HRIS – Human Resources Information Solution

RESOURCE GUIDE: AGENCY TRAINING COORDINATOR - AGENCY TRAINING SPECIALIST

AGENCY TRAINING COORDINATOR -AGENCY TRAINING SPECIALIST

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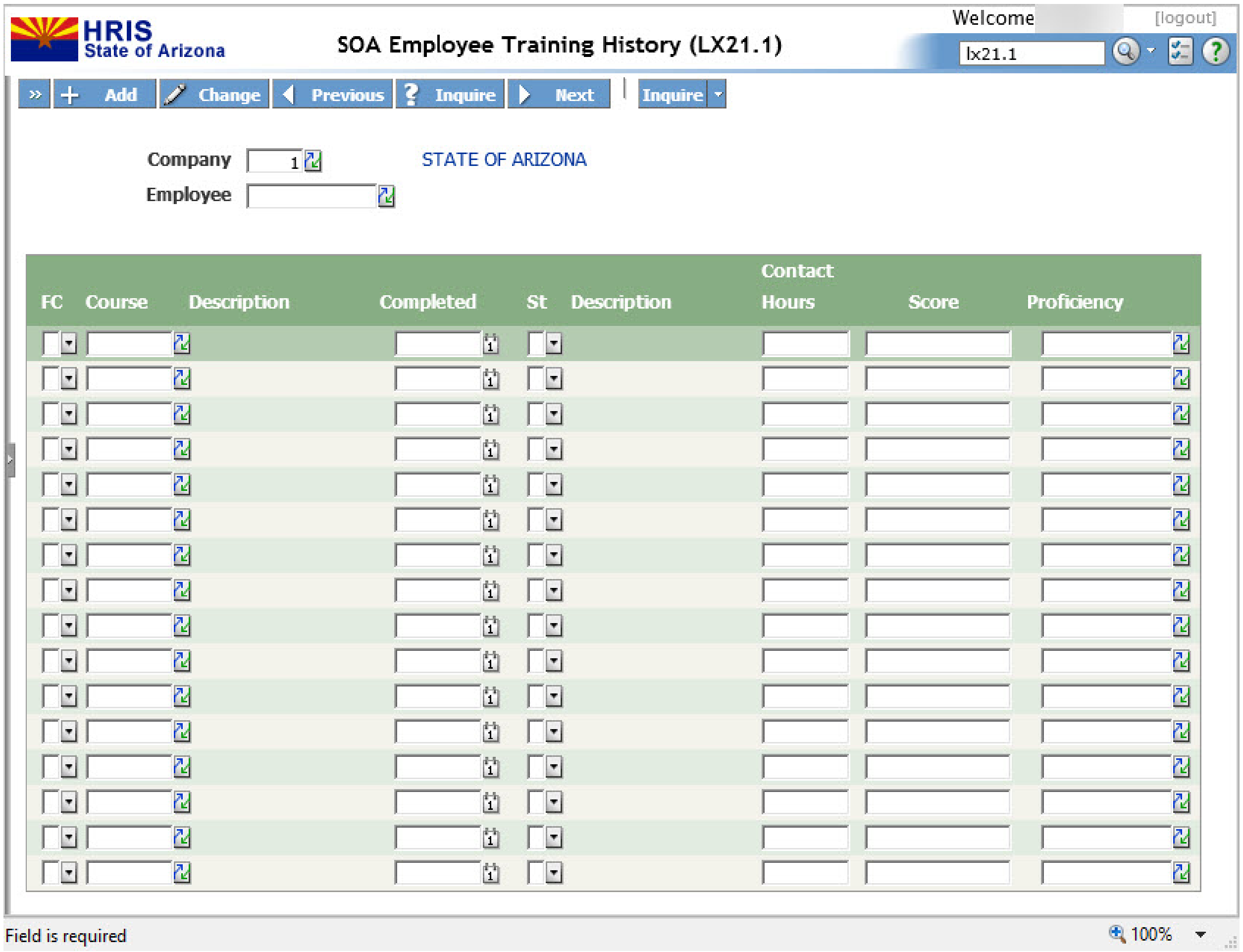
Viewing Course History

Employee Training History (LX21.1) is automatically updated. Use LX21.1 to view employee Training History.

(Image 1)



Steps to view completed course history

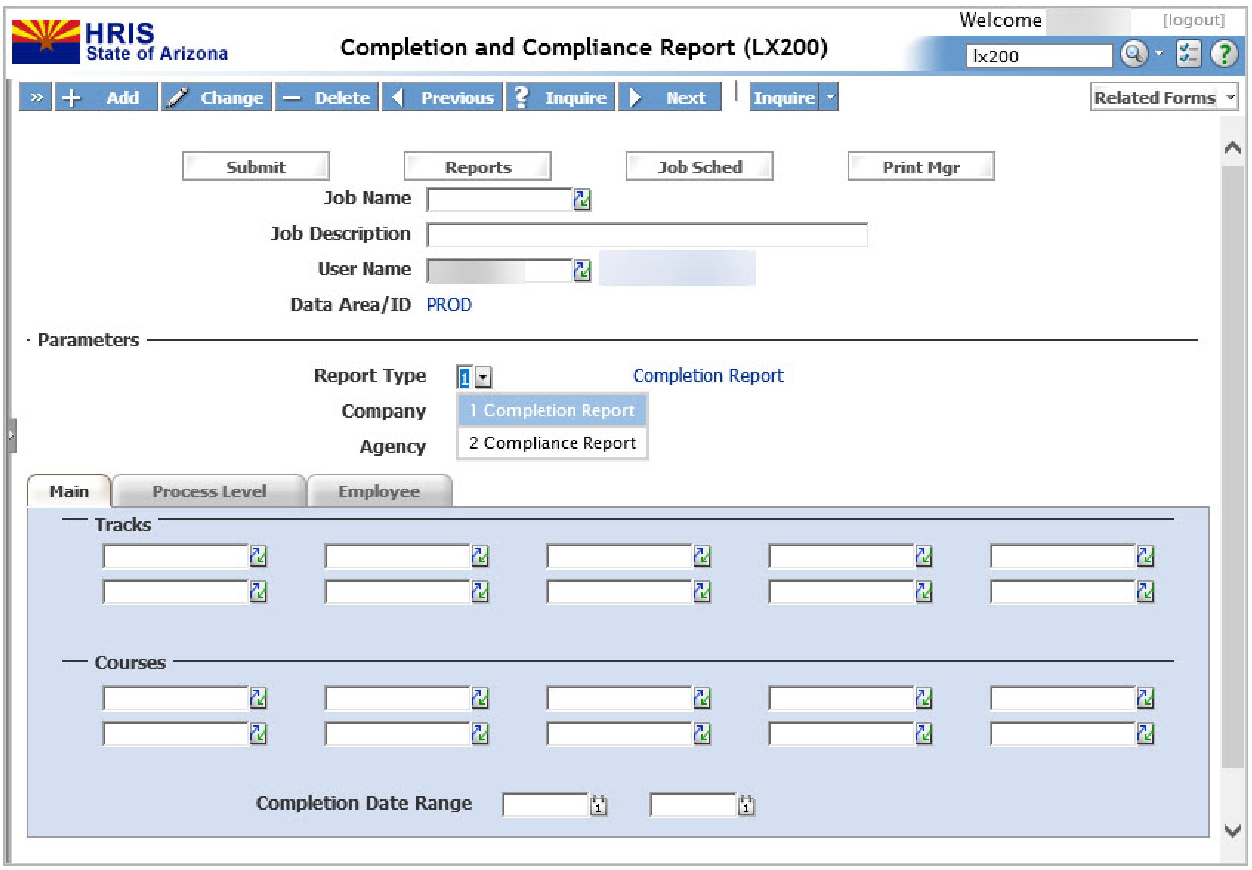
1. Access Employee Training History (LX21.1).
2. In the **Company*** field, *select Company 1.*
3. In the **Employee*** field, select the employee and choose the Inquire form function.
4. Employee transcripts will display.

HRIS Reports

HRIS provides users with numerous types of standard reports and reporting tools to extract information out of the HRIS system. After accessing a Standard Report Form, the user defines the report parameters (selection criteria), enters the appropriate information in the fields and submits the report to be processed (run). The report parameters determine what information the report displays. After the report is processed, results can be viewed online or printed in several formats. The report parameters can be saved and run repeatedly.

Completion Report (LX200)

Lists employees who have completed required training.



Steps to create a Completion Report (LX200)

1. Access Completion Report (LX200)
2. Enter **Job Name*.**
3. Enter the **Job Description.**
4. **User ID***: this field will default to the username that is currently logged in to HRIS.
5. In the Parameters section, consider the following fields:
    a. **Report Type***: Choose Completion Report.
    b. **Company***: Enter “1”, which denotes State of Arizona.
    c. **Agency:** By using the drop down box, select the **Agency.** If this field is left blank, results for all agencies will display.

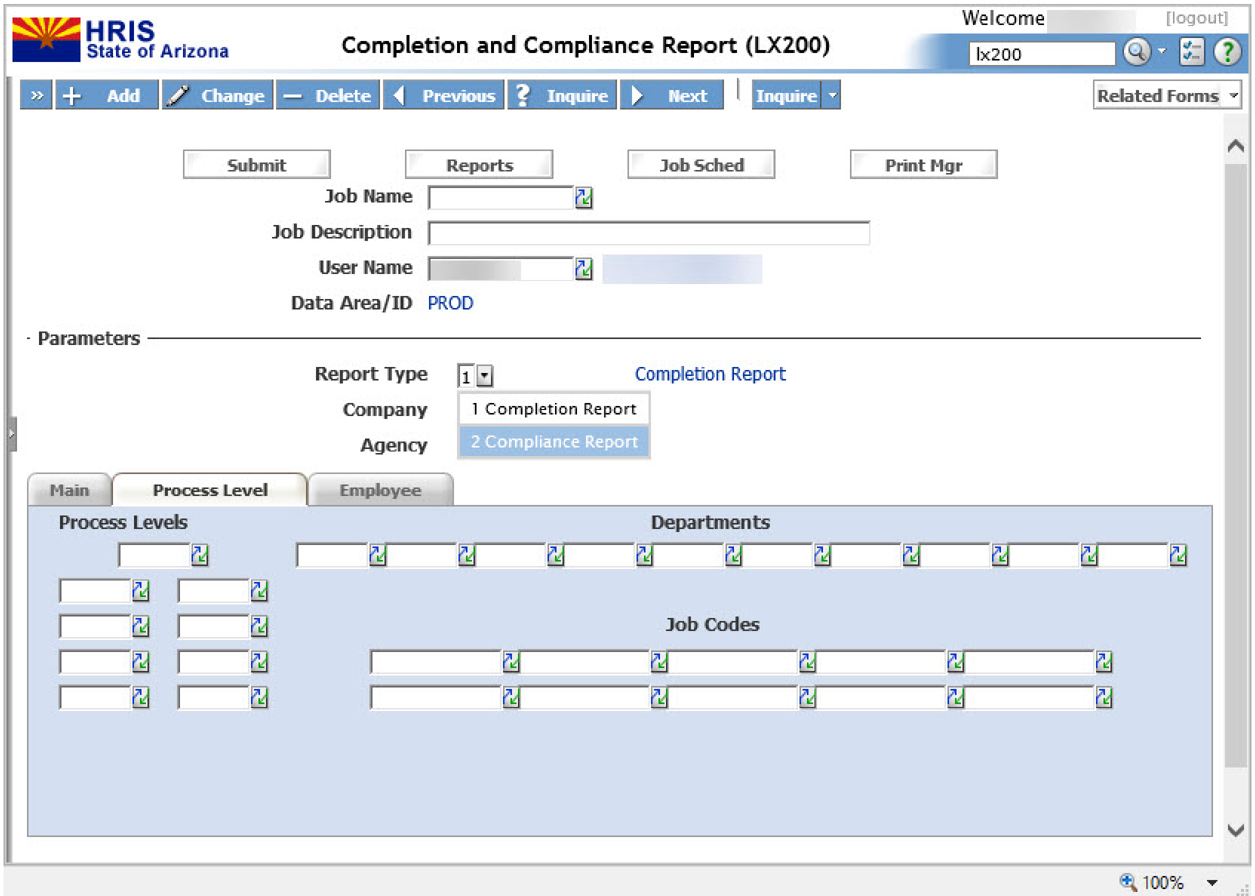
d. Consider the following **Tabs** in the Parameter section – note, there are several fields under each tab to enter data as you can choose multiple courses, process levels, departments and job codes without this data being in a specific data range.
   i. **Main**
      - Tracks – if you want to filter the records by Tracks, select the track name by using the drop down box or by entering the track name. You can choose either one Track or multiple Tracks.
      - Courses – if you want to filter the records by Courses, select the course number by using the drop down box or by entering the course number. You can choose either one Course or multiple Courses.
   ii. **Process Level:**
      - Process Levels – if you want to filter records based on Process Level, enter a process level or series of process levels. If you leave these fields blank, results for all process levels will display.
      - Departments – if you want to filter records based on Department, you must choose a Process Level as noted in previous step. Departments will display based on the Process Level chosen. If you leave these fields blank, results for all departments will display based on the Process Level(s) chosen.
      - Job Codes– if you want to filter records based on Job Codes, enter a Job Code or series of job codes. If you leave these fields blank, results for all job codes will display.
   iii. **Employee:**
      - Employee – if you want to filter records based on the training history of a particular employee, enter their EIN here. NOTE: You **CANNOT** enter anything in the Agency field when running the LX200 by Employee or an error will occur.
      - Employee Status – if you want to filter records based on Employee Status, choose Active, Inactive or All. This field will default to **All** if nothing is selected. An employee will display as inactive, if they have a termination date listed in the HR11 form.
      - Supervisor Only – if you want to filter records to only include Supervisors, select **Yes**. An employee is identified as a Supervisor by virtue of having a HRIS supervisor link.

e. Enter the **Completion Date Range:** if you want to filter records based on when the employee has completed the course, enter date or range of dates.
   NOTE: If a date range is not keyed all records will display.

6. Click **Add.**
7. Click Submit (**A Submit Job – Webpage Dialog box will appear**)
8. Click **Submit** again (the Submit button on the Submit Job – Webpage Dialog box)
9. Click **Print Manager** to view your report.

Compliance Report (LX200)

The Compliance Report will display all employees who have courses or tracks as a requirement and whether they have taken the required course. This is indicated in Lawson by the course or track being set up in TR13.1 (Required Training by Track and Course).



Steps to create a Compliance Report (LX200)

1. Access **Compliance Report** (LX200).
2. Enter **Job Name*.**
3. Enter the **Job Description.**
4. **User ID***: this field will default to the username that is currently logged in to HRIS.
5. In the Parameters section, consider the following fields:
    a. **Report Type***: Choose Compliance Report.
    b. **Company***: Enter “1”, which denotes State of Arizona.
    c. **Agency:** By using the drop down box, select the **Agency.** If this field is left blank, results for all agencies will display.
    d. Consider the following **Tabs** in the Parameter section – note, there are several fields under each tab to enter data as you can choose multiple courses, process levels, departments and job codes without this data being in a specific data range.
        I. **Main**

- Tracks – if you want to filter the records by Tracks, select the track name by using the drop down box or by entering the track name. You can choose either one Track or multiple Tracks.
- Courses – if you want to filter the records by Courses, select the course number by using the drop down box or by entering the course number. You can choose either one Course or multiple Courses.

II. Process Level

- Process Levels – if you want to filter records based on Process Level, enter a process level or series of process levels. If you leave these fields blank, results for all process levels will display.
- Departments – if you want to filter records based on Department, you must choose a Process Level as noted in previous step. Departments will display based on the Process Level chosen. If you leave these fields blank, results for all departments will display based on the Process Level(s) chosen.
- Job Codes– if you want to filter records based on Job Codes, enter a Job Code or series of job codes. If you leave these fields blank, results for all job codes will display.

III. Employee

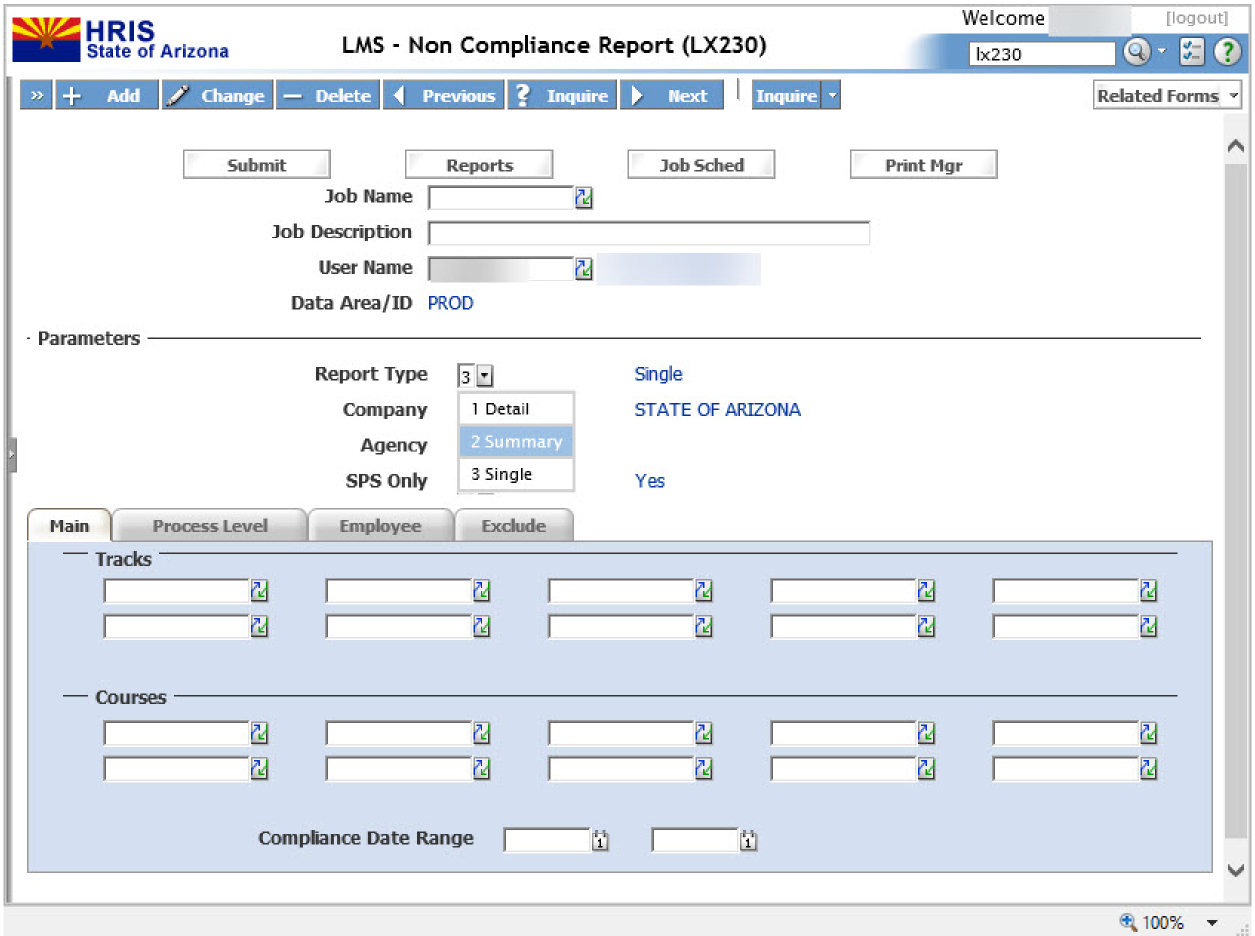
- Employee – if you want to filter records based on the training history of a particular employee, enter their EIN here.
- Employee Status - – if you want to filter records based on Employee Status, choose Active, Inactive or All. This field will default to **All** if nothing is selected. An employee will display as inactive, if they have a termination date listed in the HR11 form.
- Supervisor Only – if you want to filter records to only include Supervisors, select **Yes**. An employee is identified as a Supervisor by virtue of having a HRIS supervisor link.

e. Enter the **Completion Date Range:** please do not use this field when creating Compliance Reports.
NOTE: If a date range is not keyed all records will display.

6. Click **Add.**
7. Click Submit (**A Submit Job – Webpage Dialog box will appear**)
8. Click **Submit** again (the Submit button on the Submit Job – Webpage Dialog box)
9. Click **Print Manager** to view your report.

Non-Compliance Reports (LX230)

Displays all employees who have courses or tracks as and whether or not they have taken the course. They do not need to have any training set as required to show results.



Steps to create a Non-Compliance Report (LX230)

1. **Access Non-Compliance Report (LX230)**
2. Enter **Job Name*.**
3. Enter the **Job Description.**
4. **User ID***: this field will default to the username that is currently logged in to HRIS.
5. In the Parameters section, consider the following fields:

1. Detail Report (LX230)

The **Detail** report will return one record per employee per course per track. If a track is input in the criteria, it will return one record per employee per course for each track in the output within the date range entered. It will return the most recent Passing record first from the employee training history table within the date range entered, then with the following priority: Complete, Failed, Incomplete, Enrolled, Absent, Cancelled Timely, Cancelled Late, No Activity. If a course is input in the criteria, one record will be returned for each course that is input in the criteria with the same priority as the courses within the track. The following course has been entered in the criteria of the report: RM29.

Report Image

EMP-NAME	Course Type	Completed	Completion Status	Proficiency	ZTH-SCORE	Proficiency
	CBT	1/6/2012	Complete	PASSED	84	PASSED
	CBT		Absent			PASSED
			No Activity			PASSED
	CBT		Canceled Timely			PASSED
			No Activity			PASSED
			No Activity			PASSED
	CBT	5/20/2013	Complete	PASSED	100	PASSED
			No Activity			PASSED
		8/14/2008	Complete	PASSED	88%	PASSED

2. Summary Report (LX230)

The **Summary** report will return one record per employee per track or course. If a track is input in the criteria, the report will return one record per employee per track on the output within the date range entered. If they have passed all courses in the track, “Complete” will appear in the Completion Status field for each course within the track that is entered in the criteria. If they haven’t passed all courses in the track “Incomplete” will appear in the Completion Status field. The Summary report will not show all of the course status details such as Enrolled, or Absent, it will only display whether or not they have completed a course or track. If you enter both a course and a track in the Summary report, a record will be returned for each course and track. Tracks will be returned with the status of either “Complete” or “Incomplete” on the report. Courses will be returned with the status of either “Complete” or “No Activity” on the report. The following course has been entered in the criteria of the report: RM29.

Report Image

EMP-NAME	Employee	Course Type	Completed	Completion Status	Proficiency	ZTH-SCORE
		CBT	1/6/2012	Complete	PASSED	84
				No Activity		
				No Activity		
				No Activity		
				No Activity		
				No Activity		
		CBT	5/20/2013	Complete	PASSED	100
				No Activity		
			8/14/2008	Complete	PASSED	88%

3. Single Record Report (LX230)

The **Single** Record report will return one record only per employee. The report won't return any track or course detail and will only return one record in total even if multiple courses/tracks are entered. For example, if there are 3 track records, the report only returns the most recent completed record. If there are no completed records, it returns "No Activity" and the course/track field will be blank. This can also be used for equivalency reporting as you may enter several courses or tracks that are equivalent and the report will only return the most recent completed record. The following courses have been entered in the criteria of the report: RM29 and SPSORI100.

Report Image

Course Code	Course Name	EMP-AGE	EMP-PRC	Department	EMP-NAME	Course Type	Completed	Completion Status	Proficiency
SPSORI100	SPS EMPLOYEE HANDBOOK					CBT	11/6/2012	Complete	PASSED
SPSORI100	SPS EMPLOYEE HANDBOOK					CBT	10/30/2012	Complete	PASSED
SPSORI100	SPS EMPLOYEE HANDBOOK					CBT	9/24/2013	Complete	PASSED
SPSORI100	SPS EMPLOYEE HANDBOOK					CBT	9/9/2013	Complete	PASSED
SPSORI100	SPS EMPLOYEE HANDBOOK					CBT	11/11/2012	Complete	PASSED
SPSORI100	SPS EMPLOYEE HANDBOOK					CBT	1/8/2013	Complete	PASSED
RM29	STATE EMPLOYEE DRIVER TRA					CBT	5/20/2013	Complete	PASSED
SPSORI100	SPS EMPLOYEE HANDBOOK					CBT	11/7/2013	Complete	PASSED
SPSORI100	SPS EMPLOYEE HANDBOOK					CBT	11/6/2012	Complete	PASSED

a. **Company*** Enter "1", which denotes State of Arizona.

b. **Agency:** By using the drop down box, select the **Agency.** If this field is left blank, results for all agencies will display.

c. **SPS Only:** If you want to include results of State Personnel Agencies only, select "Y". If you want to include all agencies including those outside of the State Personnel System, select "N".

d. Consider the following **Tabs** in the Parameter section – note, there are several fields under each tab to enter data as you can choose multiple courses, process levels, departments and job codes without this data being in a specific data range.

i. **Main**

- Tracks – if you want to filter the records by Tracks, select the track name by using the drop down box or by entering the track name. You can choose either one Track or multiple Tracks.
- Courses – if you want to filter the records by Courses, select the course number by using the drop down box or by entering the course number. You can choose either one Course or multiple Courses.

ii. **Process Level**

- Process Levels – if you want to filter records based on Process Level, enter a process level or series of process levels. If you leave these fields blank, results for all process levels will display.
- Departments – if you want to filter records based on Department, you must choose a Process Level as noted in previous step. Departments will display based on the Process Level chosen. If you leave these fields blank, results for all departments will display based on the Process Level(s) chosen.

- Job Codes– if you want to filter records based on Job Codes, enter a Job Code or series of job codes. If you leave these fields blank, results for all job codes will display.

iii. **Employee**

- Employee – if you want to filter records based on the training history of a particular employee, enter their EIN here. NOTE: You **CANNOT** enter anything in the Agency field when running the LX230 by Employee or an error will occur.
- Employee Status – if you want to filter records based on Employee Status, choose All or Active. This field will default to **Active** if nothing is selected. An employee will display as inactive, if they have a termination date listed in the HR11 form.
- Supervisor Only – if you want to filter records to only include Supervisors, select **1- Supervisor Only.** An employee is identified as a Supervisor by virtue of having a HRIS supervisor link. If you want if you want to filter records to only include Non-Supervisors, select **2- Non Supervisors.** If you want to include both Supervisors and Non-Supervisors, select **0- All.**
- Create CSV – Select Select "Y" if you would like a CSV file to be produced along with your report.
- Sorting Option- 1-Course will sort the results by Course name first, 2-Name will sort records by employee name.
- Enter the **Completion Date Range:** if you want to filter records based on when the employee has completed the course, enter date or range of dates.

iv. **Exclude:**

- Excludes Board and Commission Members when "Y" is selected.
- Excludes Directors, Deputy Directors when "Y" is selected.
- Excludes Correctional Officers, Reserves, Firefighters and Coliseum Workers when "Y" is selected.
- Excludes the Governor and his/her direct staff when "Y" is selected.

e. Click **Add.**
f. Click Submit (**A Submit Job – Webpage Dialog box will appear**)
g. Click **Submit** again (the Submit button on the Submit Job – Webpage Dialog box)
h. Click **Print Manager** to view your report.