

Employee Training Tracking – Record Entry in Banner HR PPP2CRT File Load Process Instructions

Document Purpose:

To provide instructions for UA departments who want to upload UA Staff Development (training) data into the PPACERT form in Banner. The data can then be queried for reporting and for tracking compliance.

Upload Process & File Locations:

The department prepares a data file containing records of training sessions that employees have completed. The file is then saved in a central directory by the department. Using these data files, the upload process (PPP2CRT) inserts the employee records into the PPACERT form in Banner.

The upload process runs nightly, and loads all new files that are saved in the following UA Statewide domain server location (directory):

\\sw-bluewhale.apps.ad.alaska.edu\Training_Tracking

After the nightly upload has processed, the output (result) files can be retrieved from the following UA Statewide domain server location (directory):

\\sw-bluewhale.apps.ad.alaska.edu\Training_Tracking\Results

Access Request:

To request access to save and/or retrieve files from either of the locations above, you must first complete an OIT Computer Account Request Form (at the link listed below):

<http://www.alaska.edu/oit/services/account-management/forms/formAccountRequestChangeForm.pdf>

When completing the form, Check “Computer Login - Groups or Shared Drive Path:” and write-in the following drive path:

\\sw-bluewhale.apps.ad.alaska.edu\Training_Tracking

Submit the completed form to the Statewide OIT Help Desk by email, fax, or mail per the contact information listed on the form.

File Format for Processing:

All files processed through the PPP2CRT program must be in a .csv file format. Each file must include the following columns and headings: “certification code”, “UAID”, “firstname”, “lastname”, and “date”. However, the columns are not required to be in the same order (left to right). The following format example is from an Excel spreadsheet:

certification code	uaid	firstname	lastname	date
XT9	30000057	Apple	Winters	7/31/2014

The same file would appear as follows when viewed in Notepad:

```
certification code,uaid,lastname,firstname,date  
XTH,30003899,Smith,Joseph,12/3/2001  
XTH,30003898,Jones,Robert,10/1/2008
```

The upload file must be saved with the following information in the file name:¹

Campus Name_Office Name_Date (YYYYMMDD)_Sequence # (1-9, or more) .csv

Below is an example of a file name that might be used for a file from UAF Human Resources:

UAF_HR_20140922_1.csv

¹ ***If an office is submitting multiple files on the same day, the sequence number at the end of the file name must be incremented to prevent overwriting any previously saved files .***

Confirmation of .csv File Processing:

After the nightly process uploads the training data from a .csv file, an output (results) file² is produced to report the status of the employee records uploaded to the PPACERT form in Banner. You can retrieve your file(s) from the following UA Statewide domain server location (directory):

```
\\sw-bluewhale.apps.ad.alaska.edu\Training_Tracking\Results
```

For each .csv processed, a .lis output file is created with the following name format:

```
ppp2crt_Campus Name_Office Name_Date (YYYYMMDD)_Sequence # (1-9, or more).lis
```

Using the same file example from the last section, the output file name would be as follows:

```
ppp2crt_UAF_HR_20140922_1.lis
```

² ***We strongly recommend using either Notepad or Wordpad to open/review the .lis output file.***

The output report identifies each employee record that was, added, updated, or skipped (if a newer record was already present). The report will also include details for each record; each line will begin with one of the following statuses for that record: Added, Updated, Error, or Warning.

At the end of the output report, a record count will be provided of successfully imported records, records not imported, and a records total (see example below). The report will allow you to identify and research any errors that may have occurred during the upload process.

```
9 records successfully imported
2122 records not imported
2131 records total
```

Certification Codes:

The following certification codes are available to specify employee training:

XSE – EEO/Affirmative Action
XT9 – Title IX
XT9I – Title IX – Instructor Lead
XTD – Drug Free Workplace
XTF – Family Medical Leave
XTG - Diversity

XTH - Safety
XTR – Respectful Workplace
XTS – Sexual Harassment
XTV – Violence in the Workplace
XTW – American Disability Act - ADA
XWB – Workplace Bullying

A request for any additional training certification codes can be emailed to ua-syhr@alaska.edu .

Reporting from Banner:

Three TOAD queries are available to pull the employee training data in the PPACERT form in Banner.

The query names and descriptions are included below; all of the queries are located under

```
\\sw-bluewhale.apps.ad.alaska.edu\ToadQueries\HR\Personnel
```

- 1) PER_Training_Count_Report_by_TKL.tsm –prompts for a TKL (time keeping location) begin and end range for isolating the department data included on the report. The report is grouped by training/certification code, and reports the number of employees in each TKL that have a completed the designated training(s) as requested.
- 2) PER_Training_Report_by_TKL_&_employee.tsm – prompts for a TKL (time keeping location) begin and end range for isolating the department data included on the report. The report is grouped by training/certification code, and reports each employee in each TKL who has a completed the designated training(s) as requested.

Reporting from Banner continued:

- 3) PER_Training_Report_Non_Completed_by_code.tef - prompts the user for a TKL (time keeping location) begin and end range and a specific training code. The report will include all active employees who have not completed the desired training.

If you have any questions regarding the process, please contact your campus Human Resources office. For contact information, please refer to <http://www.alaska.edu/hr/contact-hr/>.