Saba People Administrator Dropdown
http://train.oar.msu.edu

Begin by choosing People Administration dropdown. You must have requested this in advance and documented need for viewing training records and acceptance of MSU’s policy on acceptable data use and FERPA regulations.

Search and View a Person’s Profile
1. From the People tab > Internal menu item (left side), enter enough information in the fields provided to narrow your search for a specific person. You don’t need to enter every field and you don’t need to complete the entire field (e.g. first few letters of a name will work better than the wrong spelling of a name.
2. Click Search button.
3. From the list of results below the search panel, click FULL PROFILE.
Add a Job Role / Certification
People Admins can add training requirements to a person’s account by adding a Job Role.

1. Go to the **Current Job Information** tab. Tabs can be collapsed by clicking their arrow box.

2. Click **Add Required Role** link (right side of inside the Required Roles box)

3. A pop-up box will open to allow you to **search** for the right Job Role.
   Most Job Role names are directly related to a Certification name.
   If you aren’t sure of the name, type the percent sign % and then a key word to narrow the Role search;
   Leave the Role field blank and hit Search button to get the full list of Job Roles to choose from.

4. When the Job Role is added, the Certification will be added below in the Certifications box below.

5. If you discover a certification no longer applies to someone, email the Helpdesk to have it removed from the person or team. Managers and relevant compliance personnel will be sent notification.
# Notifications

When training is assigned, email notifications are sent at specific times.

<table>
<thead>
<tr>
<th>Trigger</th>
<th>Notification Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor-Led Offering Enrollment: Sent to confirm enrollment in an instructor led training. Web offerings are not confirmed since trainees typically launch and finish at time of enrollment and don’t need a reminder to add to their calendar.</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Who Receives: Trainee</td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
</tbody>
</table>

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<th>Trigger</th>
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</thead>
<tbody>
<tr>
<td>Recertification Reminder:</td>
<td><img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>Email notifies trainee that it is time to complete refresher training. Sent 30 days prior to end of certification period.</td>
<td><img src="image4.png" alt="Image" /></td>
</tr>
<tr>
<td>Who Receives: Trainee</td>
<td><img src="image5.png" alt="Image" /></td>
</tr>
</tbody>
</table>

| Certification Expiration: | ![Image](image6.png) |
| Sent on the night the Certification expires because the refresher training was not completed. Trainee is re-assigned the Certification anew. Trainee or manager must contact helpdesk to have the certification (and reminders) stopped. | ![Image](image7.png) |
| Who Receives: Trainee, Manager(s) and/or Alternate Manager(s) Some certification owners may choose to receive all notifications also. | ![Image](image8.png) |
Set-Up a Proxy View

Occasionally, it is helpful to view the screens of another user. For example,

- If you want to view an Alternate Manager’s Team Dashboard.
- If you want to give someone else access to view your Team Dashboard or your reports.
- If someone asks for help with registering for a course or troubleshoot another problem.

1. From the People Admin dropdown, click People tab, then Proxy View menu item.

2. Click Add Proxy (found below the Search button).

3. Type into first field, your NetID and hit Enter. Or enter any part of your name to see similar names. Find and complete the next fields. You can also use the picker.

   - 3a. Your NetID
   - 3b. Who you will view
   - 3c. Start (e.g. today or vacation start)
   - 3d. End (end on same day or last day of month, year, or decade)

4. Click Home tab. Save. Leave unchecked if you only need to see someone’s Team Dashboard.

5. If you discover a person should be added to a Team, or that a person/s should be removed from a Manager’s Team, email the Helpdesk to update the Team.
Frequently Asked Questions

Q. How can I get someone added (or deleted) to a manager’s team?
   A. Contact the Helpdesk. Those permissions are currently only given to System Admins.

Q. How can I get a Job Role or Certification removed from someone’s account?
   A. Contact the Helpdesk. Those permissions are currently only given to System Admins.

Q. Does an Inactive/Terminated learner still show up on reports?
   A. Yes, by default, but the ad hoc reports have all been modified to filter out inactive people.

Q. How are the status of employees being updated?
   A. Periodically, HR employment status is captured and used to update Saba person records. New employees are added and those who have been terminated are changed to Inactive status.

Q. Why does the employee have two records for the same certification on my report?
   A. When a certification expires (because the employee did not complete the refresher by the end of the certification period), the Saba re-assigns the certification. At times, this can result in both the expired status and the assigned status. Neither indicates compliance.

Q. Can I get an email when someone’s certification expires?
   A. Yes. Let a Saba admin know that you want to get copied. Email train@ora.msu.edu or call.

Q. Can the system send out an email when I add the Job Role/Certification to their profile?
   A. Yes, but this is a system-wide setting and currently, the policy is to keep this setting off.

Q. How do I get training records added to Saba after I conducted a training?
   A. If the course was not set-up in advance with pre-registration, send the records to the Helpdesk. If there was pre-registration/seat reservation, you can enter the completions using the Instructor Desk or by sending the records to the Helpdesk.

Q. Does an Inactive/Terminated learner still show up on reports?
   A. Yes, by default, but the Ad Hoc reports have all been modified to include Active status parameter (hidden).

Q. Does failure to complete training during Recertification period show an Overdue or an Expired?
   A. Reports always show Expired Certification (even if also re-Assigned or Overdue in the history or dashboard views).

Q. What does it mean when a Certification is listed twice on a report?
   A. Reports show each time a certification is assigned/re-assigned.

Q. Do Obsolete/Discontinued certifications remain on reports and dashboards?
   A. Yes.

Web Resources
Includes videos and animations for common tasks. Any printable handouts are listed at bottom of page.

- Login help including non-MSU people needing CommunityID - http://ora.msu.edu/login-help
- About Certifications and other organization of training - http://ora.msu.edu/certifications
- Documentation of my training inc printing certificates or attaching files for review
- Errors and warnings: what do they mean; how to fix - http://ora.msu.edu/warnings
- Team Dashboard for supervisors - http://ora.msu.edu/pi-or-other-manager-faq
- Trainer tasks and offering set-ups - http://ora.msu.edu/trainersinstructors-tasks-views
- Reports: how to get access to Reporter and run basic reports; also includes resources for People Admin inc assigning job role/certification and proxy view - http://ora.msu.edu/reports