# 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 system.training@cu.edu 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.

| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | EmplID | Name | Course | StatusDate | Session | Grade | AttendanceStatus |
| 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 | C |
| 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 | C |

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**> **Menu**> **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. 🖉



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.

6. Click **Run**. The Process Scheduler Request page appears with **CU_TRNUP** displayed as the Process Name and **PSJob** as the Process Type.



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.

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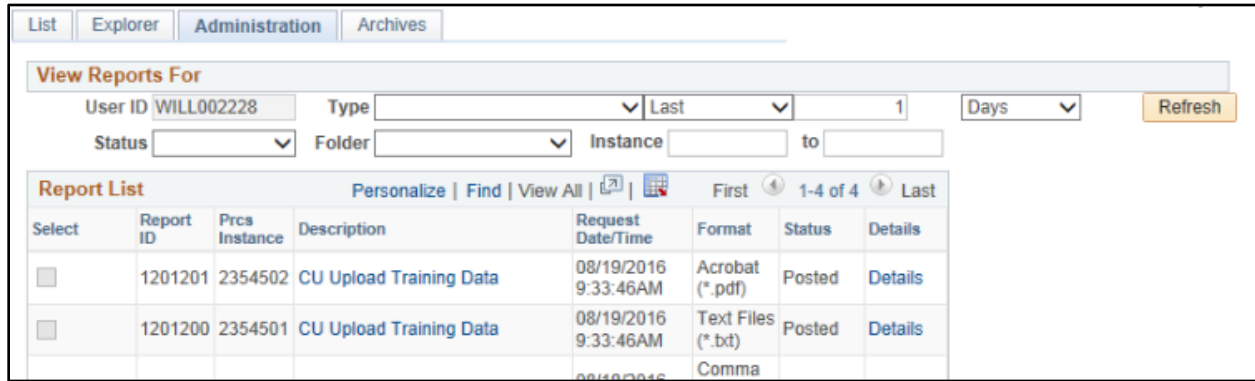


The Report List includes two lines for your upload: one in a text file format and one in a PDF format.

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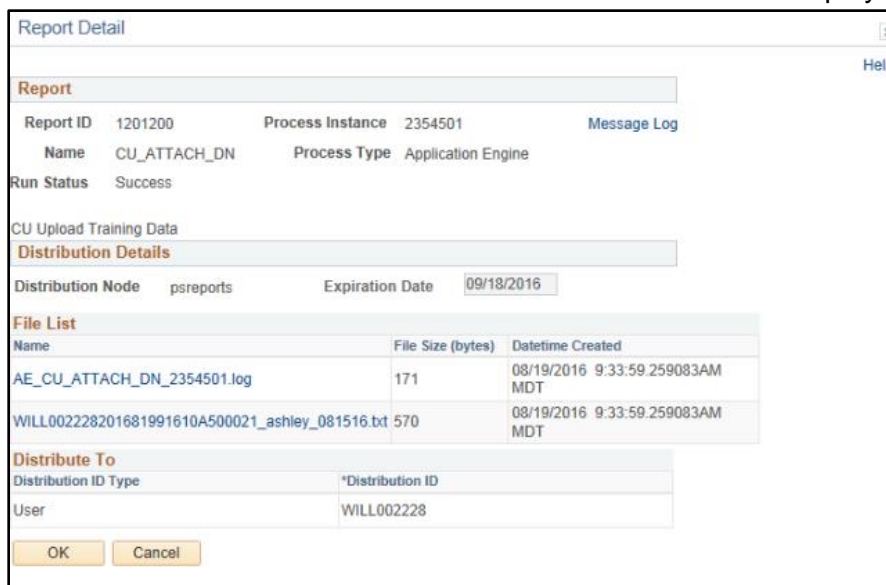


14. Under **File List**, click the log file link to check that the LOG file ended normally. The TXT file shows your uploaded data.
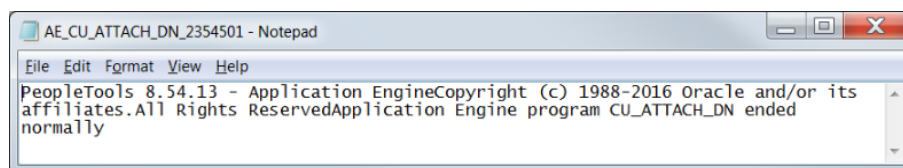


15. From the **Report List**, click the **Details** link for the Acrobat (*.pdf) file.

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



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**> **Menu**> **Administer Training**> **CU Administer Training**> **CU Comprehensive Learning Rept.**

For more information about retrieving training-completion data (and non-completions), refer to *Running the Comprehensive Learning Report Step-by-Step Guide*.