

## Human Capital Management: Step-by-Step Guide

## **Uploading Course Completion Data**

This guide describes the process of uploading course completion data to HCM. You must use the Training Upload Template (an Excel file) in the specified format to successfully upload course completion data. Contact <a href="mailto:system.training@cu.edu">system.training@cu.edu</a> for the template.

**Warning:** The following requirements apply to using the template. If your data does not match these requirements, your upload will fail.

- Course = HCM course code assigned to the course you are uploading.
   Note: Be sure the course and session are both in Active status in HCM, or the upload process will fail.
- StatusDate = Date the course was completed. Date must be entered as *mm/dd/yyyy*.
- Session = 0001.
- Grade = 100.
- AttendanceStatus = C (indicates completed).
- The heading row is required and spaces are not allowed in the column headings.
- Save the Excel template file to your local drive as **Text (Tab delimited)**. The filename you save the file to must not contain spaces or special characters.

	А	В	С	D	E	F	G
1	EmpliD	Name	Course	StatusDate	Session	Grade	Attendance Status
1	страв	Indille	Course	StatusDate	36331011	Graue	AttenuanceStatus
2	266281	Lauren Rosinski	A00170	11/05/2014	0001	100	C
3	272999	Stephen Hawthorne	A00170	11/05/2014	0001	100	C
4	272254	Lauren Wilcox	A00170	11/05/2014	0001	100	C
5	273091	Christina Sollenberg	A00170	11/05/2014	0001	100	C
6	206990	Melanie Sidwell	A00170	11/05/2014	0001	100	С
7	272769	Michael Provine	A00170	11/05/2014	0001	100	C
8	251075	Andrea Pacheco	U00105	10/27/2014	0001	100	C
9	242038	Mallory Bustow	U00105	10/27/2014	0001	100	С

Figure 1: Example of training upload excel template file prior to saving as text (tab delimited) format required for upload to HCM.

- 1. Navigation: NavBar> Navigator> Administer Training> CU Administer Training> CU Upload Training Data.
  - Note: Click the Actions list and select Add to Favorites so you can access CU Upload Training Data using NavBar> HCM Favorites in the future.
- 2. Use **Find an Existing Value** to enter your **Run Control ID**. If you do not have a Run Control ID you can create one.

To create a Run Control ID, follow the steps below; otherwise, continue to the next step to upload your file. You can create and save unique Run Control IDs for processes or reports you run on a regular basis such as uploads.

- a. Click Add a New Value.
- b. In the Run Control ID box, type a name for your Run Control ID.
- c. Click Add. The system returns you to the CU Upload Training Data tab.

3. From the CU Upload Training Data tab, click the Add Attachment icon.

CU Upload Training Data			
Run Control ID ji	owe	Report Manager	Process Monitor Run
Training Data File Name:	File must be tab-delimited text,	e.g. training_update.txt	
File Format: Tab-limit	ted text file. e.g, training_upda	ate.txt	
Line 1 is header row (Re Data: Required fields are	e <b>quired).</b> : in red. Optional fields in blue.		
EmplID, Name, Course, Session,	StatusDate(MM/DD/YYYY),	Grade, Attendance Status = C	
🔚 Save 🔯 Return to S	earch 🔄 Notify	[	📕 Add 🖉 Update/Display

- 4. Click **Browse** to locate and select the tab-delimited file you want to upload.
- 5. Click **Upload**. This attaches the file you want to upload to HCM and saves it for the process to be run.
- Click Run. The Process Scheduler Request page appears with CU\_TRNUP displayed as the Process Name and PSJob as the Process Type.

Ime PSUNX					
The second	V Ru	n Date 08/19/2016	31		
nce	Ru	n Time 9:21:25AM	Reset	to Current Da	ate/Time
one		. La construction de la construc			
ion	Process Name	Process Type	*Type	*Format	Distribution
Upload	CU_TRNUP	PSJob	Web 🗸	TXT N	<ul> <li>Distribution</li> </ul>
	ione Q	ione Q ione Q ion Process Name g Upload CU_TRNUP	ince Run Time 9:21:25AM Run Time 9:21:25AM Process Name Process Type Upload CU_TRNUP PSJob	ione Q ione CU_TRNUP PSJob Web ✓	ione Run Time 9:21:25AM Reset to Current Di ione Reset to Current Di ione Current Di ion

- 7. In the Server Name box, make sure the server name is set to PSUNX.
- 8. From the Type list, select WEB.
- 9. From the Format list, select TXT.
- 10. Click **OK**. This uploads your file to HCM.
- 11. Click **Report Manager** to check if the file uploaded successfully to HCM, and posted generated files to the report repository.

<sup>2</sup> HCM Step-by-Step Guide | hcm\_sbs-uploading-course-completion-data.docx Revised: July 23, 2018 | Prepared by: Employee Services

## 12. Select the Administration tab and click Details.

List E	xplorer A	dministra	tion Arc	hives			_				-
View R	eports For										
Us	er ID WILLO	02228	Туре		✓ Last		<b>~</b>	1	Days	~	Refresh
S	tatus	~	Folder		✓ Instance		to				
Report	List		Pers	onalize   Find   Vi	ew All   🖓   🔣	First 🤇	1-4 of 4	Last			
Select	Report ID	Prcs Instance	Description		Request Date/Time	Format	Status	Details			
	1201201	2354502	CU Upload	Training Data	08/19/2016 9:33:46AM	Acrobat (*.pdf)	Posted	Details			
	1201200	2354501	CU Upload	Training Data	08/19/2016 9:33:46AM	Text Files (*.bd)	Posted	Details			
					00/40/2040	Comma					

The Report List includes two lines for your upload: one in a text file format and one in a PDF format.

13. Click the Text File Details link to check that the Run Status displays Success.

Report De	tail					×
Report						Help
Report ID Name Run Status	1201200 CU_ATTACH_DN Success	Process Instance Process Type	2354501 Application En	Message Lo gine	g	
CU Upload Tr	aining Data					
Distribution	Node psreports	Expiration	Date 09/18	/2016		
File List						
Name			File Size (bytes)	Datetime Created		
AE_CU_ATT	ACH_DN_2354501.log		171	08/19/2016 9:33:59.259 MDT	9083AM	
WILL0022282	201681991610A50002	1_ashley_081516.txt	570	08/19/2016 9:33:59:25 MDT	MAE809	
Distribute T	0					
Distribution ID	) Туре	*Distribu	ution ID			
User		WILLOO	2228			
ОК	Cancel					

14. Under **File List**, click the log file link to check that the LOG file ended normally. The TXT file shows your uploaded data.



15. From the Report List, click the Details link for the Acrobat (\*.pdf) file.

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16. From the **Report Detail** box that displays, click the PDF file to verify that all records in your file uploaded accurately.

Report Detail						
Report						
Report ID 120	)1201	Process Instance	2354502		Message Log	1
Name CU	TRN071	Process Type	SQR Proc	ess		
Run Status Su	ccess					
CU Upload Training	g Data					
Distribution De	tails					
Distribution Node	psreports	Expiration	Date	09/18/2016		
File List						
Name		File Size (I	bytes)	Datetime Cre	eated	
SQR_CUTRN071_	2354502.log	1,832		08/19/2016	9:34:10.302424AM	/ MDT
cutrn071_2354502	PDF	3,079		08/19/2016	9:34:10.302424AM	M MDT
cutrn071_2354502	out	2,221		08/19/2016	9:34:10.302424AM	M MDT
Distribute To						
Distribution ID Type	•	*Distribu	tion ID			
llear		WILL002	2228			

The PDF Detail Report appears, listing any errors for individual records that did not upload accurately and the reason for the errors.



Error 1: Not Active Employee – Appears when an Employee ID for a record is not matched in HCM.

Error 2: No Active Course/Session – Appears when a course and session 0001 are not active in HCM.

Error 4: Not Proper Attendance Format – Appears when a field in the upload file is not formatted correctly, or is blank.

Error 5: Employee has Taken Class – Record Already Exists. Check to be sure this is correct by checking employee training summary in HCM.

After uploading, run the Comprehensive Learning Report in HCM to check that the updated training record was correctly uploaded for each employee in your original file.

## Navigation: NavBar> Navigator> Administer Training> CU Administer Training> CU Comprehensive Learning Rept.

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