# 8.9 HRMS Step by Step Guide
## Comprehensive Learning Report (HRMS Enterprise Learning)

**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). HRMS serves as the "system of record" for all training completed for university employees, student employees, affiliates and Persons of Interest (POI's).

People running these reports are restricted to the departments or nodes within their row-level security. When attempting to run the report by selecting parameters outside your security profile, the report will not produce/return any data. Setting up the run control parameters can provide a dynamic reporting tool that allows for easy tracking and analyzing of currently active employee and POI training records. This report offers the following run control options or selection criteria parameters:

➤ for an entire campus, for campus subgroup (node on the HR Tree), or for an individual employee
➤ for a particular job code
➤ for employees and POIs in your department (check box to include POIs in the report)
➤ for training completions only, non-completions only, or both completions & non-completions combined (select one of the radio buttons)
➤ for selected training date ranges, such as fiscal year
➤ for one or more specific personnel group(s)
➤ for one or more departments
➤ for one or more courses, or all HRMS courses by leaving course blank

Report output includes all of the following fields:

➤ Course #, Course Session #, Course Title
➤ Completion Date, Grade (Score)
➤ Employee ID, Empl Record #, 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

If you are unfamiliar with running HRMS Reports, you may wish to review the general Step-By-Step guide for **Running HRMS Reports** at: https://www.cusys.edu/pbs/sbs/CUonly/r/Running_HRMS_Reports.pdf.
For a complete list of reports and reviews available in PeopleSoft 8.9, go to:
https://www.cu.edu/pbs/hrms/training/downloads/online/RepIng-Resource-Guide.pdf
**Access:** If you currently have access to HRMS, then you have access to this report based on the Role(s) assigned to you (ex: Inquiry, Payroll Personnel Liaison). If you do not have access to HRMS, you may request access to the **HRMS ACCESS ROLE** titled **Inquiry Enterprise Learning-Training Reporting,** which provides training data only (no personal data or job data). To receive access for the training Role only, please complete the Human Resource System Access Request form at:
https://www.cu.edu/ums/security/CUonly/AMPS/accessrequestforms.php.
**Note:** This Role does not require any prerequisite HRMS training to obtain access, but the IT Privacy and Security Web training is required for access to university computing systems.
*Note: The screen shots used in this guide may not be representative of your HRMS access.*

1. **Navigate to Reports and Reviews**
- Reports and Reviews
- Click on ▸**Training**

2. **Training Reports are displayed**
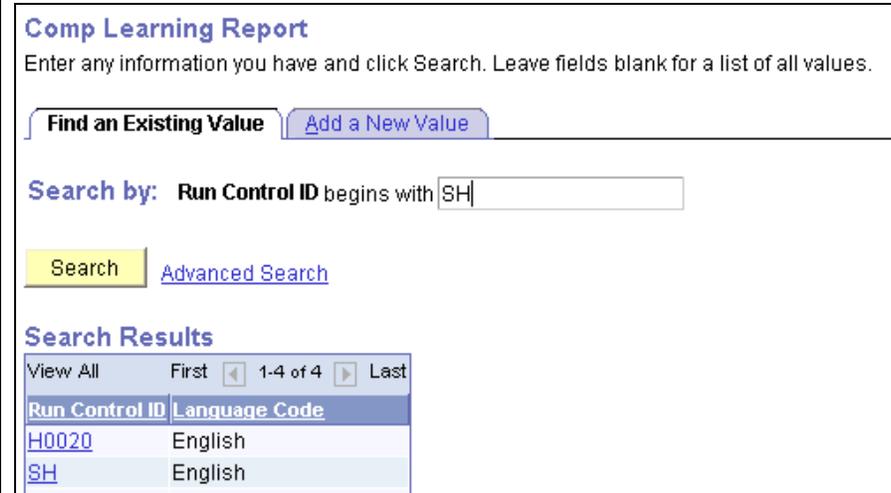- Click on **Comprehensive Learning Report**

3. **Comp Learning Report search page displays**
- Click on [ Search ] to find an existing run control ID value you have already set up

4. **Search Results display**
- Click on an existing **Run Control ID** or create a new Run Control ID
- To create a new ID, Click on **Add a New Value tab**

**NOTE**: Adding separate "new" **Run Control ID's** for different repetitive reporting needs can save some time

5. **Add a New Value page displays**
- Enter a new **Run Control ID**, **Note**: Spaces are not valid
- Click on [ Add ]

**Training**

Training

| Admin Training | Student Training History | Review Training Summary |
|---|---|---|
| Course Attendances Status | Student Training History | Displays all training courses student has taken |

Comprehensive Learning Report
Comprehensive Learning Report

**Click One**

**Comp Learning Report**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[ Find an Existing Value ] [ Add a New Value ]

Search by: Run Control ID begins with [ SH ]

[ Search ]   Advanced Search

**Search Results**

| View All | First ◄ 1-4 of 4 ► Last |
|---|---|
| **Run Control ID** | **Language Code** |
| H0020 | English |
| SH | English |

**Comp Learning Report**

[ Find an Existing Value ] [ **Add a New Value** ]

Run Control ID: [ Tng ]

[ Add ]

**6.** Comprehensive Learning Report **Run Control** parameters page displays:

**Note:** If your row-level security is not set at a high level of access for your entire campus or for campus subgroups, **bypass the Campus and Campus Subgroup fields**

- Enter a **Job Code**, only if running for specific job code
  
  *OR*
- Enter an **EMPLID** or **POI ID** only if running for one person
- Select/check ☐ **Include POIs** , if desired
- In the **Report Non-Completion/Completion data** box, use the radio buttons to have the report generate training **Non-completions** data only, **Completions** data only, or **Both**.
- In the **Date Range** box, enter **From and To Dates** to limit the time parameters for the report (Leave blank unless specific training date ranges are required)
- Use drop down arrow to select a **Personnel Group**(s), if desired
- Select **Department**(s), if desired
- Select **Course**(s). Enter (add) as many courses as desired by checking the 🞢 box at right to add rows, or leave blank to run report for all courses
- Click [ Run ] at the top right of this page
- Remember, the results delivered in the report are based on your row level security.

## Additional information for boxes ▢¹ numbered 1 – 6 (above on page 3):

1. **Campus** – This field is used to look at all transactions for a single campus and may be used in conjunction with a Campus Subgroup to narrow the output
2. **Job Code** – This parameter is 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 transaction for that job code within row-level security
3. **EmplID** – This parameter is used to limit the report results to a single employee ID or POI ID
4. **Personnel Groups** – This parameter is used to limit the report results to a Personnel Group (job code series) within row-level security
5. **Department** - This parameter is used to limit the report results to a single department. If additional parameters are not used the report will return results for every relevant transaction within department row-level security
6. **Course(s)** – This parameter is used to find the output for specific course(s). Enter as many courses as desired

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7. **Process Scheduler Request page displays**
- Enter **PSUNX** in the **Server Name**
- Verify report **Type** is **Web**
- Verify the **Format** is **CSV**

**Note:** This report is **not** available in PDF format

- Click **OK** and your report begins to process

8. **The Comprehensive Learning Report parameters page will re-display.**

**Note**: Enter new parameters and run another report while you wait for the first report process to complete

- Click on **Report Manager** link to access the report(s) you have requested to run

9. **Report Manager page, Administration Tab displays a Report List**
- The report Details link will not display until the process status is **Posted**
- Click **Refresh** until the report is **Posted**
- Click on the **Details** link or the report link under **Description** to open the completed report. (If a new window does not open, hold down the **Ctrl** key and click again)

**10.** The **Report Details** page will display.  Note that it displays the Run Status for your report.  It should say Success.
 In the **File List area,** under the Name column at the left, click on the second link displayed here **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 identifies the report your requested.

**Report Detail**

| Report | | | |
|---|---|---|---|
| Report ID: | 623905 | Process Instance: 1438260 | Message Log |
| Name: | TRN072CU | Process Type: | SQR Report |
| Run Status: | Success | | |

Comprehensive Learning Report

| Distribution Details | | |
|---|---|---|
| Distribution Node: | psreports | Expiration Date: 12/13/2015 |

| File List | | |
|---|---|---|
| **Name** | **File Size (bytes)** | **Datetime Created** |
| Message Log | 1,546 | 03/19/2013  4:25:39.000000PM MDT |
| trn072cu_1438260.csv | 175,871 | 03/19/2013  4:25:39.000000PM MDT |
| Trace File | 159 | 03/19/2013  4:25:39.000000PM MDT |

| Distribute To | |
|---|---|
| **Distribution ID Type** | **\*Distribution ID** |
| User | WILL002228 |

**11.** The Comprehensive Learning Report displays (in comma separated values (CSV format)

Print the report or save the report to your computer in an **Excel** format and then manipulate the data to meet your reporting display needs, and print if desired
**Note:** Row 3 of the report usually displays the actual column field labels.  The first two-3 rows are usually information about the report and parameters you chose, which can be deleted prior to formatting and sorting the data.

**Please Note**:  Large campus-wide training reports for a number of courses being run at one time may take 10-15 minutes to display due to size of the file that is created based on the request.

| A1 | | fx | Comprehensive Learning Report | | | | | |
|---|---|---|---|---|---|---|---|---|

trn072cu_353460.csv  [Read-Only]

| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Comprehensive Learning Report | TRN072CU | | | | | | | |
| 2 | All Courses | | Completed | Before | 4/15/2009 | | | | |
| 3 | Course | | Title | Session | Completion Date | Grade | Emplid | Empl Rcd | EE Job Start Date | Employee Name |
| 4 | F00001 | | Fiscal Code of Ethics WEB | 1 | 2/27/2006 | 200 | 117858 | 0 | 3/1/2001 | Hettema, Sharon A |
| 5 | | | | | | | | | | |

| | I | J | K | L | M | N | O |
|---|---|---|---|---|---|---|---|
| 1 | | | | | | | |
| 2 | | | | | | | |
| 3 | Employee Name | Email Address | Phone | Empl Type | Campus | Deptid | Department Description |
| 4 | Hettema, Sharon A | shari.hettema@cusys.edu | 303/735-0744 | EMP | | 5 | 51000 | Payroll & Benefit Services |
| 5 | | | | | | | |

| | P | Q | R | S | T | U | V | W |
|---|---|---|---|---|---|---|---|---|
| 1 | | | | | | | | |
| 2 | | | | | | | | |
| 3 | Position # | Jobcode | Jobcode Description | Supervisor Emplid | Supervisor Name | Supervisor Email | POI Effective Date | POI Type |
| 4 | 508212 | H6G3XN | General Professional III | 113109 | Affleck, Lisa C | lisa.affleck@cusys.edu | | |
| 5 | | | | | | | | |

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## Running the Comprehensive Learning Report is complete
## Continue below for some Excel Report Formatting Tips if Needed

# Formatting the Comprehensive Learning Report to meet Reporting needs:

**Important Notes:** This HRMS Comprehensive Learning Report was designed to produce a spreadsheet of data fields, based upon parameters set prior to running the report, which will deliver all appointment/job records for employees and POIs with <u>currently active</u> appointments and/or CU affiliations. It <u>will not</u> include terminated appointments for employees or employees on any type of leave.

**Please Note:** For purposes of this document, when it says 'employee or employees,' this will include the explanation for persons of interest/affiliates (POIs) as well.

## The primary uses envisioned for this Comprehensive Learning Report include the following:

1.  To produce a **training completion report** for a course or group of courses, so that managers, directors, vice chancellors, or vice presidents can ascertain which employees in their departments or campus have completed required training courses by a specific date. The report of training completions can then be sorted by department, by supervisor, or any number of fields offered in the data produced.
    *   Using the employee names and e-mail addresses delivered in the report, a recognition e-mail may be easily generated by the manager, director, or Chancellor for their campus thanking/acknowledging each employee directly for completing a required training course in a timely manner.
2.  To produce a **training non-completion report** for a course or group of courses, so that managers, directors, vice chancellors, or vice presidents can ascertain which employees have <u>not completed</u> required training courses by a specific date.
    *   Using the employee names and e-mail addresses delivered in the non-completion report, a direct e-mail may be easily generated by the manager, director, or Chancellor for their campus reminding each employee to complete the required training by a specific date.
    *   The report also produces the supervisor names and e-mail addresses for each non-compliant employee, so that a 2nd level of reminders may be sent out to the supervisors of employee's who have not completed required training. Those supervisors may then choose to deliver an e-mail or verbal reminder to their employees, or they may deal with the training course non-completion as a performance deficiency issue for the employee.

## Excel Report Formatting Options:

Save a Comma Separated Values (CSV) format Comprehensive Learning Report run from HRMS as an Excel Worksheet. To format and produce an accurate compliance completion or non-completion report, there are two formatting options in Excel that may be useful to simplify data, display data, and make reports as accurate as possible. The Comprehensive Learning Report was designed to serve a number of possible reporting purposes, and thus delivers many different data fields that may or may not be useful for the report to be produced. Thus, a decision must be made first about the delivered data fields that are useful, based upon the report outcome desired.

## Hide or Delete Data Fields from the Delivered Comprehensive Learning Report

To keep only those fields needed for the report being produced, choose to **hide or delete** some of the delivered fields (columns) of data. To do this, highlight the column for the data to hide or delete; right-click mouse, and choose **hide** or **delete** for the column(s).
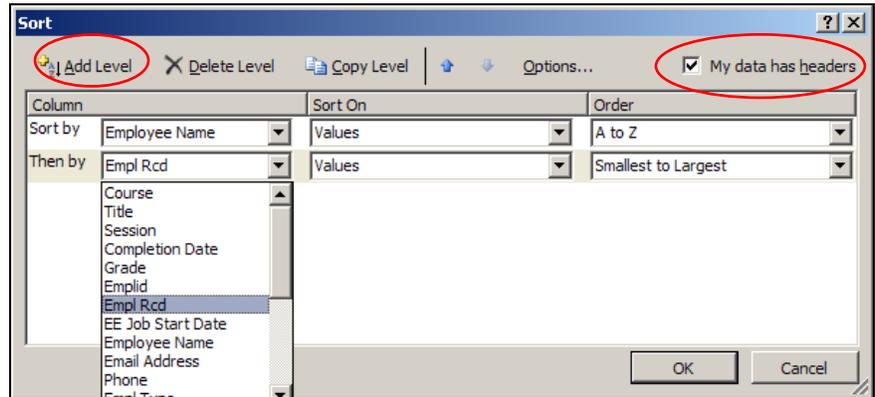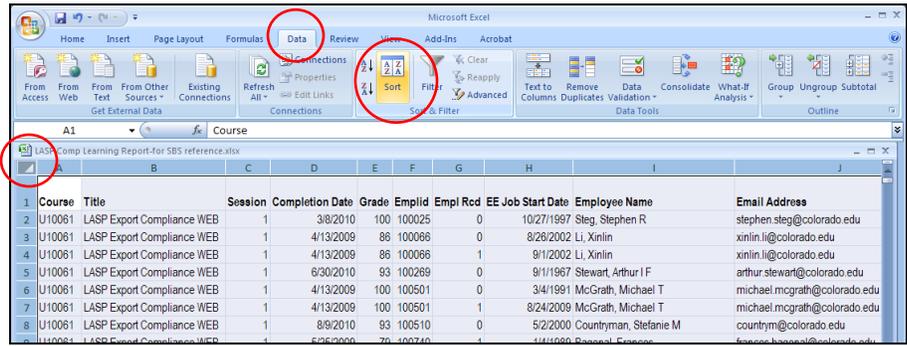
## Sort and Remove Duplicate Values

The **Comprehensive Learning Report** is designed to include all **active appointments** (see Empl Rcd field) for an employee. Thus, if there are employees in a department (or campus if running a campus-wide report), that have more than one appointment, job or affiliation in HRMS, they will show a number of repeated data rows (for different Employee Records) <u>for each course they have completed</u>. To determine/count the actual number of employees in a department or for a campus that have completed a specific course, **remove any duplicate employee records** and keep only one (Empl Rcd) per employee for that course.

Use the **sort** feature first and then the **remove duplicate values** feature second, in Excel to identify employees who have multiple records [rows] of data. When duplicate values are removed, only the values in the range of cells are affected. Any other values outside the range of selected cells are not altered or removed. Use caution, this permanently deletes data from your report, so it may be a good idea to backup the original data to another worksheet.
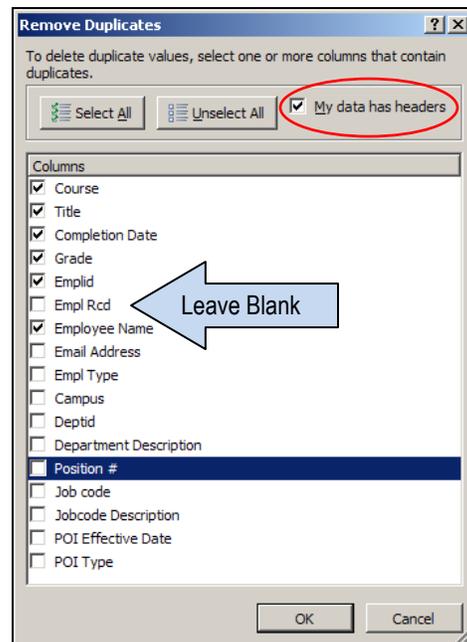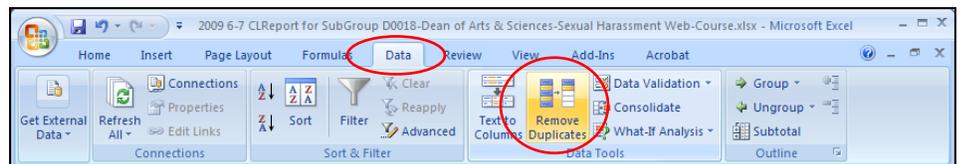
1. **First, Sort the Excel spreadsheet:**
   - Highlight the whole spreadsheet by clicking the upper left corner **box** on the Excel sheet. Then Select the **Data** Tab and use the **Sort** feature in Excel.

   - In the **Sort** dialogue box, be sure the **My data has headers** box is checked so that the Column names display properly.
   - In the **Sort** dialogue box choose **Employee Name** as the first sort criteria from the drop down list, and click **Add Level** to add another sort criteria line and enter **Empl Rcd**. This will produce a list alpha-sorted by Employees, showing all employee records for each employee, numbered from smallest, usually a "0" to largest, through/up to "7".
   - Click **OK** to complete the **Sort** function for the whole spreadsheet.
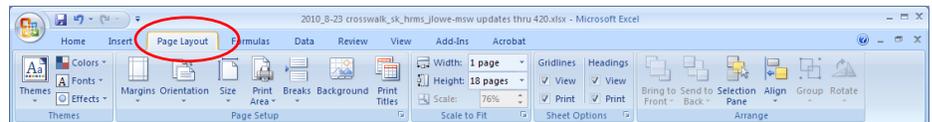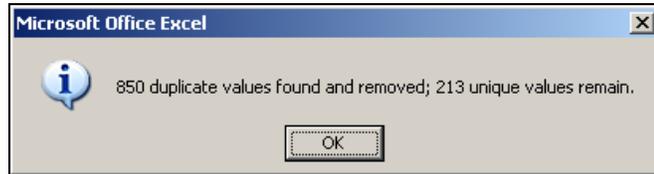
2. **To remove duplicate values for employees with multiple employee records in the report:**
   - Highlight the whole spreadsheet again. On the **Data** Tab, in the Data Tools group, select the **Remove Duplicates** feature and a dialogue box will appear.
   - Clicking on the **Remove Duplicates** will bring up a dialogue box.

   - In the **Remove Duplicates** dialogue box, be sure the **My data has headers** box is checked so that the Column names display properly.

   - Under **Columns**, select one or more columns prior to running the Remove Duplicates process. The range of cells will contain many columns. Click **Unselect All** box, and then under **Columns**, select by checking the boxes for only those columns that will show the same data for the

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duplicates to be suppressed. Check Course, Title, Completion Date, Grade, EmplId, Employee Name <u>only</u>. The **<u>Leave Empl Rcd</u>** box <u>must be left blank</u>.

- Click **OK** and a message is displayed indicating how many duplicate values were removed from the report and how many unique values remain, **OR** it will indicate that no duplicate values were found and removed.

- Click **OK** again**.** If done correctly, the report data should now display only **one** value for each employee who has completed the required training course.

- Use Excel **Page Layout** functions to set up your report for printing if desired.





**END**