



The City of New York

Financial Information Services Agency

Office of Payroll Administration

Neil Matthew, Executive Director
Andrea Glick, First Deputy Executive Director

TO: Agency CHRMS Training Contacts
Agency CHRMS Security Officers

FROM: FISA-OPA Training

DATE: October 14, 2022

SUBJECT: CHRMS Training Schedule

Please log into NYCAPS HRB to waitlist your employees to the appropriate CHRMS training session.

Table with 4 columns: Class Number/Name, Class Date & Time, NYCAPS Course Code, NYCAPS Session Nbr. Rows include classes 7H, 7J, and 7L with various dates and session numbers.



*FISA-OPA's HR-Payroll Training Unit is accredited by the International Association for Continuing Education and Training (IACET) and is authorized to issue the IACET CEU.*

For agencies with employees currently on the waiting list, FISA-OPA Training will contact Agency Training Coordinators to confirm their employees' availability. If you would like to add additional employees, or your agency has employees that have not yet attended training, please submit the Request for CHRMS Training Form on the last page of this memo via a Remedy ticket.

**See UB 012-15 for Remedy ticket instructions.**

**CHRMS Security Officers must ensure that the IDs and passwords for their agency's employees are ready for use *prior* to the scheduled class date. Agencies must be in compliance with security policies before employees can be scheduled for training. Security forms must be submitted via a Remedy ticket to OPA CPSM-Security no later than two (2) weeks before the class date.**

**Reminders for CHRMS Security Officers:**

1. If your employee(s) are scheduled for **CHRMS Web Canned Query**, you must submit the Request for CHRMS ID Form to OPA CPSM Security *before* they attend class. *Effective June 22, 2015, first time CHRMS Users can now receive their respective CHRMS Canned Query User ID and password upon approval from OPA CPSM Security, prior to attending the Canned Query training. Please contact OPA CPSM-Security to obtain the employee's CHRMS ID and password. Participant(s) should know their CHRMS ID and password when they come to training.*
2. If your employee(s) are scheduled for **CHRMS Web Ad Hoc**, you must submit the Request for CHRMS ID Form to OPA CPSM Security to add the Query Studio link to the employee's existing CHRMS ID *before* they attend the class.
3. If your employee(s) are scheduled for **CHRMS PPMS Ad Hoc**, you must submit the Request for CHRMS ID Form to OPA CPSM Security to add the PPMS Query Studio link to the employee's existing CHRMS ID *before* they attend the class.
4. Employee(s) scheduled for **CHRMS** must know their CHRMS logon ID and password when they come to class. If a participant has forgotten his/her password, you must request a password reset *before* the class date.
5. Attendees **must** have access to the Mozilla **Firefox** browser, **CityShare** and be able to access **Webex**.

Thank you for your cooperation.

# CHRMS Courses

CHRMS stands for CITY HUMAN RESOURCE MANAGEMENT SYSTEM. It is a data warehouse for City employees with records in the Payroll Management System (PMS), and for retirees or beneficiaries with records in the Pension Payroll Management System (PPMS). CHRMS users can access information on employees more easily and efficiently through the use of Canned Queries, which are pre-formatted reports, or by creating their own Ad Hoc (as needed) reports by using Query Studio.

## Course 7H: CHRMS Web Canned Query

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Virtual Instructor-led Training (vILT) course where class participants will use their own CHRMS logon ID and password to learn how to run Canned Query (pre-formatted) reports to retrieve pay, deduction, personnel, or leave data, as currently maintained in the City's payroll systems.

### Objectives:

- Logon and navigate through CHRMS.
- Perform an Employee Lookup.
- Generate and output Canned Query reports.
- Use the Set Properties function to customize and save a report with pre-set query parameters.
- Schedule a report to run automatically.
- Analyze written requests for data in order to identify the query needed, and run the query to get the data results from CHRMS.

### Prerequisites:

1. Participants should be first time CHRMS users who did not previously attend this course.
2. Prior to attending training, participants must be authorized to access CHRMS by their agency CHRMS Security Officer. Agency CHRMS Security Officers must ensure that the agency is in security compliance in order for participants to attend CHRMS training, and that their employee(s) have their IDs and passwords in time for training. Requests for access should be sent via a Remedy ticket to the FISA-OPA's *Payroll Operations – Citywide Maintenance and Integrity Unit*.
3. Participants must have their own valid CHRMS logon ID and password, and know their CHRMS ID and password when they arrive at the training session.
4. To successfully complete CHRMS training, participants must have basic desktop computer skills including navigating Windows, using Mozilla **Firefox**, MS Office Excel, and Adobe Reader.

**Length:** Attendees **must** attend the two (2) sessions (4 hours and 15 minutes each session) from start to finish in order to receive a Certificate of Completion, which will be sent via email on Friday, after completion of the course.

Attendees **must** have access to the Mozilla **Firefox** or Google **Chrome** browsers, **CityShare** and be able to access **Webex**.

**CEUs:** .5 CEU.

**Assessment Method(s):** Instructor observation, question & answer discussions, oral quiz, completion of hands-on exercises.

## Course 7J: CHRMS Web Ad Hoc

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Virtual Instructor-led Training (vILT) course where class participants will use their own CHRMS logon ID and password to learn how to create Ad Hoc (as needed) reports using the Query Studio package in CHRMS to retrieve pay, deduction, personnel or leave data, as currently maintained in the City's payroll systems.

### **Objectives:**

- Logon and navigate in CHRMS Web and the Query Studio package for ad hoc reports.
- Select tables and columns for an ad hoc query.
- Add data filters to an ad hoc query.
- Format and change the report layout.
- Insert calculations into an ad hoc query.
- Run an ad hoc query to get the report output.
- Best practices for preparing an effective ad hoc query and data relationships between ad hoc tables.

### **Prerequisites:**

1. Participants should be first time CHRMS Ad Hoc users who did not previously attend this course.
2. Prior to attending training, participants must be authorized to access CHRMS Ad Hoc by their agency CHRMS Security Officer. Agency CHRMS Security Officers must ensure that the agency is in security compliance in order for participants to attend CHRMS training, and that their employee(s) have their IDs and passwords in time for training. Requests for access should be sent via a Remedy ticket to the FISA-OPA's *Payroll Operations – Citywide Maintenance and Integrity Unit*.
3. Participants must have their own valid CHRMS logon ID and password with access to CHRMS Query Studio, and know their CHRMS ID and password when they arrive at the training session.
4. To successfully complete CHRMS training, participants must have basic desktop computer skills including navigating Windows, using Mozilla **Firefox**, MS Office Excel, and Adobe Reader.

**Length:** Attendees **must** attend the two (2) sessions (4 hours and 15 minutes each session) from start to finish in order to receive a Certificate of Completion, which will be sent via email on Friday, after completion of the course.

Attendees **must** have access to the Mozilla **Firefox** browser, **CityShare** and be able to access **Webex**.

**CEUs:** .5 CEU.

**Assessment Method(s):** Instructor observation, question & answer discussions, oral quiz, completion of hands-on exercises.

## Course 7L: CHRMS PPMS Ad Hoc

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### PENSION AGENCIES ONLY

Virtual Instructor-led Training (vILT) course where class participants learn the theory and methods needed to create Ad Hoc pension data reports in CHRMS. Study includes interpreting requests for reports or the business need, understanding the PPMS table structure and fields, creating reports with filters, calculations and formatting options. This course guides and empowers the user to build and run their own reports.

This course presents the concepts, tools and methods used to create, edit and manage customized ad hoc pension data reports in CHRMS. Learners will become familiar with the PPMS data model structure and unique characteristics of PPMS data. Learners will use Filters, Calculations, Grouping, Summarization, Format, and Run Report options to create data reports that answer specific business questions, output their report and save their query for future use.

### Objectives:

#### UNIT I: INTRODUCTION

1. Define what CHRMS PPMS Ad hoc is.
2. Describe pension data types: Recipients, Deductions and Payments.
3. Explain payment types in PPMS: Periodic Payments – recurring pension and annuity payments to retirees/beneficiaries on a recurring basis; Non-Periodic payments - loans, refunds, death benefits and rollovers.
4. Differentiate between summary data and detail data.
5. Describe the overnight batch processing of PPMS data updates on mainframe and the PPMS Reference tables.

#### UNIT II: PENSION PAYROLL ENVIRONMENT - KEY CONCEPTS

1. Logon to CHRMS environment and locate the PPMS Ad Hoc package.
2. Navigate the menus and items.
3. Explain the package structure and tables in the CHRMS PPMS Ad Hoc package.
4. Identify pension related data tables and fields.
5. Explain best practices for selecting data items.
6. Identify the purpose and desired output for the report, based on the needs of the person(s) who requested the data.
7. Review examples of simple queries: current data example, historical data example and “As-of,” and “From-to” queries.
8. Identify and format the data items required for the pension recipient ID: Pension System Code, Pension Number and Pension Suffix.

UNIT III: CASE SCENARIO 1: Create a report showing active recipients and the retirement cause for members who retired between Jan 1, 2011 and Dec 31, 2015 and are still currently active, grouped by retirement cause. Then, summarize the data to show the total number of recipients in each retirement cause category.

1. Define the purpose of the report and identify the report output.
2. Explain the importance of inserting fields when data is turned off; locate and turn off the display of data while creating the query.
3. Insert the correct fields in the report.
4. Create report Title and Sub Title and save the report.
5. Explain and apply filters to the Leave Status Code, Leave Status Effective Date, and the Pension System Code.
6. Concatenate the fields used to create the Recipient ID.
7. Select/highlight fields to perform format changes, calculations, and copy/paste.
8. Create summaries by removing detail data from the report, and using the Summary function.
9. Group report data by Retirement Cause Code.
10. Run report to display limited data and all data.
11. Display and explain the purpose of the Report Definition.

UNIT IV: CASE SCENARIO 2: Create a report showing all active recipients with all pay parameters as of January 15, 2019.

1. Define the purpose of the report and identify the report output.
2. Use the Report Definition to insert the correct fields, then title and save the report.
3. Use the Report Definition to verify that the columns selected are correct.
4. Rename column headings.
5. Create a filter for “As of” date using the Effective Date and Expiration Date fields.
6. Apply additional filters to identify the recipients that answer the business question.
7. Create Summaries using the Count function.
8. Group report data by Recipient ID.
9. Run report to display limited data and all data.

UNIT V: CASE SCENARIO 3: Create a PPMS Ad Hoc report that calculates the summary amounts of check deductions in Fiscal Year 2019 for all pension recipients.

1. Define the purpose of the report and identify the report output.
2. Use the Report Definition to insert the correct fields, then title and save the report.
3. Apply filters to the Deduction Code, Pension System Code and Pay Date fields.
4. Create subtotal and grand total for the Deduction Amount and format the amounts to appear as currency.
5. Run report to display limited data and all data.

UNIT VI: CASE SCENARIO 4: Create 3 PPMS Ad Hoc reports showing Pending Pay Summary by Agency, Pending Pay Summary by Recipient and Pending Pay Detail by Recipients.

1. Define the purpose of the reports and identify the report output.
2. Use the Report Definition to insert the correct fields, then title and save the report.
3. Apply filters, and use the Summary function.
4. Title and save the report as Pending Pay Detail by Recipient.
5. Modify the Pending Pay Detail by Recipient and save the new report as Pending Summary by Recipient.
6. Modify the Pending Pay Summary by Recipient and save the new report as Pending Summary by Pension Agency.

**Prerequisites:**

1. Participants should be first time CHRMS PPMS Ad Hoc users who did not previously attend this course.
2. Prior to attending training, participants must be authorized to access CHRMS PPMS Ad Hoc by their Agency's CHRMS Security Officer. Agency CHRMS Security Officers must ensure that the agency is in security compliance in order for participants to attend CHRMS training, and that their employee(s) have their IDs and passwords in time for training.
3. Participants must have their own valid CHRMS logon ID and password with access to CHRMS Query Studio, and know their CHRMS ID and password when they arrive at the training session.
4. To successfully complete CHRMS training, participants must have basic desktop computer skills including navigating Windows, Mozilla **Firefox** browser, MS Office Excel, and Adobe Reader.

**Length:** Attendees **must** attend the two (2) sessions (4 hours and 15 minutes each session) from start to finish in order to receive a Certificate of Completion, which will be sent via email on Friday, after completion of the course.

Attendees **must** have access to the Mozilla **Firefox** browser, **CityShare** and be able to access **Webex**.

**CEUs:** Not IACET accredited.

**Assessment Method(s):** Instructor observation, question & answer discussions, oral quiz, completion of hands-on exercises.



# REQUEST FOR CHRMS TRAINING (non-NYCAPS Agencies)



FROM: CHRMS Security Officer/Training Contact (Name): \_\_\_\_\_

PYRL NO.: \_\_\_\_\_ AGENCY NAME: \_\_\_\_\_

PHONE NO.: \_\_\_\_\_ FAX NO.: \_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_

PARTICIPANT'S NAME AND EMPL NUM  (Please Print or Type)	COURSE(S) REQUESTED:			MANAGER APPROVAL REQUIRED!! BY SIGNING THIS FORM, THE MANAGER AGREES TO THE FOLLOWING:			
	COURSE NO./NAME	TRAINING DATE	ALT DATE	MANAGER'S SIGNATURE	PRINT NAME	DATE APPROVED	MANAGER'S TELEPHONE NO.
1. Name: Empl Num:	<b>Course No./Name:</b> 7H-Canned Query 7J-Ad Hoc 7L-PPMS Ad Hoc			1. THE AGENCY SECURITY OFFICER WILL SUBMIT A "REQUEST FOR CHRMS ID" via REMEDY TO CPSM-SECURITY TO OBTAIN A CHRMS ID. 2. EMPLOYEE IS REQUIRED TO ATTEND CLASS AS SCHEDULED. IN EVENT OF CANCELLATION, AGENCY MUST NOTIFY OPA TRAINING TWO (2) WEEKS PRIOR TO CLASS DATE, EXCEPT IN CASES OF ILLNESS OR PERSONAL EMERGENCY.			
2. Name: Empl Num:							
3. Name: Empl Num:							
4. Name: Empl Num:							
5. Name: Empl Num:							
<b>COURSE DESCRIPTIONS: (REFER TO OPA TRAINING SOURCEBOOK FOR FULL COURSE INFO.)</b> <b>CANNED QUERY:</b> Introduction to CHRMS and running pre-formatted (canned) query reports. <b>AD HOC:</b> Create your own reports using CHRMS Ad Hoc. <b>PPMS AD HOC:</b> Create your own reports using CHRMS PPMS Ad Hoc.				<b>Non-NYCAPS agencies:</b> Please submit your training request/form via a Remedy ticket.  Thanks and we look forward to seeing your employees at CHRMS Training.			