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:

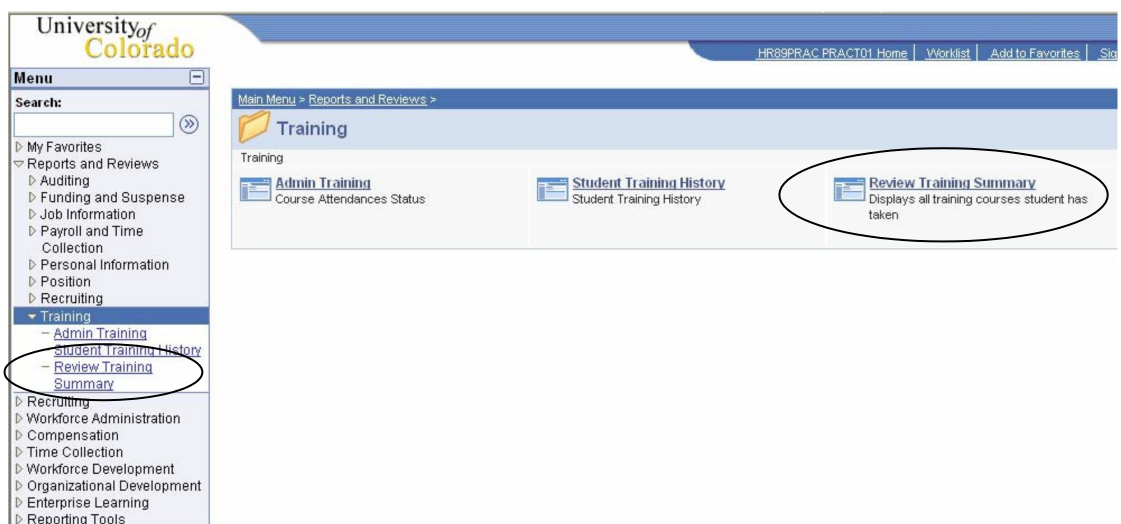
- **Review Training Summary** review: To research training records for INDIVIDUAL EMPLOYEES or POIs (Page 1)
- **Student Training History** report: To research training records for INDIVIDUAL EMPLOYEES or POIs in a report format (Page 3)
- **Admin Training** report: To research training records for MULTIPLE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

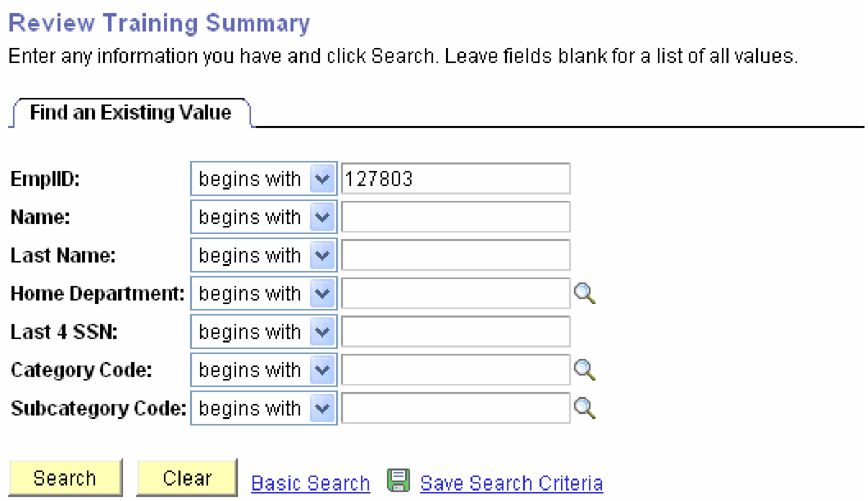
**1. Navigate to Reports and Reviews**

- ☐ Reports and Reviews
- ☐ Training
- ☐ Review Training Summary



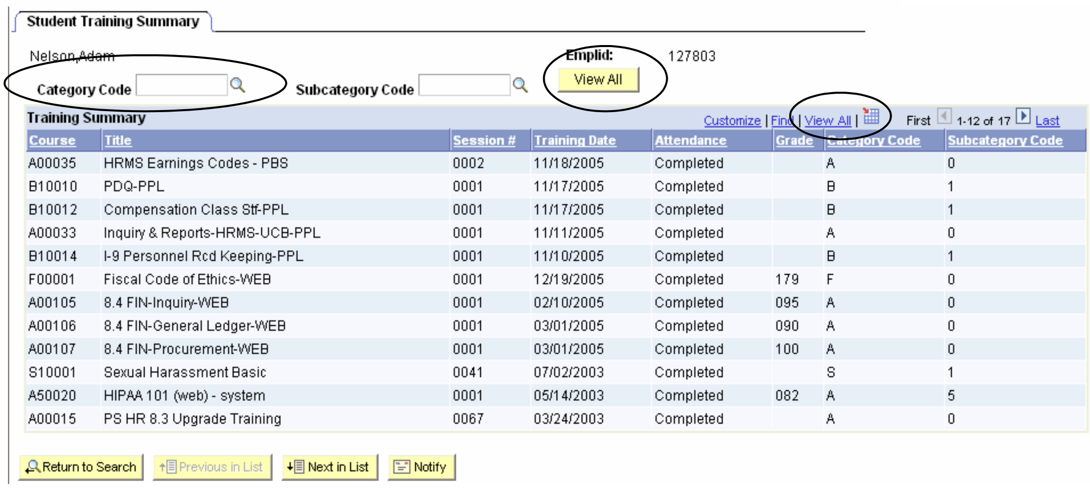
## 2. Review Training Summary search page displays

- Enter one or more of the search fields
- Click 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 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 View All

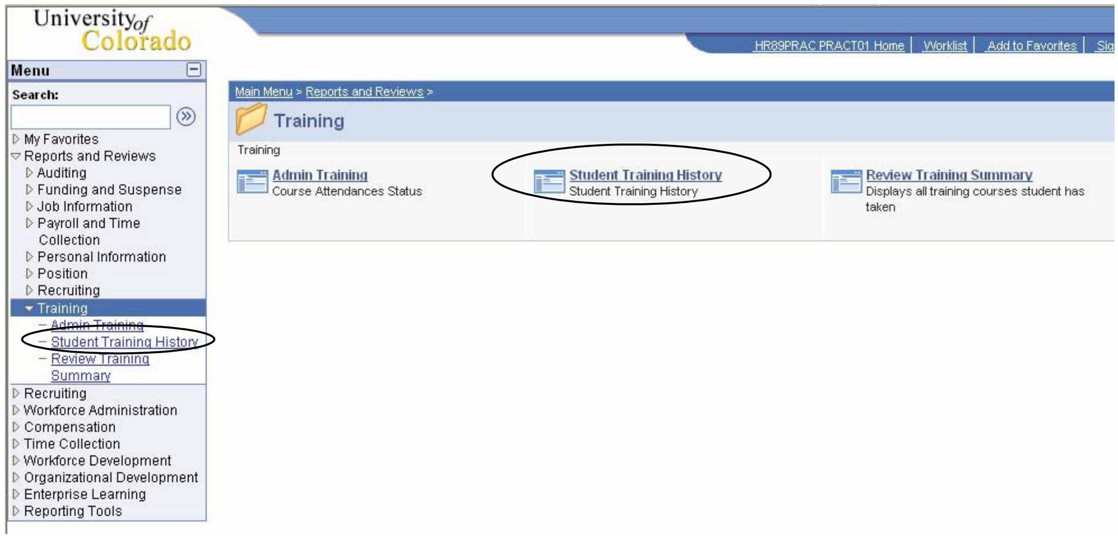



| Course | Title | Session # | Training Date | Attendance | Grade | Category Code | Subcategory Code |
|---|---|---|---|---|---|---|---|
| A00035 | HRMS Earnings Codes - PBS | 0002 | 11/18/2005 | Completed | | A | 0 |
| B10010 | PDQ-PPL | 0001 | 11/17/2005 | Completed | | B | 1 |
| B10012 | Compensation 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 |

## End Student Training Summary review

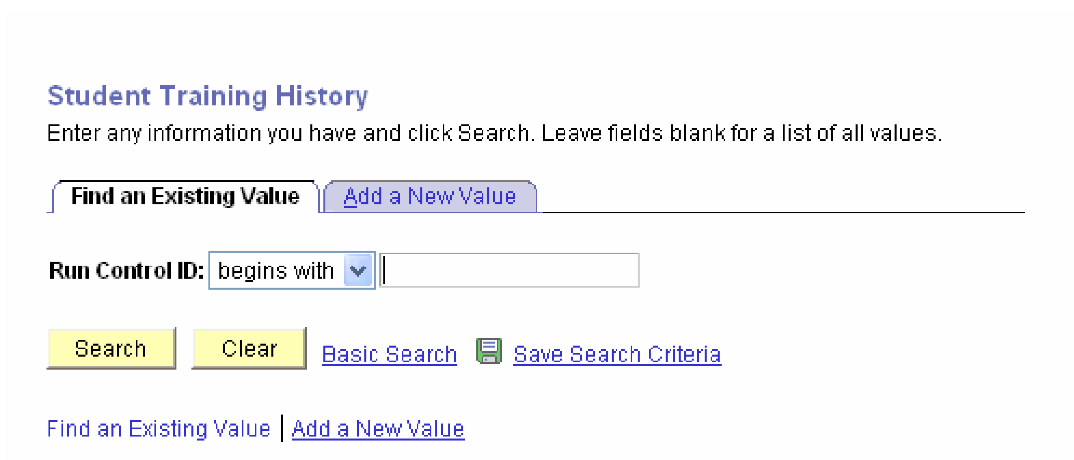
# Student Training History

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

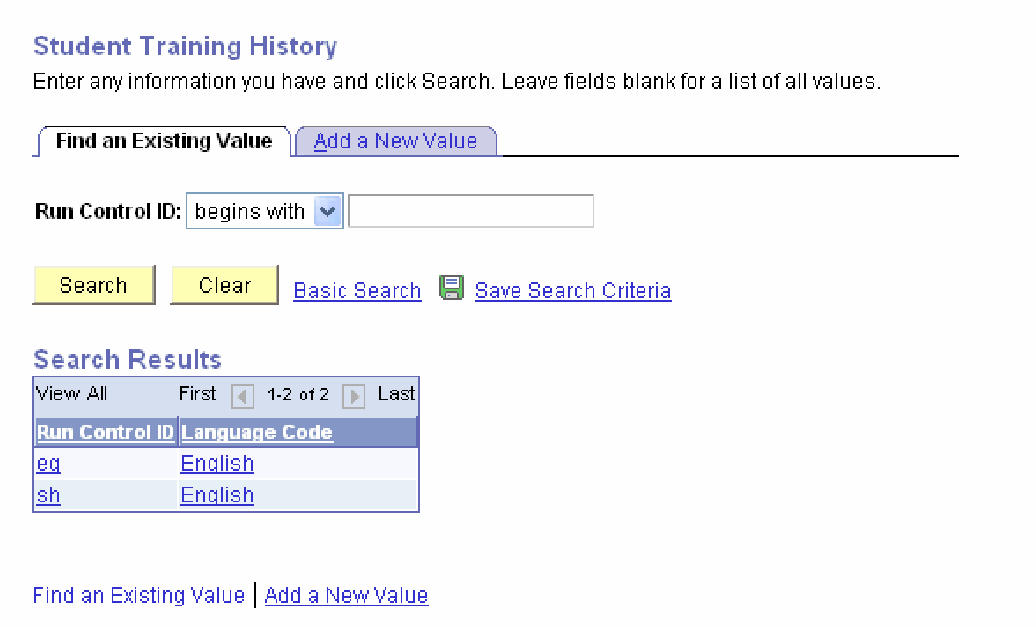



2. **Student Training History Run Control ID page displays**

- Click Search to find an existing Run Control ID

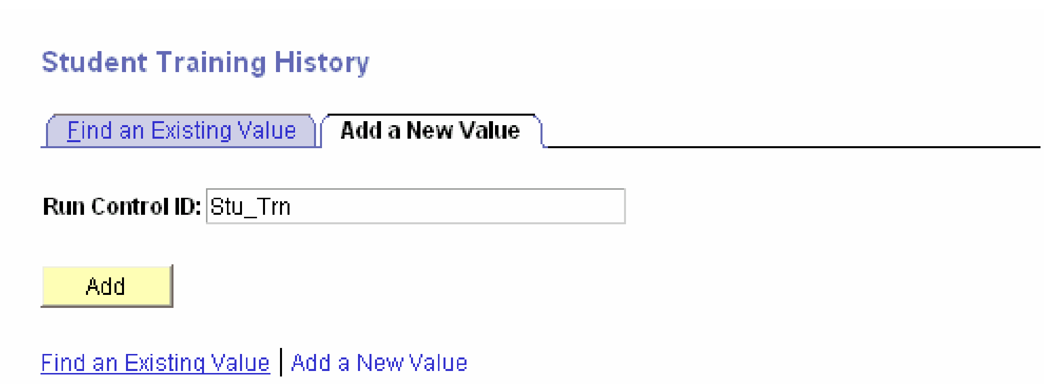
### 3. Search Results display

- Click on an existing Run Control ID or create a new ID
- To create a new ID, click Add a New Value



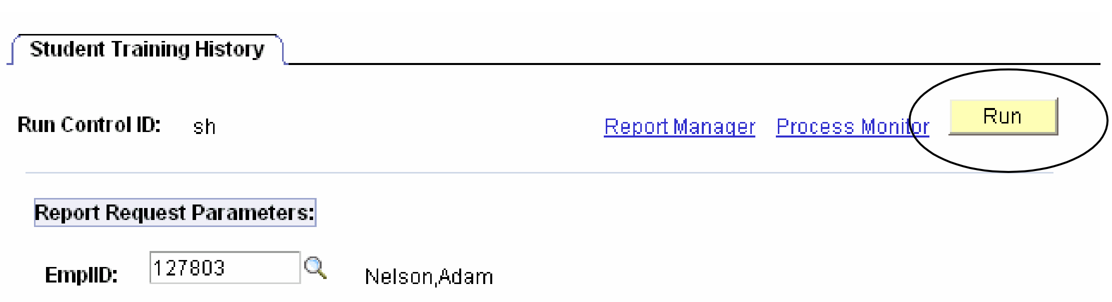

### 4. Add a New Value page displays

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



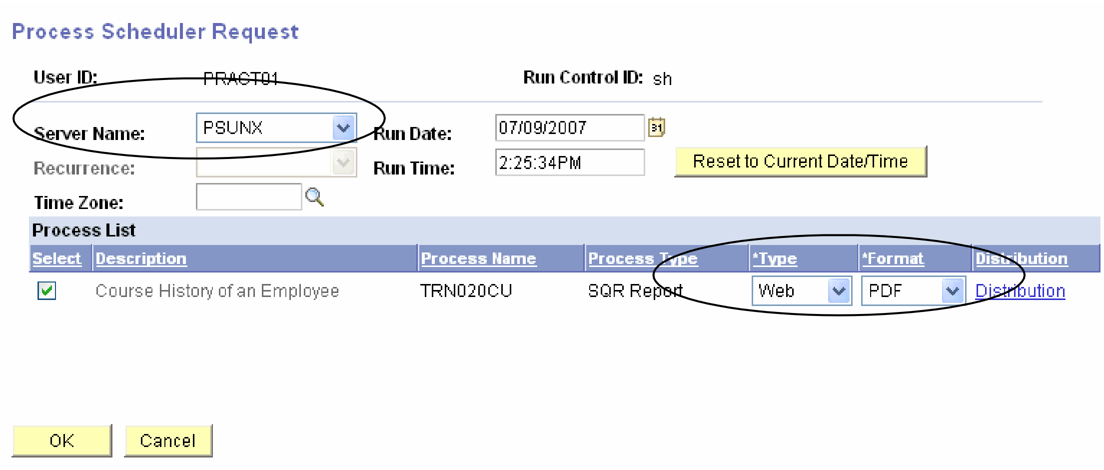

### 5. Student Training History report parameters page displays

- Enter EMPLID for employee or POI
- Click Run



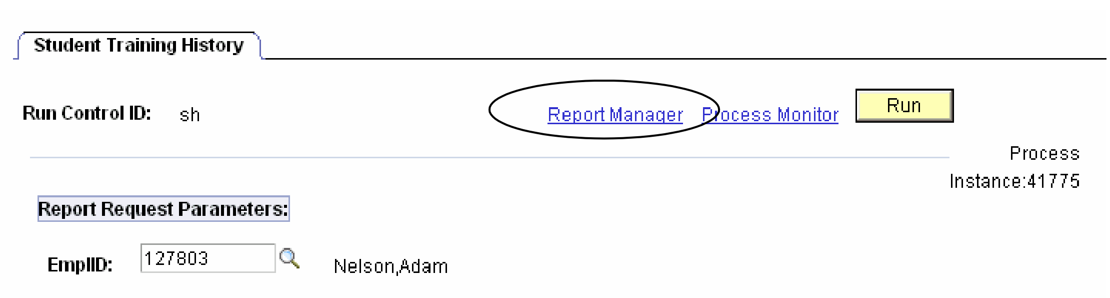
## 6. Process Scheduler page displays

- ☐ 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



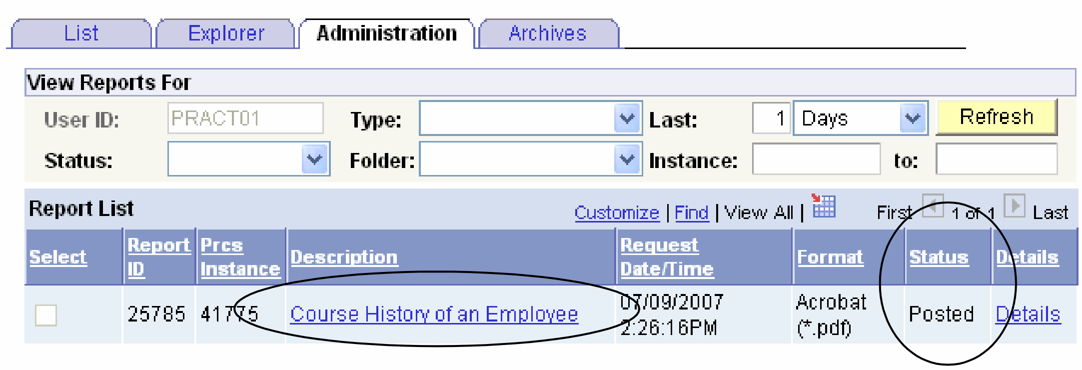

## 7. Student Training History page re-displays

- ☐ Click Report Manager

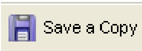



## 8. Report Manager page displays

- ☐ 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)

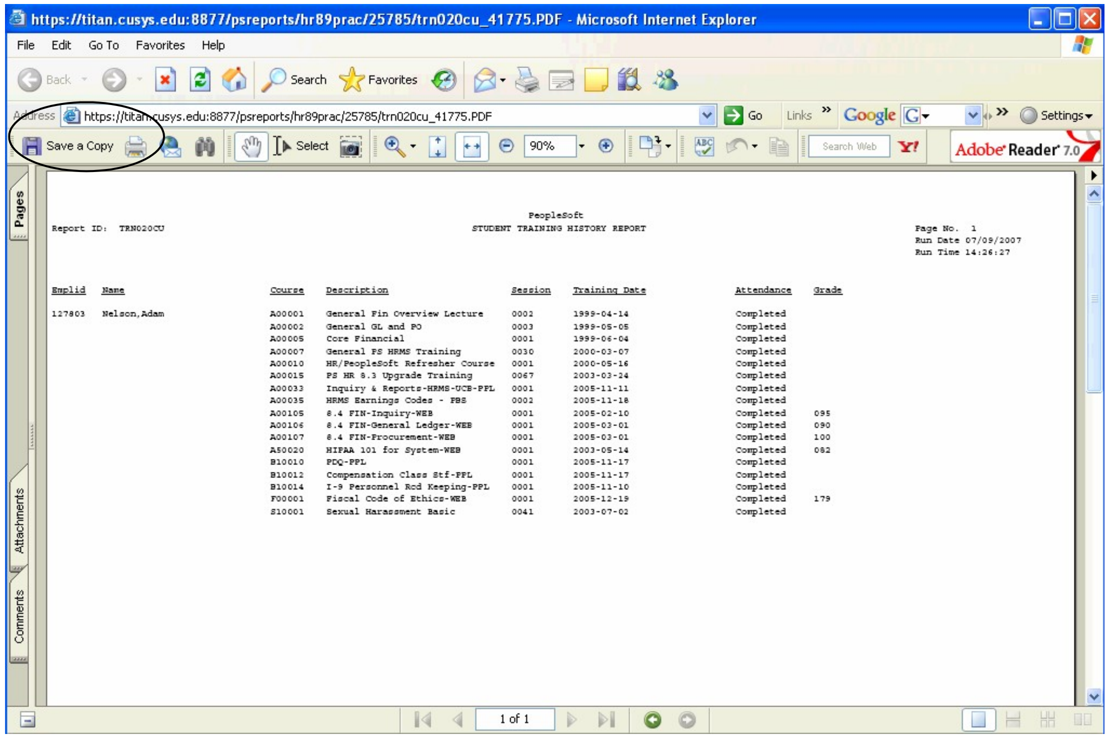


**9. Student Training History report displays in Adobe Acrobat**

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



**End Student Training History report**




PeopleSoft

Report ID: TRN020CU

STUDENT TRAINING HISTORY REPORT

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

| Emplid | 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 | 1999-06-04 | Completed | |
| | | A00007 | General PS HRMS Training | 0030 | 2000-03-07 | Completed | |
| | | A00010 | HR/PeopleSoft Refresher Course | 0001 | 2000-05-16 | Completed | |
| | | A00015 | PS 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 - PBS | 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 | PDQ-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 |
| | | S10001 | Sexual Harassment Basic | 0041 | 2003-07-02 | Completed | |

# Admin Training

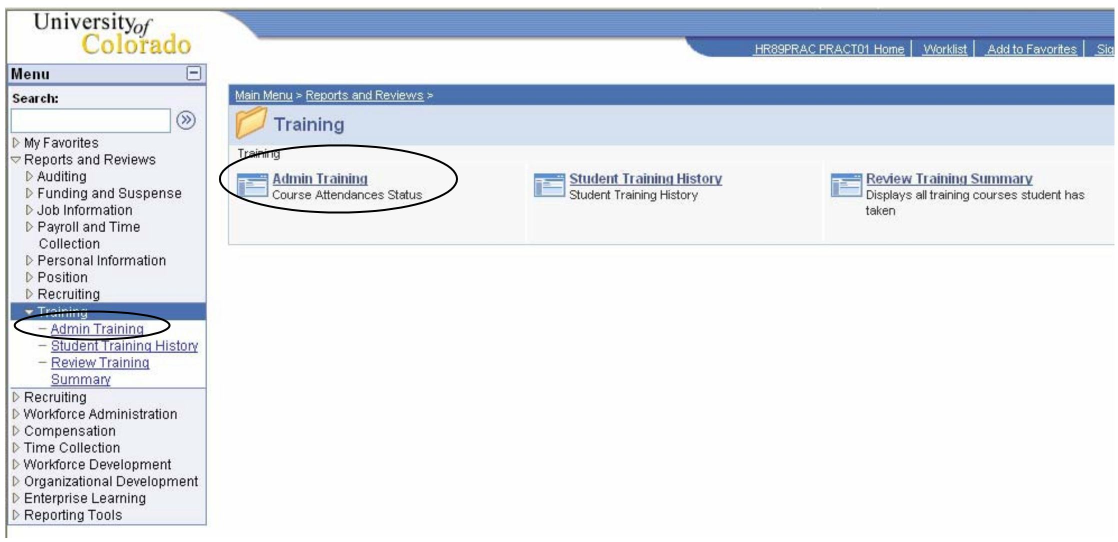
The Admin Training *report* is designed to provide a list of all employees and POIs that have/have not taken a specific course(s), accompanied by the date they took the training(s), and grade(s), if applicable.

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

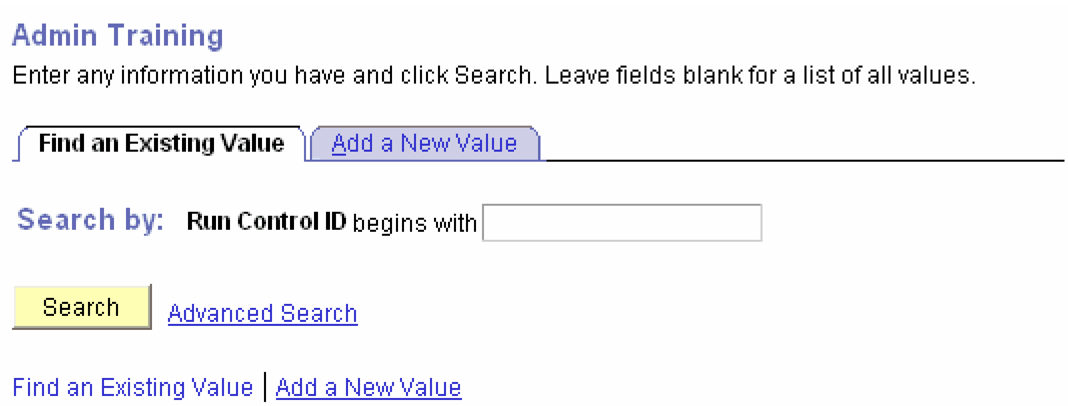
**1. Navigate to Reports and Reviews**

- ☐ Reports and Reviews
- ☐ Training
- ☐ Admin Training



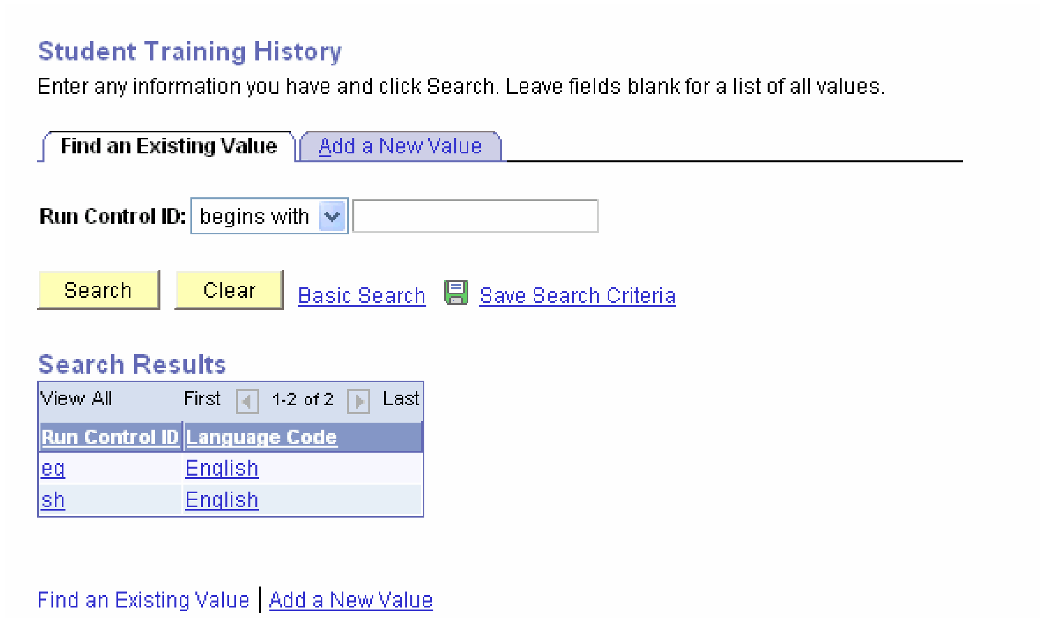

**2. Admin Training Run Control ID page displays**

☐ Click Search to find an existing Run Control ID



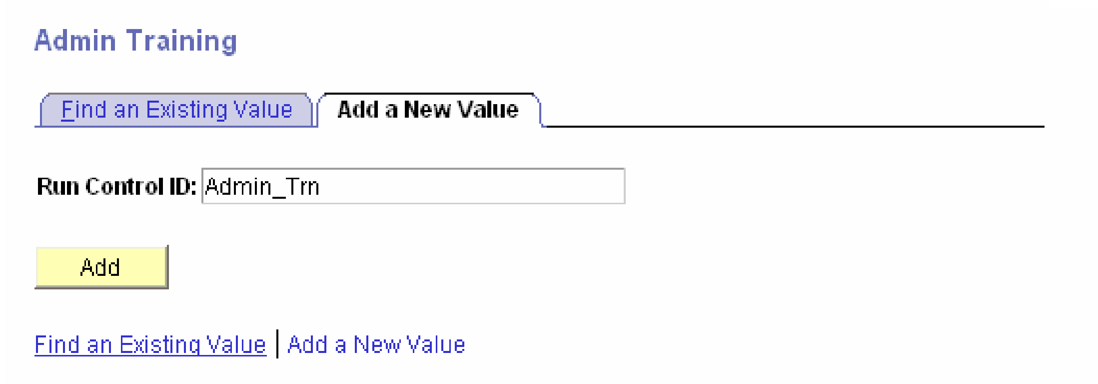
### 3. Search Results display

- 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

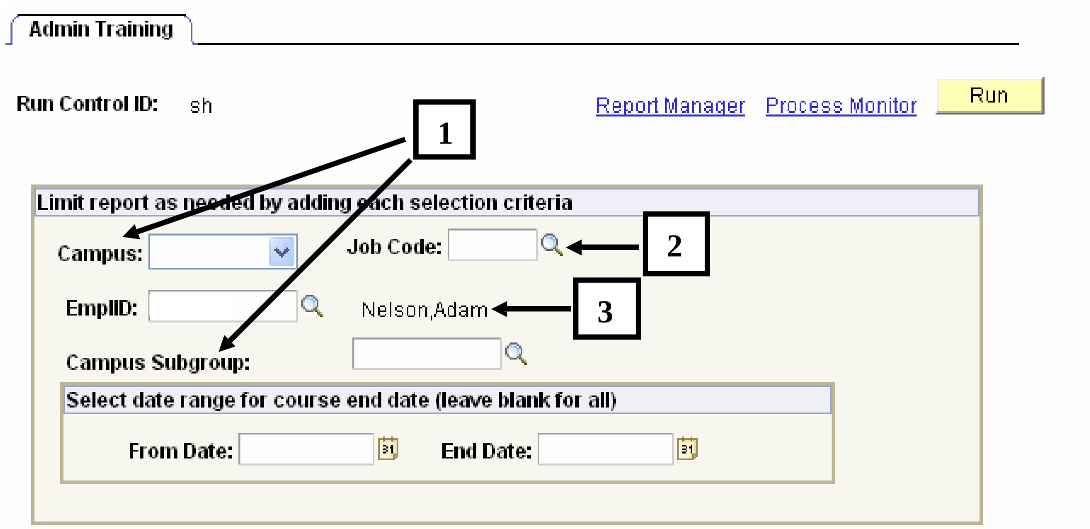


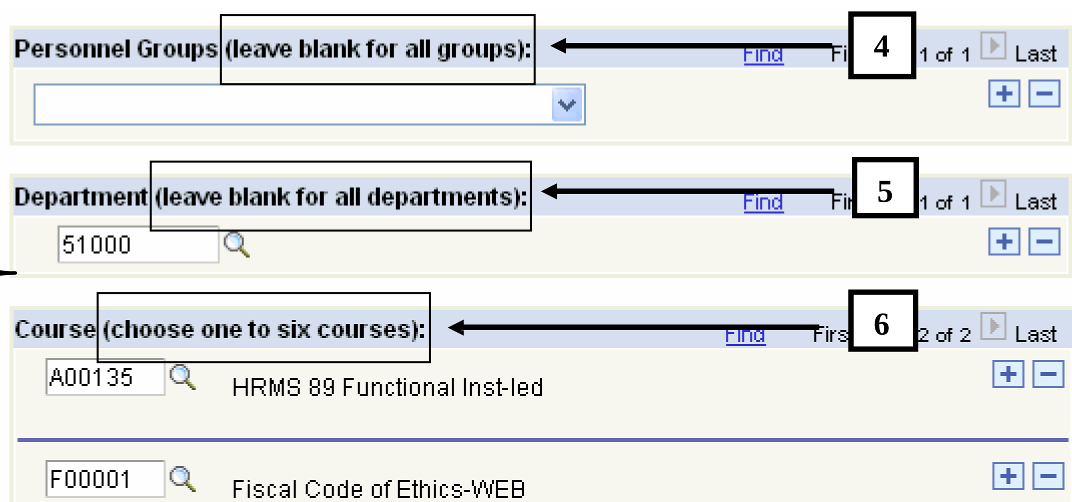
## 5. Admin Training report parameters page displays

- 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



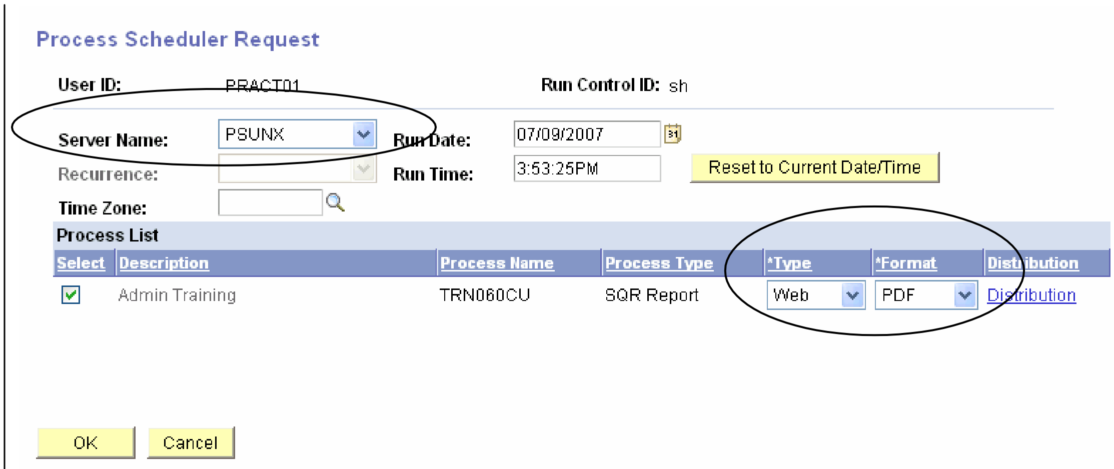

## 6. Additional information for 1 – 6 (above)

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 

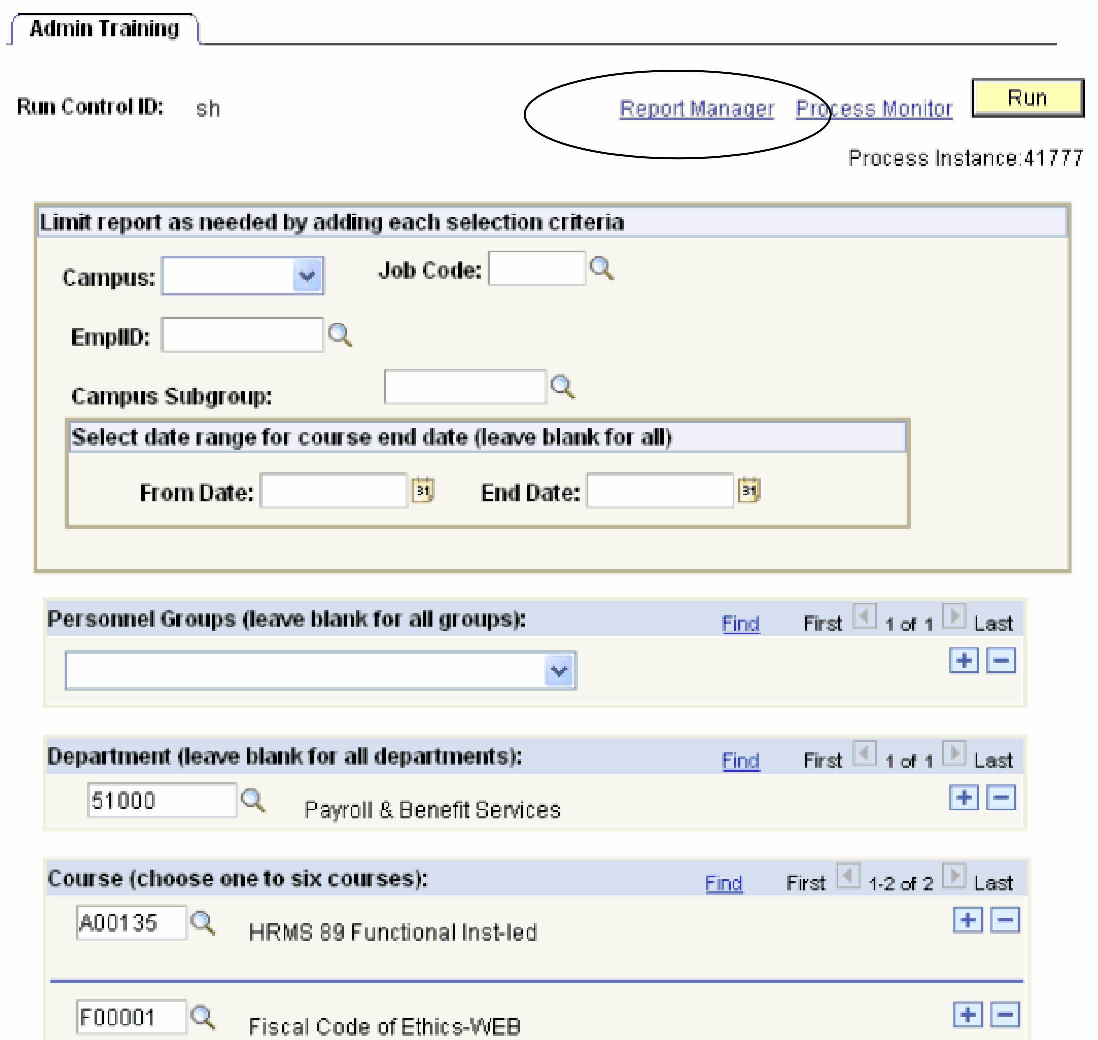






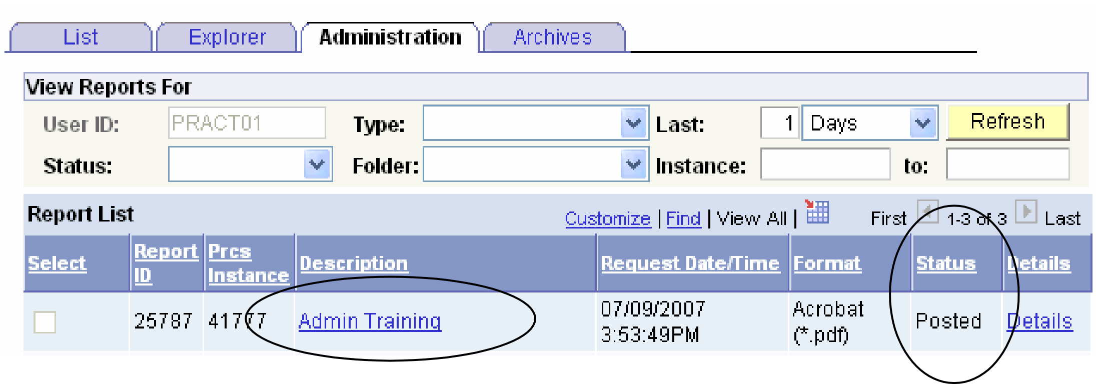
**8. Admin Training page re-displays**

- ☐ Click [Report Manager]



**9. Report Manager page displays**

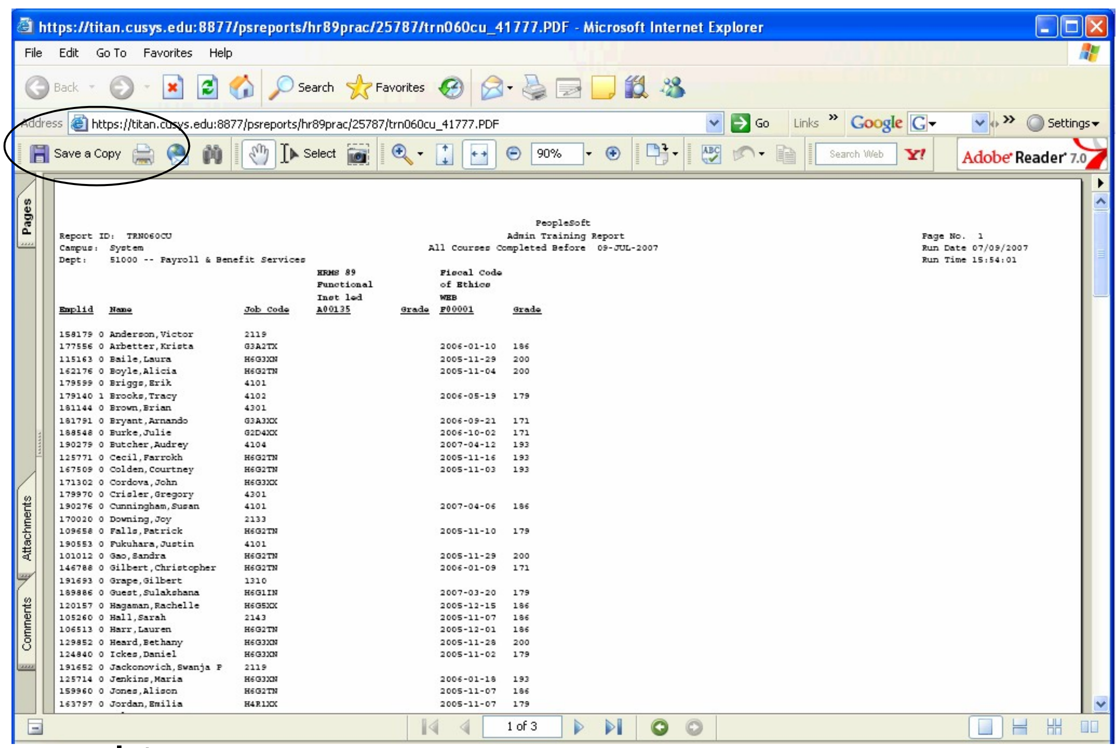
- The report will not display until the process status is Posted
- Click Refresh until the report is Posted
- Click on the report Description Admin Training (If a new window does not open, hold down the Ctrl key and click again)




**10. Admin Training report displays in Adobe Acrobat**

- Click to print the report
- Click Save a Copy to save the report

**End Admin Training report**




**Training Records Lookup complete**