Overview: This guide provides instruction on looking up training records for employees and POIs (affiliates) required to take university training courses for compliance, job requirement, enrichment and/or refresher purposes.

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

There are three ways to look up training records:

- **Review Training Summary review:** To research training records for INDIVIDUAL EMPLOYEES or POIs (Page 1)
- **Student Training History report:** To research training records for INDIVIDUAL EMPLOYEES or POIs in a report format (Page 3)
- **Admin Training report:** To research training records for MULTIPLE EMPLOYEES or POIs (Page 7)

**Review Training Summary**

The Review Training Summary is a view-only review page that is designed to provide a list of all courses a single employee or POI has taken accompanied by the date s/he took the training(s), and grade(s), if applicable.

1. Navigate to Reports and Reviews
   - Reports and Reviews
   - Training
   - Review Training Summary
2. Review Training Summary search page displays

- Enter one or more of the search fields
- Click Search

3. Student Training Summary page displays

- View employee’s or POI’s training records
  - To view all records, click View All
  - To narrow your search to a specific category, such as Fin/Budget, enter the Category Code F in the search box; to narrow your search to a specific campus where the course was offered, such as Boulder, enter the Subcategory Code 1 in the search box. NOTE: Category Code must be entered if Subcategory search is used
  - To return to original training page click View All

End Student Training Summary review
The Student Training History report is designed to provide a list of all courses a single employee or POI has taken accompanied by the date s/he took the training(s), and grade(s), if applicable.

1. Navigate to Reports and Reviews
   - Reports and Reviews
   - Training
   - Student Training History

2. Student Training History Run Control ID page displays
   - Click to find an existing Run Control ID

Student Training History

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

Run Control ID: begins with  

Search  Clear  Basic Search  Save Search Criteria

Find an Existing Value  Add a New Value
3. Search Results display
   □ Click on an existing Run Control ID or create a new ID
   □ To create a new ID, click 
     [Add a New Value]

4. Add a New Value page displays
   □ Enter a new Run Control ID. NOTE: Spaces are not valid
   □ Click [Add]

5. Student Training History report parameters page displays
   □ Enter EMPLID for employee or POI
   □ Click [Run]
6. **Process Scheduler page displays**
- Enter PSUNX in the Server Name
- Verify the report Type is **Web**
- Verify the Format is **PDF** (may also be CSV for report use in Excel)
- Click **OK**

7. **Student Training History page re-displays**
- Click **Report Manager**

8. **Report Manager page displays**
- The report will not display until the process status is **Posted**
- Click **Refresh** until the report is Posted
- Click on the report Description **Course History of an Employee** (if a new window does not open, hold down the Ctrl key and click again)
9. **Student Training History report displays in Adobe Acrobat**

- Click \(\square\) to print the report
- Click \(\square\) to save the report

**End Student Training History report**

---

### Training Records Lookup – Reports and Reviews Module

**Page 6 of 11**
Admin Training

The Admin Training report is designed to provide a list of all employees and POIs that have/have not taken a specific course(s), accompanied by the date they took the training(s), and grade(s), if applicable.

Users running this report are restricted to the departments or nodes within their row-level security. When attempting to run the report 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 training records. This report may include the following parameters:

- for one or more departments
- for your entire campus or node on the HR Tree
- for a particular job code
- for a specific employee group(s)
- for all employees in your department, in alphabetical order
- for multiple courses, all in the same report

1. Navigate to Reports and Reviews
   - Reports and Reviews
   - Training
   - Admin Training

2. Admin Training Run Control ID page displays
   - Click to find an existing Run Control ID

Admin Training

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

Search | Advanced Search

Find an Existing Value | Add a New Value
3. Search Results display

- Click on an existing Run Control ID or create a new ID
- To create a new ID click

4. Add a New Value page displays

- Enter a new Run Control ID. NOTE: Spaces are not valid
- Click

Student Training History

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

Run Control ID: begins with

Search  Clear  Basic Search  Save Search Criteria

Search Results

Run Control ID  Language Code
eg  English
en  English

Find an Existing Value  Add a New Value

Admin Training

Find an Existing Value  Add a New Value

Run Control ID: Admin_T rm

Find an Existing Value  Add a New Value
5. **Admin Training report parameters page displays**

- Results are based on row-level security

- 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

- Enter an EMPL ID for employee or POI only if running for one person

- Enter From and To Dates (Leave blank unless specific dates are required!)

- In general, most report users run this report using only the parameters in these 3 sections: 4, 5, 6

- Click **Run**

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.

3. **EmplID** – This parameter is used to limit the report results to a single employee ID.

4. **Personnel Groups** – This parameter is used to limit the report results to a Personnel Group (job code series).

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)** – **Required** – This parameter is used to find the output for specific course(s). A maximum of six courses can be selected for each report output.
7. Process Scheduler page displays
   - Enter PSUNX in the Server Name
   - Verify the report Type is Web
   - Verify the Format is PDF (may also be CSV for report use in Excel)
   - Click OK

8. Admin Training page re-displays
   - Click Report Manager
9. Report Manager page displays

☐ The report will not display until the process status is Posted

☐ Click [ ] until the report is Posted

☐ Click on the report Description Admin Training
(If a new window does not open, hold down the Ctrl key and click again)

10. Admin Training report displays in Adobe Acrobat

☐ Click [ ] to print the report

☐ Click [ ] to save the report

End Admin Training report

Training Records Lookup complete