Overview: The Comprehensive Learning Report provides HRMS training data completion (and non-completion) for all currently active University employees, student employees, university affiliates, and other persons of interest (POIs).

This report offers the following run control options or selection criteria parameters:
- campus, campus subgroup (node on the HR Tree), or individual employee
- job code
- employees and POIs
- training completions, non-completions, or both completions & non-completions combined
- date ranges, such as fiscal year
- personnel group(s)
- departments
- courses

Report output includes all of the following fields:
- Course #, Course Session #, Course Title
- Completion Date, Grade (Score)
- Employee ID, Empl Record #, Employee Type, Job Start Date
- Employee Name, Email Address, Phone #
- Campus, Department ID, Department Description (Name)
- Position #
- Job Code, Job Code Description
- Supervisor EmplID, Name, Email
- POI Type, POI Effective Date

Access: If you currently have access to HRMS, then you have access to this report based on the Role(s) assigned to you. If you do not have current security access to HRMS, request access to Inquiry Enterprise Learning role category, by completing the Human Resource System Access Request form at: http://www.cu.edu/employee-services/hrms

Note: The screen shots used in this guide may not be representative of your HRMS security access.

Navigation Shortcut: University portal https://my.cu.edu/ > Resources tab > Business Applications > HRMS
How to run the Comprehensive Learning Report:


2. Comp Learning Report page displays.
   - The first time an end user runs a Comprehensive Learning Report, a new Run Control ID must be created.
   - Click the Add a New Value tab
   - Enter a Run Control ID description.
     - Note that spaces are not valid.
   - Click Add. This will take you to the run control parameters page

3. If this is not the first time you have run a Comp Learning Report, use a previously saved Run Control ID.
   - Click Search to display your list of saved Run Control IDs.
   - Choose an existing Run Control ID from the.
   - Note that Run Control ID contains specific parameters you have previously set and saved for this report. These may be changed to meet your new report parameters, or you may want to add a new Run Control ID.

Note: Adding separate “new” Run Control ID’s for different repetitive reporting needs can save time. (i.e. for reports run weekly, monthly or quarterly.)
4. Setting the Run Control parameters for your report.
   a. Select Include POIs, if affiliates should be included.
   b. In the Report Non-Completion/Completions data box, choose the radio button that will return the information needed.
   c. In the Select Date Range box, enter the From Date and End Date.
   d. In the Course box, as many courses as desired by checking the plus box at right to add new rows.
   e. To launch your report in HRMS, click the Run button at the top right.

Additional Information about optional report parameter fields above.
   a. Campus – Used to look at all transactions for a single campus and may be used in conjunction with a Campus Subgroup to narrow the output.
   b. Job Code – Used to limit the report results to a single job code. If additional parameters are not used the report will return results for every relevant course completion for that job code within row-level security.
   c. EmplID – Used to limit the report results to a single employee ID or POI ID.
   d. Personnel Groups – Used to limit the report results to a Personnel Group (a job code series) within row-level security.
   e. Department - Used to limit the report results to a single department. If additional parameters are not used the report will return results for every relevant course completion within department row-level security. Enter a number of departments by adding additional rows by clicking on the plus box at the right.
   f. Course – Used to find the completion output for specific course(s). Enter as many courses as desired by adding additional rows using the plus box at the right. Leave blank to run for all courses.

Note: Remember that the results delivered in the report are based on your HRMS row-level security. If you select parameters outside your security profile, the report will not produce/return any data.

5. The Process Scheduler Request page displays.
   a. Select PSUNX as the Server Name
   b. Verify report Type is Web
   c. Verify the Format is CSV

Note: The Comprehensive Learning Report is delivered only in CSV format, which can be saved to your desktop as an Excel document.

Click OK.

6. When you click OK, the Comp Learning Report parameters page will re-display. You may enter new parameters and run another report while you wait for the first report process to complete.
   a. Click the Report Manager link to access the report(s) you have requested to run.
7. The Report Manager page, Administration Tab displays a Report List.
   - The report Details link will not display until the process Status changes from “Processing” to “Posted.” Click Refresh until the report is posted.
   - Click the Details link to open the completed report.

8. The Report Details page will display. Run Status will read Success.
   - In the File List Name column, click the second link displayed, trn072cu_xxxxxxx.csv. This is the link to the csv-formatted report delivered by HRMS.
   - The number that follows the trn072cu is the Process Instance number assigned by the HRMS reporting system that uniquely identifies the report you requested.

9. A request box opens. Click okay, choose Open, Save, or Save as to save the CSV (comma separated values) report to your computer in an Excel format.
   - The Comprehensive Learning Report currently returns 23 fields of information about each course completion, and may be sorted and displayed by any field of interest.
   - The first 2 or 3 rows are usually information about the report and parameters you chose, which can be deleted prior to formatting and sorting the data in Excel. Row 3 of the report usually displays the actual column field labels for the report.

Note: Please see separate Excel Report Formatting Information for instruction on how to sort and format the Comprehensive Learning Report within Excel.