

# CU 8.9 HRMS Step by Step Guide

## Training Records Lookup - Reports and Reviews Module

**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:

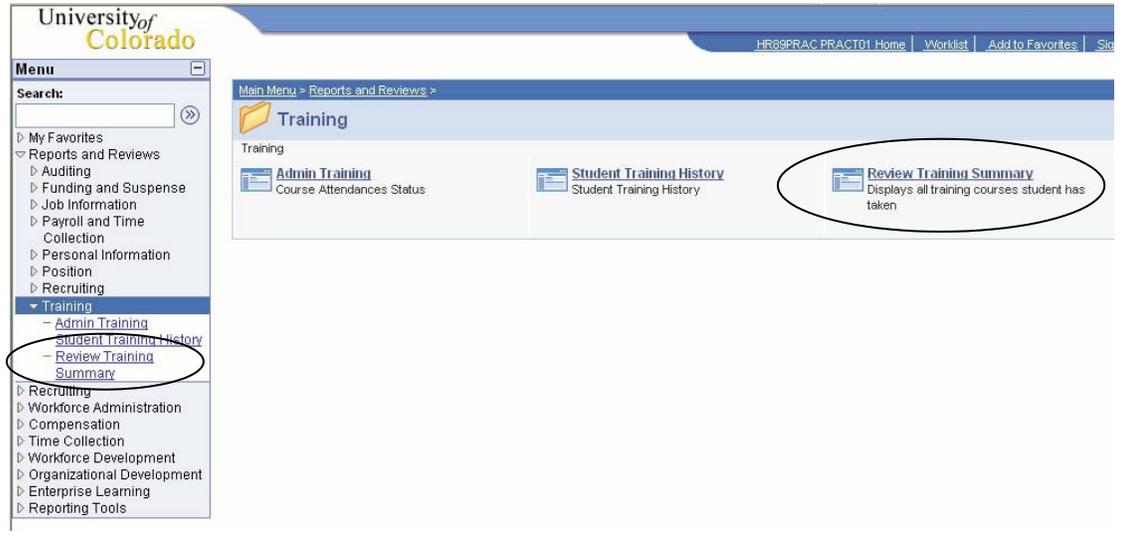
- **Review Training Summary** review: To research training records for INDIVIDUAL EMPLOYEES or POIs (Page 1)
- **Student Training History** report: To research training records for INDIVIDUAL EMPLOYEES or POIs in a report format (Page 3)
- **Admin Training** report: To research training records for MULTIPLE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

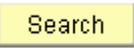
#### 1. Navigate to Reports and Reviews

- Reports and Reviews
- Training
- Review Training Summary



## 2. Review Training Summary search page displays

- Enter one or more of the search fields

Click 

## 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

Category Code

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

Subcategory Code

search box. **NOTE:** Category Code must be entered if Subcategory search is used

- To return to original training page click



## End Student Training Summary review

### Review Training Summary

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

Find an Existing Value

**EmplID:**  127803  
**Name:**   
**Last Name:**   
**Home Department:**    
**Last 4 SSN:**   
**Category Code:**    
**Subcategory Code:**  





[Basic Search](#)

 [Save Search Criteria](#)

Student Training Summary

Nelson, Adam

**EmplID:** 127803

Category Code

Subcategory Code



Course	Title	Session #	Training Date	Attendance	Grade	Category Code	Subcategory Code
A00035	HRMS Earnings Codes - PBS	0002	11/18/2005	Completed	A		0
B10010	PDQ-PPL	0001	11/17/2005	Completed	B		1
B10012	Compensation Class Stf-PPL	0001	11/17/2005	Completed	B		1
A00033	Inquiry & Reports-HRMS-UCB-PPL	0001	11/11/2005	Completed	A		0
B10014	I-9 Personnel Rcd Keeping-PPL	0001	11/10/2005	Completed	B		1
F00001	Fiscal Code of Ethics-WEB	0001	12/19/2005	Completed	179	F	0
A00105	8.4 FIN-Inquiry-WEB	0001	02/10/2005	Completed	095	A	0
A00106	8.4 FIN-General Ledger-WEB	0001	03/01/2005	Completed	090	A	0
A00107	8.4 FIN-Procurement-WEB	0001	03/01/2005	Completed	100	A	0
S10001	Sexual Harassment Basic	0041	07/02/2003	Completed	S		1
A50020	HIPAA 101 (web) - system	0001	05/14/2003	Completed	082	A	5
A00015	PS HR 8.3 Upgrade Training	0067	03/24/2003	Completed	A		0







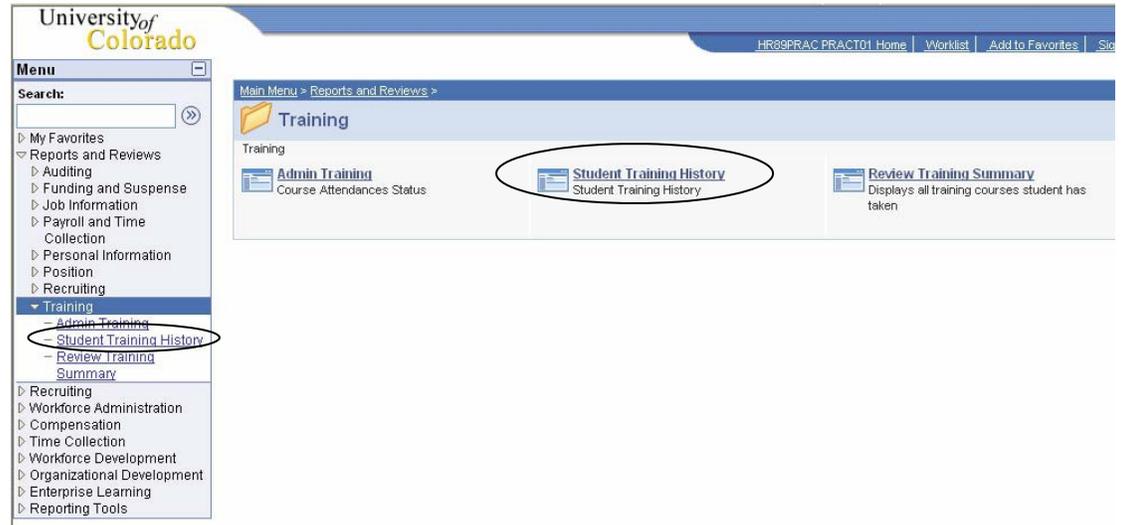


# Student Training History

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.

Run Control ID: begins with

[Basic 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

[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](#)

#### 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

View All First 1-2 of 2 Last

Run Control ID	Language Code
<a href="#">eg</a>	<a href="#">English</a>
<a href="#">sh</a>	<a href="#">English</a>

[Find an Existing Value](#) | [Add a New Value](#)

#### Student Training History

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

#### Student Training History

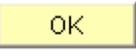
Run Control ID: sh [Report Manager](#) [Process Monitor](#) [Run](#)

#### Report Request Parameters:

EmpID:  [Nelson,Adam](#)

## 6. Process Scheduler page displays

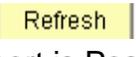
- Enter **PSUNX** in the Server Name
- Verify the report Type is **Web**
- Verify the Format is **PDF** (may also be CSV for report use in Excel)

Click 

## 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  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)

### Process Scheduler Request

User ID: PRACT01 Run Control ID: sh

Server Name: PSUNX Run Date: 07/09/2007  
 Recurrence: Run Time: 2:25:34PM 

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Course History of an Employee	TRN020CU	SQR Report	Web	PDF	Distribution

### Student Training History

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

Process Instance: 41775

**Report Request Parameters:**

EmpID: 127803 Nelson,Adam

[List](#) [Explorer](#) [Administration](#) [Archives](#)

**View Reports For**

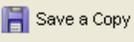
User ID: PRACT01 Type: Last: 1 Days 

Status: Folder: Instance: to:

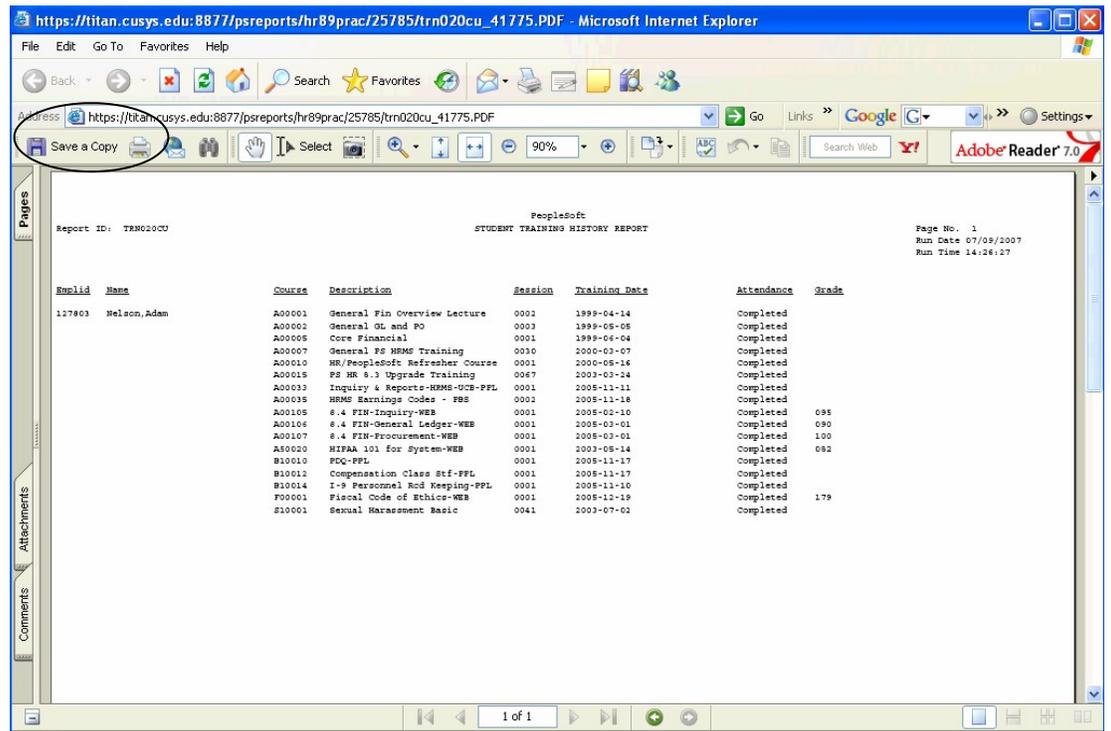
**Report List** [Customize](#) [Find](#) | View All | First 1 of 1 Last

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	25785	41775	<a href="#">Course History of an Employee</a>	07/09/2007 2:26:16PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

**9. Student Training History report displays in Adobe Acrobat**

- Click  to print the report
- Click  to save the report

**End Student Training History report**



Report ID: TRN020CU

PeopleSoft  
STUDENT TRAINING HISTORY REPORT

Page No. 1  
Run Date 07/09/2007  
Run Time 14:26:27

EmpId	Name	Course	Description	Session	Training Date	Attendance	Grade
127803	Nelson,Adam	A00001	General Fin Overview Lecture	0002	1999-04-14	Completed	
		A00002	General GL and PO	0003	1999-05-05	Completed	
		A00005	Core Financial	0001	1999-04-04	Completed	
		A00007	General FS HRMS Training	0030	2000-03-07	Completed	
		A00010	HR/PeopleSoft Refresher Course	0001	2000-08-14	Completed	
		A00015	FS HR 8.3 Upgrade Training	0067	2003-03-24	Completed	
		A00033	Inquiry & Reports-HRMS-UCB-PPL	0001	2005-11-11	Completed	
		A00035	HRMS Earnings Codes - FBS	0002	2005-11-18	Completed	
		A00105	8.4 FIN-Inquiry-WEB	0001	2005-02-10	Completed	095
		A00106	8.4 FIN-General Ledger-WEB	0001	2005-03-01	Completed	090
		A00107	8.4 FIN-Procurement-WEB	0001	2005-03-01	Completed	100
		A50020	HIPAA 101 for System-WEB	0001	2003-05-14	Completed	082
		B10010	EQC-PPL	0001	2005-11-17	Completed	
		B10012	Compensation Class Stf-PPL	0001	2005-11-17	Completed	
		B10014	I-9 Personnel Rcd Keeping-PPL	0001	2005-11-10	Completed	
		F00001	Fiscal Code of Ethics-WEB	0001	2005-12-19	Completed	179
		B10001	Sexual Harassment Basic	0041	2003-07-02	Completed	

# Admin Training

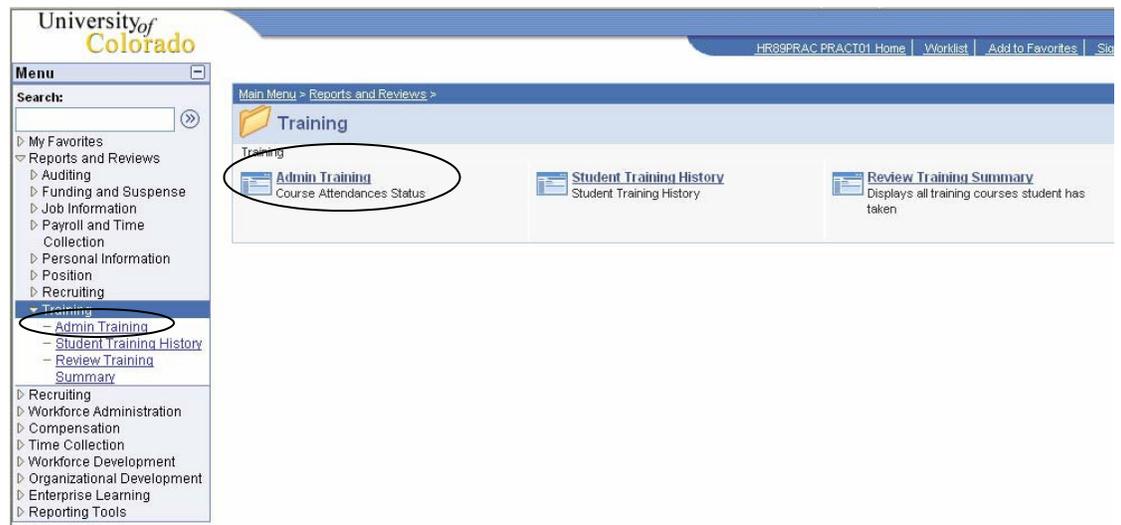
The Admin Training *report* is designed to provide a list of all employees and POIs that have/have not taken a specific course(s), accompanied by the date they took the training(s), and grade(s), if applicable.

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.

Search by: Run Control ID begins with

[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

[Add a New Value](#)

### 4. Add a New Value page displays

- Enter a new Run Control ID. NOTE: Spaces are not valid
- Click [Add](#)

#### 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

View All First 1-2 of 2 Last

Run Control ID	Language Code
<a href="#">eg</a>	<a href="#">English</a>
<a href="#">sh</a>	<a href="#">English</a>

[Find an Existing Value](#) | [Add a New Value](#)

#### Admin Training

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

## 5. Admin Training report parameters page displays

- Results are based on row-level security

- 1** 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**

- 2** Enter a Job Code, only if running for specific job code

*Or*

- 3** 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)

- 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.
- 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.
- EmplID** – This parameter is used to limit the report results to a single employee ID.
- Personnel Groups** – This parameter is used to limit the report results to a Personnel Group (job code series).
- 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.
- 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](#)

**Process Scheduler Request**

User ID: PRACT01 Run Control ID: sh

Server Name: PSUNX Run Date: 07/09/2007  
 Recurrence: Recurrence Run Time: 3:53:25PM **Reset to Current Date/Time**

Time Zone: Time Zone

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Admin Training	TRN060CU	SQR Report	Web	PDF	Distribution

OK Cancel

**Admin Training**

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

Process Instance: 41777

**Limit report as needed by adding each selection criteria**

Campus: Campus Job Code: Job Code  
 EmpID: EmpID  
 Campus Subgroup: Campus Subgroup

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

From Date: From Date End Date: End Date

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

Personnel Groups

**Department (leave blank for all departments):** Find First 1 of 1 Last

51000 Payroll & Benefit Services

**Course (choose one to six courses):** Find First 1-2 of 2 Last

A00135 HRMS 89 Functional Inst-led  
 F00001 Fiscal Code of Ethics-WEB

## 9. 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 [Admin Training](#)  
(If a new window does not open, hold down the Ctrl key and click again)

**View Reports For**

User ID: PRACT01    Type:    Last: 1 Days    Refresh

Status:    Folder:    Instance:    to:

**Report List**    Customize | Find | View All | First 1-3 of 3 Last

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input checked="" type="checkbox"/>	25787	41777	Admin Training	07/09/2007 3:53:49PM	Acrobat (*.pdf)	Posted	Details

## 10. Admin Training report displays in Adobe Acrobat

- Click  to print the report
- Click  to save the report

https://titan.cusys.edu:8877/psreports/hr89prac/25787/trn060cu\_41777.PDF - Microsoft Internet Explorer

File Edit Go To Favorites Help

Address: https://titan.cusys.edu:8877/psreports/hr89prac/25787/trn060cu\_41777.PDF

Save a Copy    Print    Select    90%    Search Web    Adobe Reader 7.0

Pages

PeopleSoft  
Admin Training Report  
All Courses Completed Before 09-JUL-2007

Report ID: TRN060CU  
Campus: System  
Dept: 51000 -- Payroll & Benefit Services

Functional Code of Ethics  
Inst led  
Grade

EmpId	Name	Job code	Grade	Grade
188179	Anderson, Victor	2119		
177556	Arbette, Krista	03A2TX	2006-01-10	186
115143	Baile, Laura	8603DN	2005-11-29	200
142176	Boyle, Alicia	8603DN	2005-11-04	200
179599	Briggs, Erik	4101		
179140	Brooks, Tracy	4102	2006-05-19	179
181144	Brown, Brian	4901		
182791	Bryant, Armando	03A3DX	2006-09-21	171
188548	Burke, Julie	01D4DX	2006-10-02	171
190279	Butcher, Audrey	4104	2007-04-12	193
125771	Cecil, Faxrokh	8603DN	2005-11-16	193
147809	Colden, Courtney	8603DN	2005-11-03	193
171302	Cordova, John	8603DN		
179970	Crisler, Gregory	4101		
190276	Cunningham, Susan	4101	2007-04-06	186
170020	Downing, Joy	2133		
109658	Falls, Patrick	8603DN	2005-11-10	179
190553	Fukuhara, Justin	4101		
101012	Gao, Sandra	8603DN	2005-11-29	200
148788	Gilbert, Christopher	8603DN	2006-01-09	171
191693	Gump, Silbere	1310		
189886	Gusat, Sulakhana	8603DN	2007-03-20	179
120187	Hagaman, Rachelle	8605DX	2005-12-15	186
105260	Hall, Sarah	2143	2005-11-07	186
108513	Harr, Lauren	8603DN	2005-12-01	186
129852	Heard, Bethany	8603DN	2005-11-28	200
124840	Ickes, Daniel	8603DN	2005-11-02	179
191652	Jacksonovich, Swanja F	2119		
129714	Jenkins, Maria	8603DN	2006-01-18	193
159960	Jones, Allison	8603DN	2005-11-07	186
163797	Jordan, Emilia	8681DX	2005-11-07	179

Page No. 1  
Run Date 07/09/2007  
Run Time 15:54:01

1 of 3

Training Records Lookup complete