

Learning and Development in myHRinfo

Providing a Tool for Departments to Record and Report
on Employee Training

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University of Waterloo

HRMS Project Team

Learning and Development in myHRinfo

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Introduction

Online course registration and training summaries are now available for employees and their managers through myHRinfo for courses taken through the following departments:

- The Safety Office
- Centre for Teaching and Excellence
- Organizational and Human Development
- Information Systems & Technology's Skills for Electronic Workplace (SEW) series

Many departments on campus also send employees to other courses, some external to the University, and track this training internally. myHRinfo can be used to record this training for your department.

myHRinfo would provide you and your employees with the opportunity to have all training recorded in one database. This would be viewable by employees, their Managers and department administrators.

How to Proceed

If you would like to take advantage of this opportunity, please follow the steps outlined below:

Step 1: Obtaining Access

The Department Head can send a request to Jim Howard (jbhoward@uwaterloo.ca) to request security access. This request should contain:

- the department you are requesting the access for and your preferred 2 or 3 character department abbreviation (example, HR for Human Resources)
- who will have administrative security access to enter courses for employees for that department
- an indication of any courses that require renewal after a certain period of time (an example would be First Aid which has to be renewed every so many years)

If the request comes from somebody other than the Department Head, the Department Head must reply to the request with his/her approval.

Step 2: Setting Up Courses

Once you have been contacted that the appropriate security has been set up for your request, you can proceed with creating your courses. Please refer to the screen shot below and its relevant notes for details on how to set up courses. Note that only the people who were identified to have administrative security access will be able to proceed steps outlined in this document.

Your course abbreviation code belongs to all courses you set up for your department. It will also secure your information so that nobody else can access your courses, add people to your courses, or remove people from your courses. Other administrators will not be able to view people who have taken your courses.

Please do not use the back or forward buttons in your browser to navigate through pages of myHRinfo. These buttons will not work properly since you are logged into a vendor application, not accessing a general web page.

Log into myHRinfo, using the same user id and password that you have always used. Navigate to Enterprise Learning > Define Course/Cost Details > Courses.

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You will be presented with a search page similar to the following:

If you want to update an existing course, and know the course code, enter it here and press the Search button. If you don't know the code, you could enter your department's abbreviation (eg. HR) and then press the search button and all course codes starting with HR will appear.

If you want to update an existing course, and don't know the course code, enter any key words in the description of the course and hit the search button.

To add a new course for your department, click on this link or on the Add a New Value tab. The following will appear:

Create your course "code" which must always start with your 2-3 digit department abbreviation you requested in Step 1, followed by a 3-4 digit number. The course codes should be 6 digits in total. It's advisable to start the number portion of the course code at 100(0) and increment by 1, but not required.

Using your department abbreviation at the beginning of the course code is critical to ensure security is enabled for your courses and participants in the courses.

Course code series may look like HR1001, HR1002, HR1003, or SEW100, SEW101, SEW103.

When you have entered the course code, press the Add button.

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If you are searching for an existing course, and have clicked the yellow Search button, a list of values will appear for you to choose from:

Courses

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Limit the number of results to (up to 300):

Course Code:

Description:

Internal/External:

Course Type:

Include History Correct History Case Sensitive

Search Results

[View All](#) First Last

Course Code	Description	Internal/External	Course Type	Creation Date
CTE	UW-ACE Studio	Internal	Contin Ed	03/01/2010
CTE002	OLD TD	Internal	Comp Check	08/20/2009
CTE006	Teaching Large Classes	Internal	Contin Ed	01/01/2009
CTE022	Creating CVs and Cover Letters	Internal	Contin Ed	06/24/2009
CTE055	Writing as a Learning Tool	Internal	Contin Ed	09/27/2010
CTE064	Physics TA Training	Internal	Contin Ed	10/04/2010
CTE068	Understanding the Learner	Internal	Contin Ed	04/08/2009
CTE073	Course Design	Internal	Contin Ed	04/08/2009
CTE088	Motivating Students	Internal	Contin Ed	04/01/2009
CTE097	CUT Research Projects #1	Internal	Contin Ed	04/27/2009
CTE099	CUT Research Projects #2	Internal	Contin Ed	09/16/2010
CTE101	rahul Test	Internal	Contin Ed	04/05/2011
CTE102	rahul test	Internal	Contin Ed	05/27/2011
CTE112	Critical Thinking	Internal	Contin Ed	04/14/2010
CTE113	Teaching Dossiers Workshop	Internal	Contin Ed	04/08/2009
CTE128	Be A Faculty Member	Internal	Contin Ed	04/08/2009
CTE146	Research Projects Workshop	Internal	Contin Ed	04/08/2009
CTE150	Designing Exams	Internal	Contin Ed	04/14/2010
CTE160	Assessing & Improving Teaching	Internal	Contin Ed	08/24/2009
CTE165	Interactive Teaching	Internal	Contin Ed	12/10/2009
CTE169	Learning From Ontario's Best	Internal	Contin Ed	04/01/2009
CTE175	Clickers in the Classroom	Internal	Contin Ed	04/03/2009
CTE176	Dealing with Classroom Disrupt	Internal	Contin Ed	04/15/2010
CTE179	Presidents' Colloquium	Internal	Contin Ed	04/27/2010
CTE189	Old Undergrads: Who Are They	Internal	Contin Ed	08/06/2010

The next set of pages will be the same whether you are adding a course or updating an existing course. The only difference will be empty fields if you are adding a course.

Learning and Development in myHRinfo

There are some simple rules to follow when creating your course. The pages and rules will be explained below:

Fields with an * in front (such as Title, Internal/External, etc) are required fields. You must enter a value for those fields or you will not be allowed to save your course.

Title: enter a description for your course
Short Title: enter an abbreviated description for your course
Creation Date: allow to default to today's date unless you have a specific date.

Course Profile | Required Instr Comps/Accomps | **Prereqs, Goals** | Equipment | Catalog | Description

Course: CTE

*Title: UW-ACE Studio

Short Title: UW-ACE

Creation Date: 03/01/2010

*Internal/External: Internal

*Course Type: Contin Ed

*Primary Delivery Method: Instructor

Min/Max Student: 1 25

Duration Time:

Course Units:

School Code/School:

*Course Status: Inactive

Revision Date:

Session Administration

Multilingual Course

Instructor Comps/Accomps Req

Cost Unit: Hour

Course Offering: Quarterly

Internal/External: this value must be set to Internal, even if the course was taken off campus

You can choose whatever course type and delivery method you wish by clicking on the box's arrow and choosing a value. These fields are for your information only.

Min/Max students, duration time and course units are optional and do not have to be entered.

Course Status must be active to put people into the course. If you no longer use that course, you can set the status to Inactive and it will no longer be accessible.

The other fields can be left as defaulted.

If your course requires a renewal after a period of time, you can contact Tammy Marcinko (tmarcink@uwaterloo.ca) in Human Resources and ask for a license/certificate for your course. Your request should include the following information:

- The license/certificate ID which will be your course code, with a 'C' at the end (eg. If your course code is HR1001, the license/certificate you ask for should have an ID of HR1001C when you request it to be set up).
- The renewal time frame required (eg. First Aid training renewal would be 3 years)

Once the license/certificate has been set up by HR, you can add it to your course by clicking on the "Prereqs, Goals" tab circled on the above image.

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This Prereqs,Goals page will allow you to enter other courses that may be a prerequisite to the one you are currently setting up as well as the license/certificate you asked HR to set up for you.

The license/certificate code is added here. It is set up to expire after a time duration you specify. People who take this course will show with an expiry date, as identified in this license/certificate. With our implementation, only one license/certificate can be used per course.

Please do not fill in any other fields on this page, unless you want to identify a prerequisite course.

The screenshot shows the 'Prereqs,Goals' page for a course. The course is 'CTE' at 'UW-ACE Studio' and is currently 'Inactive'. The page has several sections:

- Prerequisite Courses:** A search field with a magnifying glass icon and a '+ -' button.
- Target Competencies:** A search field, a '*Proficiency' checkbox, and a 'Grant to Empl after Course:' checkbox (checked).
- Target Accomplishments:** A search field, a '*License/Certification Code' field (circled in red), and a 'Grant to Empl after Course:' checkbox (checked).
- Target Languages:** A search field, 'Speak', 'Read', and 'Write' dropdown menus, and a 'Grant to Empl after Course:' checkbox (checked).

At the bottom, there is a toolbar with buttons: 'Save' (circled in yellow), 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. Below the toolbar are navigation links: 'Course Profile | Required Instr Comps/Accomps | Prereqs,Goals | Equipment | Catalog | Description'.

When all of the information for the course has been entered, click on the yellow Save button circled above. This button shows on this page, and on the first page you entered information into. Your course has now been saved and you are ready to enter people into the course.

Please note that once you have created a course and saved it, it can't be deleted. It can be inactivated if it is no longer going to be used.

The Return to Search button will take you back to the initial list of courses you searched through.

Step 3: Enrolling Employees in Courses

Your next step is to enrol people into the course.

Navigate to Enterprise Learnings > Student Enrollment > Enroll in Course

You will be presented with a page similar to the one below. You will be expected to enrol one person at a time into a course. myHRinfo requires an employee id (EmplID) as seen below to identify a person, but will allow you to search for a person by name using the other fields below.

Enroll in Course

Enter any information you want to search for

Find an Existing Value

Limit the number of results to (up to 300): 300

Empl ID: begins with

Empl Record: =

Name: begins with

Last Name: begins with

Second Last Name: begins with

Alternate Character Name: begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

You will be presented with a list box of values to choose from if there is more than one value in the database to match your criteria (eg. If you search by surname = Smith, anybody with surname Smith will be presented to you). Pick the person you are looking for and you will be presented with the course enrolment page for that person.

If the person has taken any courses with course abbreviations you do not have security access to, the enrolment page will load with fields filled in and greyed out. The course code and course title will not display. You will know that the person has taken other courses on campus, but you won't know what courses they have taken. You can proceed by clicking the blue + button on the right side of the page. This enables you to add a new course for that person.

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Enter the course code in this box that you would like to enrol this person in. If you do not know the course code, click on the magnifying glass beside the edit box and a search will appear where you can search for the appropriate course code based on description or course abbreviation. Please see the screen shot below for the course search.

Enroll in Course
Lopez Rodriguez
Person ID: 123000

Course Information

Course Code:

Internal/External: External
Start Date:
School Code:
Facility:

Course Title:
Session Nbr:
End Date:
School Name:
Language:

Student Information

Prerequisites Met

*Attendance: Course Waitlist
Training Reason:
Business Unit: UWATR U. Waterloo
Grade:

Date Needed:
Status Date: 11/02/2011
Waitlist Date: 11/02/2011
Dept ID: 1651 Migallery
Letter Code: Letter Dt:

Entering the course abbreviation (such as SO, SEW, OHD) in the course code box and clicking on the yellow Look Up button is one way to search for all courses for a certain department. Another common option for searching for a course code is by entering part of the course description in the Description box and clicking on the yellow Look Up button.

To add another course for the same person, click the blue + button on the right side of the screen (circled above). If you entered the wrong course against a person, you can remove that course by clicking the blue - button on the right side of the screen (circled above).

Once you have entered your search criteria and clicked the Look Up button, you can click on the course that appears in the Search Results. This will retrieve the course code.

Look Up

Course Code:

Description:

Course Status: =
Course Type: =
Multilingual Course:
Internal/External: =
Session Administration:

Search Results
View 100

Course Code	Description	Course Status	Creation Date	Course Type	Multiling Course
CTE	UW-ACE Studio	Inactive	03/01/2010	Contin Ed	N
CTE002	OLD TD	Inactive	08/20/2009	Comp Check	N
CTE006	Teaching Large Classes	Active	01/01/2009	Contin Ed	N
CTE022	Creating CV's and Cover Letters	Inactive	06/24/2009	Contin Ed	N

Once you have entered the course code, the Course Title, Internal/External and Session # fields will populate from the information that was set up pertaining to the course. They will be greyed out because they can't be changed during enrolment. Since this is exclusively for non-classroom courses, there will never be anything in the Session # field.

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The start date and end date of when the course was taken can be entered here. Clicking on the yellow calendar icon beside the date boxes will provide a calendar to choose a date to ensure it is entered in the correct format. The date format should be MM/DD/YYYY

The Attendance value must be set to Completed for this course to show for the employee. This can be chosen by clicking on the arrow at the end of the Attendance box and clicking on Completed.

The Business Unit must be set to UWATR, as defaulted.

The Grade and Date Needed are optional fields, if you wish to record this type of information for the course. The Department will default to the employee's department, as recorded in myHRinfo.

Do not change the status date. Leave this as defaulted.

After entering the information, click on the yellow Save button at the bottom of the page. After the save completes, the person will be recorded as completing this training. It will be reflected through that individual's self service. That person's direct Reports To will also be able to view the information.

You can set Attendance to Enrolled or other options if you wish to record them as being enrolled before the course is taken. This would then involve a two step process for you as an Administrator, since you would have to go back in after they have completed the course and change the Attendance to Completed. It is an option if you wish to reflect them as registered them in a course that won't be taken until a future date.

Step 4: Inquiring and Downloading

There are various options available for inquiring what courses a person has taken, or who has taken a particular course. These inquiry options all include the capability to download the data to Excel.

View Students by Course

View the list of people who have taken a course by navigating to UW ELM > View Non-Classroom Crs Enrolment. You are presented with a page to enter the course code. This is no different than when you searched for a course code when enrolling students. Enter the course code if you know it, or search by entering the course abbreviation or a description to find the code. Select the row that appears in the Search Results.

You will be presented with a grid containing the list of people who have taken this course.

The screenshot shows a web interface for 'Nonds Enrolment'. The course selected is 'SO1002 WHMIS for Staff'. Below the course name is a grid with the following columns: Empl ID, Name, Course End Date, Dept ID, Dept Description, Accomplishment, and Expiration Date. The grid contains five rows of data. A callout box with an arrow pointing to the 'Expiration Date' column contains the text: 'If a license/certificate was set up against the course to determine an expiration date, it will be displayed here. The expiration will be based upon the date the course was completed for the person.'

<u>Empl ID</u>	<u>Name</u>	<u>Course End Date</u>	<u>Dept ID</u>	<u>Dept Description</u>	<u>Accomplishment</u>	<u>Expiration Date</u>
1 100003	Novenski,Nathon	12/01/2000	6239	Food Services-Village 1	SO1002C	12/01/2005
2 100344	Kostyan,Julianna	08/28/2003	6212	Food Services-Brubakers	SO1002C	08/28/2008
3 100410	Wong,Lawrence Lai-Pong	09/16/2009	2450	Systems Design Engineering	SO1002C	09/16/2014
4 100612	Soares,Joao	09/15/2010	2100	Chemical Engineering	SO1002C	09/15/2015
5 100699	Lalatovic,Dragica	10/05/2004	6555	Village 2-Housekeeping	SO1002C	10/05/2009

The column headings are underlined (EmplID, Name, etc) for the values listed. If you click on any one of those column headings, the data will be re-sorted based upon the column you clicked on. If you click on that same column a second time, the sort will change to descending.

There are a number of options within the purple border along the top of the grid:

- The grid's display defaults to a limited number of people in the display. You can click on "View 100" and it will show you 100 people per page instead of 5
- Clicking on the arrows will scroll through the list of people. You could click on First to bring you to the first person in the list or on Last to bring you to the last person in the list.
- If you click on the blue grid icon (the mouse over says Download), you will be able to download this list of people into Excel. If you experience problems downloading the file to Excel, please read Appendix A.
- If you click on Find, a search string box will appear. You can enter a search string value and a row with that value will display at the top of the list of values
- If you click on Customize, you can change the order of the columns in the grid or set up sorts by multiple columns

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View Courses by Student

You can also view the courses that a specific person has taken by navigating to Enterprise Learning > Result Tracking > Review Training Summary

You will be presented with a page that requires an Employee ID (EmplID). This is no different from other places where an EmplID had to be entered. If you know the EmplID, you can enter it. If not, you can search by name and the list of values matching your criteria will appear. Click on the one that you want.

A summary of courses the employee has taken (that you have security access to view) will be displayed.

Review Training Summary

[Mladen Bogdanovic](#) Person ID: 100866

Training Summary				
Session	Status			
Course	Title	Session Number	Start Date	End Date
SO1038	Emergency First Aid	0032	06/01/2006	06/01/2006
SO1002	WHMIS for Staff		10/12/2004	10/12/2004

The first page will show the course, course description/title, start date and end date. If you click on the Status tab, you will see the Attendance (which should be completed) and the grade, if one was entered.

Review Training Summary

[Mladen Bogdanovic](#) Person ID: 100866

Training Summary				
Session	Status			
Course	Title	Session Number	Attendance	Grade
SO1038	Emergency First Aid	0032	Completed	
SO1002	WHMIS for Staff		Completed	

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Department Employee List

You can do an employee inquiry within a department by navigating to UW ELM > Department Employee List

By entering a department on the search page, it will retrieve all employees in that department. You can then select the row with the employee you want to look at. You could also enter the employee's id. By clicking on the hour glasses beside the fields, you can extend the way you search. For example, you can search by department description for the department id. You can search by name for the employee id. This works the same as it did in the other pages of this document.

The results will look similar to the following:

This grid functions the same as the other ones mentioned in this document where you can change the sort order of the columns, view all or view a smaller set and download to Excel.

The accomplishment and expiration date will show you when a course expires based on the license/certificate set up against it.

Employee information

Department: 6239 Food Services-Village 1
Empl ID: 100003 Novenski,Nathon

Course Code	Description	Course End Date	Accomplishment	Expiration Date	Course Session Nbr	Enrollment/Attendance
1 SO1038	Emergency First Aid	11/23/2010			0097	Enrolled
2 SO1002	WHMIS for Staff	12/01/2000	SO1002C	12/01/2005		Completed

Department Course List

The other inquiry option is by course and department. This will return everybody who has taken a specific course within a specific department. You can view this by navigating to UW ELM > Department Course List

On the initial search page you can enter a department id or a course code. The hour glass will allow you to search by descriptions for the department id and the course code.

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Once you have selected the department and course you want to look at, the page will display all employees in that department who have taken that course, like the following:

This grid functions the same as the other ones mentioned in this document where you can change the sort order of the columns, view all or view a smaller set and download to Excel.

The accomplishment and expiration date will show you when a course expires based on the license/certificate set up against it.

Department Course Details

Department 6239 Food Services-Village 1

Course Code SO1002 WHMIS for Staff

Customize Find View All First 1-5 of 24 Last						
Empl ID	Name	Course End Date	Accomplishment	Expiration Date	Course Session Nbr	Enrollment/Attendance
1 100003	Novenski,Nathon	12/01/2000	SO1002C	12/01/2005		Completed
2 156082	Yeung,Brandon	11/27/2007	SO1002C	11/27/2012		Completed
3 156134	Foreman,Beverley	11/27/2007	SO1002C	11/27/2012		Completed
4 156808	Verth,Michael	11/27/2007	SO1002C	11/27/2012		Completed
5 130664	Cvijeticanin,Ruzica	11/09/2001	SO1002C	11/09/2006		Completed

Reporting Issues

If you encounter problems setting up a course, enrolling people in courses, or viewing course participants, please send an email to rt-IST-ATHR@ist.uwaterloo.ca

Please include a detailed description of the problem with specifics on the course or person you were accessing when the problem occurred. If you encounter an error message, please include the text of the error and what you were doing when the error executed. Screen shots, if possible, are also helpful for us to troubleshoot and solve any issues you may have.

Appendix A: Exporting to Excel from myHRinfo

Internet Explorer users can experience a problem using the Excel export from a grid of data work correctly within myHRinfo. The symptom is generally that myHRinfo attempts to export the information, a pop-up window quickly flashes but disappears, and nothing else happens.

This can be remedied by a configuration tweak in Internet Explorer. For IE7:

1. Navigate to **Tools > Internet Options**
2. Under the *Security* tab, select the Local Intranet icon
3. Click on the **Custom Level...** button
4. Scroll a third of the way down the *Settings* list to the Downloads section.
5. Find the *Automatic prompting for file downloads* item; ensure it is set to: **Enable**
6. Find the *File download* item; ensure it is also set to: **Enable**
7. Click the **OK** button to close the *Security Settings* dialog
8. Click the **OK** button again to close the *Internet Options* dialog.
9. If logged into any applications, logout
10. Quit all instances of Internet Explorer

Restarting Internet Explorer and logging back into myHRinfo should allow exports to Excel to function properly.

If that does not solve the problem, the following change may also be necessary. However, it represents a minor security risk, as explained below.

1. Again, in IE7, navigate to **Tools > Internet Options**
2. Under the *Advanced* tab, scroll down through the *Settings* to reach the Security section near the bottom of the list
3. Find the *Do not save encrypted pages to disk* item; ensure its box is **unchecked**

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4. Click the **OK** button to close the *Internet Options* dialog.

You should now be able to export to Excel.

Security Risk:

Unchecking the *Do not save encrypted pages to disk* option will cause Internet Explorer to permanently store the downloaded Excel files in the browser's cache (i.e. "Temporary Internet Files"), until such time as you manually delete the cache. If the downloaded files contain confidential or private information, it's possible a third party could gain access to your computer and view these files. For more detail, see this [information page](#).