

Comprehensive Learning Report: Step-by-Step Guide

HRMS Enterprise Learning - Comprehensive Learning Report

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

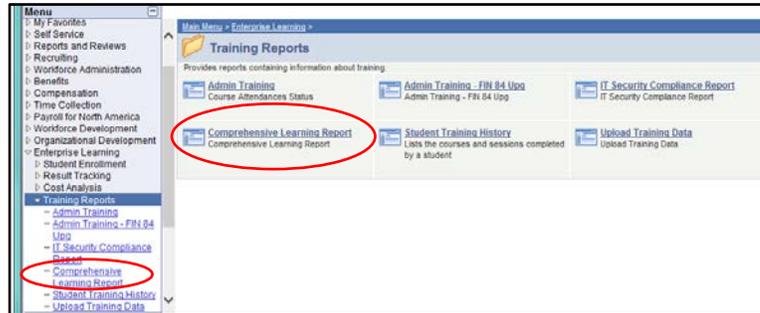
Access: If you currently have access to HRMS, then you have access to this report based on the Role(s) assigned to you. If you do not have current security access to HRMS, request access to **Inquiry Enterprise Learning role category**, by completing the Human Resource System Access Request form at: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

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

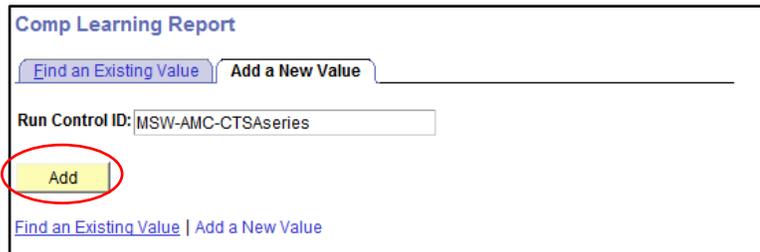
Navigation Shortcut: University portal <https://my.cu.edu/> > Resources tab > Business Applications > HRMS

How to run the Comprehensive Learning Report:

1. Navigate to the **Enterprise Learning** module in HRMS: HRMS>Enterprise Learning>Training Reports>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**.
 - Chose 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.

- Select **Include POIs**, if affiliates should be included.
- In the **Report Non-Completion/Completions data** box, choose the radio button that will return the information needed.
- In the **Select Date Range** box, enter the **From Date** and **End Date**.
- In the **Course** box, as many courses as desired by checking the plus box at right to add new rows.
- To launch your report in HRMS, click the **Run** button at the top right.

Additional Information about optional report parameter fields above.

- **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.
- **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.
- **EmpID** – Used to limit the report results to a single employee ID or POI ID.
- **Personnel Groups** – Used to limit the report results to a Personnel Group (a job code series) within row-level security.
- **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.
- **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.

- Select **PSUNX** as the **Server Name**
- Verify report **Type** is **Web**
- 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.

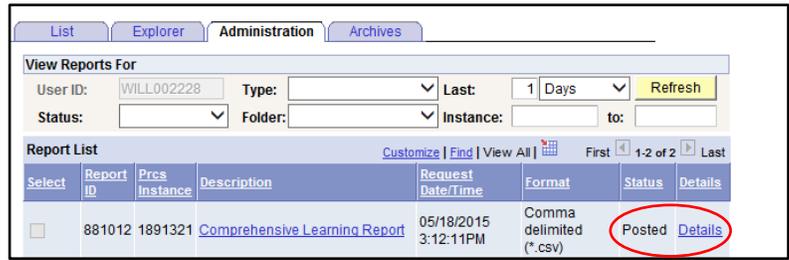
Click **OK**.

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.

- 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.

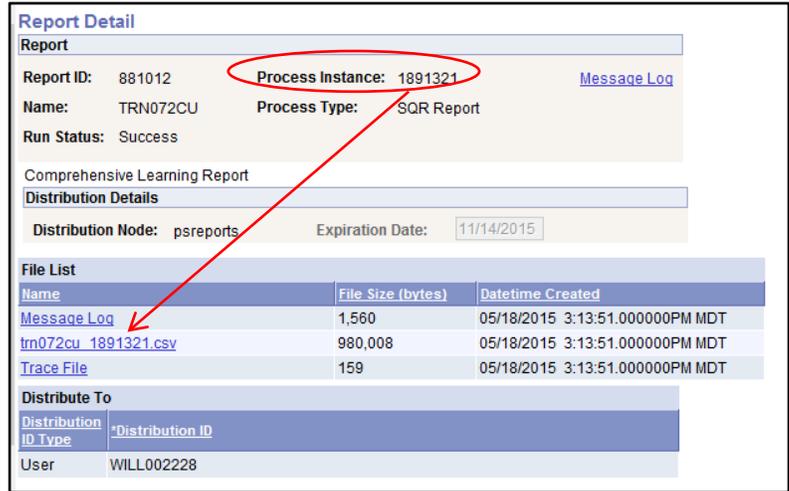


Note: Large campus-wide training reports for a number of courses run at one time may take 5-10 minutes to display.

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.

Note: 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.

Note: 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.

Course	Title	Session	Completion Date	Grade	Emplid	Empl Rcd	EE Job Start Date
S10007	Discrimination&Harassment-WEB	1	4/15/2015	87	117854	2	8/15/2003
X00490	SK: Asbestos Awareness	1	4/8/2015	88	117854	2	8/15/2003
U00118	IACUC Refresher Training-WEB	1	5/7/2014	82	117854	2	8/15/2003
U00096	PeopleAdmin/JobsatCU-WEB	1	3/17/2014	83	117854	2	8/15/2003
Z10007	CITL IRB1 Panel A SB Basic	1	10/29/2013	80	117854	2	8/15/2003

Course	Title	Session	Completion Date	Grade	Emplid	Empl Rcd	EE Job Start Date	Employee Name	Email Address	Phone
S10007	Discrimination&Harassment-WEB	1	4/15/2015	87	123456	2	8/15/2003	Pooh, Winnie	winnie.pooh@cu.edu	303/860-1111
X00490	SK: Asbestos Awareness	1	4/8/2015	88	123456	2	8/15/2003	Pooh, Winnie	winnie.pooh@cu.edu	303/860-1111
U00118	IACUC Refresher Training-WEB	1	5/7/2014	82	123456	2	8/15/2003	Pooh, Winnie	winnie.pooh@cu.edu	303/860-1111
U00096	PeopleAdmin/JobsatCU-WEB	1	3/17/2014	83	123456	2	8/15/2003	Pooh, Winnie	winnie.pooh@cu.edu	303/860-1111
Z10007	CITL IRB1 Panel A SB Basic	1	10/29/2013	80	123456	2	8/15/2003	Pooh, Winnie	winnie.pooh@cu.edu	303/860-1111

Empl Type	Cam pus	Dept id	Department Description	Position #	Job code	Jobcode Description	Supervisor Emplid	Supervisor Name	Supervisor Email	POI Effective Date	POI Type
EMP	5	51000	Employee Services	222222	1212	Working Employee	234567	Robin,Chris	chris.robin@cu.edu		
EMP	5	51000	Employee Services	222222	1212	Working Employee	234567	Robin,Chris	chris.robin@cu.edu		
EMP	5	51000	Employee Services	222222	1212	Working Employee	234567	Robin,Chris	chris.robin@cu.edu		
EMP	5	51000	Employee Services	222222	1212	Working Employee	234567	Robin,Chris	chris.robin@cu.edu		

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