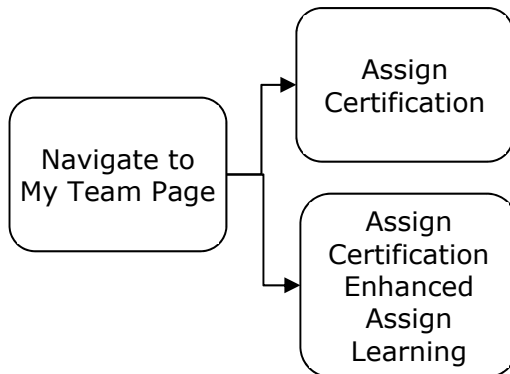


Job Aid: Assigning a Certification to a Team Member(s)

Process

Process flow



Process steps

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

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

Additional Information

When working with bulk registrations, how are error/warning messages handled?

The **Select People** step of the **Assign Learning** wizard does not display the error/warning messages after clicking the select arrow icon in the **Action** column. Instead, the wizard first adds the users to the **Selected People** pane and displays a **Verifying...** message while validating the users.

If there are any errors or warnings for the person, then a **Click to view Error(s)/Warning(s)** link is displayed for the user. Clicking this link opens the Alerts popup page that displays errors and warning associated with the user, and **Continue** and **Close** buttons. If there are only errors, then you cannot take any action on them and so Saba Cloud displays only the **Close** button.

You can select or clear any of the warning messages and then click the **Continue** button, which results in to the following:

- Creates internal orders for users with selected warnings
- Removes orders for users whose warnings are not selected, and
- Removes orders for users with errors

Clicking Close just closes the popup page.

The **Selected People** pane also displays a **View all errors and warnings** link. Clicking this link opens the **Alerts** popup page that displays a combined view of all errors and warnings for all selected users. The **Continue** and **Close** buttons work similar to the way it works for individual users.

Saba Cloud make it mandatory to take action on the warnings that are displayed for selected users in the wizard, without which you cannot proceed to the next step of the wizard. So if you are viewing error/warning of individual users, then you must ensure that you take some action on the warnings of each user and then click the **Continue** button in the popup page for each such user. Similarly, if you are viewing at the combined errors/warnings of all selected users, then you must ensure that you take some action on the warnings and then click the **Continue** button.

If any warnings are left unattended, then Saba cloud displays the same combined **Alerts** popup page when you click the **Next** button of the wizard. Take the required action on the warnings and click **Continue** to proceed to the summary step of the wizard.

What other options are available in the Assign Learning flow?

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

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

- Language
- Sort By with the following options:
 - A-Z
 - Z-A
 - Relevance
 - Recently Added
 - Recently Modified
 - Rating (high to low)
 - Rating (low to high)
 - Most Shared
 - Most Commented

➞ *Note: These filters also appear in the **Enhanced New Order** page for Registrars.*

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

Add Person

Person Search:   Filters

☒ Judy Womack 
☒ Jared Allen 

☒ Direct Team
 ☐ Alternate Team
 ☐ Organization
 ☐ SELECT ALL

Name	Manager	Mandatory	Add
 Judy Womack Nurse Director	Pat Rose	Yes <input checked="" type="button" value="No"/>	
 Jared Allen Regional Manager	Pat Rose	Yes <input checked="" type="button" value="No"/>	

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

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

References

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