

8.9 HRMS Step by Step Guide Comprehensive Learning Report (Training)

Overview: The Comprehensive Learning Report is designed to provide training data completion (and non-completion) for the university's employees and Persons of Interest (POIs).

Users running this report 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 any data. Setting up the run control parameters can provide a dynamic reporting tool that allows for easy tracking and analyzing of employee and POI training records. This report may include the following run control options or parameters:

- for your entire campus or campus subgroup (node on the HR Tree)
- for a specific employee group(s)
- for one or more departments
- for a particular job code
- for employees and POIs in your department
- for training completions/non-completions or both
- for one, multiple, or all HRMS courses; all in the same report
- for selected training date ranges

Report output includes all of the following:

- 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 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 the 8.9 HRMS Report and Review Resource Guide at <https://www.cu.edu/pbs/hrms/training/downloads/online/Replng-Resource-Guide.pdf>

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

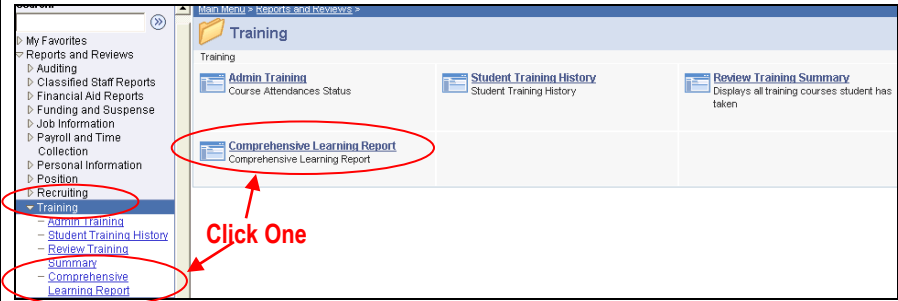
Access: If you currently have access to HRMS, then you have access to this report based on the Role(s) assigned you (ex: Inquiry, Payroll Personnel Liaison). If you do not have access to HRMS, you may request access to the **HRMS ACCESS ROLE** titled **Inquiry Enterprise Learning-Training Reporting**, 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, located at: <https://www.cu.edu/ums/security/CUonly/AMPS/accessrequestforms.php>. This Role does not require any prerequisite training to obtain access.

1. Navigate to Reports and Reviews

- Reports and Reviews
- Click on ▶Training

2. Training Reports are displayed

- Click on [Comprehensive Learning Report](#)



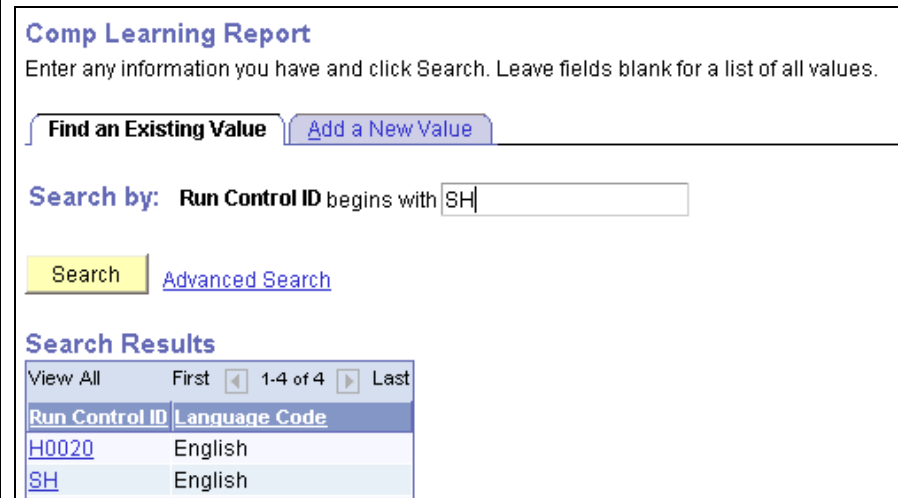
3. Comp Learning Report search page displays

- 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 ID
- To create a new ID, Click on **Add a New Value** tab

NOTE: Adding separate “new” **Run Control ID’s** for your different repetitive reporting needs can save you some time



5. Add a New Value page displays

- Enter a new **Run Control ID**, **Note:** Spaces are not valid
- Click on [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 **Include POIs** , if desired
- In the **Report Non-Completion/Completion data** box, use the radio buttons to have your report generate training Non-completion data only, Completions only, or both.
- In the **Date Range** box you may choose to enter **From and To Dates** to limit the time parameters for your report (Leave blank unless specific training dates 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 adding rows by checking the “+” box at right
- Click at the top right of this page
- Remember, results delivered are based on row level security

Additional information for boxes numbered 1 – 6 (above):

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 further 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

8. 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  and your report begins to process

Process Scheduler Request

User ID: R00198 Run Control ID: Tng

Server Name: PSUNX Run Date: 04/15/2009

Recurrence: Run Time: 9:06:28PM

Time Zone: [Search]

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Comprehensive Learning Report	TRN072CU	SQR Report	Web	CSV	Distribution

OK Cancel

9. 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

Comp Learning Report

Run Control ID: Tng

[Report Manager](#) [Process Monitor](#) Run

Limit report as needed by adding each selection criteria

Campus: [Dropdown] Job Code: [Search]

EmplID: [Search]

Campus Subgroup: [Search]

Include POIs

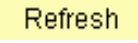
Report Non-Completion/Completion data

- Non-Completion (incompletes)
- Completion data
- Both Completions & Incompletes

Select date range for course end date (leave blank for all)

From Date: [Date] End Date: [Date]

10. Report Manager page displays your Report List

- The report link will not display until the process status is **Posted**
- Click  until the report is **Posted**
- Click on 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)

List Explorer Administration Archives

View Reports For

User ID: R00198 Type: [Dropdown] Last: 1 Days Refresh

Status: [Dropdown] Folder: [Dropdown] Instance: [Dropdown] to: [Dropdown]

Report List [Customize](#) [Find](#) [View All](#) First 1-9 of 9 Last

Select	Report ID	Pres Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	207999	353460	Comprehensive Learning Report	04/15/2009 9:08:08PM	Comma delimited (*.csv)	Posted	Details

Please Note: Large Campus-wide 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.

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

- **Print or Save** the report to **Excel** format and then manipulate the data to meet your needs, and format the report for printing if necessary

Note: Row 3 usually displays the actual column field labels. The first two rows are information about the report and parameters, which can be deleted prior to formatting.

Comprehensive Learning Report									
tm072cu_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									

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							

Running Comprehensive Learning Report complete; Continue for Report Formatting Tips

Formatting the Comprehensive Learning Report to meet Reporting needs:

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 currently active appointments and/or CU affiliations. It will not 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 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 not completed 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 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) for each course they have completed. 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.

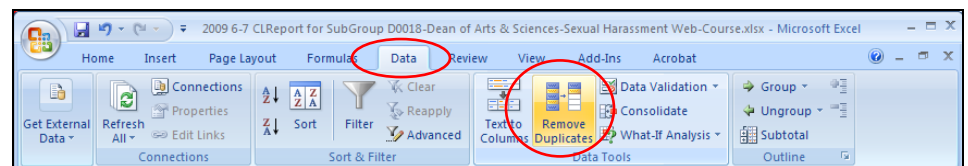
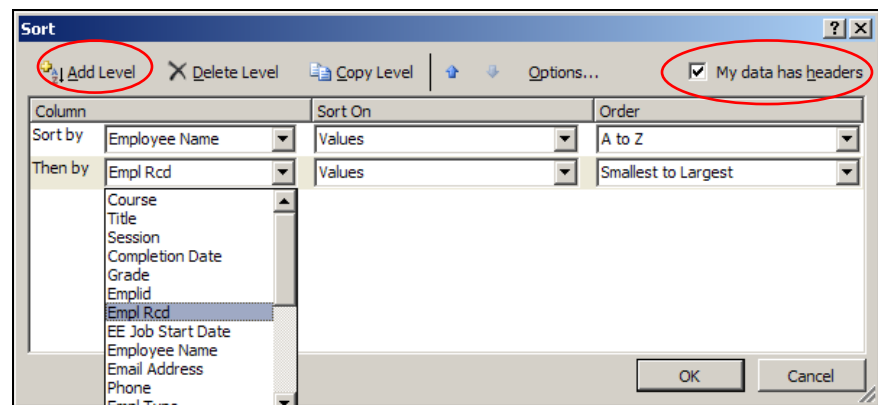
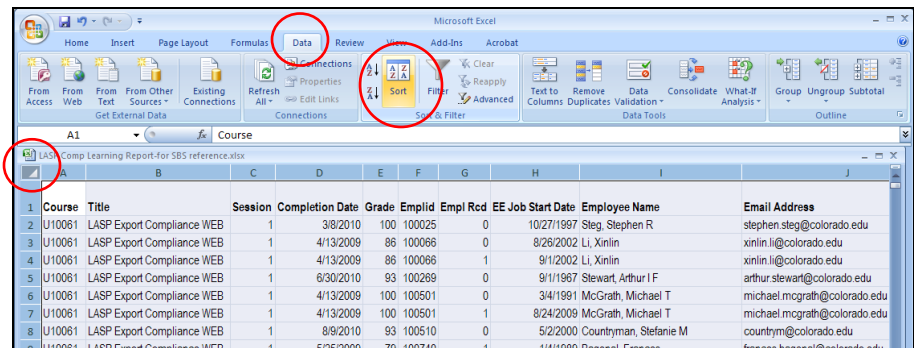
Use the **sort** feature first and then the **remove duplicate values** feature second, in Excel to identify employees who have multiple records [rows] of data. When duplicate values are removed, only the values in the range of cells are affected. Any other values outside the range of selected cells are not altered or removed. Use caution, this permanently deletes data, so it may be a good idea to backup the original data to another worksheet.

1. First, Sort the Excel spreadsheet:

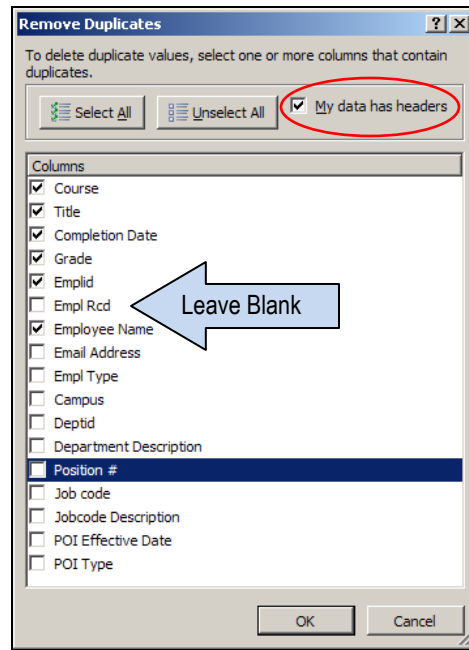
- Highlight the whole spreadsheet by clicking on the upper left corner **box** on the Excel sheet. Then Select the **Data Tab** and use the **Sort** feature in Excel.
- In the **Sort** dialogue box, be sure the **My data has headers** box is checked so that the Column names display properly.
- In the **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:

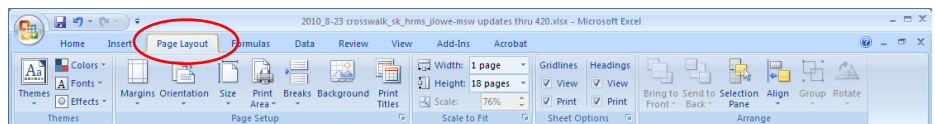
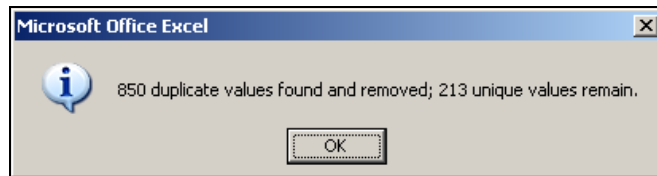
- Highlight the whole spreadsheet again. On the **Data Tab**, in the Data Tools group, select the **Remove Duplicates** feature and a dialogue box will appear.
- Clicking on the **Remove Duplicates** will bring up a dialogue box.



- 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 duplicates to be suppressed. Check Course, Title, Completion Date, Grade, EmplId, Employee Name only. **Leave Empl Rcd box blank.**



- 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