

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 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 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 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, 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

For a complete list of reports and reviews available in PeopleSoft 8.9, go to the 8.9HRMS Report and Review Resource Guide. *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 training Role titled **Inquiry Enterprise Learning Training Reporting**, which provides training data only (no personal data or job data). There are no prerequisite trainings required to obtain access for this Role.

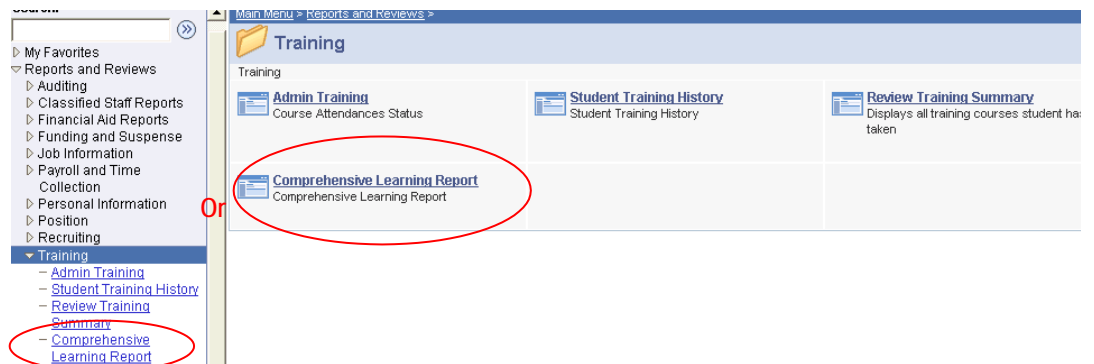
1. Navigate to Reports and Reviews

- Reports and Reviews
- Click on **Training**



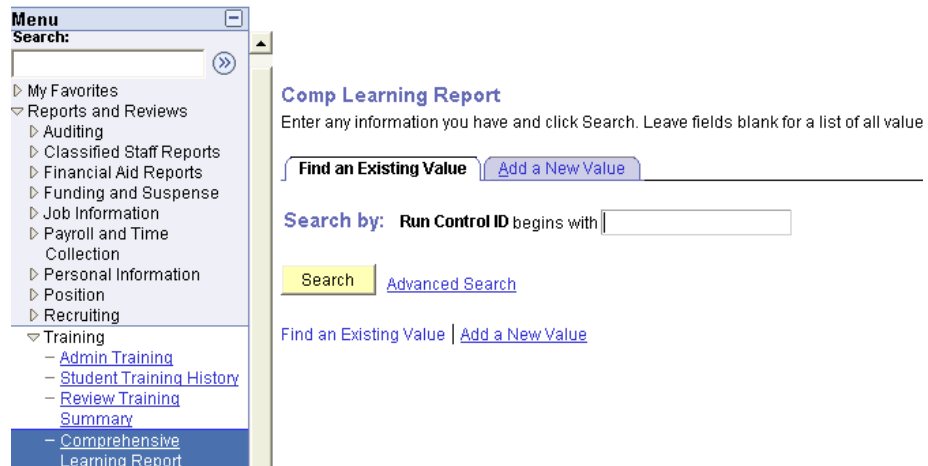
2. Training Reports are displayed

- Click on [Comprehensive Learning Report](#)



3. Comp Learning Report search page displays

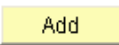
- Click on **Search** to find an existing run control ID value you have already set up



4. Search Results display

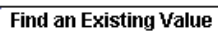

- Click on an existing Run Control ID or create a new ID
- To create a new ID, Click on **Add a New Value** tab
- Adding separate “new” run control ID’s for your different repetitive reporting needs can save you some time

5. Add a New Value page displays

- Enter a new **Run Control ID**,
Note: Spaces are not valid
- Click on 

Comp Learning Report

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

Search by: Run Control ID begins with

 [Advanced Search](#)

Search Results

View All	First	◀	1-4 of 4	▶	Last
Run Control ID	Language Code				
H0020	English				
SH	English				

Comp Learning Report

Run Control ID:

 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**
- Select ☐ **Include POIs** , if desired
- Select ☐ **All Courses** , only if report output is to 'search' all courses that are recorded in HRMS (currently there are over 300 courses; be patient)
- **Note:** If 'All Courses' is selected, EEs and POIs who have not completed the course(s) will not appear on report
- 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)

Comp Learning Report

Run Control ID: Tng 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Limit report as needed by adding each selection criteria

Campus: Job Code:

EmplID:

Campus Subgroup: Description:

☐ Include POIs ☐ All Courses (Will not include non-completion data)

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

From Date: End Date:

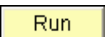
Personnel Groups (leave blank for all groups): [Find](#) First 1 of 1 Last

Personnel Group:

Department (leave blank for all departments): [Find](#) First 1 of 1 Last

Course (Must Choose atleast one course, or all courses): [Find](#) First 1 of 1 Last

7. Comp Lng Rpt Run Control page displays, cont.

- Enter a **Job Code**, only if running for specific job code
or
- Enter an **EMPLID** or **POI ID**, only if running for one person
- Results delivered are based on row level security
- Use drop down arrow to select **Personnel Group(s)**, if desired
- Select **Department(s)**, if desired
- Select **Course(s)**, *if* 'All Courses' has not previously been selected. Enter (add) as many courses as desired
- Click 

Comp Learning Report

Run Control ID: Tng [Report Manager](#) [Process Monitor](#) [Run](#)

Limit report as needed by adding each selection criteria

Campus: Job Code: **2**

EmplID: **3**

Campus Subgroup: Description:

☐ Include POIs ☐ All Courses (Will not include non-completion data)

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

From Date: End Date:

Personnel Groups (leave blank for all groups): [Find](#) First 1 of 1 Last **4**

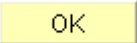
Department (leave blank for all departments): [Find](#) First 1 of 1 Last **5**

Course (Must Choose atleast one course, or all courses): [Find](#) First 1 of 1 Last **6**

Additional information for 1 – 6 (above):




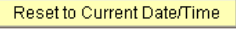

1. **Campus** – This field is used to look at all transactions for a single campus and may be used in conjunction with a Campus Subgroup to further narrow the output
2. **Job Code** – This parameter is used to limit the report results to a single job code. If additional parameters are not used the report 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 the 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:  Run Date: 04/15/2009 
Recurrence:  Run Time: 9:06:28PM 
Time Zone: 

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








9. Comprehensive Learning Report parameters page re-displays so you can enter new parameters and run another report while you wait for the first report process to complete






- Click on [Report Manager](#) to access the report(s) you have requested to be run









Run Control ID: Tng [Report Manager](#) [Process Monitor](#) 

Process Instance: 353460

Limit report as needed by adding each selection criteria

Campus:  Job Code: 
EmpID: 117858  Hettema, Sharon A
Campus Subgroup:  Description: 
☐ Include POIs ☐ All Courses (Will not include non-completion data)
Select date range for course end date (leave blank for all)
From Date:  End Date: 

Personnel Groups (leave blank for all groups): [Find](#) First  1 of 1  Last

Personnel Group:  

Department (leave blank for all departments): [Find](#) First  1 of 1  Last

Course (Must Choose atleast one course, or all courses): [Find](#) First  1 of 1  Last
F00001  Fiscal Code of Ethics-WEB  

10. Report Manager page displays your Report List

- The report link will not display until the process status is **Posted**
- Click **Refresh** until the report is **Posted**
- Click on the report Description to open the completed [Comprehensive Learning 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: Type: Last: Days
 Status: Folder: Instance: to:

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

Select	Report ID	Prce 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 up to **15 to 30+** minutes to display due to size of the file that is created based on the request.

11. Comprehensive Learning Report displays (in CSV format)

- Print the report (you may want to do some formatting first)
- or**
- Save the report to **Excel** and then manipulate the data to meet your needs, and format the report for printing

Note: Row 3 usually displays the actual column field labels.

A1 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								

Running Comprehensive Learning Report complete; continue for Formatting Tips

Formatting the Comprehensive Learning Report to meet your Reporting needs: This HRMS Comprehensive Learning Report was designed to produce a spreadsheet of data fields, based upon parameters you set when you ran the report, that delivers 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 the required training 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 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:

To run an accurate compliance completion or non-completion report, there are three formatting options in Excel that you may find helpful to simplify your data, display your data, and make your 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 you may or may not find useful to manipulate the data for the report you want to produce. Thus you must make some decisions first about the delivered data fields that are useful to you each time you choose to utilize the report, based upon the outcome you wish to achieve.

1. Hiding or deleting fields from the delivered report in Excel

You may choose to keep only those fields you need for the report you are trying to produce, so you may want to **hide or delete** some of the delivered fields (columns) of data.

- To do this, highlight the column for the data field you wish to hide or delete; use your mouse right-click to quickly hide or delete a column of data you do not need in your report

2. Remove duplicate values (employees who have multiple records [rows] of data) from the delivered report in Excel

The Comprehensive Learning Report is designed to pick up and include all **active appointments** for an employee. Thus, you may have individuals in your department (or campus if you are running a campus-wide report), that have more than one appointment, job or affiliation in HRMS, and thus will show a number of repeated data rows for each course they have completed. If you are trying to determine/count the actual number of people in your department or campus that have completed a specific course, you will want to **remove any duplicate employee records** for that course, so that you show and count an employee having completed a course only once. **Example:** The Denver campus Training department needed an accurate count of the number of Denver Campus employees who had completed the Sexual Harassment web course that was required by their Chancellor.

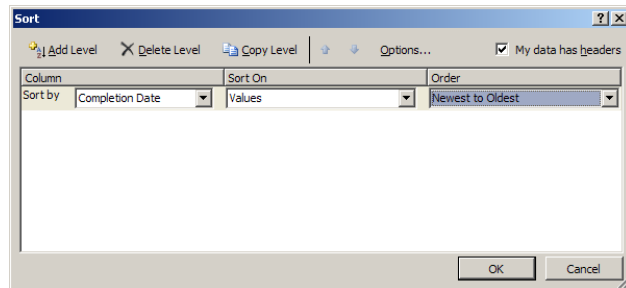
To remove duplicate values:

When you remove duplicate values, only the values in the range of cells are affected. Any other values outside the range of selected cells are not altered or removed. Caution:

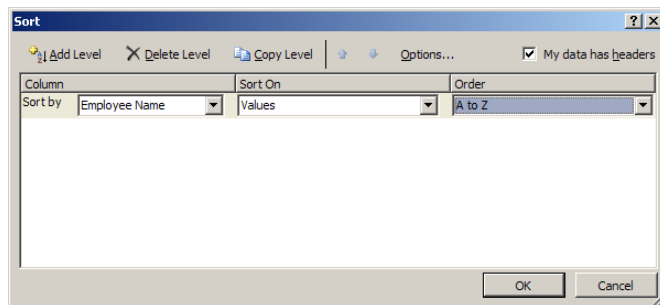
because you are permanently deleting data, it is a good idea to copy the original data to another worksheet or workbook before removing duplicate values.

1. The **Comprehensive Learning Report** delivers all employees who have and have not completed a course

- To produce a list of all employees who have completed a training course, first sort the data by course completion date. This will result in all employees who have a course completion date to sort to the top of the spreadsheet



- Then delete all rows of data at the bottom of the report that show no completion date. These people have not completed the course and need to be removed from the spreadsheet. Accomplish this by highlighting the first row of data with no completion day then scroll to the bottom of the spreadsheet to the last row of data, hold down the Shift key and click on the last row with no completion data and this will “select” and highlight all of the rows you wish to delete from the spreadsheet for the report of course completions you wish to produce
- Next, sort the employees with a completion date by their name. Click on the upper left corner box that will highlight the whole spreadsheet. Then go to **Data** and select **Sort** and sort by Employee Name. Scroll through your remaining data to see if you have a number of duplicate rows for individual employees. Note: It may help to look for Employee Records other than “0”

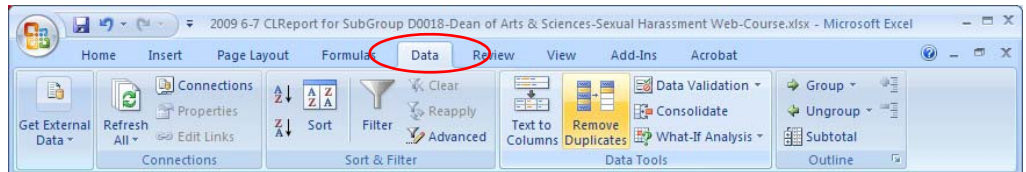


2009 6-7 CLRReport for SubGroup D0018-Dean of Arts & Sciences-Sexual Harassment Web-Course.xlsx - Microsoft Excel													
C11 4/20/2009													
Completion Date	Grade	Emplid	Rcd	Employee Name	Email Address	Empl Type	Campus	Deptid	Department Description	#	Position code	Job	Jobcode Description
4/15/2009	81	202625	0	Abeyta, Michael Paul	michael.abeyta@ucdenver.edu	EMP	3	30101	CLAS-Modern Language	681756	1102	Associate Professor	
4/23/2009	88	123125	0	Albeck, David Scott	david.albeck@ucdenver.edu	EMP	3	30110	CLAS-Psychology	350568	1102	Associate Professor	
4/19/2009	88	130494	0	Alcott, Linda Scales	linda.alcott@ucdenver.edu	EMP	3	30101	CLAS-Modern Language	350122	1104	Senior Instructor	
4/19/2009	88	130494	2	Alcott, Linda Scales	linda.alcott@ucdenver.edu	EMP	3	30101	CLAS-Modern Language	350332	1105	Instructor	
4/23/2009	75	146560	0	Allen, Elizabeth Sandin	elizabeth.allen@ucdenver.edu	EMP	3	30110	CLAS-Psychology	350133	1103	Asst Professor	
4/23/2009	75	146560	1	Allen, Elizabeth Sandin	elizabeth.allen@ucdenver.edu	EMP	3	30110	CLAS-Psychology	680669	1103	Asst Professor	
1/15/2009	94	121034	1	Anderson, Bret A	bret.anderson@ucdenver.edu	EMP	3	30095	CLAS-Communication	621363	1419	Lecturer	
6/4/2009	100	107566	0	Anderson, Larry Gene	larry.anderson@ucdenver.edu	EMP	3	30094	CLAS-Chemistry	350100	1101	Professor	
6/4/2009	100	107566	1	Anderson, Larry Gene	larry.anderson@ucdenver.edu	EMP	3	30094	CLAS-Chemistry	670799	1101	Professor	
4/20/2009	94	193301	0	Anderson, Mark R.	mark.anderson@ucdenver.edu	EMP	3	30094	CLAS-Chemistry	678176	1101	Professor	
4/20/2009	94	193301	1	Anderson, Mark R.	mark.anderson@ucdenver.edu	EMP	3	30094	CLAS-Chemistry	601001	1101	Professor	
4/20/2009	94	193301	2	Anderson, Mark R.	mark.anderson@ucdenver.edu	EMP	3	30094	CLAS-Chemistry	350822	1435	Chair	
6/4/2009	100	200646	0	Anthamatten, Peter J	peter.anthamatten@ucdenver.edu	EMP	3	30102	CLAS-Geography	682197	1103	Asst Professor	

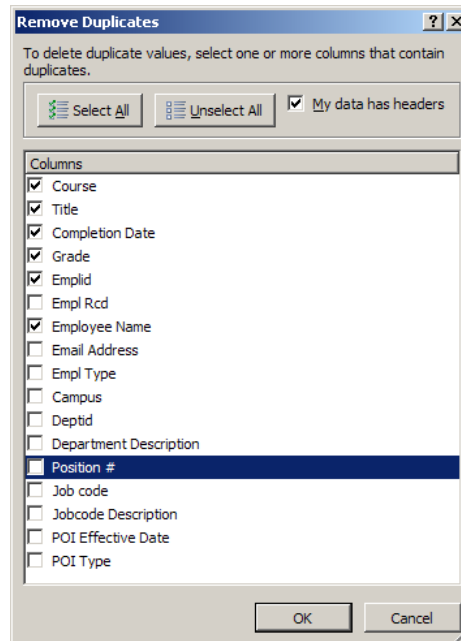
Note: If you have employees who also have a duplicate row that is a “POI” record, you may want to delete the POI record row by hand (manually) prior to removing other duplicates, since it is probably best to maintain employee rows rather than POI rows for reporting purposes on a course completion report

- Select the range of cells on your spreadsheet for which you wish to remove duplicate values, or you may select the whole spreadsheet from which to remove duplicate values

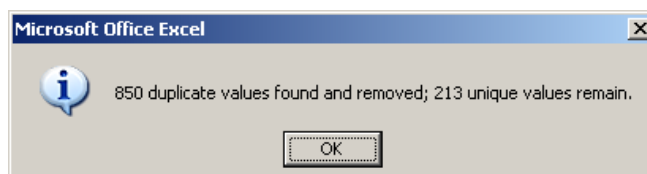
2. On the **Data** tab, in the **Data Tools** group, click the **Remove Duplicates**



- Clicking on the **Remove Duplicates** will bring up a display box. Under **Columns**, you will need to select one or more columns prior to running the Remove Duplicates process. The range of cells will contain many columns and you will want to select only a few columns, so you should click **Unselect All**, and then under **Columns**, select only those columns that will show the same data for the duplicates you wish to suppress



3. Click OK
4. A message is displayed indicating how many duplicate values were removed and how many unique values remain, or if no duplicate values were found and removed

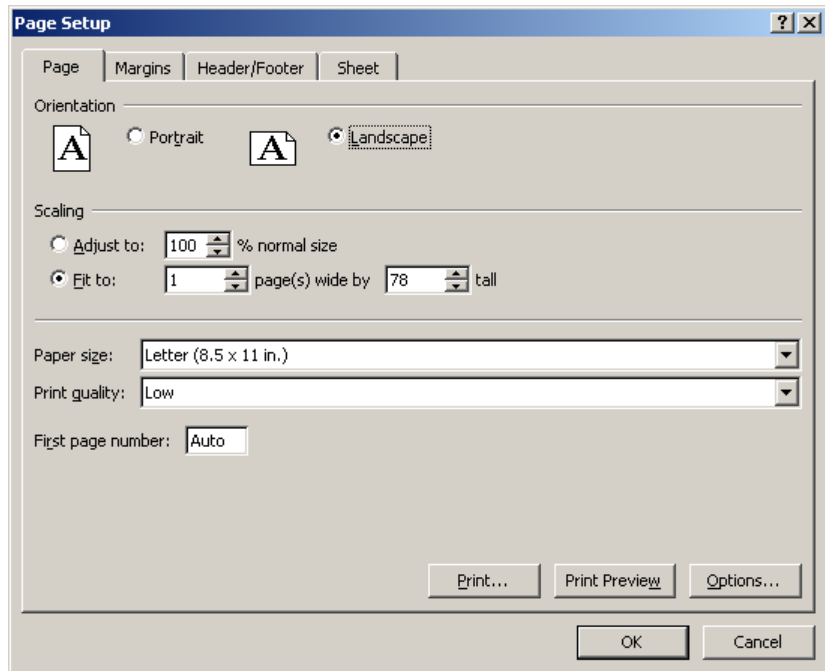
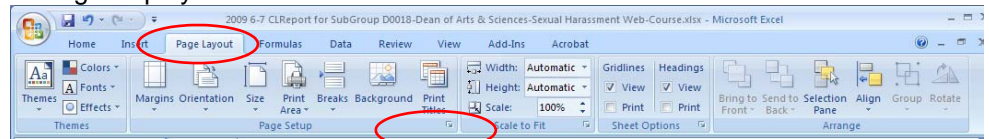


5. Click OK. If done correctly, you data should now display only one value for each employee who has completed the required training course

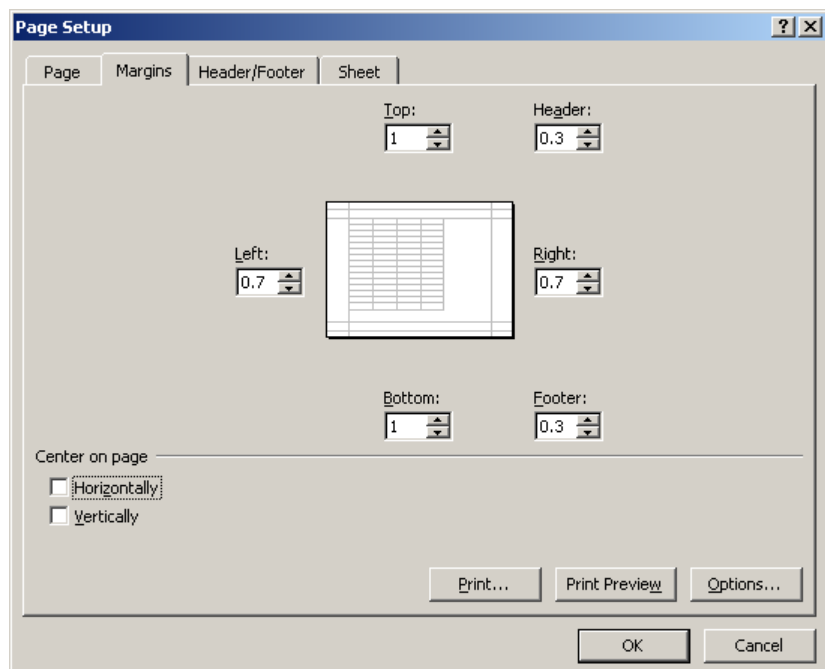
3. Formatting a report to print out or display using Page Layout options

Click in upper left corner to highlight all data in your resulting spreadsheet that displays course completions

Select the **Page Layout** tab at top of page, and click on bottom right of **Page Setup** box to see the Page display box

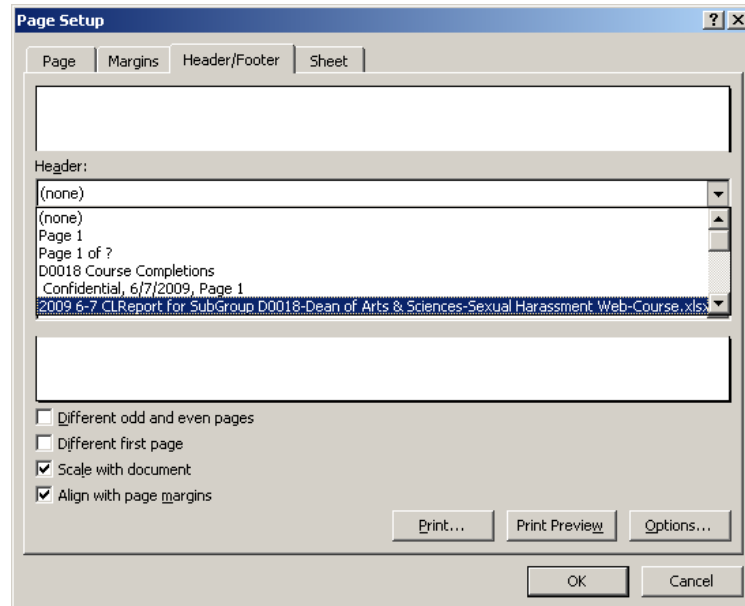


On the **Page** box, choose Landscape orientation. For **Scaling**, select **Fit To**: 1 page wide by approx 50 (pages) tall. Note: May need more or less depending on size of your report

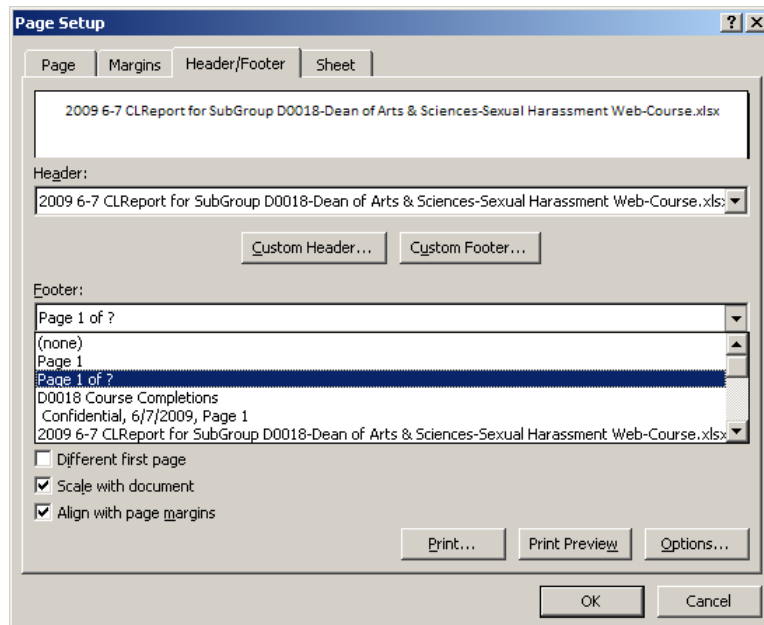


Set the left and right margins to .07. Set the top and bottom margins to 1.0

On the **Header/Footer** tab, choose an appropriate **header** from the drop down arrow, or type in a custom header as needed



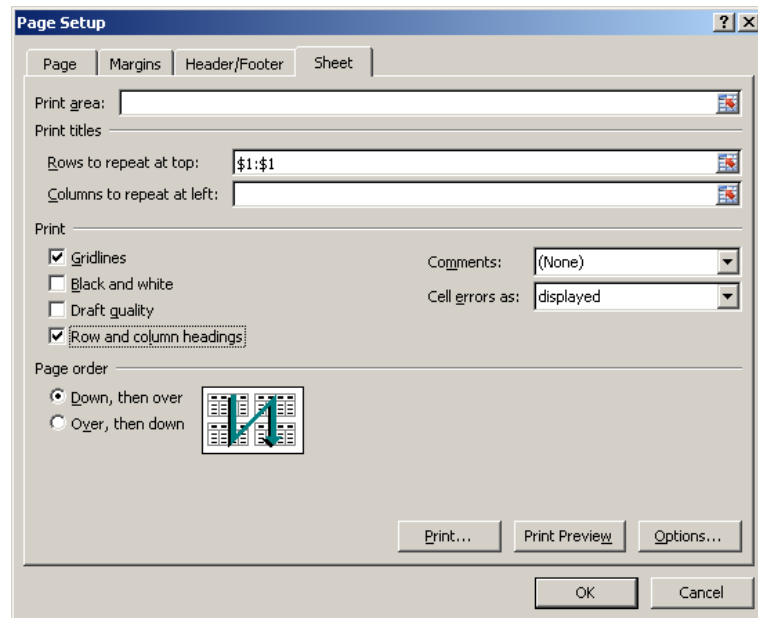
For the **footer** choose a page numbering format



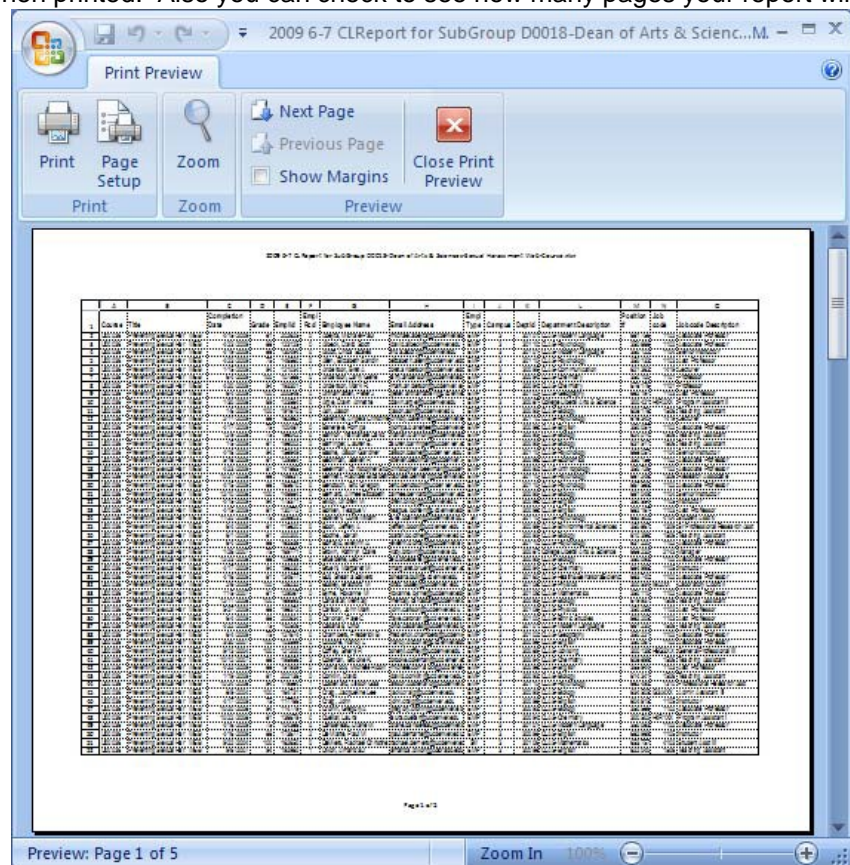
Click on the **Sheet** tab:

For **Rows to repeat at top**: choose your spreadsheet column-labels header row to repeat at the top of each printed page

If you wish, choose **gridlines** and **row and column headings** to display on your report



Then you can check **Print Preview** under the **Print** option to see what your report sheets will look like when printed. Also you can check to see how many pages your report will produce



END OF COMPREHENSIVE LEARNING REPORT – Example of a course completions report format