus~tom9":"9th"}	string	No
customValues	Custom values	{\"custom0\": \"1\"}	string	No

Request Body

```
{
    "owner_id":{
        "id":"cmpny000000000001002",
        "displayName":"Company3"
    },
    "agreement_no":"00001149",
    "expiration_date":null,
    "trainingunit_id":{
        "id":"tunit000000000001058",
        "displayName":"TU1"
    },
    "no_unit":19,
    "currency":{
        "id":"crncy000000000000001",
        "displayName":"US Dollars"
    },
    "paymentType":"invoiceMe",
    "paymentTransactionId":"axxccssxx1001",
    "invoiceRequest":{
        "details":"Invoice payment for TUA via rest api test",
        "custom0":"abc"
    },
    "customValues": {
    "custom0": true,
    "custom1": "cust1",
    "custom2": "cust2",
    "custom3": "cust3",
    "custom4": "cust4",
    "custom5": "cust5",
    "custom6": "cust6",
    "custom7": "cust7",
    "custom8": "cust8",
    "custom9": "cust9"
  }
}
```

Return Values

```
{
  "id": "tutpo000000000001282",
  "displayName": null,
  "href":
"https://<hostname-api.sabacloud.com>/v1/tuagreement/tutpo000000000001282"
}
```

UPDATE DETAILS OF A TRAINING UNIT AGREEMENT

Overview

Allows updating an existing training unit agreement based on the Training Unit Agreement's ID.

Requires OAuth

No

Method

PUT

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*>

Calling Options

Table 23: Calling Options

Name	Description	Sample Value	Data Type	Required?
id	Training Unit Agreement's ID		string	Yes
agreement_no	Agreement Number for Training Unit Agreement **Note:** Can be passed in case the auto-generation of the agreement number is disabled.		string	No
expiration_date	Expiration date for Training Unit Agreement	2014-07-27T18:30:00.000+0530	string	No
customValues	Custom values		string	No

Request Body

```
{
    "customValues":{"custom0": "11111"},
    "agreement_no":"123123123"
}
```

Use case

N/A

Held Certification APIs to reflect expired reassigned status

How did it work?

The following REST APIs did not reflect expired reassigned status:

1. GET HELD CERTIFICATION/CURRICULUM DETAILS ALONG WITH ALL THE ACTIVITIES
2. SEARCH CERTIFICATIONS/CURRICULA OF LOGGED IN USER
3. SEARCH ALL THE CERTIFICATIONS/CURRICULA ASSIGNED TO A LEARNER BASED ON THE STATUS, TIMESTAMP
4. FIND DETAILS OF RECURRING COURSE COMPLETIONS
5. FIND DETAILS OF RECURRING COURSE COMPLETIONS (Using POST - Range based search)

How does it work now?

These APIs are now updated to return additional fields that help indicate if the certification was expired and reassigned:

- is_reassigned: Depicts whether this certification/recurring course had expired in past at least once.
  - 0 - Shows that this record doesn't have any expired record created in past.
  - 300 - Shows that this record has a past expired record for certification/recurring course for the same learner.
  - 700 - Shows that this record has a past revoked record for certification/recurring course for the same learner.
- prev_expired_on: It has the value of expired_on column of the last expired record that exists at the time of creation of this record. If there are no previous expired records of certification, it would hold null.

Return Values (the additional fields)

```
{
    "is_reassigned":300,
    "prev_expired_on":"2017-04-09T18:30:00UTC"
}
```

Use case

This enhancement includes the fields in the output of Held Certification APIs that help indicate if the certification was expired and reassigned.

FIND DETAILS OF ORDERS API to support additional search criteria

How did it work?

Currently, when using the FIND DETAILS OF ORDERS API, the search criteria mentioned below were not available.

How does it work now?

This API is now updated to include the following search criteria:

Overview

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

Method

GET

URL

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(:criteria_field==:field_value)&count=:count&startPage=:startPage

Examples of the search criteria that you can use with this API:

Searching Orders by Learner

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=?q=(learner_id%3D%3Demplo000000000200095)

Searching Orders by Date Range

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(created_on%3Dge%3D2015-01-08,created_on%3Dle%3D2015-04-09)

Searching Orders by Order Number

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(order_no%3D%3D00202910)

Searching Orders by Registration ID

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(registration%3D%3Dregdw000000000004040)

Searching Orders by Custom fields

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(custom0%3D%3Daaa)

Searching Orders by Course No

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(course_no%3D%3DINDEX5)

Searching Orders by Base Organization

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(ord_base_organization%3D%3Dcmpny000000000001000)

Searching Orders by Order Contact

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(ord_contact_username%3D%3DCONE)

Searching Orders by Bill to

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(ord_billto_organization%3D%3Dcmpny000000000001002)

Searching Orders by price

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(exter_total_charges%3D%3D12)

Searching Orders by status

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(ord_status%3D%3DConfirmed)

Searching Orders by Title

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(offering_id%3D%3Ddowbt000000000001590)

Searching Orders by created_on

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(created_on%3Dge%3D2017-01-08,created_on%3Dle%3D2017-04-09)

Searching Orders by method of Payment

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(exter_method_of_payment%3D%3D13)

Searching Orders by Delivery Type

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(delivery_type%3D%3DWEB-BASED)

Searching Orders by Created By

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(exter_created_by%3D%3DUONE)

Searching Orders by Updated By

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(exter_updated_by%3D%3DUONE)

Searching Orders by Updated On

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(exter_updated_on%3Dge%3D2017-01-08,exter_updated_on%3Dle%3D2017-04-09)

Searching Orders by Group Admin

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(group_admin_id%3D%3Demplo000000000001010)

Searching Orders by Account Number

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(ord_account_no%3D%3D001000)

Searching Orders by Approval Status

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(orditem_approval_status%3D%3D400)

Searching Orders by Billing Status

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(orditem_billing_status%3D%3D200)

Searching Orders by Contact First Name,Contact Last Name

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(perso_contact_id_fname%3D%3DClient,perso_contact_id_lname%3D%3DOne)

Searching Orders by Purchase Order Number

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(po_number%3D%3d1919)

Searching Orders by Promotion Code

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(promotion_code%3D%3Dnew1)

Searching Orders by Subscription Order No

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(subscription_no%3D%3d00001012)

Searching Orders by registration

https://<*hostname-api.sabacloud.com*>/v1/learning/order?q=(registration%3D%3Dregdw000000000004040)

Use case

N/A

New REST APIs

Profile APIs for following a person

How did it work?

These are new REST APIs.

How does it work now?

The following REST APIs are now available that will allow to start or stop following a user and also retrieve all the people following a particular user:

- GET PERSON'S FOLLOWERS
- GET PERSON'S FOLLOWINGS
- FOLLOW PERSONS
- STOP FOLLOWING A PERSON

GET PERSON'S FOLLOWERS

Overview

Returns the list of persons who follow the particular person.

Requires OAuth

No

Method

GET

URL

https://<*hostname-api.sabacloud.com*>/v1/common/profile/:personId/followers

URL (User-friendly)

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

https://<*hostname-api.sabacloud.com*>/v1/common/profile/username%3D<*UserName*>/followers

Calling Options

Table 24: Calling Options

Name	Description	Default Value	Data Type	Required?
personId	Person's ID	em~ plo000000000001026	string	Yes

Return Values

```
[
  {
    "id": "emplo000000000001000",
    "displayName": "User One",
    "href":
"https://<hostname-api.sabacloud.com>/v1/people/emplo000000000001000"
  }
]
```

GET PERSON'S FOLLOWINGS

Overview

Returns the list of persons who are followed by the particular person.

Requires OAuth

No

Method

GET

URL

https://<*hostname-api.sabacloud.com*>/v1/common/profile/:personId/follows

URL (User-friendly)

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

https://<*hostname-api.sabacloud.com*>/v1/common/profile/username%3D<*UserName*>/follows

Calling Options

Table 25: Calling Options

Name	Description	Default Value	Data Type	Required?
personId	Person's ID	em~ plo000000000001026	string	Yes

Return Values

```
[
  {
    "id": "persn000000000001024",
    "displayName": "Client5 One5",
    "href":
"https://<hostname-api.sabacloud.com>/v1/people/persn000000000001024"
  },
  {
    "id": "persn000000000001000",
    "displayName": "Client One",
    "href":
"https://<hostname-api.sabacloud.com>/v1/people/persn000000000001000"
  },
  {
    "id": "emplo000000000001002",
    "displayName": "User Three",
    "href":
"https://<hostname-api.sabacloud.com>/v1/people/emplo000000000001002"
  }
]
```

FOLLOW PERSONS

Overview

Follow specified persons.

Note: It is the logged in user who starts/stops following. An admin cannot make someone start/stop following others.

Requires OAuth

No

Method

POST

URL

https://<*hostname-api.sabacloud.com*>/v1/common/profile/follows

Calling Options

Table 26: Calling Options

Name	Description	Default Value	Data Type	Required?
personList	List of IDs of the Persons to be followed		string	Yes

Request Body

```
{
 "personList": [
 {
```

```
  "id":"emplo000000000001027"
 },
 {
  "id":"emplo000000000001028"
 },
 {
  "displayName":"CONE4"
 }
]}
```

Note: If some of the users specified in the input list are already followed by the logged in user then warnings are returned for those specific users:

```
{
  "warnings": [
    "persn000000000200347 already follows emplo000000000001027",
    "persn000000000200347 already follows CONE4"
  ]
}
```

STOP FOLLOWING A PERSON

Overview

Stop following a person.

Note: It is the logged in user who starts/stops following. An admin cannot make someone start/stop following others.

Requires OAuth

No

URL

https://<*hostname-api.sabacloud.com*>/v1/common/profile/follows/:personId

URL (User-friendly)

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

https://<*hostname-api.sabacloud.com*>/v1/common/profile/follows/username%3D<*UserName*>

Calling Options

Table 27: Calling Options

Name	Description	Default Value	Data Type	Required?
personId	Person Id	em~plo000000000001026	string	Yes

Note: If the logged in user is not following the specified user then an error message is returned:

```
{
  "errorMessage": "emplo000000000001000 is not following emplo000000000001026"
}
```

Use case

N/A

Enhancements to the API Dashboard

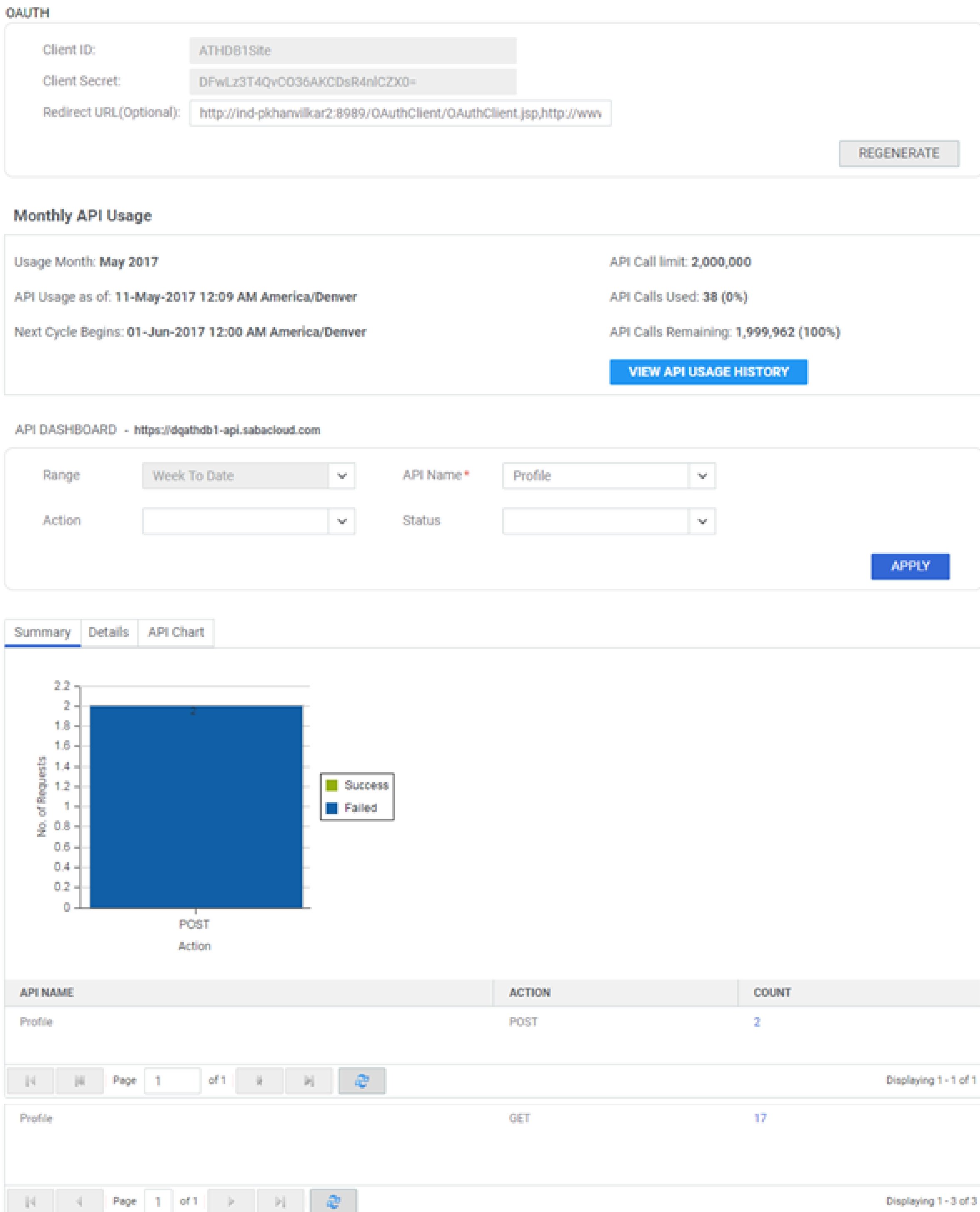
How did it work?

The existing API dashboard provided limited information with respect to cumulative API filter.

How does it work now?

The cumulative monthly API limit and usage is now replaced with a more detailed section (Monthly API Usage).

The date and time in **Monthly API Usage** section is shown as per site's timezone.



View the API usage history by clicking **VIEW API USAGE HISTORY** to view the past six months data.

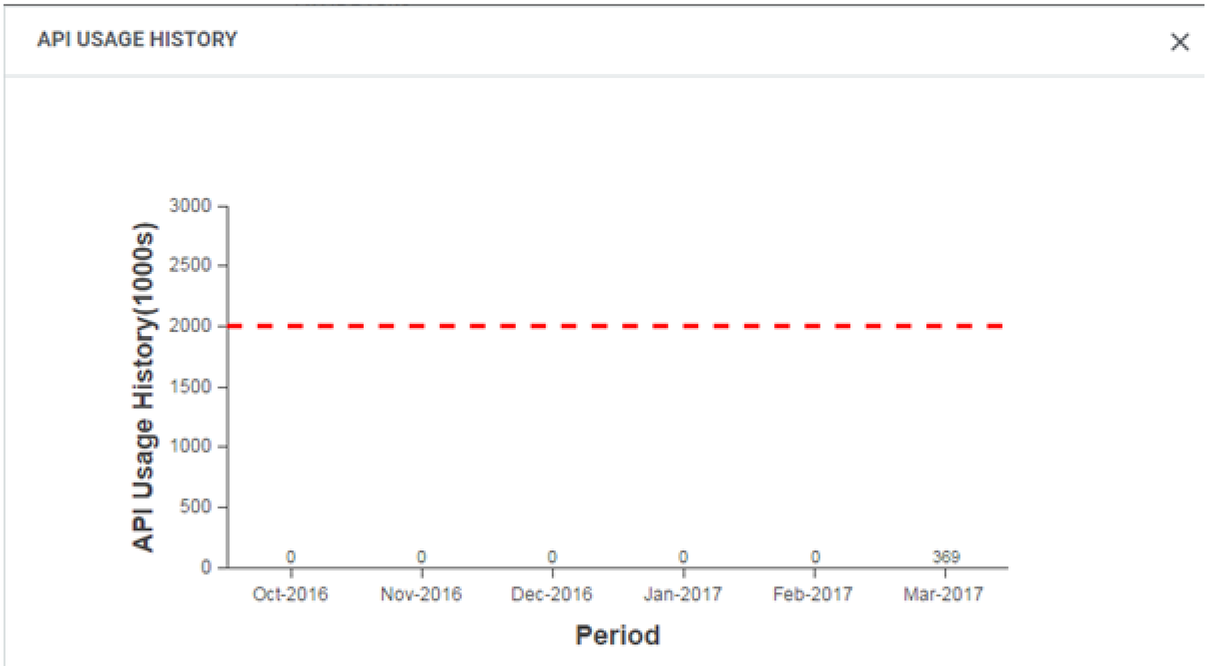


Figure 210: API Usage history

Figure 209: Summary

Customers will have a hard stop limit on the number of API calls they can make. An error message will be shown if more APIs are called than the limit. If you wish to increase the hard stop limit, contact your Account Manager or Saba Support.

These changes help make the Cumulative API usage more readily visible on the API dashboard.

Use case

API dashboard is now enhanced so it is clearer to users when they will hit the API Call limit.

Chapter 14

Talent

Topics:

- Removed hover message from Successor Status column
- Role expansion of Talent administrator

Removed hover message from Successor Status column

How did it work?

The hover message on the **Successor Status** column on the Talent Dashboard page was no longer needed as the statuses under the column were self explanatory.

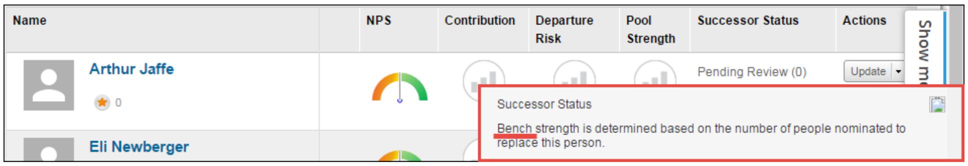


Figure 211: Hover messages with term Bench

How does it work now?

The hover message has now been removed from the **Successor Status** column.

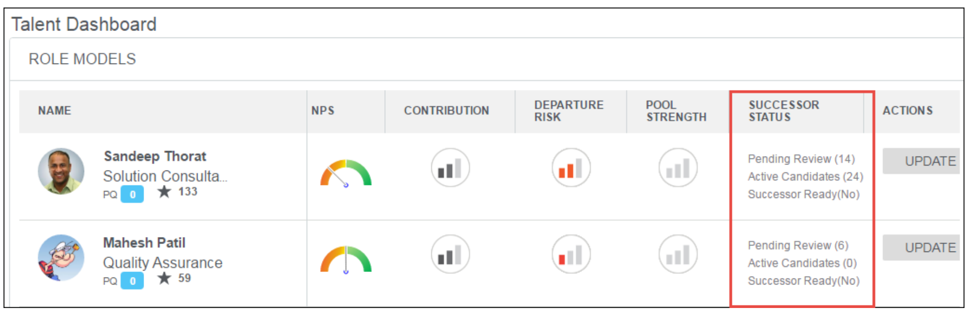


Figure 212: No hover message on Successor Status column

The above hover message is removed from:

- Admin > Talent > Talent Dashboard (Successor Status column in Star Employees and Role Models dashboard)
- Admin > Talent > Search > Talent Search > Search results > Successor Status column in the dashboard
- My Team > Talent > Talent Dashboard > Successor Status column

Use case

N/A.

Role expansion of Talent administrator

How did it work?

If the administrator or manager associated with the pool is terminated or left the organization, then no other administrator could take any action on that pool. The pool co-owner could take action only if the Edit privileges are granted to that user. There was a need to increase the scope of talent administrator so that none of the pools are left unattended.

How does it work now?

The Talent administrator's role has now been expanded such that the administrator has the following full permissions on the pool:

Important: The pool's domain must be same as talent administrator's domain.

- View all talent data including the performance review score.
- Edit pool details including updating owners and co-owners even when the pool is in Open state.
- Assign checklists to pool members.
- Move pool candidates through the workflows i.e., moving to **Active Candidates** tab or to **Not Selected** tab and so on.
- Rank pool members.
- Edit data which only manager could edit on the Talent Profile screen.
- Create, edit, and delete n-box snapshots created by manager.

Note: The administrator cannot view talent pools in other domains even if he/she is the owner or co-owner.

Use case

Talent administrator is responsible for the integrity of the data contained in the Talent area and thus needs to be able to assist with data input, correct errors, and reassign ownership of items when a manager leaves the organization. Since they are super users they should be to perform any task within the Talent module, as domain controls allow. If a manager resigns, their talent pools and approvals need to be reassigned. Talent admin is the one that needs to be able to perform these functions. A talent admin working with a group of managers can also be asked to help with the data input, hence they need to be able to access the same screens as a manager can. This role expansion can now help the talent administrator have full access on pools.