

Instructions for Querying in HRMS

User's Manual for compliance can be located from the HRMS menu by clicking on:

<http://www.rochester.edu/working/> Select "HRMS" and log in.

[UR Documentation -> HRMS User Guides -> Compliance Tracking and Reporting](#)

The following updates are not included in the User Guide, so are described below.

HRMS Update Summary - UR Course Compliance Advanced Search

Summary of Update

An advance search option has been added to the UR Course Compliance Course Code search. This advanced search provides the ability to look up a course by Category Type.

Reason for Update

The UR Course Compliance Look up Course Code option displays the entire list of compliance courses. Compliance courses are considered to be any required employee education courses that may require reporting. This is illustrated in Figures 1 and 2.

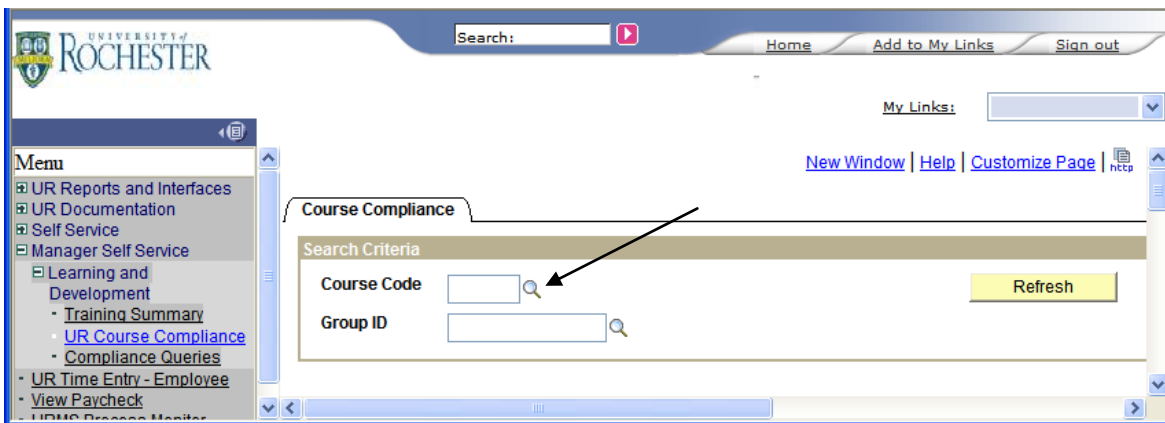


Figure 1. UR Course Compliance Query

Figure 2 shows the Look up Course Code screen. The list of compliance courses has gotten very long, so it is unwieldy to find a course if you do not know the course code. The new search option to "Look up Category Code" is indicated by the arrow in Figure 2.

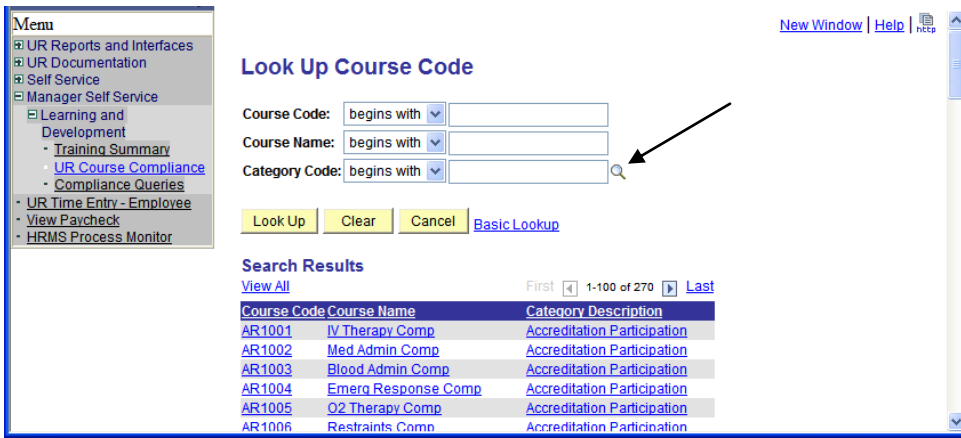


Figure 2. Compliance Query Look Up Course Code Screen

Description of New Look-up Screen

If you click the magnifying class next to Category Code in the Look up Course Code screen, a list of category codes is displayed, as shown in Figure 3. Note that the “HB” code corresponds to any courses categorized as “Human Resources”, which includes courses that begin with “H0” or “H2”, so remember to select “HB” even if your course short description begins with “H0” or “H2”.

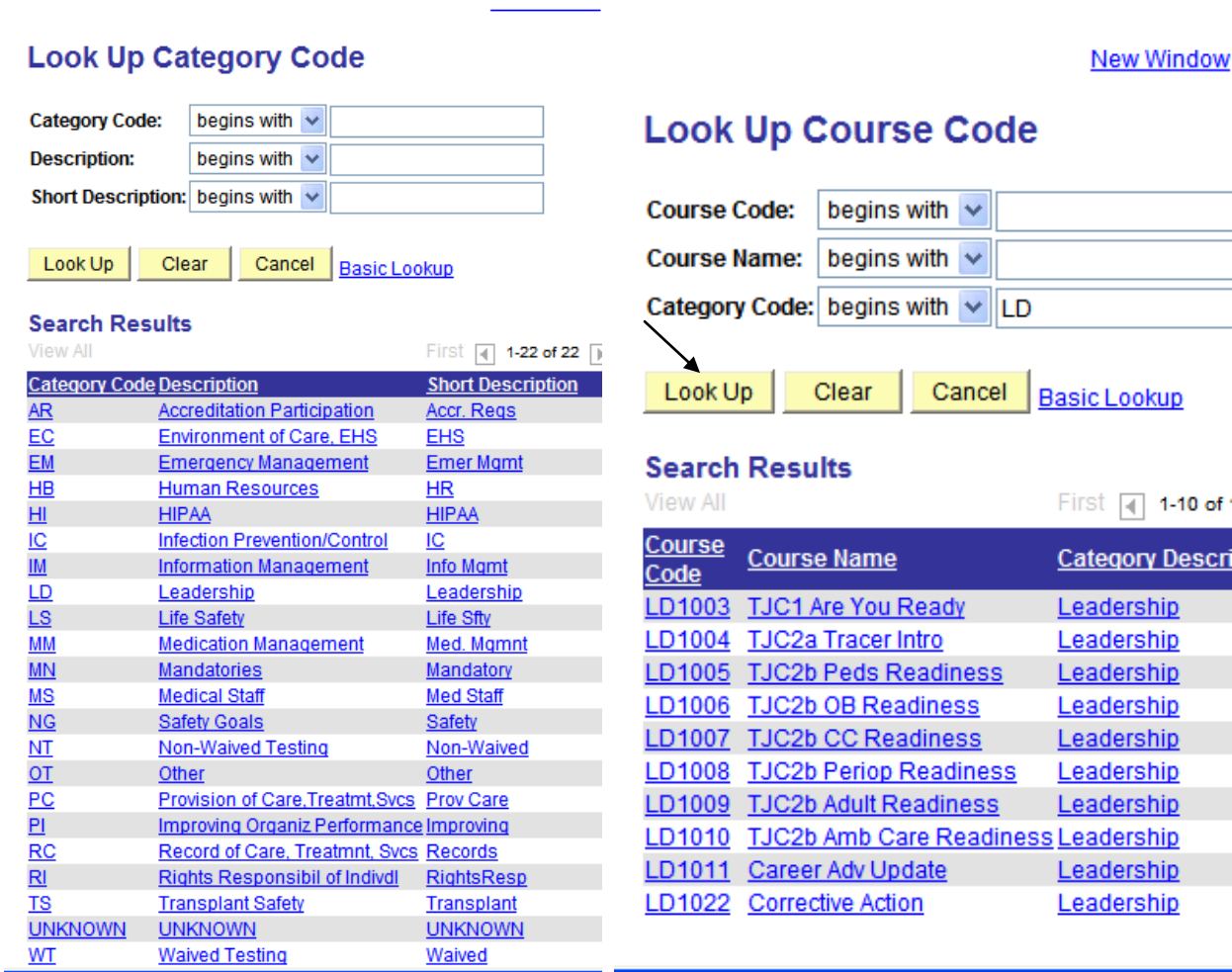


Figure 3. Look up Category Code Screen and Results Screen

Select the category code, then click the “Look Up” button to see the filtered results list.

HRMS Update Summary – Query for Quality Monitoring “QM” Activities.

QM modules cannot be found under the “UR Course Compliance” search because the UR Course Compliance is just for training activities, and QM modules are considered to be quality monitoring rather than training.

This update allows for querying of non-training activities. Note that the “Compliance” course type and query is used only for training. Another course type has been set up, “Quality Monitoring”, to track non-training activities such as Cart Check. Querying for Quality Monitoring activities is a little different from regular compliance training querying.

The HRMS “Compliance Managers” now have three new queries on the query page (Manager Self Service > Learning and Development > [Compliance Queries](#))

Use this last option “Compliance Queries” to track progress for QM activities.

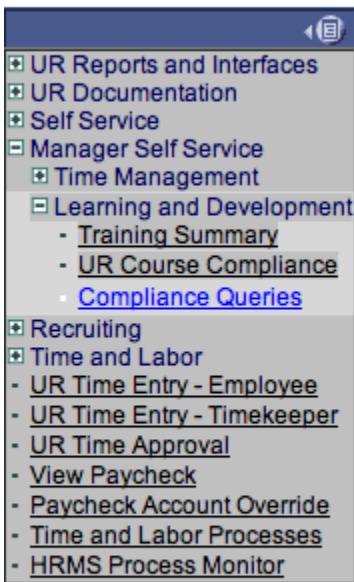
Training by Course: View training records for any course, regardless of whether or not it is managed as a Compliance Course.

Training by Course Type: View training records by type, e.g. “Quality Monitoring”.

Training by Person: View an individual’s entire training history.

As with the other Queries, the results can be downloaded into excel spreadsheets.

The access to training records will continue to be limited to those individuals in their “Groups” (i.e. Departments).



Compliance Queries

Compliance Queries

[Completed or Not Required](#)

[Training by Course](#)

[Not Completed](#)

[Training by Course Type](#)

[All Compliance Activity](#)

[Training by Person](#)

[Laboratory Safety](#)

[Harrassment Free Training](#)