# Administer Training Report
# User Guide

Never Stand Still

## Introduction

### Why would you run this report?

For Training Administrators to generate a participant list or view training records for individual or multiple training courses. School Administrators and Human Resources can use this report to view training records at the local level for their School / Faculty.

### Who can run this report?

- UNSW Training Administrators
- Human Resource Staff
- Faculty/Divisional and School/Unit Administrators

## Running a Training Report

**STEP 1:** **Navigate to the Report Location**

Log into the Admin Portal and go to: Main Menu > Administer Training > UNSW Custom > Training Reports > Training Report 33

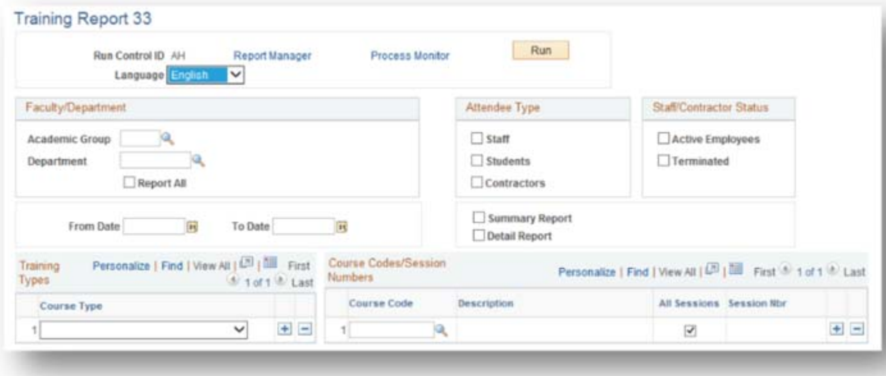
**STEP 2:** **Create New Run Control ID or Enter Existing Run Control ID**

A Run Control ID can be set up so that you do not have to enter the same information each time you want to run a report. You can set up one or multiple Run Control IDs.

Click on **Add a New Value** to enter a new run control or enter the name of an existing Run Control ID. Note: you must enter a run control and must not leave it blank.

**STEP 3:** **Enter Report Criteria**

Review or enter the relevant criteria for the report.




| Field/ Button | Description |
|---|---|
| **Academic Group** | Select Academic Group by clicking on the magnifying glass or leave blank if reporting on all training. |
| **Department** | Select Department by clicking on the magnifying glass or leave blank if reporting on all training |
| **Report All** | Tick the check box if you want to report on all Faculties and Departments. |
| **Staff** | Tick the check box if you want to report on staff. |
| **Students** | Tick the check box if you want to report on students. |
| **Contractors** | Tick the check box if you want to report on Persons of Interest. |
| **Active Employees** | Tick the check box if you only want active employees to show in the report. |
| **Terminated** | Tick the check box if you want to include terminated employees in the report. |
| **From Date** | The start date for the report data.<br>Note that if the date is left blank, only courses that commenced three years prior will be returned. For SCARS enter the start date as 01/01/10 to return all SCARS. |
| **To Date** | The end date for the report data. |
| **Summary Report** | Tick the check box for a summary report (see below for details). |

| Field/ Button | Description |
| --- | --- |
| **Detailed Report** | Tick the check box for a detailed report (only available to Training Administrators and HR Staff) (see below for details). |
| **Course Type** | Enter the course type.<br>Add a row to select more than one course type.<br>Leave blank to report on all course types. |
| **Course Code** | Enter or select the Course Code. By clicking on the magnifying glass .<br>Leave blank to report on all courses within that course type. |
| **All Sessions** | Tick the check box to report on all course sessions. |
| **Session Number** | Click on the magnifying glass to select one or more session numbers.<br>Note this can not be selected if *All Sessions* has been selected. |
| Save | Click on **Save** if any details have been changed. |
| Run | Click on **Run** when the report is ready to run. |

The two reports return similar, but slightly different information:

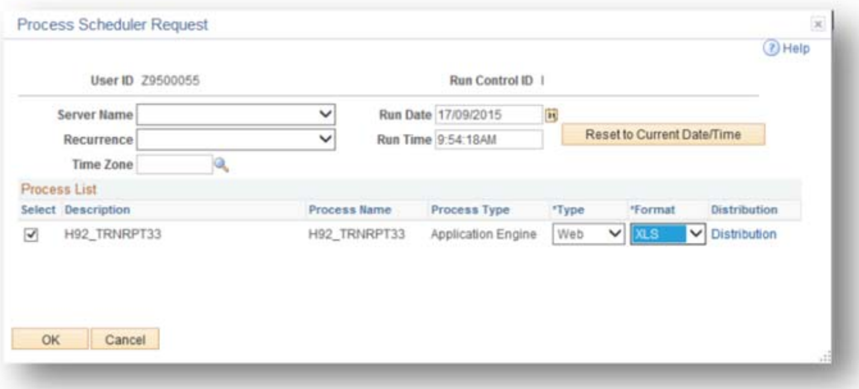
| Detailed Report | Summary Report |
| --- | --- |
| **Course Code** | Course Code |
| **Course Title** | Course Title |
| **Enrolment Status** | Enrolment Status |
| **Employee ID** | Employee ID |
| **Given Name** | Given Name |
| **Family Name** | Family Name |
| **Employee Type** | Employee Type |
| **Job Description** | |
| **Faculty/ Name** | Faculty Name |
| **Department Name** | Department Name |
| **Salary Plan Description** | |
| **Grade** | |

| | |
|---|---|
| **Supervisor Status** | Supervisor Status |
| **Employee Status** | Employee Status |
| | Session Number |
| | Training Type |

## STEP 4: Run the Report

Click on **Run** to start the processing of the report. A Process Scheduler Request will pop up. Change the Format type to XLS to produce an Excel version of the report and then click on **OK**. Choose the Server PSUNIX.

To schedule a report to run at a specified time (this is good to do for large reports that take a long time to run), change the **Run Date** and **Run Time**. Don't forget to pick your report up from myUNSW when run.



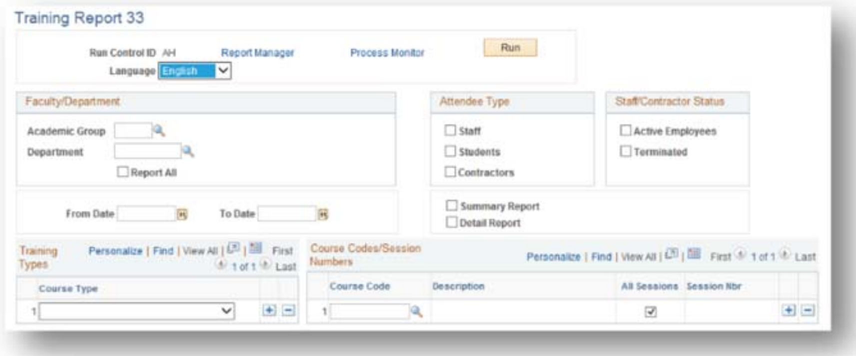

## STEP 5: View the Report

There are two ways of viewing your report:

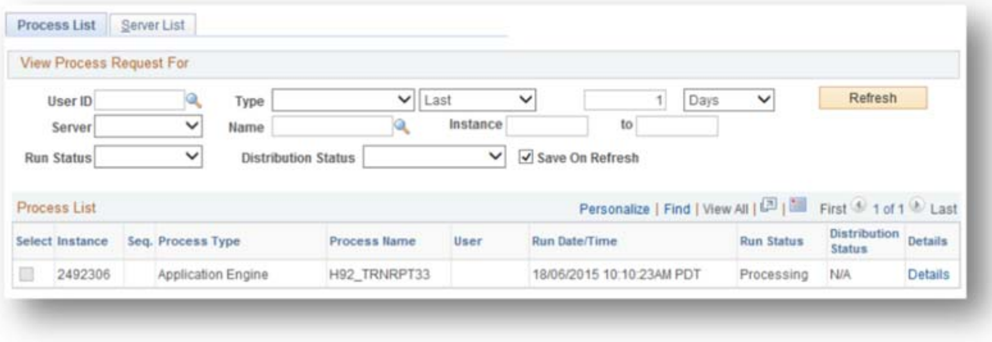
1. Process Monitor
2. myUNSW My Staff Profile Dashboard

## Process Monitor

Click on **Process Monitor** to view the status of your request.

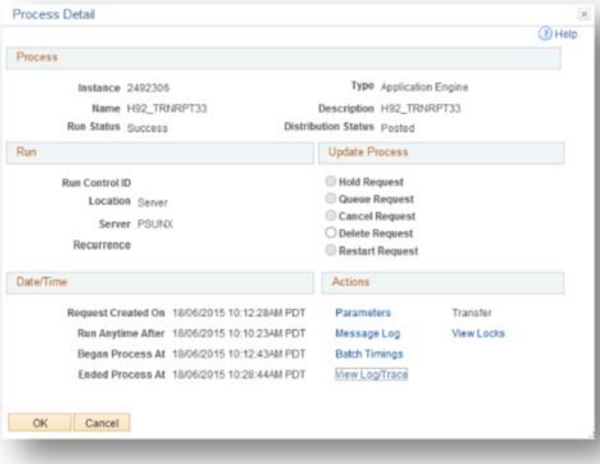



A new window will open and you can view the **Run Status** of your report.

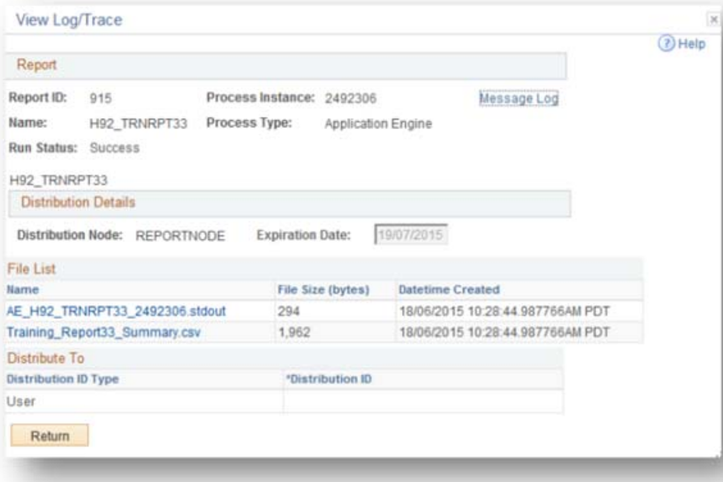



Check the **Run Status** column and when the status changes to success (click on

periodically to update the status column), click on **Details** and a window will open up. Click on **View Log/Trace.**




Your report will appear in the **File List.** Click on *Training_Report33_Summary.csv*



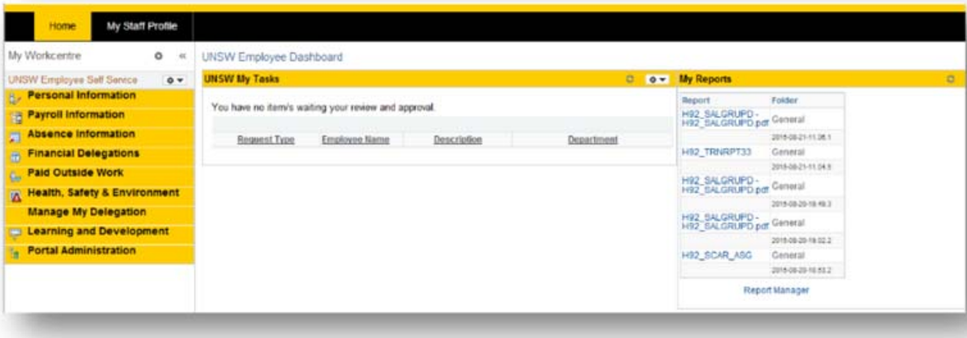

Choose to open the file or save it to view later. If you click on **Open** the file will open in Excel on your computer and you can save the file to your local computer or network drive.

If you click on **Save** the file will be saved to your computer and then you will be given the option to **open** the file or open the location where the file is stored (**Open folder**).

You may see a message regarding file formats, click on **OK** and the report will open.

### myUNSW My Staff Dashboard

You can also pick up the report from your My Staff Profile dashboard in your reports section:




## Frequently Asked Questions

**Why did my report come back with no data?**

- You may not have the correct security role set up to access the data you are trying to retrieve. Contact the IT help desk to ensure you have been set up correctly to access the right data.
- You may have entered a combination of dates and training types where there were no courses in that period.

If you have been set up correctly and have entered a valid set of parameters then contact the HR systems team for further trouble shooting assistance.