Oracle® Learning Management

User Guide

Release 11*i*

Part No. B31217-01

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Oracle Learning Management User Guide, Release 11*i*

Part No. B31217-01

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Oracle Learning Management User Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Learning Management User Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- Oracle Self-Service Web Applications.

   To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- The Oracle Applications graphical user interface.

   To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Related Documents for more information about Oracle Applications product information.

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Related Information Sources

Oracle Learning Management shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle Learning Management.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

OA Personalization Framework and OA Extensibility Framework

Learn about the capabilities of the 11.5.10 Framework technologies.

Oracle HR Intelligence Daily Business Intelligence for HRMS User Guide

This guide describes the dashboards and reports available for HR Line Managers, Chief HR Officer, Budget Managers, and Benefits Managers using Daily Business Intelligence for HRMS. It includes information on using parameters, how DBI for HRMS derives values, and how to troubleshoot dashboards and reports.

Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

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Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

Learn how to use Oracle HRMS to represent your enterprise. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining person types to represent your workforce, and also how to manage your budgets and costs.

Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

Learn about wage attachments, taxes and social insurance, the payroll run, and other processes.

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

Learn how to use Oracle HRMS to manage your total compensation package. For example, read how to administer salaries and benefits, set up automated grade/step progression, and allocate salary budgets. You can also learn about setting up earnings and deductions for payroll processing, managing leave and absences, and reporting on compensation across your enterprise.

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration in Oracle HRMS

Learn about extending and configuring Oracle HRMS, managing security, auditing, information access, and letter generation.

Oracle Human Resources Management Systems Implementation Guide

Learn about the setup procedures you need to carry out in order to successfully implement Oracle HRMS in your enterprise.

Oracle Human Resources Management Systems FastFormula User Guide

Learn about the different uses of Oracle FastFormula, and understand the rules and techniques you should employ when defining and amending formulas for use with Oracle applications.

Oracle Self-Service Human Resources Deploy Self-Service Capability Guide

Set up and use self-service human resources (SSHR) functions for managers, HR Professionals, and employees.

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence (HRMSi) in your environment.

Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide

Learn about the workforce intelligence reports included in the HRMSi product, including Daily Business Intelligence reports, Discoverer workbooks, and Performance Management Framework reports.

Implementing Oracle Approvals Management

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications. Download this guide from Oracle *MetaLink*, Note: 282529.1.

Oracle iRecruitment Implementation Guide

Set up Oracle *i*Recruitment to manage all of your enterprise's recruitment needs.

Oracle Time and Labor Implementation and User Guide

Learn how to capture work patterns such as shift hours so that this information can be used by other applications such as General Ledger.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains

instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

"About" Document

For information about implementation and user document, instructions for applying patches, new and changes setup steps, and descriptions of software updates, refer to the "About" document for your product. "About" documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, Auto Patch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

<u>Oracle Workflow Administrator's Guide</u>

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

<u>Oracle Workflow Developer's Guide</u>

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

<u>Oracle Workflow User's Guide</u>

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

<u>Oracle Workflow API Reference</u>

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

<u>Oracle Applications Flexfields Guide</u>

This guide provides flexfields planning, setup, and reference information for the Oracle HRMS implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

<u>Oracle eTechnical Reference Manuals</u>

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink*.

<u>Oracle Applications Message Manual</u>

This manual describes all Oracle Applications messages and is available in HTML format on the documentation CD-ROM for Release 11*i*.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Introduction to Oracle Learning Management

Introduction to Oracle Learning Management

Oracle Learning Management (OLM) is designed to support all education models by providing a single unified learning delivery system to the extended enterprise of employees, customers, and partners.

Tightly integrated with the talent management functions within the Human Resources application, OLM is also integrated with Oracle Financials and Order Management applications to administer the financial and commercial aspects of your learning business. The application records worker competencies, making them available for career planning as well as candidate placements, performance appraisals, and other activities.

OLM offers a wide range of functions, from catalog and online class management to learner enrollments and learning paths, enabling you to:

Manage All Learning With the Unified Catalog

The catalog provides an interface for administrators to manage the setup and delivery of learning. The catalog model relies on five catalog objects:

- Categories organize the catalog so that learners and administrators can find what they're looking for. A category can hold courses, learning paths, or other categories.

- Courses define subject matter and instructional objectives.

- Offerings define the delivery mode and language of a course. An offering might be an online course given in French, or an instructor-led course taught in Danish.

- Classes are enrollable instances of offerings. For example, an instructor-led offering might need delivery online, or in several different places at different times. A learner would enroll in a class held at a specific time and place. You can also hold live online classes using OLM's integration with Oracle Web Conferencing.

- Sessions are subdivisions of classes. To help you create a detailed agenda for a class, you can break it down into shorter sessions, specifying the location and schedule of each session.

From the catalog, you can also create and maintain other objects that are not a part of the nested hierarchy such as forums, chats, web conferences, learning paths, and learning certifications. Administrators use the catalog to grant learners access, book resources, and assign competencies to learning. Learners and managers can also view a version of the catalog to enroll in learning.

Group Courses Into Learning Paths and Certifications

Learning paths help to monitor performance and develop the careers of your workforce. Learning paths group courses into meaningful sequences, and can include completion targets to indicate to subscribers the dates by which they should complete the learning path.

Learning path types come from three sources:

- Catalog learning paths, created by a learning administrator, appear in the learner catalog and enable multiple learners to follow a path.

- Manager learning paths enable managers to specify courses of study for their employees, either directly or as a result of another Human Resources activity such as a performance appraisal.

- Learner learning paths, created by learners to set their own goals, define a plan to achieve them, and measure their progress along the way.

Learning Certifications offer learners the opportunity to subscribe to and complete one-time and renewable certifications, including regulatory certifications such as compliance training and professional development certifications such as Oracle DBA. Unlike learning paths, certifications can include renewals and enforced due dates. Administrators can choose from a wide variety of options to designate how long a certification lasts, whether and when a learner can renew, and when the application sends notifications.

Track and Manage Enrollments

Administrators can enroll and subscribe one or multiple learners in classes, learning paths, and learning certifications. They control enrollment through a combination of learner access, self-enrollment permission, and approval options. You can also track successful attendance, maintain learning histories, and set up automatic updates to a learner's competency profile. Search capabilities enable you to place the right learners into the right classes.

Using class and enrollment statuses, you can control enrollments in a class throughout its life cycle. For example, you can create a *Planned* class to monitor learner interest and investigate resource availability. You might then enter enrollments with the status *Requested* as learners express an interest in the class and you can update their status to *Waitlisted* when the learners confirm their interest. You can update the class status to *Normal* when you have sufficient Waitlisted enrollments to meet the minimum numbers required to run the class, automatically taking *Placed* enrollments from the waiting list.

Grant and Restrict Learner Access

Learner access enables administrators to define which learners have access to which learning. Administrators can specify this access on any catalog object. All catalog objects contained under this catalog object inherit this access. For example, granting learners access to a category grants them access to all the courses in that category. Learners cannot view or enroll in learning to which they lack access.

Manage, Deliver, and Track Online Content

The content interface enables you to organize and prepare content to be delivered as online self-paced courses. You assemble online content within the interface, or import existing content, such as third-party courseware.

To deliver the online content to learners, you can create a catalog offering, in which learners enroll and which they access through the online player. Web conferences facilitate delivery of online synchronous classes. Instructors can host a live web conference and deliver the class to learners over the web.

The player supports any type of Web-playable content--such as video, HTML, and Flash--that resides on a web server.

The application tracks learner progress through an online course. By default, the application retains performance details at the learning object level, including time spent, completion status and test scores. Further, the application supports content that contains recognized e-learning industry specification function calls, such as SCORM CMI or AICC HACP, to enable finer-grained tracking within the content when required.

Create and Manage Tests

The test builder enables you to create tests, to measure a learner's performance, knowledge, and skills. You can also create and maintain question banks, which help to organize and reuse questions across multiple tests.

You deliver a test to a learner either as a topic within a course, or as an offering in its own right. The application scores a test, and a learner passes or fails based on the results.

The application displays performance statistics, enabling you to analyze learners' performance for a given test or question.

Define Player Prerequisites

For online offerings, you can define one learning object, including a test, to be a prerequisite for another learning object within the same course, or in a different course. When a learner attempts to play a piece of content (learning object), the online player prevents access unless the learner has successfully completed the identified prerequisite (mandatory) content.

Import and Export Online Content

You can import and export existing content--both the metadata and, optionally, the content files themselves--that conforms to recognized content specifications, such as SCORM and IMS QTI. This may be content created in-house, but external to the application, or content purchased from third-party vendors, either off-the-shelf or custom-built.

Enable Learners To Manage Their Learning

The learner interface makes it easy for learners to find, enroll, view, and play their learning. Learner pages include:

The Learner Home page, which provides a snapshot view of learning paths and courses in which a learner is currently enrolled. Learners can:

- View the detailed course, offering, and class descriptions as well as enrollment information
- Manage their learning paths
- View online and offline classes, where learners can obtain their class progress, view their class enrollment status, and take online classes

- View and access catalog forums and chats that they have subscribed to

The Catalog and Search pages, which present an online catalog of available learning. When navigating through the catalog, learners can find and enroll only in learning to which they have access. Learners can also:

- Search for learning paths, learning certifications, category forums and chats, and learning related to a subject matter; learners can search by course name, description, location, competencies, and training dates

- Browse for learning by drilling down through categories to find the desired courses and learning paths

- View catalog information such as course objectives and descriptions, to help them find the desired learning

- Enroll directly in the learning they find

The Requested Learning page, which displays the classes for which the learner has requested enrollment, but cannot enroll because of pending approval or a full class. The learner can also view classes in which they are waitlisted and courses that are pending approval.

Offer Learning Access to External Learners

All learners, including those in the extended enterprise of customers and partners, can use the Learner pages, making classes available to virtually anyone you wish to train.

View Complete Learning History

The learning history functionality enables you to keep track of all learning activities that a learner has attended, passed, failed, completed, cancelled, or expired. Learners can move courses, learning paths and learning certifications to the Learning History page. This information appears in several sections:

- Individual Enrollments presents detailed information for courses (not attached to their learning paths or certifications) such as status, score, and time taken.

- Learning Paths lists the expired learning paths and those that the learner has subscribed to and completed, unsubscribed from, or moved to Learning History.

- Learning Certifications displays information on expired certifications and certifications that the learner has completed, unsubscribed from, or moved to the Learning History page

- External Learning shows learning taken externally, such as from an outside vendor, and entered manually.

Manage Learner and Course Competencies

Like learning paths, competencies help to monitor performance and develop the careers of your workforce. This release extends to learning paths the existing ability to link HR competencies to courses. Administrators can configure the application to update, automatically or with approval, learners' personal competency profiles after they have completed classes successfully. For each course they can also set competency prerequisites, courses a learner should or must complete before they can enroll in a given class.

Enable Managers To Manage Their Workers' Learning

Managers access a page from which they can view learning-related information about their employees. After choosing an employee to view, managers use the learner interface to enroll that employee in a course, or to view employee performance and progress.

Enable Instructors to Manage Their Classes

Using the instructor interface, instructors can manage their classes and bookings, communicate with learners online, and carry out their administrative tasks. The instructor pages include:

- The Home page, which lists the classes that you are scheduled to teach

- The Class Details page, which provides detailed class information on resources, enrollments, sessions, course prerequisites, and class forums and chats.

- The Forums and Chats page, which displays your class forums and chats and the forums and chats that you need to moderate.

- The Supplemental Bookings page, which displays your bookings for non-catalog activities such as vacation or preparation time. You can view your past bookings on the Booking History page.

Automate Communication With Workflow Notifications

The application delivers over 25 workflow notifications that inform learners and managers of classes such as enrollments that require approval, and enrollments and cancellations made by managers or others. Implementers can use Oracle Workflow and Oracle Approval Manager to configure these notifications and their behavior.

Develop and Budget for Courses

You can assign budgets both for the development of new courses and for the running costs of all classes scheduled for a course. You can assign instructors and other resources for course development.

Secure Access to Functions and People

You can restrict administrator access to a subset of the application (such as the catalog or resources) and people (such as members of other business groups) through OLM's implementation of Role-Based Access Control and HR Security Groups.

Manage Waiting Lists

You can create a waiting list for a class, either because the class is full or because you want to prioritize enrollments before allocating places. When a place becomes available (a learner may cancel their enrollment or you increase the available places), or you are ready to allocate places, you can view the waiting list and select from it.

Automatic Waitlist Enrollment

Alternatively, you can enroll waitlisted learners automatically, based on waitlist priority or enrollment date. Automatic enrollment for waitlisted learners occurs when a learner has cancelled an enrollment, or after the maximum number of attendees for a class has increased. OLM automatically moves the first eligible waitlisted person into the class.

Record Outcomes of Attendance

When a class has taken place, you can record the results of each attendance, including the failure reason, where appropriate.

If you are holding competency information in Oracle Human Resources, you can update learner records to show the new qualifications, knowledge, or experience they have gained from the class.

Cross Charge Class Fees and Resources

You can transfer the cost of class fees or resources between organizations, departments, or cost centers within your enterprise.

You can designate, at finance header level, a receiving cost center and a paying cost center, and summarize finance details for charges (or credits) for each combination of approved finance headers and lines. You can also create output to be included in the open interface for the Oracle General Ledger system (or another general ledger or accounts receivable application).

Oracle Learning Management Requirements

Oracle Learning Management (OLM) supports a wide range of business activities associated with learning and development.

What courses can you set up?

You can set up courses, learning paths, and learning certifications to describe any educational or developmental undertaking designed to enhance competencies, qualifications, or experience. Courses are not restricted to conventional training--you can use them for online training, on-the-job training, work experience, apprenticeships, tests, and so on.

Can instructors deliver live online classes to learners over the web?

The integration with Oracle Web Conferencing (OWC) enables instructors to deliver live online classes to learners over the web. Administrators can set up online classes as web conferences using the integration with OWC. Instructors can host the web conference and deliver the class over the web. Learners automatically join the live web conference on playing the class from the learner interface.

Can you create and maintain the content for the online courses within OLM?

Creating content is a task for curriculum developers outside of the application. OLM supports all Web-based content and places no restriction on the authoring tools that you use to create the content, as long as the content is playable on the web. You can set up one or more content servers in OLM, to store and maintain the online content. You can transfer online content to the server using the Upload and Import utilities.

What industry specifications does OLM support for sharing content across learning management systems?

You can create, manage and better distribute online content across learning platforms if the content adheres to common industry specifications. OLM supports industry

specifications such as IMS, SCORM, and AICC to reuse common content across applications without making significant changes. You can import and export learning objects, tests, and content hierarchies using XML files that adhere to these specifications.

Can you design curriculum for specific goals?

Yes. Not only can you can design curriculum for specific goals and objectives, but you can also include licenses, certificates, and management training.

Does OLM support external learners?

OLM enables Applicants (people of the type applicant in HR and iRecruitment), who are not created as learners in OLM, to search and enroll in learning using the learner interface. They can either self enroll through the learner interface, or an administrator or a manger can enroll them. Enrollment is subject to the learner access conditions defined on the learning.

Can you update competencies?

You can update competencies automatically or manually after a learner successfully completes a class.

Can I use HRMS Intelligence to investigate and monitor career management?

If you also have Oracle HRMS installed, HRMS Intelligence includes Reports, Discoverer Workbooks, and Performance Measures designed to help you investigate the competencies, proficiencies, and training within your enterprise. You can use HRMS Intelligence to answer business questions such as:

- How many people, and which ones, have the required skills and competencies for the job?

- How quickly can I improve the skills of a group of people, and at what cost?

- How does a person compare with the skills and competencies needed for the job?

- Do my employees need more training?

Introduction

The Learning Cycle

The learning cycle followed in the Oracle E-Business Suite model appears in the figure below.

You can use Oracle Learning Management in tandem with other Oracle Applications to support just as much of the learning cycle as you require.

Setup Stages

1. Define the competency requirements of your business: define the competencies (qualifications, knowledge, and experience) your enterprise requires from its current staff and future applicants.

2. Assign competency requirements to organizations, jobs, and positions: assign your general and specific business requirements to particular structures within your enterprise.

3. Assess competency achievements and gaps: evaluate your current workers and applicants, then conduct a development needs analysis to identify the gaps.

4. Design or identify development courses: develop new internal courses or identify external activities that can supply the competencies required to close the gaps.

5. Price courses: create budgets and create price lists, if appropriate.

6. Group courses into learning paths and categories: design your catalog to accommodate the needs of organizations and individuals.

7. Identify resources and suppliers: identify the equipment, venues, instructors, and other resources required to run your courses, and build up a database of resources you can book.

User Stages

1. Create classes and book resources: create online and offline classes and book the resources required to run them. Manage payments to resource suppliers.

2. Manage charges and commercial relationships.

3. Enroll learners in classes.

4. Manage enrollments and cancellations: handle multiple enrollments using waiting lists and confirmations, issuing standard letters as required. Invoice paying customers.

5. Record attendance and achievements: after classes, record results including test scores, attendance levels, and competencies attained.

6. Evaluate courses: assess their effectiveness and compare actual revenues and spending with budgets.

7. Appraise learners: evaluate the longer term impact of learning management.

The OLM Learning Cycle
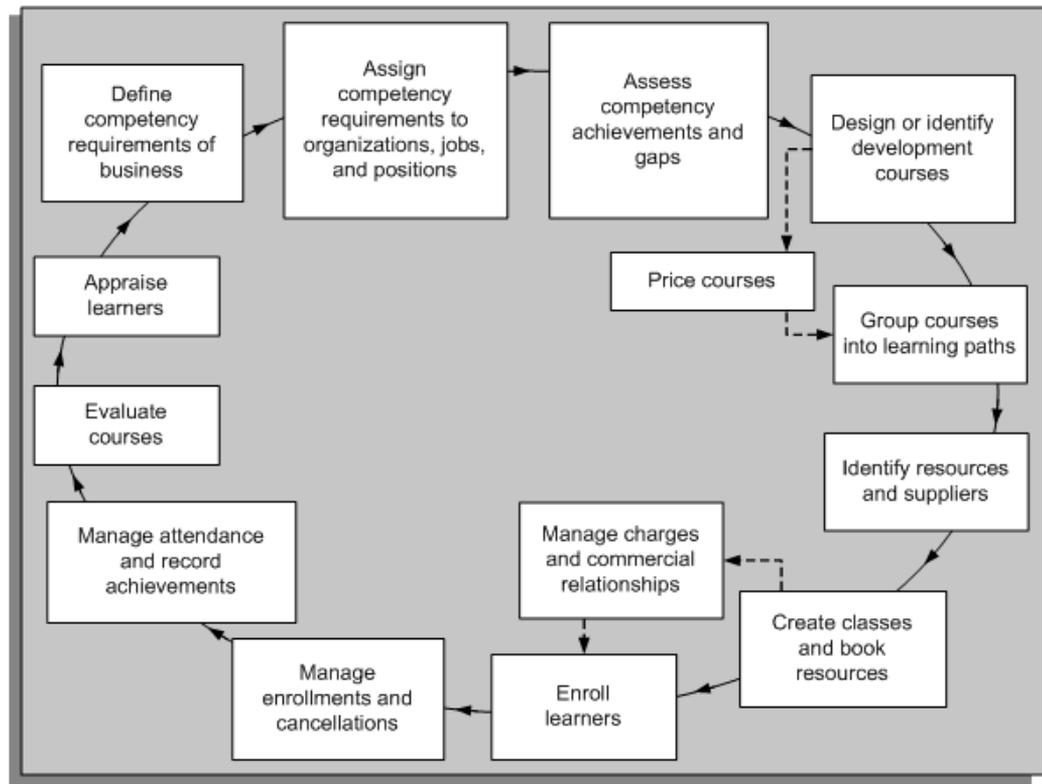
Setup Decisions

Before you set up Oracle Learning Management so that users can perform their tasks, we recommend that you plan carefully.

The responsibility for planning and setting up the different stages of the OLM learning cycle varies from enterprise to enterprise. Typically, stages 1 and 2 may be the joint responsibility of several departments, stages 3 and 14 may be the responsibility of the human resources department, while stages 4 to 13 lie more clearly within the domain of learning management.

OLM is integrated with Oracle Human Resources, and together these applications can support all stages of the learning cycle.

You may not be concerned with every stage in the cycle. For example, commercial learning service providers need not identify internal training requirements nor maintain detailed learner records. They mainly focus on the maintenance of schedules and the management of enrollments and financial transactions.

Internal training departments that do not open up their classes to external learners on a commercial basis may be less interested in the management of price lists and other financial information. To support internal accounting practices, however, the application does enable cross-charging.

What Decisions Do You Need to Make?

To understand the decisions you have to make before you set up OLM, see Implementing Oracle Learning Management, *Oracle Learning Management Implementation Guide*.

2

Catalog

Catalog Overview

The catalog is the application's primary administrative structure, a nested hierarchy that enables you and your learners to browse all available learning, or to drill down to detailed class descriptions. From here you create and maintain all your catalog objects: categories, courses, offerings, classes, and sessions. From the catalog, you can also create and maintain other objects that are not a part of the nested hierarchy such as forums, chats, web conferences, learning paths, and learning certifications.

Reporting on the Catalog

The Attendance and Signature Sheet Report, page 3-14 enables instructors to take and report class attendance.

Key Concepts

The catalog depends upon several key concepts:

- Catalog Objects, page 2-4--categories, courses, learning paths, learning certifications, offerings, classes, and sessions--are the building blocks of the catalog.

- Categories, page 2-4 are purely structural objects, like folders, that contain other catalog objects.

- Courses, page 2-5 define *what* a class teaches a learner.

- Offerings, page 2-5 determine *how* the learning is delivered.

- Classes, page 2-7 set *where* and *when* the learning takes place.

- Learning Paths, page 2-10 and Learning Certifications, page 2-13 are virtual collections of courses that help learners achieve learning goals that a single course cannot address.

- Class Statuses, page 3-7--Planned, Normal, Full, Closed, and Cancelled--reflect typical stages in the class life cycle.

- Sessions, page 2-9 are subdivisions of classes, facilitating resourcing and scheduling.

- Web Conferences, page 2-15 facilitate delivery of online synchronous classes.

- Forums, page 2-15 are online bulletin boards that learners and instructors use to post general learning topics for discussion.

- Chats, page 2-15 are scheduled live discussions that enable learners and instructors to exchange messages online.

- Learner Access, page 2-16 determines *who* can enroll in a given class.

- Delivery Modes, page 2-6 set whether a class is delivered online or offline, and scheduled or unscheduled.

- Restricted Classes, page 2-17, in tandem with learner access, determine enrollment availability for both customers and internal learners.

Catalog Requirements

You can fit the OLM catalog to your existing catalog or build a new catalog from scratch, to better represent your plans for future courses. Categories enable you to maintain a relatively flat structure, only one or two levels deep, or to nest courses several levels deep, which you may wish to do to accommodate a large and varied catalog.

How relevant are courses to your business?

Learning activities enable workers to acquire or enhance competencies, qualifications, and experience. Learners can then better fulfill job requirements and achieve career objectives.

Your enterprise benefits directly as workforce skills and competencies improve and workers meet job requirements more fully. By keeping a detailed, up-to-date record of competencies you can utilize the potential of your employees more completely and effectively.

How versatile is class design using OLM?

The application allows you wide flexibility in scheduling and grouping courses and classes.

- You can use offerings and classes to run multiple versions of courses.

- You can group courses together into versatile learning paths.

- You can run classes for any period of time you require.

- To help you create a detailed agenda for a class, you can break it down into shorter sessions, specifying the location and start and end times of each session. You can book resources, such as venues and trainers, for the whole class or for individual sessions.

How do you deliver online synchronous classes?

You can use the integration with Oracle Web Conferencing (OWC) to deliver web conferences, learning delivered by a live instructor to learners over the web. The built-in integration simplifies the administrative process of linking your application to a virtual learning tool to deliver online synchronous classes. The integration with OWC also enables you to deliver online asynchronous class as recorded web conferences, providing an alternative method to host online asynchronous classes.

How do forums and chats benefit learners and instructors?

Forums and chats are communication tools that bring learners and instructors together in a learning environment. Learners can use class chats to exchange queries on the class subject area with instructors and other learners enrolled in the class. Both learners and

instructors benefit by the knowledge and information sharing that happens through class forums. Learners and instructors can also utilize the private forum messages capability to share information that should not be available to all learners, such as homework assignment. Category forums and chats encourage participation in general subject areas beyond a specific class. They are not associated with a specific class and are accessible to all learners who meet the learner access conditions defined for the forum or chat.

Catalog Administration

Catalog Objects

The core of the Learning Management catalog is a hierarchy of catalog object types:

- Categories, page 2-4 are containers that hold other learning objects

- Courses, page 2-5 define subject matter and other generic information

- Offerings, page 2-5 are specific instances of courses, and hold the delivery mode and language of instruction

- Classes, page 2-7 are specific instances of offerings, holding enrollment, scheduling, and location information

- Sessions, page 2-9 are subdivisions of classes, holding scheduling, location, and resource information

Learning Paths, page 2-10 and Learning Certifications, page 2-13, unique types of catalog object, contain virtual groups of courses that help learners achieve learning goals that a single course cannot address.

The hierarchical structure of the catalog takes advantage of inheritance in several ways. Each of the five main object types inherits (and can sometimes override) characteristics inherited from its parent object type. Classes, for instance, inherit the delivery modes of their parent offerings, while all offerings under a course deliver the same essential subject matter.

You can use learner access, page 2-16 at every level of the hierarchy, each object inheriting (and optionally adding to) the learner access designated for its parent object.

Catalog Prerequisites

You can specify courses and competencies a learner must or should complete before enrolling in a given class. Mandatory prerequisites prevent learners from enrolling in the class, while advisory prerequisites merely inform the learner of courses they should take or competencies they should acquire prior to enrollment. You can also choose to apply a course prerequisite to internal learners only, external learners only, or both, enabling you to establish different prerequisites for each set of learners. Competency prerequisites, which enable you to specify an expected or required level for each competency, apply only to internal learners.

Categories

Categories, the top level of the catalog hierarchy, serve to organize and structure your catalog. With one notable exception, they do not themselves hold information, but serve as named containers to hold other learning objects. They can even hold other categories, enabling you to nest catalog items, much like the directory structure on your computer.

Categories can hold one important piece of information: learner access. Depending on your catalog structure, you can use categories to target courses to particular organizations or any defined subgroup of learners.

Courses

Courses, the second level of the catalog hierarchy, hold generic information that tends to remain unchanged even when the delivery mode, schedule, or location changes. Courses save you from entering the same, or incorrect, information each time you create an offering or class. Courses hold a variety of information:

- topics and description

- objectives

- competencies delivered

- professional credits delivered

- intended audience

- administrative details

> **Tip:** To increase its availability to learners, you can reference a course in multiple categories, but you must designate exactly one category as primary.

OLM uses start and end dates to control when courses appear to learners and managers (administrators can view all catalog objects until deletion). You cannot run classes for the course earlier than the start date or later than the end date.

As with categories and other learning objects, you can establish learner access for each course.

See Learner Access, page 2-16

The application can generate a hyperlink to this course that you can paste into e-mail, external web pages, or announcements.

Learner Competencies

By specifying competencies the course can deliver to learners, you can tie the course into the HRMS competencies functionality.

See Competencies, page 2-17

Order Management and OLM

If you are using Oracle Order Management to manage external classes, you associate your inventory organization with a course.

See Using Oracle Learning Management With Order Management, page 11-73

Course Information Types

If you have set up the Personal Analysis key flexfield, and created and enabled Special Information Types from the professional user interface, you can use Course Information Types from the Other Information link on the Course page.

Offerings

Third in the learning object hierarchy, offerings are specific instances of courses. You can enter various kinds of data at this level, but the primary purposes of offerings is to set

the delivery mode and the language of delivery of each class under it and, for online offerings, to establish the link to the online content. In other words, offerings largely determine *how* a course is delivered.

Delivery Modes

OLM predefines delivery modes based on two concepts.

- Learners take *online* classes using the OLM Player; the application considers other classes to be *offline*.

- *Synchronous* classes are scheduled; learners can take *asynchronous* classes at any time within the window of opportunity you define.

Thus, the application offers four combination delivery modes (and typical applications):

- Online synchronous (web conference with live instructor over the web)

- Online asynchronous (online self-study or recorded web conference)

- Offline synchronous (traditional instructor-led class)

- Offline asynchronous (reading a book)

> **Important:** The online modes are available only if your enterprise has purchased the OLM Online Learning Option and enabled the Online Learning Option Licensed profile.

Each class you create takes on the delivery mode of its parent offering. Thus you can offer versions of any course in any or all of the four modes.

From the Setup tab, you can create more delivery modes, each based on one of the four options.

Resources and Offerings

You can use the Resource Checklist to specify resource types or resources that are required or useful to run classes for a particular offering. You can then override any of these choices for individual classes.

If you end-date the offering, you must enter an end date for the associated resources. This end date must occur on or before the end date of the offering.

Player Preferences

Player preferences control the display and behavior of the player when a learner plays an online offering. You set the player preferences for online classes from the Offering creation and update pages. The available preferences are:

- *Show Toolbar* displays the Player navigation toolbar.

- *New Window* opens the Player in a separate, new window.

- *Next* includes the Next icon in the Player toolbar. Checking this box enables the learner to navigate to the next content object.

- *Previous* includes the Previous icon in the Player toolbar. Checking this box enables the learner to navigate to the previous content object.

- *Outline* includes the Outline icon in the Player toolbar. Checking this box displays the outline of the offering.

- *Exit* includes the Exit (Home) icon in the Player toolbar. When learners launch an offering from within OLM, Exit returns them to their Home page. If the Player has opened in a new window, Exit simply closes the window, which leaves the Home page or referring URL available to the learner in the previous window.

Instructor Competencies

Select the Instructor Competencies link to specify the competencies required of an instructor of an offering and of the classes based upon it.

See Competencies, page 2-17

Settings Passed to Classes

For each offering you can include several pieces of information that become defaults for any classes based on the offering, then override those defaults for each class. You can specify

- Price Basis: Customer, Learner, or No Charge

- Budgeted and Actual Cost

- Maximum Attendees, Minimum Attendees, and Maximum Internal Attendees

As with categories and courses, you can also set (and add to) learner access at the offering level.

Classes

Fourth in the learning object hierarchy, classes are specific instances of offerings. Classes are the learning objects that learners enroll in and attend or take online. For any class, you can:

- schedule dates, times, and locations

- enable, disable, or update learner access

- view and change existing enrollments and enrollment parameters

- view and change resource bookings

- subdivide the class into sessions

- provide administrative details

- restrict enrollments to specific customers

Marking a class Restricted limits enrollments to external learners from selected customers, or activates learner access for internal learners. Otherwise, the class is open to any learner.

See Learner Access, page 2-16

To enable administrators to receive and take action on workflow notifications, you must designate a class owner and a sponsor.

If you are an independent learning vendor using Order Management, your telesales representatives can schedule classes in OM as your customers request them.

Scheduling and Resourcing

For each class you can specify dates, times, durations. Class dates must fall within the valid dates of its parent offering. For online classes, learners and instructors view the correct class and enrollment times for their own time zones.

You can also designate the beginning and the end of the enrollment period, enabling you to plan and resource classes without making them available to learners, and to close enrollment for a class about to begin or for a class that might be cancelled (setting the class status to Closed, page 3-10 also prevents new enrollments). You can also enroll learners in advance or retrospectively by changing the enrollment dates.

For offline classes you can specify a location hierarchy:

• Training Center

• Location

• Venue

Use the Create or Update Class pages to choose a Training Center (a general locale or organization, for example) and a Location (perhaps a building or institution belonging to the training center). Then choose a Primary Venue (such as a classroom or meeting room) from the Resource Bookings or Resource Checklist pages.

Use the Resource Bookings or Resource Checklist pages to select an instructor or other resources. The Resource Checklist enables you to view and book resources defaulted from the offering.

See Resource Booking, page 4-7

Enrollment

You can update and delete learner enrollments from the Class or Enrollments and Subscriptions pages.

Once a learner has completed a class, you can record the learner's successful (or unsuccessful) attendance. If enabled, the application may automatically update the learner's competency profile.

If your enterprise uses organization security for classes and enrollments, only users who belong to the appropriate sponsoring organization can designate a class as secure. If you belong to the sponsoring organization, you can update and delete the class and enroll learners in the class later. If you are not assigned to the organization that is administering the class, you cannot update or delete the class nor enroll learners in the class.

> **Caution:** Selecting the Secure check box for a class overrides learner access granted to any learner outside the sponsoring organization.

Class Pricing

You can choose from among three price bases for a class (a fourth, Order, defaults automatically when a telesales representative creates a class in Order Management; others cannot choose this option).

Customer means that you plan to charge customers associated with the class a block price for a certain number of enrollments. If you select Customer, you must associate one or more customers with the class before entering enrollments.

Student (Learner) means that you plan to charge a price for each learner enrollment.

*No Charge,*of course, means that the price of the class is zero.

Any pricing information you enter here overrides any pricing information set for the parent offering.

The associated finance line must use the same currency as the price basis for the class.

If the price basis is Customer, you enter the price for each customer associated with the class in the Customers for Restricted Class window.

If the price basis is Learner, the price you specify becomes the standard class price, which appears in the Enrollment Details window. Users with a qualifying responsibility, however, can charge a different amount when they enter enrollments.

Internal Learners

You can set a maximum on the number of employees who can enroll in a class. This number is a subset of the maximum total number of learners who can enroll in a class.

Cost Analysis of Classes

If you have installed Project Accounting (PA), you can link classes created in OLM with projects to analyze the actual cost of running a class. You track classes, resources, or resource bookings through OLM while you track and invoice the cost of preparing and delivering training through PA.

Additionally, if you need to bill expenses (such as those costs associated with delivering a restricted class) to a customer, you can itemize the expenses in Project Accounting, and invoice them through the standard Project Accounting (PA) to Accounts Receivable (AR) interface.

Change the Status or Maximum Attendees of an Class

After creating a class, you might need to change its status or the maximum number of places available.

For example, if a class proves to be popular, you can increase the number of places available by changing the venue, or rearranging the seating at the selected venue.

Alternatively, if a class is Full, you might want to prevent any new enrollments by changing the class status to Closed, automatically cancelling any enrollments with the status Requested (that is, enrollments where the learner's interest has not been confirmed or approved). You can cancel any finance lines associated with these enrollments.

Sessions

Sessions are the lowest level objects in the catalog hierarchy. A synchronous class, online or offline, can run for any period of time you choose, from hours to weeks. To help you create a detailed agenda for a class, you can break it down into shorter sessions, specifying the location and schedule of each session.

Sessions are discrete topics or time slots within a class. For example, you may run the class *Setting Up and Using Learning Management* over three days. The first session, on Day 1, might be *Introducing Learning Management,* the second session, on Day 2, might be *Setting Up the Application* and the third session, on Day 3, might be *Scheduling Classes and Enrolling Learners.* The sessions may or may not be held at the same venue.

You can divide a class into several sessions, specifying the date and time for each session. For example, if a course runs every Wednesday morning for 5 weeks, you can create a class with a duration of 5 weeks, comprising 5 sessions. You can then schedule each session from 9 am to 12 noon on consecutive Wednesdays. You must specify both start and end dates for a class to add and schedule sessions. The session start and end dates must occur within the class start and end dates.

> **Note:** The session end date is always the same as the start date. To schedule sessions that occur over multiple days, you must schedule separate sessions, one per day.

You can book resources, such as instructors or venues, for individual sessions. See Resource Booking, page 4-7

> **Note:** Before you can delete a session that has resource bookings, you must delete the bookings.

Learning Paths

A learning path is a catalog object that contains one or more virtual groups of courses (sections), helping learners achieve learning goals that a single course cannot address.

Learning paths can come from various sources:

- Learners and managers can create individual learning paths within OLM.

- Appraisers and managers can create learning paths from Talent Management.

When an overall learning objective spans multiple courses, such as a curriculum of introductory, intermediate, and advanced courses, you can set up a learning path to which learners subscribe, and which then appears to the learner in a specific learning path table.

A learning path does not duplicate the courses; the learning path is simply a container for a logical grouping of existing courses, with some added attributes at the learning path level.

A learning path enables you to identify mandatory and optional courses, and to set a target completion period, to help learners and their managers manage their long-term goals. You can also specify a number of days prior to the end of the target completion period for the application to notify the learner of the upcoming target completion.

OLM uses start and end dates to control when learning paths appear to learners and managers (administrators can view all catalog objects until deletion).

Many aspects of catalog learning paths are similar to courses. You can set learner competencies for a learning path, in addition to competencies that already exist at the individual course level. See Competencies, page 2-17

As with courses and other catalog objects, you can establish learner access for a learning path. See Learner Access, page 2-16

Learner and Manager Learning Paths in OLM

Learners and managers can create learning paths through Self Service. Such learning paths usually serve individual needs, and do not appear in the catalog. Learner-created paths receive a source type of Learner, and manager-created paths receive a source type of Manager. See Self-Service Interfaces, page 10-4

Learning Paths from Talent Management

If you run both SSHR and OLM, appraisers and managers using the Appraisals or Suitability Matching modules can recommend courses for their employees to take. These courses become part of a learning path automatically created for the learner, and do not appear in the catalog. The path receives a source type of Talent.

Target Completion Period

The target completion period for a learning path is optional, but is useful to ensure learners successfully meet their goals, for example when related to performance reviews and career planning.

You enter the target completion period as a number of days. When a learner subscribes to the learning path, the number of days is converted to a date calculated from the subscription date.

Learning Path Sections

A learning path must consist of at least one section. Each section determines how many courses (components) in the group the learner must complete. Create sections to provide a mixture of elective and mandatory courses in the same path.

You can reorder the sections, to determine the order in which they appear to learners within the learning path.

The section types available are:

- *All Components Mandatory* means the learner must complete all courses in the section.

- *All Components Optional* means all courses in the section are optional. The learner may elect to enroll in one or more, or in none of the courses.

- *One or More Components Mandatory* means the learner must complete a given number of courses in the section. You specify the number of courses the learner must complete, but the learner selects which courses to take.

To ensure an identifiable completion criterion, at least one section must have a mandatory component. Therefore, when you create the first section of a learning path, the All Components Optional section type is not available. If you subsequently create additional mandatory sections, you can make the first section optional.

A learning path is marked as completed when a learner has met the completion requirements of all sections in the learning path.

Learning Path Components

Learning path components are existing courses in the catalog. You add components to each section in the learning path. You can reorder the components, to determine the order in which they appear to learners within the section.

When you add components, you may set a target completion period for individual components. If you specify a period for one component that is greater than the period set for the learning path, the application updates the target completion period for the learning path to match the longest individual component period.

Subscription and Enrollment

When learners subscribe to a learning path, the application does not automatically enroll them in any of the component classes. Learners search for offerings and classes for each of the components they wish to take.

Similarly, when learners unsubscribe from a learning path, the application does not unenroll them from the component classes. Learners can unenroll from individual classes.

Learning paths have no effect on enrollment or learner access. Learners require access to the individual components in order to enroll in a class, whether or not the learners have access to the learning path.

Notifications

When learners have subscribed to a learning path, the application sends the following notifications:

- *Subscription (Unsubscription) to Learning Path* notifies the learner of their subscription (or unsubscription) to a learning path.

- *Learning Path Completion Notification to Learner* notifies the learner that the learner has completed the learning path, and that the learning path will move to the learner's learning history.

- *Learning Path Completion Notification to Creator* notifies the learner or manager who created the learning path that the learner has completed the learning path.

    Note: This notification is applicable only for Learner and Manager learning paths.

In addition, if you specify a target completion period for the learning path or for individual components, the application sends the following notifications:

- *Learning Path Completion Target Reminder* notifies the learner that the learning path is approaching its target completion date. The application sends this notification a number of days prior to the target completion date, dependent on the value you enter in the Notification before Target for the learning path.

- *Learning Path Component Completion Target Reminder* notifies the learner that an individual component is approaching its target completion date. The application sends this notification a number of days prior to the component's target completion date, dependent on the value you enter in the Notification before Target for the component.

The application sends the preceding two notifications only if you have scheduled the following concurrent programs to run at least once every day:

- Send Learning Path Completion Target Notifications

- Send Learning Path Component Completion Target Notifications

See the implementation step Set Learning Path Reminder Concurrent Programs to Run Regularly, *Oracle Learning Management Implementation Guide*

Learning Certifications

The learning certification catalog object offers learners the opportunity to subscribe to and complete one-time and renewable certifications, including regulatory certifications such as compliance training and professional development certifications such as Oracle DBA.

> **Important:** Oracle Learning Management provides the administrative framework for learning certifications; it is solely the responsibility of your organization to ensure that each learner meets all the success criteria you establish. These criteria may include such activities as proctored examinations and supervised laboratory work.

Like a learning path, a learning certification is a catalog object that contains one or more courses, helping learners achieve learning goals that a single course cannot address. Unlike learning paths, certifications can include renewals and enforced due dates. Certifications do not duplicate their component courses; the certification is primarily a container for a logical grouping of existing courses, with added attributes such as renewability and deadlines.

OLM uses start and end dates to control when certifications appear to learners and managers (administrators can view all catalog objects until deletion).

As with courses and other catalog objects, you can establish learner access for a certification. See Learner Access, page 2-16

You can set competencies learners achieve by completing a certification, in addition to competencies that already exist at the individual course level. See Competencies, page 2-17

When a learner subscribes to or unsubscribes from a certification, or when a certification is due for completion, the application sends workflow notifications. See Certification Notifications, page 11-68

Learning Certification Components

Certifications consist of components, which are referenced courses. Learners must complete classes for all components to achieve certification. You specify the order in which components appear to learners, though you would have to assign catalog prerequisites to enforce the order in which learners must complete the classes.

Learning Certification Completion and Renewal

When creating a certification, you can specify when a learner must complete this certification, both initially and during renewals. "Based on date" specifies a fixed due date for all learners, while "Based on number of days" enables you to set a due date relative to each learner's subscription or renewal date.

For unrenewable (one-time) certifications, the options are simple: enter the due date or the number of days until due and specify when to send the learner a reminder of the due date.

Renewable certifications first require you to select one of three options (the fourth option, Never, creates unrenewable certifications):

- *Learner can renew immediately after certification due date* enables learners to renew their subscription anytime after the previous certification period's due date. If I complete

my previous certification on September 21, and its due date is October 31, I can renew my certification beginning on October 31.

- *Learner can renew immediately after learner completes* enables learners to renew anytime after they have completed the requirements for the previous certification period, regardless of the due date. If I complete my previous certification on September 21, and its due date is October 31, I can renew beginning on September 21.

- *Learner can renew for a period before certification expires* enables renewal for a set number of days prior to the expiration of their current certification. If my certification expires on September 21, and you have set the number of days at 10, I can renew beginning on September 12.

You must also specify how long the certification is valid. If you selected "Based on date", you need only specify the number of days for the validity period. If, however, you selected "Based on number of days", you must decide whether the certification validity period should begin on the day the learner completes the certification or on the due date of the certification period.

Learning Certification Statuses

To control records, availability, and workflow notifications, certification uses two types of statuses, *subscription* and *period*.

Subscription statuses apply to the entire subscription, determining whether the learner is subscribed or certified. Most status changes occur automatically; for example, the status changes from subscribed to certified when the learner has completed all the component courses. You can, however, manually change some subscription statuses from the Enrollments and Subscriptions page. The default subscription statuses are:

- Waiting for Approval--the learner has attempted to subscribe and is waiting for a required approval

- Subscribed--the learner has successfully subscribed

- Concluded--the learner has completed the component courses but the certification is not yet verified

- Certified--the learner has completed the certification

- Unsubscribed--the learner has cancelled a subscription

- Expired--the certification has passed its end date and cannot be completed

- Rejected--the learner's manager (or other approver) has declined the subscription attempt

Period statuses apply only to renewable certifications, and work with subscription statuses to provide a clearer picture of the state of a subscription.

- Active--the learner is subscribed and has renewed or can renew their subscription for the current period

- Completed--the learner has successfully finished the certification for the current period

- Inactive--a subscribed learner cannot currently renew or complete a renewed certification, usually because the renewal period has ended, a component course is unavailable, or the learner is not enrolled in any classes that complete the current certification

- Cancelled--the learner has cancelled their subscription for the current period

Forums and Chats

Forums and chats are online communication tools that bring learners and instructors together in a learning environment. A forum is a message board that learners and instructors can use to post general learning topics for discussion. Chats enable quick and easy online communication between learners and instructors. You can create forums and chats within a category or for a specific class.

Category Forums and Chats

Category forums and chats encourage participation in general subject areas beyond learners enrolled in a specific class. They are accessible to all learners who meet the learner access conditions defined for the forum or chat. Learners can:

- Search for or drill down a category to locate and subscribe to category forums and chats

- View subscribed category forums and chats from their home page.

- Post public topics and messages to subscribed category forums. They can view category forum messages without subscribing but cannot post messages or enable forum notifications without subscription.

- Subscribe to category chats and exchange online messages with other learners in the chat.

You can book a moderator to monitor messages exchanged in category forums and chats. Only a moderator is allowed to delete messages in a forum.

Class Forums and Chats

Learners can use class chats to exchange queries on the class subject area with instructors and other learners enrolled in the class. Class forums support both public and private messages. Learners and moderators can post private messages that are only visible to selected recipients. Moderators can post private messages to learners or other moderators. Learners can post private messages to moderators only.

Learners can access the class forums and chats from the learner interface, only after they have enrolled in the class. Instructors can access the forums and chats associated with their class by logging in to the instructor self-service. An instructor usually serves as a moderator for class forums and chats, however you can book a separate moderator (using resource type Trainer or Others) if required. Users booked as moderators can log in to the instructor interface to moderate the forums and chats. For more information on the instructor interface see Instructor Interface, page 10-6

Web Conferences

You use Web conferences to deliver online synchronous classes, and to record these classes for on demand playback.. A Web conference is a live class delivered by an instructor to learners over the Web. OLM integrates with Oracle Web Conferencing (OWC) to deliver online synchronous classes over the Web.

Creating a Web Conference

To host online synchronous classes, you must set up a conference server that integrates your application with the OWC server. For more information on setting up a conference server see Conference Servers, page 11-19

You can create a Web conference for an online synchronous class after you have set up a conference server in the application. This Web Conference link is visible on the Class page only if you have at least one conference server set up in the application. OWC uses the conference information entered in OLM to create the web conference on the OWC server. The OWC server returns the meeting ID, attendee URL, and the host URL after creating the conference. Once you have created a web conference, you cannot change the conference server, meeting ID and the time zone for the conference. You can update other information until the web conference begins.

Setting up a Recorded Web Conference

You can also host online asynchronous classes as Web conferences. OWC enables you to record a Web conference on the OWC server as it is being played. You can enter recorded Web conference information such as the meeting ID and the conference server name, for a learning object. To deliver an online asynchronous class as a recorded web conference, you associate the class with the learning object that has the recorded Web conference information specified.

Learner Access

Learner Access is OLM's term for determining who can view and enroll in any given class. You can grant learner access at any level of the learning object hierarchy, each object inheriting (and optionally adding to) the learner access designated for its parent object.

Learner access to your catalog begins at zero: no learner can view or enroll in any catalog object. You must define your own access model.

> **Note:** You cannot modify inherited access directly. You must modify access from the source catalog object.

Tight or Loose? Your Access Model

Inheritance means that you can establish varying degrees of control over access, from defining individual learners' access to each class, to opening up the catalog to everyone with a login.

You'll probably wish to create an access model somewhere in between the two extremes, as one would require huge amounts of maintenance and the other would result in inappropriate enrollments.

Thus it may not be a good idea to set root category learner access to include the entire business group. If your catalog model uses categories to target courses to specific organizations, you can add those organizations to the category's access profile. Then everyone in those organizations could view and enroll in all the classes within that category.

Similarly, by granting learner access at the offering level, you give learners their choice of delivery modes to fulfill their learning requirements.

Restricted Classes

A class can be either public (learners from any customer or internal organization can enroll) or restricted. Marking a class unrestricted disables all learner access rules attached to it or inherited from a parent object.

A restricted class is either:

- An internal class in which you can enroll learners according to learner access, or

- Associated with one or more customers so that only those customers can enroll learners in the class

You restrict a class by checking the Restricted check box on the Create or Update Class pages.

If you restrict classes to selected customers, use the Customers for Restricted Class window to select the valid customers. Once you have done so, only that customer's representatives can enroll in the class.

Learner Access Options

You can add access by assignment by specifying any combination of organization, job, and position. You can thus grant access to all members of an organization, or to all senior programmers in the business group. The Include child organizations box appears when you specify an organization, which enables you to select an organization hierarchy and grant access to all members of the selected hierarchy in addition to members of the selected organization.

Adding access by learner, of course, grants access to selected individuals.

The Self-enrollment option enables the selected learners to bypass the approvals process when enrolling in classes governed by these access rules.

> **Caution:** Selecting the Secure check box for a class overrides learner access granted to any learner outside the sponsoring organization.

Competencies

You can deliver course competencies at a specific proficiency level through classes your enterprise (or an outside supplier) provides. You can then update a learner's personal competency profile after they have successfully gained the competency. You can also set competency prerequisites, competencies learners must or should achieve before they can enroll in a class under a specified course.

For further information regarding the Oracle HRMS competency model used by OLM, see Competencies, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

You can also require the instructor of each course to exhibit competencies at specified proficiency levels.

To find instructors qualified to teach a course, see Finding Specific Locales and Instructors, page 4-7.

Competency Automation

If enabled, you can update competencies automatically, depending on the default workflow rule chosen:

- Notification, Automatic Update after Approval

- Notification, Automatic Update without Approval (automatic update occurs without approval)

- No Notification, No Auto Update

- Notification, Manual Update (learner or manager notified that they must manually update profile)

Even if the default rule is one of the first two, automatic updates will *not* occur unless one of the following is true:

- For offline classes, an administrator or instructor must select the Successfully Attended box under Attendance on the Update Enrollment page.

- For online classes, the learner must meet the criterion--a test mastery score, for example--established for the successful completion of the class.

You can also set automation rules at the catalog object level (course, offering, learning path, and learning certification), overriding the default automation rule or the rule set for the offering's parent course.

3

Enrollment

Enrollment Overview

Oracle Learning Management (OLM) enables administrators to manage and track all enrollments in classes listed in the catalog. You control enrollment through a combination of learner access, self-enrollment permission, and approval options. You can also track successful attendance, maintain learning histories, and set up automatic updates to a learner's competency profile.

> **Note:** The Enrollment area primarily concerns enrollment in classes. For subscription information, see Learning Paths, page 2-10 and Learning Certifications, page 2-13

Learners can enroll in classes from Learner Self-Service. Administrators can then track and adjust enrollments, filling waiting lists and notifying enrollees as needed.

OLM facilitates management of a comprehensive workforce training and certification business. Managers and main appraisers can create and manage personalized learning paths, if enabled, to fulfill career and workforce objectives.

Enrollment and HRMS Talent Management

In conjunction with functionality Oracle HRMS Talent Management (both Core and SSHR), learner competencies are available for career planning as well as candidate placements, performance appraisals, and suitability matching.

See Oracle HRMS Talent Management, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Reporting on Enrollment

OLM reports relating to enrollments include:

- Attendance and Signature Sheet Report, page 3-14

- Registration List Report, page 3-13

- Student Sign-in Sheet Report, page 3-16

Key Concepts

Enrollment relies upon several key concepts:

- Enrollment Statuses, page 3-7

Enrollment statuses such as Requested and Waitlisted are the heart of the OLM enrollment engine, responding to and causing changes in class status as well as triggering notifications, letters, and other processes.

- Customer and Worker Enrollments, page 3-4

  You can enroll customers (external enrollments) or workers (internal enrollments).

- Waiting Lists, page 3-4

  When a class is full, OLM automatically creates a waiting list, from which you can choose people when places become available.

- Automatic Waitlist Enrollments, page 3-4

  Activating automatic waitlist enrollments automatically moves the first eligible waitlisted person into a class vacancy.

- Multiple Enrollments, page 3-4

  The multiple enrollment pages enable administrators and telesales representatives to enroll or subscribe multiple learners into classes, learning paths, or learning certifications at one time. Users can select enrollees from search-generated lists or copy enrollments from one catalog object to another.

- Overlap Control, page 3-5

  Depending on the class and enrollment statuses, the application warns the prospective enrollee that they are already enrolled in an overlapping class, or prevents them from enrolling.

- External Learning, page 3-12

  You can record enrollments and results of classes taken outside of the application.

Enrollment Requirements

OLM enables you to enroll individuals and groups of learners both from within and from outside your organization. OLM's integration with Order Management enables your organization's telesales representatives to enroll external customers in classes.

Can you enroll workers and customers in the same class?

Yes, you can enroll both workers (including applicants) and customers (non-employees) in the same class.

How are waiting lists handled?

OLM provides waiting list management to enable you to allocate places in a class as they become available. For example, if you cancel an enrollment when the class status is Full and a waiting list exists, the application can enroll waitlisted learners automatically. If you have not set up automatic waitlist enrollments, you can manually select another learner from the waiting list.

Can you make multiple enrollments?

To save time and limit data entry mistakes, you can make multiple enrollments in a class, or select a group of enrollments and update them all in the same way.

How can you manage priority enrollments?

You can manage priority enrollments by entering a priority level against each enrollment. You (or the application, if automatic waitlisting is enabled) then select people from the waiting list according to their priority.

Can you correspond with learners?

The application delivers to learners and their managers a number of enrollment-related notifications, including enrollment confirmations and completion notices.

You should use workflow notifications, rather than letters, to inform learners, managers, and administrators of enrollment-related events such as waitlisting, placement, and competency profile updates.

Can you enter information about classes not held in OLM?

To maintain complete learning histories for your workers and customers, you can record information about courses they have attended outside your organization.

Enrollment

Enrollment Basics

OLM employs two types of enrollment:

- For an internal organization, by holding the learner as a worker in Oracle HRMS

- For a customer, by recording the learner as a customer contact

You can enter enrollments for employees, contingent workers, and applicants you have identified as people in Oracle HRMS or HRMS Foundation. You can also enter enrollments for customers, with enrollees unnamed or set up as customer contacts.

Multiple Enrollments

The multiple enrollment pages enable administrators and telesales representatives to enroll or subscribe multiple learners into classes, learning paths, and learning certifications at one time. To add multiple enrollments to a class, you can select individual learners from a search-generated list, or you can copy some or all learners from an existing class, learning path, or certification.

As you select learners, a profile option, OTA: Maximum Enrollments Processed Online, determines the number of enrollments processed immediately; selecting more than the specified number sends the enrollments for processing by the Process Bulk Enrollments concurrent program. If you need the enrollments processed immediately--to ensure that places become filled in the correct order or to give learners quick access, for example--then you should avoid processing more than the number specified. Consider making the enrollments in batches.

> **Note:** The Add Selected Learners page gives you multiple search criteria. Note that while most of the search fields narrow your search results, the three "Include..." check boxes expand your results.

You can update multiple enrollments by changing their class status, for example, from Normal to Cancelled, which cancels the enrollments for the class. You can also record the successful attendance of multiple learners. You cannot enter enrollment justifications while making multiple enrollments.

Waiting List Management

Waiting list management enables you to allocate places as they become available. For example, if you cancel an enrollment when the class status is Full, you can select a learner from the waiting list.

The application changes the class status to Full when the number of learners occupying places reaches the maximum number of places defined for the class. Enrollments with the status Placed or Attended occupy places; other enrollment statuses (Requested, Waitlisted, and Cancelled) do not.

If an offline class proves to be popular, you might decide to increase the number of places available by changing the venue, or rearranging the seating at the selected venue.

You record this change by increasing the maximum number of learners defined for the class.

See Changing the Class Status or Maximum Attendees, page 2-9

Automatic Waitlist Enrollment

You can enroll waitlisted learners automatically, based on waitlist priority or enrollment dates. This automatic enrollment functionality also helps to prevent overlapping enrollments.

Automatic enrollment for waitlisted learners occurs when a learner has cancelled an enrollment, or after the maximum number of attendees for a class has increased. The application automatically moves the first eligible waitlisted person into the class.

Automatic waitlisting is optional. If you don't want to use the automated waitlist processing, you can continue to use the existing functionality and select a learner from the list of waitlisted learners after a cancellation or an increase in the maximum number of attendees.

Automatic waitlisting requires you to set the Cancel Enrollment concurrent program to run frequently, as often as every five to ten minutes.

To establish automatic waitlisting, you set several user profiles:

- Activate Automatic Waitlist Enrollments
- Automatic Waitlist Enrollment Default Booking Status
- Automatic Waitlist Enrollments: Hours Prior To Class
- Waitlist Sorting Criteria

See Profile Options, page 11-34

Priority Levels and Justifications

If you have entered more requested enrollments than available places, you must decide which enrollments to place and which to put on a waiting list in case of cancellations. To help you decide which enrollments to place, learners, managers, and administrators can enter a priority level, which assigns a justification for each enrollment.

The priority level, not the justification, determines the order that automatic waitlisting uses to fill places. By default, each justification is attached to one of the priority levels. Administrators can override this linkage by choosing a different priority level for each enrollment, but learners and managers can select only a justification from a predefined list. Once they have chosen and saved an enrollment request, learners cannot change the justification.

If a placed learner cancels, you can choose the highest priority waitlisted learner to fill the place. You can update multiple priority requests to the status Placed, then update the remaining requests to the status Waitlisted.

Overlapping Enrollments

Administrators can enroll learners in offline classes whose dates or times overlap, but receive a warning if the status of the existing enrollment is anything but Cancelled or any user-defined status based on Cancelled.

Administrators receive no warning if the status of the existing enrollment is Cancelled or any user-defined status based on Cancelled.

Learners receive a warning only if they try to enroll in a class in which they are already enrolled.

Enrollment Security

Your system administrator may have set up security to limit your ability to enroll learners by class type or enrollment status.

Some classes may be *secure*: only those people assigned to the organization that is administering the class can enter and update enrollments in the class.

See: Organization Security, page 11-33

Enrollment status security prevents users with specified responsibilities from entering, updating, or deleting enrollments of specified statuses.

See: Enrollment Status Security, page 11-72

Enrollment Entry

When you enter a new enrollment, the minimum information you need to enter is the name of the customer or organization that is sponsoring the enrollment, and a learner or contact. By default, the number of places enrolled for the customer or organization is one. If the class originated in Order Management and the places have not already changed, the number of places equals the maximum number of places available for the class.

You can use the multiple enrollments page to enter multiple enrollments for individual learners. You can add learners according to a range of search criteria, and you can copy learners from existing enrollment lists. Use Copy Learners to transfer learners from one class to another, or to enroll successful attendees of one class in a succeeding class.

> **Caution:** If the number of selected learners exceeds Maximum for immediate processing, the enrollments must be processed by a concurrent program, and may not appear in the class list immediately. If the learners need immediate access to the class, be sure to keep the number of selected learners below the Maximum for immediate processing.

Customer (External) Enrollments

For customer enrollments, you can reserve multiple places in a class by increasing the number of places beyond one, but these enrollments are always anonymous. Such enrollees cannot take advantage of self-service access, nor can you keep records of individual attendance or performance.

To enable customer personnel to access self-service and to keep records of their attendance and performance, you must create them as customer contacts *and* as application users, linking the user to the contact record. Note that managers cannot supervise such training through Manager Self-Service, and Order Management telesales representatives cannot enroll these learners as individuals (they can, however, create classes for a customer).

Enrollment History

The Learning History page, available under the Learner tab, enables you to view the classes a learner has attended, both internal and external, as well as the certifications

and learning paths to which they have subscribed. To view enrollments for a particular class, go to the Class details page.

Enrollment Communication

OLM offers a range of automatically generated workflow notifications to communicate enrollment information to learners. Notifications include status changes such as waitlisted to placed, class completion, and competency updates.

See Workflow Notifications, page 11-43

You can also use the HRMS Web Application Desktop Integrator (Web ADI) to generate form letters you can send to learners.

See Data Download and Upload Using Web ADI Overview, *Configuring, Reporting, and System Administration in Oracle HRMS*

Restricting Letters By Vacancy or Class

The original automatic letter generation functionality processed all enrollees for the same letter type regardless of which class they enrolled in. The limitation could cause problems for a large enterprise, partly because of the sheer numbers of classes and enrollments and partly because class owners may want to send letters at different times.

A profile--"HR: Restrict Letter by Vacancy or Event [Class]"--enables administrators to generate separate letter requests for each class (under a given enrollment status). This profile serves both HR and OLM Letter Requests (HR restricts them by vacancy). Setting the profile to Yes displays the Class Name field on the Letter Requests form. Choosing a value in the field restricts letter generation to enrollees in the class you choose in the Class Name field. Leaving the field blank causes the application to create a new letter request.

When the profile is set to "Yes", the application creates or updates a letter request automatically whenever an enrollment is created or updated and a letter type exists for the booking status type.

The automatic letter generation is independent of the profile if a letter type already exists for the booking status type (if a letter type exists for the booking status, a letter is always created). The difference in the creation is that when the profile is set to Yes, every automatically created letter request is associated with the class of the enrollment.

If you have created multiple letter types for the same enrollment status, the application creates the letter request based on the last letter type created, according to the letter type ID (since multiple letter types should not be associated with the same enrollment status type).

Class and Enrollment Statuses

OLM provides five predefined class statuses. These statuses reflect typical stages in the class life cycle:

Class Life Cycle Management
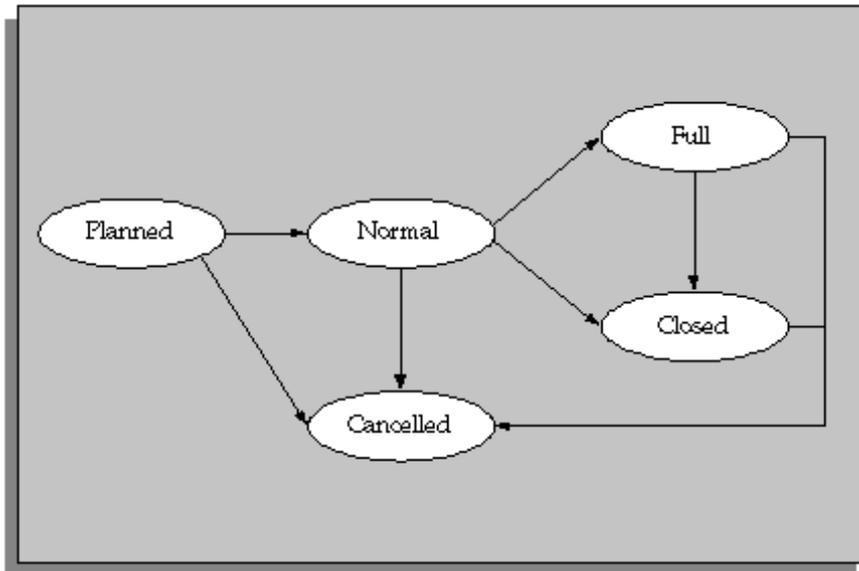
1. Create a new class with the status **Planned**.

2. Update the class status to **Normal** when you have sufficient interest to meet the minimum numbers required to run the class.

3. The application automatically sets the class status to **Full** when learners have filled all the class places.

4. When you are ready to prevent any new enrollments, you can update the class status to **Closed**. Once you Close (or **Cancel**) a class, you cannot enter enrollments of any kind.

Creating Your Own Class Statuses

This is just one possible sequence of class statuses. You can also create your own class statuses, based on one of the five predefined statuses. You can use such statuses to provide further information about the life cycle of a class (such as Planned--Awaiting Confirmation, or Full--No Cancellations Allowed).

> **Note:** These additional statuses are optional and do not affect enrollment processing.

Enrollment Statuses

OLM provides five predefined enrollment statuses:

*   Requested

*   Placed

*   Waitlisted

*   Attended

*   Cancelled

You can use these class statuses to track and control the progress of enrollments.

The figure below illustrates how the five predefined enrollment statuses operate.

Enrollment Statuses
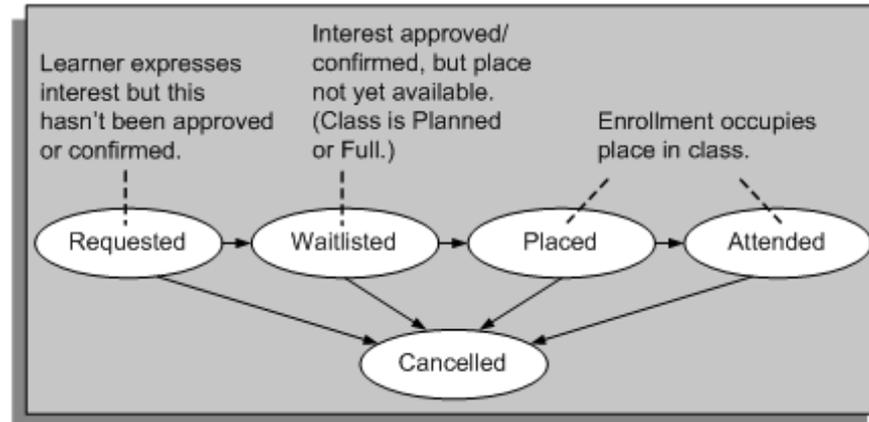
Although the application provides these five predefined statuses, during setup you must name all the statuses yourself. For example, enter the name Requested (or another name) as the status that you want to appear for enrollments of the type Requested and associate it with the predefined status Requested. You must do this for the remaining four statuses.

Additional Statuses

You can also create your own enrollment statuses from these predefined statuses to better match the stages you recognize in your business.

For example, you might want to distinguish between cancellations that incur a penalty fee and those for which there is no charge. You might also use different statuses to track management approval of a Requested enrollment.

You can use these statuses to manage waiting lists and cancellations, and to trigger notifications. You can view the history of statuses for each enrollment.

Combining Statuses to Track and Control Enrollments in Classes

The combination of class and enrollment statuses enables you to track and manage enrollments in classes.

Typically, you might follow this sequence of steps:

1. Create a new class with the status **Planned**.

2. Enter enrollments with the status **Requested** as learners express an interest in the class.

3. Update the status of these enrollments to **Waitlisted** when the learners confirm their interest and/or management approves their attendance.

4. Update the class status to **Normal** when you have:

    • Sufficient Waitlisted enrollments to meet the minimum numbers required to run the class

    • Booked all the resources required

5. Update the status of the Waitlisted enrollments to **Placed**.

When the number of Placed enrollments equals the maximum number of places defined for the class, the application automatically sets the class status to **Full**.

6. Continue entering Waitlisted enrollments, or close the class.

   If a Placed enrollment cancels, you can select a learner from the waiting list to fill the place. When you are ready to close the waiting list and prevent any new enrollments, you can update the class status to **Closed**. Once you Close (or Cancel) a class, you cannot enter enrollments of any kind.

This is just one possible sequence of class statuses. If you prefer, you can create a new class with the status Normal and enter all enrollments as Placed (or Attended) until the class is Full.

Closing a Class

Even when a class is Full, you can continue entering Requested or Waitlisted enrollments. If you want to prevent *any* new enrollments, you can set the class status to Closed, which automatically cancels any enrollments with the status Requested. You can then cancel any finance lines associated with these enrollments.

If the class is not full when you close it, you can opt to redefine the maximum number of places for the class to the current number of Placed and Attended enrollments.

Cancelling a Class

When you cancel a class, OLM automatically cancels all enrollments (but none of the associated resource bookings). You can choose which cancellation status to use for the enrollments (if you have defined more than one). You can also choose whether to cancel any finance lines associated with the enrollments.

Changing a Class Status to Planned

Similarly, if you change a class status back to Planned, any enrollments with the status Placed or Attended automatically change to Waitlisted. You can cancel any finance lines associated with these enrollments.

> **Note:** Because reverting a Normal class to Planned can create learner confusion as well as administrative headaches, we recommend that you leave in Planned any class that may not occur.

Which Statuses Occupy Places in a Class?

Only the following enrollment statuses occupy a place in a class:

• Placed

• Attended

• Any statuses based on Placed and Attended

When you set a maximum number of places for a class, only the definite bookings (Placed and Attended) take up those places.

Enrollment Updates

OLM enables you to update enrollments quickly. For example, if you change a class status from Normal to Planned, you can change any enrollments for the class to Requested. You can also record a learner's successful attendance of a class, or update a learner's competency profile.

Mass Updates

You can apply certain changes to multiple enrollments. For example, after changing a class status from Planned to Normal you can query and place all the waitlisted enrollments. After a class, you can query all the enrollments, change their status to Attended, and mark whether the learners successfully completed the class.

Using Priority Levels

You can make mass updates to enrollments using the priority levels you entered for the enrollment. Search for all learners with a specific priority level, then select the names you want to update.

For example, if you previously entered more requested enrollments than available places, you can use the priority levels to help you decide which enrollments to place and which to put on a waiting list. You could update the highest priority requests to the status Placed, then update the remaining requests to Waitlisted. If a placed learner cancels, you can choose the highest priority waitlisted learner to fill the place.

Mass Updates and Cancellations

When you cancel enrollments using mass update, any enrollments previously cancelled retain any user-created status based on the default status of Cancelled. Similarly, no previously cancelled enrollments transfer to a new class you specify. The class title also remains the same.

Attendance and Results

You can record the successful attendance or non-attendance of a learner, and the results of the attendance. You can use the multiple update page to record this information for many learners together, one class at a time.

Competency Profiles

You can update a learner's competency profile anytime with competencies the learner has earned by attending an internal or external class. Depending on whether you have set up approval requirements for such updates, workflow notifies learners and their managers of automatic updates or the need for manual updates.

If you have been granted the authority, you can automatically add these competencies delivered by the class, along with the proficiency levels, to a learner's competency profile.

If you add the competencies, OLM uses the start date of the class as the date at which the learner is proficient in the competencies. If the learner already possesses that competency but at a different proficiency level, OLM adds the competency at the new proficiency level from the start date of the class, and ends the competency at the previous proficiency level from the day before. This new proficiency level can be higher or lower than that previously demonstrated by the learner.

You can, of course, override the start date and the proficiency levels. For example, a learner may not be proficient in a competency until midway through a class. If the

learner is proficient in the delivered competencies, but not at the level identified for the course, you can override the proficiency level and select the correct one. If the learner has not gained some of the competencies identified for the course, or if the class does not deliver identified competencies, you do not have to apply them to the learner's competency profile.

Correction, Cancellation, and Deletion

You might have to correct enrollment details for a variety of reasons: entering a learner or contact name incorrectly, for example, or enrolling the wrong learner in a class. If so, you must delete the enrollment and re-enter it. You cannot return to correct the personal details or enter the correct enrollment agreement.

Before you delete an enrollment, you must check to see if any finance lines exist. If lines exist with the status Not for transfer, you must delete them before you can delete an enrollment. If lines exist with the status Transferred, you cannot delete them.

If you delete an enrollment, you also delete the learner history, so be careful when using this facility. Consider cancelling the enrollment instead. Cancel an enrollment, for example, if the class does not run (or if a learner cancels attendance).

When you cancel an enrollment, the application prompts you to choose whether you also want to cancel any associated finance lines.

If you cancel an enrollment when the class status is Full and a waiting list exists, OLM displays an alert that gives you two options:

• Continue to save the cancellation

• Select a learner from the waiting list to fill the new place

External Learning

To record a complete picture of a person's learning history, you can enter information about external learning (if enabled, learners can enter their own external learning, with or without approval, from the Learner Self-Service responsibility). External learning is any learning that does not appear as a class in the OLM catalog, such as an external class or an internal class your enterprise has stored in another learning management system.

You can use this data to assemble a complete picture of a worker's learning history and to identify the types of classes people take that your enterprise does not offer.

Administrators use the Create External Learning page (accessible from the Learning History page) to record the details of any classes attended by employees or customers but not registered as classes in OLM (learners and managers use the External Learning page). To view all the classes already entered for a learner, select Learning History.

Enrolling Customers in Restricted Classes (Secure Customer-Based)

Some customer-based classes might be *secured*. You can enter and update enrollments in these classes only if you belong to the organization that is administering the class.

If you use Order Management, creating a restricted class automatically enters an enrollment with the number of places equal to the number you specify in the OTA Pricing Attribute. If you want to add enrollments or name the individual enrollees, you

must follow the procedures detailed in Using Oracle Learning Management with Order Management, page 11-73.

To enter customers for restricted classes priced per student or no charge:

1. Create a class on the Create Class page. Be sure to select Restricted.

2. Select the class in the Customers for Restricted Class window.

3. Select one or more customers for this class, and save your work.

To enter customers and enrollments for restricted classes priced per customer:

1. Create a class on the Create Class page.

2. Select the class in the Customers for Restricted Class window.

3. Select one or more customers for this class.

4. Enter the number of places each customer requires.

5. Select a contact for the enrollments, and enter the enrollment status. You can also select the source of the enrollment.

Entering Financial Information:

1. Select an existing finance header in the Invoice field. The customer on the finance header does not need to be the same as the customer for whom the learners work.

   Select a Standard header to issue an invoice to the customer.

Creating a Finance Header:

1. Choose the Finance button if you have not yet created a finance header for this customer.

2. Create the finance header.

   See: Creating a Finance Header, page 5-6.

3. In the Customers for Restricted Class window, enter the header number in the Invoice field.

What to do Next:

- **Enter an Enrollment:** You can use the Add Single Enrollment page to enter individual enrollments for these customers. Note that the application has already created a number of anonymous enrollments equal to the number you specified in the Places field.

Producing the Registration Report

The Registration report lists all learners (internal and external) scheduled to attend a class. It includes learner and contact names with relevant phone numbers.

Once you have checked the learners listed on the report, you can contact those scheduled to attend a class, but did not.

Limiting Output

You can limit the output to one of the following:

- One class

- All classes of a selected type

- All classes administered from a specified training center

- Classes that start or end on specified dates

You run this report in the Submit a New Request window.

To run the Registration report:

1. Select the report name.

   The Parameters window opens.

2. Select a class title to include learners scheduled to attend the class. Only learners with the status Attended appear in the report.

   > **Important:** If you are reporting on a single class, leave the other parameter fields blank. To report on classes of a specified type, training center, or dates, leave the Class field blank.

3. Select the class type. Leave blank to view classes of all types (subject to the other parameters you select).

4. Select a training center. Leave blank to view classes for all training centers (subject to the other parameters you select).

5. Enter a start date or an end date to include classes that begin or end on the date specified. Leave blank to view classes for all dates (subject to the other parameters you select).

6. Select OK and Submit Request.

Report Output:

The report header includes the business group, report name, and date; the class title and start date; and the offering name and venue. The columns list learner name and phone number, contact name and phone number, enrollment status, finance header, and payment status.

The report prints in landscape orientation and fits on 8.5" x 11" paper.

Producing the Attendance and Signature Sheet Report

The Attendance and Signature Sheet Report enables the instructor to walk into the classroom with a ready-made roster of learners registered for the class. The report includes spaces for the learners to sign in and for the instructor to record the names of walk-ins.

The Attendance and Signature Sheet Report is virtually identical to the Learner Sign-in Sheet report. Only the layout and sorting differ. Use this version *unless* you want to generate pages to send to individual companies, or if you need learners to sign in for each day of the class, as some companies and laws require.

Run the Attendance and Signature Sheet Report from the Submit Requests window. You can submit this report alone or as part of a Request Set.

To run the Attendance and Signature Sheet report:

1. In the Name field, enter or select Attendance and Signature Sheet Report.

2. Click in the Parameters field and select the parameters for the report. See the Report Parameters section for more information.

3. Enter the printer information and number of copies that you want to print.

4. Submit the report.

Report Parameters:

The parameters window includes eight optional fields:

- **Class Title**

  Select a class from the list. Leave this field blank to generate information for all valid classes, subject to the limits you set in the other parameters.

- **Training Center**

  Select from the list of values to limit the report to a single training center. Leave this field empty to generate information for all valid training centers.

- **Class Start Date**

  Enter the beginning date of the class(es) to include in the report.

- **Class End Date**

  Enter the ending date of the class(es) to include in the report.

- **Enrollment Number**

  To generate a receipt or information for a single enrollment, enter the enrollment number.

- **Optional Column Heading**

  The optional column provides blank space for your learners to write information such as automobile license numbers. The words you type here become the column heading.

- **Display Payment Confirmation**

  Enter Yes to display a column that indicates if a learner has paid for the class (the value is Yes or No).

- **Display Trainer Signature**

  Enter Yes to display a line for the instructor's signature.

Report Output:

The report header includes the business group, report name, and date; the class title, start date, and duration; the course name, venue, and instructor, if any. The columns list learner name, company/employee ID, enrollment number, and the optional columns. If you have left the Class field blank, the report subdivides for each course covered. Within each class, the reports sorts alphabetically by learner surname.

The report prints in landscape orientation.

Producing the Learner Sign-In Sheet Report

The Learner Sign-In Sheet report enables the instructor to walk into the classroom with a ready-made roster of learners registered for the course, sorted by each learner's organization, one organization per page. The report includes spaces for the learners to sign in each day of the class (up to five) and for the instructor to record the names of walk-ins.

The Learner Sign-In Sheet report is virtually identical to the Attendance and Signature Sheet report. Only the layout and sorting differ. Use this version to generate pages to send to individual companies, or if you need learners to sign in for each day of the class, as some companies and laws require.

Run the Learner Sign-In Sheet report from the Submit Requests window. You can submit this report alone or as part of a Request Set.

To run the Learner Sign-In Sheet report:

1. In the Name field, enter or select Learner Sign-In Sheet.

2. Click in the Parameters field and select the parameters for the report. See the Report Parameters section for more information.

3. Enter the printer information and number of copies to print.

4. Submit the report.

Report Parameters:

The parameters window includes eight optional fields:

*   **Class Title**

    Select a class from the list. Leave this field empty to generate information for all valid classes, subject to the limits you set in the other parameters.

*   **Training Center**

    Select from the list of values to limit the report to a single training center. Leave this field empty to generate information for all valid training centers.

*   **Class Start Date**

    Enter the start date of the class(es) to include in the report.

*   **Class End Date**

    Enter the ending date of the class(es) to include in the report.

*   **Enrollment Number**

    To generate a receipt or information for a single enrollment, enter the enrollment number.

*   **Optional Column Heading**

    The optional column provides blank space for your learners to write information such as automobile license numbers. The words you type here become the column heading.

*   **Display Payment Confirmation**

    Enter Yes to display a column that indicates if a learner has paid for the class (the value is Yes or No).

- **Display Trainer Signature**

  Enter Yes to display a line for the instructor's signature.

Report Output:

The report header includes the business group, report name, and date; the class title, start date, and duration; the course name, venue, and instructor, if any. The columns list learner name, company/employee ID, enrollment number, and the optional columns. If you have left the class field blank, the report subdivides for each course covered. Within each class, the reports sorts alphabetically first by company (one company per page), then by learner surname.

The report prints in landscape orientation.

4

Resources

Resources

Resources are facilities, people, or equipment that you require to run any educational or learning programs in an enterprise.

Managing the learning needs of your employees includes tasks such as scheduling and managing classroom and instructor resources. You need to define the required resource types (the trainer and venue types are predefined) and assign resources to various learning programs. You must also create resources and assign each one to a resource type. To manage resources effectively, you can also:

- Add resources to an offering to create a resource checklist

- Book resources for a class

- Set up suppliers and customers

- Block-book resources

- Update and delete resources

    Note: For backward compatibility, we predefine 'Trainer" and "Venue" as resource types. However, when you define resources of these types, you use instructor and room. Instructor is a person in charge of delivering a synchronous offering. Room is the physical room (identifier) where a class takes place.

Key Concepts

The following key concepts enable you to manage resources:

- Training Resource Key Flexfield, page 4-3

- Resource Types, page 4-3

- Resources, page 4-4

- Resource Booking, page 4-7

- Required Resources, page 4-8

Resources Requirements

OLM enables resource management for both classroom and online classes.

What is the Impact of the Catalog on Resource Management?

You can specify a resource checklist at the offering level, and book at the individual class and session level. At the offering level, you can search for resources and create a checklist needed for the particular delivery mode.

Can You Define Any Type of Resource?

Yes. OLM provides the following predefined resource types:

- Trainer

- Venue

To add user-defined resource types, you create new structures in the Training Resource key flexfield.

Why Specify Resources as Required?

Specify that a particular resource or resource type is required for an offering if you must book the resource before you can start the class. After specifying a resource as Required, you can easily book the resource later on the Add Resources page.

Why Do You Need to Check the Resource Dates?

If you specify a resource as Required, ensure that the start and end dates for the resource cover a wide enough period to enable you to book the resource for classes in the future. The resource must be available on or before the start date of the class, but not necessarily on the booking date. For example, if you run a class from December 16th to the 19th, the resource dates you specify for the course could be from December 1st to 20th. The resource in this example is available before the start date of the class.

Resources

Training Resource Key Flexfield

For each resource type, you set up a structure of the Training Resource key flexfield, giving you control over content, formatting, and validation. The name of the structure must be the same as the name of the resource type.

> **Important:** Do not use the seeded resource structures provided by the application. Build new structures as detailed in the implementation steps.

To enable users to select instructors already entered as people or contacts (rather than letting them enter new instructor names when they define resources), set up a segment of the Training Resource key flexfield structure for instructors to hold an instructor's full name. Then you define a table-validated value set to provide a list of instructor names from the appropriate table for this segment.

Setting up flexfields is normally a job for your system administrator. You can define up to 30 segments for each flexfield structure and choose how to validate each segment, including cross-validation between segments.

For example, you can set up the Full Name segment for the Trainer (instructor) resource type.

For the Venue resource type, for example, you can define the following segments:

- Name
- Center
- Capacity

You can define the same segment in multiple structures. For example, duplicating the Center segment in the structures for all resource types enables you to report on all resources held at your training centers.

If you define more than one business group, the Training Resource structures are shared across the groups. However, you can use only the structures that correspond to resource types defined for the business group you are using. If necessary, you can define multiple structures for, say, training guides, and use one structure in each group. Each structure and corresponding resource type must have a different name.

Resource Type Setup

Resource types enable you to categorize your resources, such as classroom locations, instructors and equipment for synchronous classes, or additional physical materials for asynchronous classes. Each resource you create must belong to a resource type. You define resource types as values for the lookup type RESOURCE_TYPE.

See Adding Lookup Types and Values, page 11-5

> **Note:** You can enter your centers as values for the lookup type TRAINING_CENTRE if your Training Resource key flexfield structure includes a segment for training center.

Entering Instructors

Depending on how you set up the Training Resource key flexfield structure for the Trainer resource type, you may have to add instructors as persons before you can select them as resources. You can enter instructors as individuals with their own addresses. Alternatively, you can simply record that a certain supplier provides a certain number of unnamed instructors. Note that this alternate method does not enable instructors to use the OLM Instructor interface.

To enter instructors, use the HR People window to enter your instructors, training administrators, and managers.

See Entering a New Person, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Resource Creation

You can create resources and assign them to catalog objects such as classes, sessions, forums, and chats or to supplemental bookings that represent time reserved for non-catalog activities. From the Resources page, you can create and display all your resources. You can search for resources available between specific dates or of a specific type, or for one specific resource name. During resource creation you can:

- Check Allow Overlapping Booking if the resource has multiple copies, such as a course manual, that you can book for more than one object at the same time. This option is not available for resources of the types Trainer or Venue.

- Enter a cost value and cost unit against the resource, to enable you to manage resource expenses such as instructor and location costs for scheduled classes.

- Specify a Person value if the resource needs to access the instructor interface. For example, if you are creating a resource of the type Trainer and do not specify the Person value, this resource cannot access a class from the instructor interface even if booked as an instructor for the class.

Once you have created a resource, you can assign it to an object by creating a resource booking.

Suppliers and Customers

Suppliers are internal or external agencies who supply an enterprise with goods or services. In OLM, you enter the names, addresses, and contacts for the suppliers who provide training resources, such as rooms or equipment for training. You can enter only these names and addresses on payable finance headers.

Customers are the external organizations for which you run classes and enroll learners. This includes internal or external agencies to whom you supply goods or services.

You set up as customers:

- The names and addresses of the organizations where external learners work, or through which they can be contacted.

- The names and addresses to appear on invoices for learner enrollments.

- Any third-party agencies through whom you handle enrollments.

- The customer learners for which you run private classes and those for which you create special enrollment agreements.

You must also set up your *internal* organizations as customers if you do not use Oracle Human Resources and you want to enroll internal learners. You enter your employees as contacts for these customers.

Shared Supplier and Customer Information

Organization, supplier, and customer information is shared with other Oracle Applications.

Creating a Supplier

Use the Suppliers window to define organizations that supply instructors, rooms, equipment, or other resources required for learning. You can then select these suppliers when you create offerings, define resources, and create payable finance headers.

> **Note:** This window is shared with other Oracle Applications. OLM does not use some of its fields, including Classifications and Contact Roles.

To enter a new supplier:
1. Enter the supplier name and a unique number (depending on your setup options, OLM may enter the supplier number for you).

2. Click Open to access the Suppliers window.

3. Select the Sites region and click Open to navigate to the Supplier Sites window.

4. Enter the site name. This is only for your reference and does not appear on finance headers.

5. Select a Country to determine the address style, then enter the address details. OLM does not use the Site Uses fields.

6. Select the Contacts region. Enter the names, details, and telephone numbers of as many contacts as you require for this supplier.

7. Save your work.

Creating a Customer

Create and maintain customer names, addresses, and contacts in the Customers window.

> **Note:** The Customers window is shared with other Oracle Applications. OLM does not use some of the fields in this window, including Classifications and Contact Roles. If you plan to use customers in other Oracle Applications, refer to the full documentation on this window.
>
> See Customers, *Oracle Receivables User Guide*

To enter a new customer organization:
1. Enter the customer name and a unique customer number, and save your work.

Depending on your setup options, OLM may enter the customer number automatically.

2. Click New to open the Customer Addresses window.

3. Select a Country.

4. Enter the address details and save your work. Some of the address components may be required if you are using address validation.

   OLM does not use the Business Purposes fields.

   The application enters a unique reference number for the customer at that address.

5. Select the Contacts: Telephones region and enter the names and telephone numbers of as many contacts as you require for this customer. If you enter a telephone number, you must select a Type, such as General or Fax.

6. Ensure that the Active check box remains selected for all active contacts and save your work.

7. Select the Contacts: Roles region and select a role description for the contacts in the Description field. Ensure that the Active check box remains selected for all active roles.

8. Save your work.

Establishment: Entering Training Provider Contracts

Use the Training Provider Contracts window to enter details about contracts that the selected establishment has with training providers. You can have any number of training contracts for each establishment. Before you do this you must define the training provider as a supplier in the Supplier window.

See Creating a Supplier, page 4-5

To enter training provider contracts:

1. Select the training provider, and start and end dates of the contract.

2. Select the type of contract, for example, annual, and enter the details of any payments made relating to the contract.

3. Save your changes.

Resource Booking

Resource Booking

Use the Resource Bookings page to book resources for catalog objects such as classes, sessions, forums, and chats and to create supplemental bookings. For catalog objects, you can also book resources by accessing the object from the Catalog and selecting the Resource Booking link or, for classes, the Resource Checklist page.

Booking Resources

You can book relevant resources that are available for the booking period you have specified. Resources that are already confirmed at any time during the period you specified do not appear unless the resource type allows overlapping bookings. The selected resources receive an initial booking status of Planned. If the resource type does not allow overlapping bookings and the selected resource has an overlapping booking, you cannot change the booking status to Confirmed.

You can book resources for a specified period or for the entire booking period of a class by selecting Book For Entire Period. For example, a class may require two venues for two different sessions conducted at different times on the same day. You can decide not to book the venue for the entire day, which makes the venue available for booking for the other session at a different time on the same day. The Display to Learner field enables learners to view resources booked against a catalog object when they view the object details from the learner interface. The Maximum Usage field enables you to specify the maximum number of learners who can use a resource (such as a venue).

> **Note:** When you book a resource against a session, it must have an end date equal to the session date or later. If you need to book the resource for some time prior to the session start, create a supplemental booking.

Primary Venue

When you book a resource of the type venue, the application automatically identifies the venue as the primary venue, provided that a primary venue does not already exist. You can designate only one primary venue for a class, but you can change the primary venue.

This automatic designation does not prevent you from assigning multiple venues to a class, but it does reduce the chances that no venue is defined as primary.

If you delete a primary venue and save without identifying another venue as the primary, a warning message appears. This message does not, however, prevent you from saving your changes.

Supplemental Bookings

You can make a resource unavailable for booking by creating supplemental bookings, for example, to account for instructor holiday or illness, or room unavailability. When you create a supplemental booking, you do not book the resource against any object.

Overlapping Resource Bookings

By definition, you can use each named trainer (instructor) or venue (room) for only one scheduled class at a time, so the application prevents you from creating overlapping bookings for those resource types.

Other resource types you define must fall into one of two categories

* Consumable resource types, such as manuals and stationery, which are not returned to stock after a class, and

* Non-consumable resource types, such as overhead projectors and computers, which are loaned for the duration of the class only.

The application does not prevent you from double-booking consumable resources. It assumes you have an unlimited stock of these resources. If you try to double-book a non-consumable resource, the system warns you that the resource is already booked, but does not prevent you from confirming the new booking. You can then flexibly define and manage these resources.

Required Resources

You can define the resources and quantity required to run classes for a particular offering.

> **Important:** You can access this functionality only through the Book Resources window, not through the Resource Bookings html page.

If you define resources as Required, you can book them in two ways:

* Automatically

* Individually

If you do not define resources as Required, you must manually book the resources for a class.

When Do You Use the Automatic Method?

Use this short cut to list and book all the resources marked as Required for a class. As you book the class or session, you can delete any or all of the required resources from the resource list.

When Do You Use the Individual Method?

Use this method to list the resources that are required to run classes before you book them. Required resources in the resource checklist display the value Y(es) in the Required column.

You can then select the resources you want to book from the list.

5

Finance and Pricing

Finance and Pricing Overview

Oracle Learning Management (OLM) manages the financial relationships of an enterprise with external or internal customers using the following key concepts:

- Finance Headers and Lines, page 5-3

  A finance header holds generic financial information about the dealings you have with a particular customer or supplier. Each individual transaction with a customer or supplier is a finance line.

- Price Lists, page 5-12

  A price list is a catalog of courses and the prices at which they are available between certain dates.

- Cross-Charging, page 11-25

  For internal classes, OLM can charge a learner's cost center when the learner enrolls in an OLM class.

- Currencies, page 11-25

  You can use multiple currencies to hold price and cost information. For example, you can schedule a class in US Dollars and create headers in other currencies for resource payments.

- Financial Security, page 11-25

  Your system administrator can establish financial security to permit users only of certain responsibilities to update and delete prices. Otherwise, all users can update and delete prices.

- Organization Training Plans, page 5-19

  Organization training plans group courses into a plan to determine the proposed training and training budgets for your organization

Oracle Financial Applications Integration

We recommend that you use OLM's integration with Oracle Order Management to handle your for-profit learning management.

You can transfer the finance headers and lines to Receivables and Payables or to another financial application, to manage the collections and expenditures efficiently.

When used in conjunction with General Ledger, OLM can effectively manage the financial details, such as charges for resources or learner attendance, that define the cost-transfer of funds related to the classes.

Key Concepts

OLM finance and pricing uses these additional key concepts:

Header and Line Types, page 5-3

Finance Transfer Process, page 5-5

Finance and Pricing Requirements

OLM enables you to hold and manage price lists and use several types of financial header to specify your financial relationships with external or internal customers. You can also use multiple currencies to hold price and cost information.

What finance headers does OLM provide?

To facilitate invoicing, OLM provides four types of finance header:

- Payable, for supplier payments

- Cost transfer, for manual or automatic cross-charging

- Cancellation, for superseding previously transferred headers

- Receivable, for standard invoices

> **Important:** For-profit training organizations should use the Order Management integration rather than the Receivable header, as this header requires a customized interface.

Can you create your own headers?

Yes, you can create finance headers for different currencies per customer or supplier. For example, you can schedule a class in one currency, but create finance headers for specific suppliers in other currencies to pay for the resources.

How do you cross-charge class fees and resources?

You can automatically transfer the cost of class enrollments or resources between organizations, departments, or cost centers within an enterprise. When you establish automatic cross-charging, the application uses the standard price of a class.

How should users of Oracle Order Management handle pricing and invoicing?

For internal classes, use the standard financial functions of OLM. If you are an independent training vendor who has installed Order Management (OM), however, you should use OM to handle your external class inventory, pricing, and invoicing.

Finance Headers and Lines

Finance Headers and Lines

A finance header holds generic financial information about your dealings with a particular customer, supplier, or internal cost center. This information can contain the customer name, contact information, address, and the payment currency. In OLM, you enter each individual transaction with a customer or supplier as a finance line (unless you are using the Order Management integration).

When you transfer the finance header and lines to your financial application, the finance lines appear on the printed sales or purchase invoice, one item per line.

Header and Line Types

You must create a finance header of the appropriate type for each supplier or customer. The application delivers four predefined types of finance line, but you can also create your own.

Header Types

The four predefined types of finance header are:

- Payable - for resource charge finance lines
- Receivable - (superseded by the Order Management integration)
- Cost Transfer - for transferring the cost of training fees or resources between organizations, departments, or cost centers within your enterprise

  Cross-charging for resources is beneficial if you operate a business in which cost centers within your enterprise or other organizations, rather than external suppliers, provide resources.

- Cancellation - for superseding a previous header that the application has transferred to your financial system and that cannot be updated

Line Types

The three predefined types of finance line are:

- Enrollment Charge--an amount receivable from a customer or internal learner for attending a class
- Prepurchase Charge--(superseded by the OM/Inventory integration)
- Resource Charge--a charge for resource usage under a cross-charge (cost transfer) header
- Supplier Payment--an amount payable to a supplier in exchange for resources

You can also define your own finance line types, as values for the Lookup Type FINANCE_LINE_TYPE. For example, you can define types for accommodation charges or other resource costs you are passing on to a customer.

> **Note:** The only type of finance line that you can associate with an enrollment is an Enrollment Charge.

Automatic Finance Line Creation

OLM automatically creates a finance line when you select a finance header while enrolling a learner or booking a resource, or when an internal learner enrolls in a class (and you have enabled automatic cross-charging).

You can, however, create a finance line manually.

Update and Delete Prices

Your system administrator can use the financial security of the enterprise to enable users of a certain responsibility to update and delete the following prices:

- Monetary

- Standard

If your enterprise has not set up financial security, all users can update and delete prices.

See Financial Security, page 11-25

Cost Transfer Finance Headers

From the Cost Transfer Finance Headers page, you can create Cost Transfer finance headers, cancel and recreate new headers, restore cancelled headers and create and manage finance lines for a header.

You create a finance header of type Cost Transfer when you need to transfer the cost of training fees or resources between organizations, departments, or cost centers within your enterprise. When creating a Cost Transfer finance header:

In the From Set of Books field, enter a set of books then fill out the accounting flexfield segments to specify the Transfer From account.

In the To Set of Books field, enter a set of books then fill out the accounting flexfield segments to specify the Transfer To account.

Managing Finance Lines in a Cost Transfer Finance Header

Use the Finance Lines link on the Cost Transfer Finance Headers page to create finance lines for a Cost Transfer finance header. Specify a Line Type, the amount to transfer, and the Transfer Status, which indicates whether or not to process the transfer. The application, however, does not process finance lines within a finance header whose status is Do Not Interface, irrespective of their individual transfer status.

Headers and Currency

OLM can create finance headers for different currencies per customer or supplier. For example, you can schedule a class in US Dollars, but create finance headers for specific suppliers in other currencies (such as UK Sterling and Turkish Lire) to pay for the resources.

You cannot, however, create finance headers in other currencies to pay for learner enrollments. If you schedule a class in UK Sterling, you must create finance headers for the class in UK Sterling too.

Finance Transfer Process

You can also integrate OLM with Oracle Receivables and Oracle Payables, or another financial system, but your implementation team must create a process to transfer finance headers and lines to your financial system.

> **Important:** We recommend that for-profit training organizations use the integration with Oracle Order Management, which includes built-in integration with Advanced Pricing, Inventory, Payables, and Receivables.

New headers receive a default status of Not For Transfer. To transfer a header, authorize and change its status to Awaiting Transfer. Running the transfer process transfers all headers with this status and updates them to the status Successful Transfer or Unsuccessful Transfer.

The other information the transfer process can return to OLM includes:

- External reference
- Date
- Message
- Paid flag

You can also set up other fields of information using the descriptive flexfield.

Cost Transfer of Enrollments and Resources to General Ledger

If you have set up cross-charge accounting, under many circumstances OLM automatically transfers finance headers of the type Cost Transfer.

See Setting Up Cross-Charge Accounting, page 11-26

To transfer headers that contain internal resource cost transfers, the header must satisfy several general conditions:

- The header type must be Cost Transfer.
- The header transfer status must be Awaiting Transfer.
- The header value must be Authorized.
- It must contain at least one uncancelled line.

Finance headers for enrollments must also meet the following conditions:

- For synchronous offline classes, the enrollment status must be Attended or Cancelled.
- For online classes, the Enrollment status must be Placed, Cancelled, or Attended, and the learner must have attempted or played the class.

Finance headers for resource bookings must also meet the following conditions:

- The resource booking status must be Confirmed.
- The resource must be internal (cannot belong to an external supplier).
- The corresponding resource booking date must be today or before.
- The resource booking period must have ended.

Do not switch the header status to Awaiting Transfer until all its finance lines fulfill the necessary conditions.

Preventing Processing of Finance Headers

OLM enables you to prevent further processing of finance headers.

You can prevent processing of finance headers to create financial records for 'correcting' agreement balances, or to record alternative financial transactions initiated in other applications (corrections to journal entries for cost-transfers, for example).

To prevent transfer, change the status to Do Not Interface when you enter a new header. This prevents any further processing by any financial interfaces, such as accounts receivable, accounts payable, or general ledger applications. The application does not process finance lines within a finance header of the status of Do Not Interface irrespective of their individual statuses.

Cancelling a Finance Header

After the application successfully transfers a header, you cannot make any changes to it or to the finance lines that belong to it. However, you can cancel a finance header or individual finance lines. This causes the application to create a new finance header of type Cancellation, which supersedes the original header. You can then create a new finance header and lines showing the correct information.

Alternatively, you can record these changes in your financial application.

Creating a Finance Header

Important: Use the Cost Transfer Finance Headers page to create a Cost Transfer finance header. To create finance headers of the type Payable, Receivable, or Cancellation, use the Finance Headers window.

You can open the Finance Header window from the menu or by clicking the Finance Header button in one of the following windows:

- Enrollment Details: to create a receivable header for an enrollment (use Order Management integration instead)

- Resource Booking: to create a payable header to the supplier of a resource

- Customer for Restricted Class: to create a receivable header for a customer learner associated with a restricted class that is priced on a Per Customer basis.

The Finance Header Window

If you open the Finance Headers window using the menu, the window displays buttons that enable you to cancel headers, reinstate cancelled headers, and enter new finance lines for the header.

If you open the Finance Headers window from another window, these buttons do not appear. Within the context of entering an enrollment or resource booking, you can only select an existing header or enter a new header. The application automatically creates a finance line for this header.

To create a finance header:

1. In the Raised By field, select the organization responsible for the header.

2. Select the header type: Payable, Receivable, or Cancellation.

Receivables and Payables:

1. For a Payable Header, select Payable.

2. For a Receivable header, select Receivable and a Standard subtype.

3. Select the customer or supplier if the correct information does not appear by default.

4. Select a contact and an address.

5. For a Receivable header, select the appropriate payment method.

Transfer:

1. Select the appropriate status: Awaiting Transfer if you are ready to transfer this header to your financial system (you must select the Authorized check box to assign this status), Do Not Interface to prevent further processing of the finance header, or Not For Transfer.

   OLM updates the status of all finance lines that have the same status as the header.

   > **Note:** If you are creating a finance header while you are entering an enrollment in OLM (but not in self-service), the application defaults generic financial information into the Finance Header window for you. You must complete all the information before you can save your work and generate the finance line and identity number.

2. Save your work.

What to do Next:

- **Enter an Enrollment**: If you are manually creating a finance header while you are entering an enrollment, return to entering the enrollment.

- **Create Finance Lines**: You can manually create the finance lines for this header .

   See Creating a Finance Line Manually, page 5-7

   > **Note:** To manually create a finance line for a Cost Transfer finance header, select the Finance Lines link on the Cost Transfer Finance Headers page.

Creating a Finance Line Manually

OLM automatically creates finance lines for you. You can, however, create a finance line manually.

To create a finance line manually:

> **Note:** To manually create a finance line for a Cost Transfer finance header, select the Finance Lines link on the Cost Transfer Finance Headers page. Use the Finance Headers window to create a finance line for finance headers of type Payable, Receivable, and Cancellation.

1. Enter or query the appropriate finance header in the Finance Header window.

2. Click Finance Lines.

3. Select a blank line.

4. Select a line type.

5. Click New Line.

6. Select one of the following to associate with this line:

   • An enrollment

   • A resource booking

7. Enter an amount in money.

8. Save your work.

To change the transfer status of a line:

1. Select the line and select another status in the Transfer field.

> **Note:** The application does not process finance lines within a finance header whose status is Do No Interface, irrespective of their individual status.

Moving Finance Lines To a New Header

You can move finance lines as a group from one header to another. You might want to do this before cancelling a header.

> **Note:** You cannot move finance lines from a header already transferred to your financial system.

To move finance lines to a new header:

> **Note:** To move finance lines in a Cost Transfer finance header to a new header, select the finance line from the Cost Transfer Finance Headers page and use the Change Header button on the Finance Lines page.

1. First create the finance header, page 5-6 to which you want to move the lines.

2. Query the header in the Finance Header window to which the lines currently belong.

3. Click Finance Lines.

4. Click Change Header in the Finance Lines window.

5. Select the header to which you want to move the lines.

6. Select the Move check box for each line you want to move to the new header.

7. Save your changes.

Cancelling Finance Headers and Lines

If you cancel a header or line that has not been transferred to your financial system, the application marks it as cancelled.

If you cancel a header that has been transferred, the application creates a new header of type Cancellation, which supersedes the header you are cancelling.

After you transfer a header, you can choose another option to cancel and recreate the header. In this case, the application creates a new header of type Cancellation and a new header based on the old header, which you can then edit.

You can also cancel individual finance lines.

To cancel a finance header:

> **Note:** To cancel a Cost Transfer finance header, select the header from the Cost Transfer Finance Headers page and use the Cancel Header button.

1. Query the header in the Finance Header window.

2. Click Cancel Invoice.

3. Save your changes.

   OLM cancels every finance line that belongs to this header.

To cancel and replace a finance header:

> **Note:** To cancel and replace a Cost Transfer finance header, select the header from the Cost Transfer Finance Headers page and use the Cancel and Recreate button.

1. Query a header in the Finance Header window that has the status Successful Transfer.

2. Click the Cancel/Recreate button, and save.

   The application creates a Cancellation header and a new header, based on the old one, to replace it.

3. Enter information for the new header, and save.

To cancel a finance line:

> **Note:** To cancel a finance line in a Cost Transfer finance header, select the finance line from the Cost Transfer Finance Headers page and use the Cancel button on the Finance Lines page.

1. Enter or query the appropriate finance header in the Finance Header window.

2. Click Finance Lines.

3. Mark the line you want to cancel and click Cancel.

4. Save your changes.

   OLM selects the Cancelled check box for this line.

Deleting Finance Headers and Lines

You can delete a finance header and lines if, for example, you enrolled the wrong learner in a class and created a finance header or line that you must now delete.

Deleting Headers

Before you delete a finance header, you must check if any finance lines exist. If any do exist (with the status Not for transfer), you must delete them before you can delete a header.

You cannot delete a Transferred finance line.

> **Note:** To delete a Cost Transfer finance header, select the Delete icon on the Cost Transfer Finance Headers page.

Deleting Lines

You can delete a finance line until you have transferred it to your finance system. You must delete any existing finance lines before you can delete a header.

Do not confuse deleting headers and lines with cancelling headers and lines. For example, you delete headers and lines if you have made a mistake, but you cancel headers and lines if the class for which headers and lines exist does not run.

> **Note:** To delete a finance line in a Cost Transfer finance header, select the finance line from the Cost Transfer Finance Headers page and use the Delete button on the Finance Lines page.

To delete a finance line:

1. Enter or query the appropriate finance header in the Finance Header window.

2. Click Finance Lines.

3. Choose the line you want to delete and select Delete Record from the Edit menu.

4. Save your changes.

To delete a finance header:

1. Query a header in the Finance Header window.

2. Select Delete Record from the Edit menu.

3. Save your changes.

Restoring Cancelled Lines and Headers

You can restore a cancelled finance header or line. If the header were transferred before cancellation, thereby creating a Cancellation header, clicking the Reinstate button deletes the Cancellation header. However, if the Cancellation header has also been transferred, you cannot restore the original header.

To restore cancelled lines and headers:

> **Note:** To restore a Cost Transfer finance header, select the header from the Cost Transfer Finance Header page and select the Reinstate button. Similarly, select the Reinstate button on the Finance Lines page to restore a finance line in a Cost Transfer finance header.

1. Query a header in the Finance Header window.

2. Click Reinstate.

3. Save your changes.

Pricing

Price Lists

A price list catalogs courses and the prices at which they are available between certain dates.

> **Important:** We recommend that you use OLM's integration with Oracle Order Management and Advanced Pricing to handle your for-profit learning management.

You can set up price lists in any currency. You can quote prices per learner enrollment or arrange for establish volume discounts for customers. You can create multiple price lists to account for different suppliers or different seasons. You can easily copy information from one price list to another and change prices by a percentage.

You can define any number of price lists for a variety of purposes:

- Each year or season
- Different discount bands
- Different suppliers
- Different categories of courses

You can mark one price list per currency as the default to help administrators select a standard price when they create a class. You can also create discounts on price list entries using enrollment agreements.

A course can appear on several price lists or more than once on a single price list. For example, a course can have several entries on a price list if prices differ between dates or depend on the number of learners attending the course.

Overlapping Price List Entries

You cannot create overlapping entries for learner-based price list entries for the same course.

Price Basis

You can charge per learner or per customer for a number of learners to attend. The customer must be associated with the class to be eligible for a Per Customer price. You associate a customer with a class in the Customers for Restricted Classes window.

Per Customer entries must include the minimum and maximum number of learners to which the price applies. The following table offers a few examples.

Course	Min	Max	Price	Start Date	End Date
PL*SQL Basics	1	9	4,000	01-JAN-2005	31-DEC-2005
PL*SQL Basics	10	19	7,000	01-JAN-2005	31-DEC-2005
PL*SQL Basics	20	25	12,000	01-JAN-2005	31-DEC-2005

Effective Price List Dates

You can extend the dates a price list is effective by copying an existing price list and entering the start and end dates for the new, extended list. You can also apply a percentage change across all the price list entries.

Calculating Price List Entries

The application calculates the dates of the entries for the new, extended price list based on:

- The end dates of existing price list entries

- The end dates of the course

- Any price list dates you enter

- Today's date

By calculating the dates in this way, the application ensures that the entries for the new price always extend to the correct dates.

Example 1

Price List 1 is effective for the period 01-JAN-2005 to 31-DEC-2005, and today's date is 01-SEP-2005. Enterprise Z wants to extend Price List 1 to 31-DEC-2006, starting from 01-JAN-2006. They also want to increase the prices by 10 percent.

The course to which the price list entries apply is effective from 01-JAN-2005 onwards.

Price List or Entry	Start Date	End Date	Price
Price List 1	01-JAN-2005	31-DEC-2005	N/A
Entry 1	01-JAN-2005	30-JUN-2005	200.00
Entry 2	01-JUL-2005	31-AUG-2005	100.00
Entry 3	01-SEP-2005	31-DEC-2005	150.50

In this example, Enterprise Z copies Price List 1 to create the new, extended Price List 2, with the following entry:

Price List or Entry	Start Date	End Date	Price
Price List 2	01-JAN-2006	31-DEC-2006	N/A
Entry 3	01-JAN-2006	31-DEC-2006	165.50

Notice that only entry 3 appears on Price List 2. Entries 1 and 2 do not appear because they were manually terminated to end on 30-JUN-2005 and 31-AUG-2005 respectively (and today's date is 01-SEP-2005). Price List 1 ran to 31-DEC-2005 (and is still open). The application extended the only eligible entry 3 (it ended only because the price list ended), while the other two entries had already ended.

Example 2

Price List 1 is effective for the period 01-JAN-2005 to 31-DEC-2005. Enterprise Z wants to extend Price List 1 to 31-DEC-2006, starting from 01-JAN-2006. They also want to increase the prices by 15 percent.

The course to which the price list entries apply is effective from 01-JAN-2005 to 31-JUL-2005. as described in the table.

Price List or Entry	Start Date	End Date	Price
Price List 1	01-JAN-2005	31-DEC-2005	N/A
Entry 1	01-JAN-2005	30-JUN-2005	200.00
Entry 2	01-JUL-2005	31-AUG-2005	100.00
Entry 3	01-SEP-2005	31-DEC-2005	150.50

Enterprise Z then copies Price List 1 to create the new, extended Price List 3, with the following entry as described in the table:

Price List or Entry	Start Date	End Date	Price
Price List 3	01-JAN-2006	31-DEC-2006	N/A
Entry 3	01-JAN-2006	31-JUL-2006	172.50

Notice that Entry 3 appears on Price List 3 but ends on 31-JUL-2006, because the course on which the price list is based ends on 31-JUL-2006. Entries 1 and 2 still do not appear on the new price list.

Pricing for Customer-Restricted Classes

You can price customer-restricted classes per learner or per customer:

- If the class is priced per learner or has no charge, you select valid customers in the Customers for Restricted Classes window, then you enter enrollments for these customers in the Enrollment Details window.

- If the class is priced per customer, you select valid customers in the Customers for Restricted Classes window and you also use this window to enter enrollment information (such as contacts and pricing).

You block-book the number of places a customer requires for a customer-based class. These enrollments are anonymous; that is, they do not mention learner names. To keep your learner enrollment records up-to-date, you can also enter enrollments naming particular learners in the Enrollment Details window.

If the class price basis is Customer-based, you must charge for the block-booking using the Customers for Restricted Class window--you cannot charge for these individual learner enrollments in the Enrollment Details window.

Creating a Price List

Use the Price Lists window to create a price list for your courses.

To create a price list:

1. Enter a unique name for the price list.

2. Select a currency for the prices.

3. Select the Default check box to set the prices on this list to appear as the default standard price for classes.

    Note: You can use only one default price list for each currency.

4. Enter a start and end date to define when the price list is effective.

5. Display the Learner region to make entries priced on a per-learner basis.

6. Select the course, enter the price, and enter a start date. The start and end dates of an entry must be within the start and end dates of the price list.

7. Display the Customer region to make entries priced on a per-customer basis.

8. Select the course, and enter the price and the range of learner numbers to which it applies. Enter a start date for the entry.

9. Save your work.

Extending a Price List

Use the Copy Price List and Change Dates and Prices window to copy an existing price list and enter the start and end dates for a new, extended price list.

To extend a price list:

1. Query the price list to extend and click Copy List.

2. Enter the name of the new, extended price list.

3. Enter the start and end date of the new list. The start date of each entry changes in line with the change for the list.

4. Enter the percentage to increase the prices on the new list (the amount must be between 0 and 100).

5. Select the direction in which the new prices are to be rounded, and the unit to which they are to be rounded.

    For example, if the prices are in US dollars and you want to round the new prices up to the nearest 10 cents, select Up and enter 0.1 in the Nearest To field.

6. Click Copy List and the application creates the new price list for you.

Changing Price List Dates

After you have saved a price list, you cannot edit the Start and End Date fields directly. Use the Change Price List Dates window instead.

To change the price list dates:

1. Query the price list in the Price List window.

2. Click Change Dates.

3. Enter the new start and/or end dates.

4. Select the Alter Entry Dates check box to allow changes to the dates of price list entries.

5. Choose Change Dates. The application applies and saves your work.

Alter Entry Dates:

If you do not select the Alter Entry Dates check box, the start and end dates of the price list entries remain unchanged. You cannot make any change to the price list dates that would invalidate the dates of entries on the price list.

If you do select the Alter Entry Dates check box, the dates of the entries on the price list change according to these rules:

• If you make the new start date earlier, any entries that started on the old start date take the new start date. Other entries are unchanged.

• If you make the new start date later, any entries that start before the new start date start on this new date. Other entries are unchanged.

• If you make the new end date later, any entries that ended on the old end date take the new end date. Other entries are unchanged.

• If you make the new end date earlier, any entries that end after the new date now end on this new date. Other entries are unchanged.

Changing Prices for Entries Within a Price List

You can change the prices for entries within a price list. You change the price by copying some or all of the existing entries and giving them a new start date and new prices.

The application calculates the dates of the entries based on

• The end dates of existing entries

• The end dates of the course

• Any price dates you enter

• Today's date

Example

You have a Management Training price list containing entries for the current year. You now want to make entries for next year so you can take advance enrollments. Using the Change Prices facility, you can copy all the existing entries, or all entries with a start date on or after a date you specify. At the same time you can enter a new start date for the entries and the percentage by which to change the prices.

For all the entries you copy, the application enters a course end date (if present), or the day before the start date of the new entries.

Changing Prices for Entries Within a Price List:

Use the Change Prices window to change prices for entries within a price list.

To change prices for entries within a price list:

1. Query the price list on which you want to change prices.

2. Select Change Prices.

3. Enter the effective date for the new entries. You can also enter a new end date. If you leave the end date blank, the new entries have the same end date as the price list.

4. To copy entries starting after a given date, select Entries Starting From and enter the start date.

5. To copy all entries, select All Entries.

6. Enter the percentage (between 0 and 100) to increase the prices of the new entries by that percentage.

7. Select a direction and unit for rounding the new prices. For example, if the prices are in US dollars and you want to round the new prices up to the nearest 10 cents, select Up and enter 0.1 in the Nearest To field.

8. Select Change. The application applies and saves your work.

Running the Budget and Cost Breakdown Report

This report shows the profitability of classes your enterprise runs, presenting the total cost and the total revenue for each class.

You can view the cost and revenue information for an individual class or for a group of classes. You can group classes by:

- Catalog Category (formerly Activity Type)

- Course

- Class

- Program

You can choose to see either summary or more detailed information, including:

- **Cost:**
  - The resources used for each class
  - The resource booking statuses
  - Currency codes

- **Revenue:**
  - Learner names (internal and external)
  - Transfer statuses
  - Currency codes

You run this report in the Submit Request window.

Different Currencies

You can choose a display currency that differs from your normal working currencies. The report displays a total in your display currency even if the total is made up of a series of different currencies.

To run the Budget and Cost Breakdown report:

1. Select the report name in the Request Name field.

   The Parameters window opens.

2. Select one of the following values to produce the report:

    •   Catalog Category--if you select a catalog category, you do not have to select a course title; the application lists all courses for the category.

    •   Course--if you select a course you do not have to select a class title; the application lists all classes for the course.

    •   Class Title

    Leave these fields blank to see all courses and classes in the report.

3. Select the status of any finance headers transferred to your accounting application. Leave this field blank to see finance headers of all statuses.

4. Select the resource booking statuses (such as Planned) to include in the report. Leave this field blank to see resource bookings of all statuses.

5. Select a currency to restrict the report to learner enrollments for that particular currency. If you do not select a currency then the report includes enrollments for all currencies.

6. Select the learner display currency.

7. Select a currency to restrict the report to resource bookings for that particular currency. If you do not select a currency then the report includes bookings for all currencies.

8. Select the resource display currency.

9. Select Yes to include summary only information in the Summary Display Mode field, or select No to include detailed information.

10. Enter start and end dates to report on classes within that range.

11. Select Yes to include all learner enrollments for which payment has been made, or No to include learner enrollments that have not been paid.

12. Enter the standard price of the classes you want to include in the report. The report lists all classes with standard amounts up to and including the price you enter. Leave this field blank to view all prices.

13. Click Submit Request.

Organization Training Plans

Organization Training Plans

Organization training plans enable you to group together courses into a plan to determine the proposed training and training budgets for your organization.

You can use organization training plans to set out your proposed training courses for a certain period, usually a year.

Training Plan Measurement Types

To report against budgeting and costing details you must set up *measures* against which these values can be recorded for your Business Group. The measure types are:

- Money

- Integer

- Number

Each measure can be budgeted and costed at different levels so before you set up your measurement types you must decide at which level you will record budget and cost information. When setting the budgeting and costing levels for your measurement types there are a number of rules that you must be aware of:

- If a measurement type's budgeting level is Course, the Costing level cannot be Plan

- If a measurement type's budgeting level is Class, the Costing level cannot be Plan.

In addition to setting up these required measurement types you must set up measurement types for all the training budget and cost categories you want to record for your company. For example, you could create measurement types to record budgeted and actual values for trainer costs, accommodation costs, or equipment costs.

Training Plan Budgets

You can set up budgeting information for your training plan at the following levels:

- Plan

- Plan Member

- Class

The budgeting information you can enter is dependent on the measurement types you have already set up. You use the Training Plan Budgets, Training Plan Member Budgets, or Training Plan Classes Budgets window depending on the level at which you are recording budgets.

Training Plan Costs

Once the classes in your training plan have taken place you can record actual costs against them. You can enter costs at three levels:

- Plan

- Class

- Student

The costing information you can enter is dependent on the measurement types you have already set up. You use the Training Plan Costs, Training Plan Class Costs, or Training Plan Student Costs window depending on the level at which you are recording costs.

Budget and Cost Reconciliation Report

At the end of each year, you can produce a report to show how much of the learning you proposed to undertake at the beginning of the year has actually taken place.

The Budget and Cost Reconciliation Report lists all the budget information entered at the start of the year and shows the actual cost of learning that has taken place. It includes all active budget values and all costs. You can then compare these figures to see if you have met the learning targets.

Depending on the measurement types that you have set up, the report can also show other cost information you have recorded, such as instructor costs, accommodation costs, and equipment costs.

Prerequisites for the Budget and Cost Reconciliation Report

Prior to running the report, you must set up the following:

- A default payroll

- Exchange rates

- Actual hours duration of the class measurement type

You must also set up any other measurement types required to fulfill the costing needs of your company, and enter all the costing information you want to include in this report against these types into the Training Plan Costs, Training Plan Class Costs, and Training Plan Student Costs windows. See: Entering Training Plan Cost Information, page 5-22

When running the report you can set the level of detail you see using the Rollup Level option. This defines the level at which you want the values to be totaled. You can select one of four options:

- Plan

- Catalog Category

- Course

- Class

For example, if you set the rollup level to Course, all the values entered at the class and delegate level are summed and displayed against their parent course. To break the report down further, you can set the rollup level to Class, which displays the costs against each individual class.

Entering a Training Plan Measurement Type

Use the Training Plan Measurement Types window to set up measurement types.

To enter training plan measurement types:

1. Select the required measurement type. The available measurement types are defined in the OTA_PLAN_MEASUREMENT_TYPE extensible Lookup Type.

2. Select the required units for the measurement type and enter the sequence if required. This enables you to define a reporting order should you want to write a report based on measurement types.

3. Select the budgeting level. If you want to allow users to set up multiple occurrences of this budgeting type for a training plan you must check the Allow multiple values check box. This enables you to break the budget down into employee categories. For example, when setting up an Estimated Salary Per Category measurement type, you will need to check this box so that you can enter a salary for each employee category.

4. Select a costing level, if required.

5. If you want to dynamically calculate a cost, select the name of the template that contains the required calculation and select the item type that is to be used.

> **Note:** Organizations outside France do not need to take this step, which exists only to assist French companies in filing their Declaration 2483.

6. Save your changes.

Entering a Training Plan

Once you have set up the courses required you can group them together into a training plan. This will set out all the training that is proposed by your organization.

You define training plans in the Organization Training Plan window.

To enter a training plan:

1. Enter a name for the training plan and select the status.

> **Note:** Training plans with a status of Cancelled will not be available when running the Budget and Costs Reconciliation Report.

2. Select the organization to which the training plan applies and select the currency in which the plan will be budgeted.

3. Select the required calendar and period. This will usually be a yearly calendar with a twelve month period. You may only have one active training plan for any given date, for your organization.

   For more information on setting up budget calendars see Defining Calendars in the Oracle HRMS online help.

   > **Note:** Any training plan or training plan member status that is not Cancelled is considered to be active.

4. Select a training plan member for the training plan. This can either be a course type or a course. You are only able to select courses, or course types whose start date is before the end date of the period, and whose end date is after the start date of the period.

5. Select the status of your training plan member. You are prevented from having an active course if the parent course type is also included in the training plan and is also active.

6. Enter as many training plan members as required and save your work.

Entering Training Plan Budget Information

To enter budget information:

1. Query the required training plan in the appropriate window.

2. Select the measurement type for which you want to enter a budget.

3. If you are entering budgets at the training plan member level, select the required member.

4. If you are entering budgets at the class level, select the required class. As one-time events (classes) are generally not planned far in advance, they are not associated with a course and therefore are not available for budgeting purposes.

> **Note:** All classes must have an end date for them to be available in this window. If an end date is not known, for example, in the case of a development event, you will only be able to record costs.

5. Enter the value for the budget line. If you want to assign the budget value to a particular employment category, click in the Extra Information field and select the required employment category. You should only select an employment category for measurement types that have the Allow multiple values checkbox checked in the Training Plan Measurement Types window.

> **Note:** You must only have one entry per employment category for each measurement type. If you enter duplicate records for the same employment category the reports will only use the first entry, not sum the entries together.

6. Enter as many budget lines as required and save your work.

Entering Training Plan Cost Information

To enter actual costs information:

1. Query the required training plan in the appropriate window.

2. Select the measurement type for which you want to enter a cost. The currency defaults to the budget currency for the training plan if the selected measurement type has been set up to use monetary values.

3. If you are entering costs at the class level, select the required class.

4. If you are entering costs at the student level, select the required student.

5. Enter the cost amount. If the cost has been set up to use a cost calculation, click Calculate. This will run the SQL calculation associated with the measurement type and display the result in the Amount column.

6. If you are using the Actual hours duration of class measurement type, click in the Statutory column to display the Further Plan Cost Information window. Select who has subsidized the training.

7. Enter as many cost lines as required and save your work.

What to do next:

Once you have entered all the costing information for your training plans, you can run the Budget and Cost Reconciliation report. This will list all the budget and associated cost information for a training plan so that you can compare them. See Budget and Cost Reconciliation Report, page 5-20

Running the Budget and Cost Reconciliation Report

Run reports in the Submit Requests window.

To run the Budget and Reconciliation Report:

1. Select Budget and Costs Reconciliation Report in the Request field.

2. Select the training plan for which you want to run the report and select the report currency. All monetary values are converted into, and displayed, in this currency.

3. Select the rollup level.

4. Click Submit.

   You can now view and print the report from the Requests window.

6

Content

Content Administration Overview

Content is learning material made available to learners through online classes. Courseware developers and subject matter experts design and build the content, which learners view in a player that runs inside a Web browser. Content can be any Web-playable format, such as slides, text documents, html pages, video clips, or other multimedia format. OLM enables you to administer and deliver online content.

> **Note:** The delivery of online content is possible only if your enterprise has purchased the OLM Online Learning Option and enabled the Online Learning Option Licensed profile.

Content administration in OLM follows a cycle of tasks as illustrated below:

Content Administration Tasks
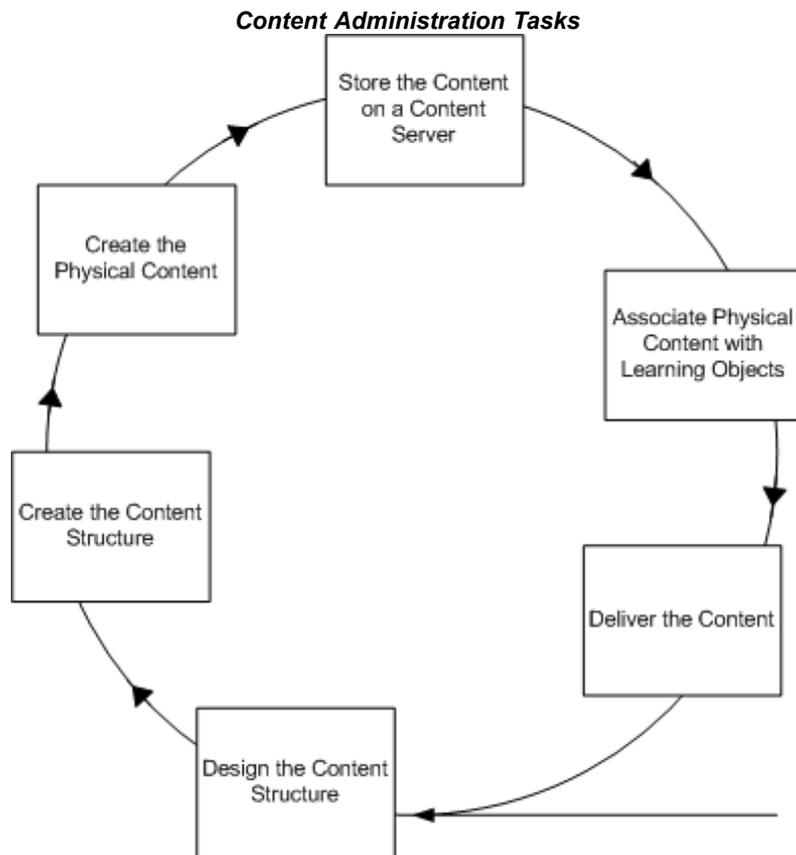
Key Concepts

Content administration depends on the following key concepts:

- **Designing the content structure** is a task for curriculum managers outside of the application. Before creating objects in the application, you should already have designed your content structure, in terms of folders and the learning objects and tests within those folders. See Content Structure, page 6-4

- **Creating a content structure** involves creating a hierarchy of folders and creating learning objects and tests within those folders. For further details see Learning Object Management, page 6-4 and Test Builder, page 7-1

- **Creating physical content** is a task for curriculum developers outside of the application. OLM supports all Web-based content, placing no restriction on the authoring tools you use to create the content, as long as the content is playable on the Web.

- **Storing the content** on a content server or a Web server enables learners to access the content from the player. You can set up a content server and upload content to the server from the application, or store content on an existing or third-party web server. See Online Content Setup, page 11-17

- **Associating the physical content with learning objects** ties the location of the physical content to specific learning objects within a course structure.

- **Delivering the content** is the final stage of making the content available to the learners over the web. See Online Content Delivery, page 6-6

Content Administration Requirements

Content administration involves creating a content structure and managing the content for your online courses.

What is the difference between online and offline learning modes?

In online learning, learners either join a live Web conference (online synchronous) or view and play the content from within the OLM player (online asynchronous). In the offline mode, learners either attend a physical classroom (offline synchronous), or receive the content in some offline form such as a book or local computer-based training (offline asynchronous). You create both online and offline classes within the catalog, and maintain the content for your online courses using the Content page.

> **Note:** The delivery of online content is possible only if your enterprise has purchased the OLM Online Learning Option and enabled the Online Learning Option Licensed profile.

How can you associate physical content with a content structure?

You associate physical content with a content structure by specifying the actual location of the content, such as an accessible URL, in the learning object properties.

Can you replicate an existing content structure?

Yes, you can replicate an existing content structure by creating a copy of the content structure. You can copy an individual learning object, a hierarchy of objects, or a hierarchy of folders. Once you have copied the content structure, you can modify the new objects to fit your needs.

Online Content Management and Delivery

Content Structure

The first step in content administration is designing and creating the content structure for your online courses. Creating a content structure involves creating a hierarchy of folders and sub folders and grouping the learning objects and tests within the folders.

You can manually create a content structure in the application or transfer a content structure along with the physical content from an external source into the application. The import utility enables you to transfer content available in another application or learning management system into your application. See Content Import and Export, page 8-4

Creating Folders

You set up folders to reflect the structure of your learning material, for example by subject matter, faculty, or learner job roles. Use a logical hierarchy and a meaningful naming scheme for the folders and other objects in the content hierarchy. To better manage the content structure, you can establish naming conventions for all objects in your application.

> **Note:** You can use duplicate names for the objects in your content structure as the application does not verify the names of folders, learning objects, or tests.

Assembling Learning Objects

After you have designed your content structure and created the folders and sub folders, you create learning objects within the folders. Learning objects are database objects that represent the physical content and enable you to organize and deliver online content. See Learning Object Management, page 6-4

Assembling Tests

You create tests in a content structure to assess the learner performance in an online course. You can use the test builder to create tests from questions drawn from one or more question banks. You can create question banks, write the appropriate questions and response options, and then create the test by assembling questions from question banks. See Test Builder, page 7-1

Searching the Content Structure

You browse several folders if you are searching for a particular object in a long hierarchy of folders, sub folders, learning objects, and tests. Use the Search and Advanced Search features to search for objects in the content hierarchy based on various parameters.

Learning Object Management

Learning objects are database objects that represent the physical content residing on a content server. Learning objects facilitate the management and delivery of online content. The Content page displays the content hierarchy comprising folders, learning objects, and tests. From here you can create and manage your learning objects.

Creating Learning Objects

You can either manually create learning objects or import them into your application from another application or learning management system. You can also copy learning objects from one location to another within your content hierarchy. The import and export utilities in OLM enable the transfer of learning objects, content hierarchies, and tests across applications. For details see: Content Import and Export, page 8-1

A learning object identifies the physical content with which the object is associated. Some learning object properties and their definitions are listed in the table below:

Property	Definition
Duration	The time taken to play the content represented by the learning object
Audience	The target learning audience
Hardware Software Requirements	System requirements required to run the content
Mastery Score	The score that the learner should attain to master the content represented by the learning object
Mime Type	The format of the content; this information is used when exporting learning object using the IMS specification
Author	The author or publisher of the content
Catalog	The entry specified in the catalog
Catalog Number	Catalog ID or number for use within an external cataloging system
Version	The ID or number that identifies the content version

Setting the Content Properties

You must define the content properties to associate a learning object with the physical content. If your content is located on an external content server that is not managed by OLM, select URL Access in the Type field and specify the URL to access the content. Alternatively, if an OLM content server hosts your content, select Content Server Access and provide the content location details. To identify the content location, you must specify the content server name, the directory where the content resides, and the file name. To know about setting up a content server, see: Content Servers, page 11-17

You can also associate a learning object with a recorded web conference, by specifying the recorded conference details such as conference server and the meeting ID in the Content section. You use this association to deliver online asynchronous classes as recorded web conferences. For details see: Web Conferences, page 2-15

Defining Player Prerequisites

A player prerequisite is a learning object that a learner must complete before beginning or continuing a sequence of learning. For example, learners may need to complete an introductory sequence of learning before attempting the advanced material. You can make the introductory learning object a player prerequisite to the advanced learning object. You can assign multiple prerequisites to a learning object, and learners must complete all prerequisites before they can launch the learning object.

Publishing Learning Objects

By default, all learning objects are initially unpublished. You publish learning objects to visually indicate that the content is available, and to enable Catalog Administrators to assign the learning object to an offering. When you publish a learning object that contains nested objects, the system publishes all learning objects and tests currently contained within the parent object. Learners cannot see a nested object that remains unpublished. You unpublish a learning object when you need to make changes, and do not want learners to access the object while the changes are being made.

Online Content Delivery

When you have the content structure and learning objects in place, the next and final step is to deliver the content to learners as an online course within the Catalog. The application provides a systematic approach to creating courses, offerings and classes from within the Catalog. The process is similar whether you are creating online or offline offerings. For details see: Catalog Administration, page 2-4

> **Caution:** The delivery of online content is possible only if your enterprise has purchased the OLM Online Learning Option and enabled the Online Learning Option Licensed profile.

Creating Quick Offerings

If your learning object is ready to be made into an offering, you can shorten the process by creating an offering directly from the learning object properties page. Using this method, you can create a course, offering, and a class, all in one step. The Create Offerings button on the learning object properties page:

- Creates an offering for the learning object and prompts you to either create a new course for the offering or select an existing course.

- Automatically creates a class for online asynchronous offerings. The class has restricted learner access by default.

A good practice is to create the basic offering, course, and class using the above method. You can then add properties, define learner access, book resources, and perform other functions by accessing the objects from the catalog.

> **Note:** if you create offerings in a category that has learner access defined, then those learners will immediately have access to the offering, because the offering inherits the learner access from the category.

7

Test Builder

Test Builder Overview

The Test Builder enables you to create and manage tests either as topics within a course, or as courses in their own right. A test is a means of measuring a learner's performance, knowledge, and skills. Tests can be scored or not scored. When a test is scored, and a mastery score is specified, a learner passes or fails a test based on the results. Tests that are not scored can provide survey functionality.

> **Note:** The Test Builder is an integral part of the application, and is available to all administrative users, assuming the Online Learning option is enabled for the application. No licence or separate software is required.

The test building process follows a cycle of tasks as illustrated below:

```
                    Add Questions to
                    Sections from
                    Question Banks
                         (4)

  Add Test Sections                      Preview and
       (3)                               Deliver Test
                                             (5)

  Create Test and                        Review Test Using
  Define Properties                      Test Statistics
       (2)                                    (6)

            Create Question
            Banks
              (1)
```
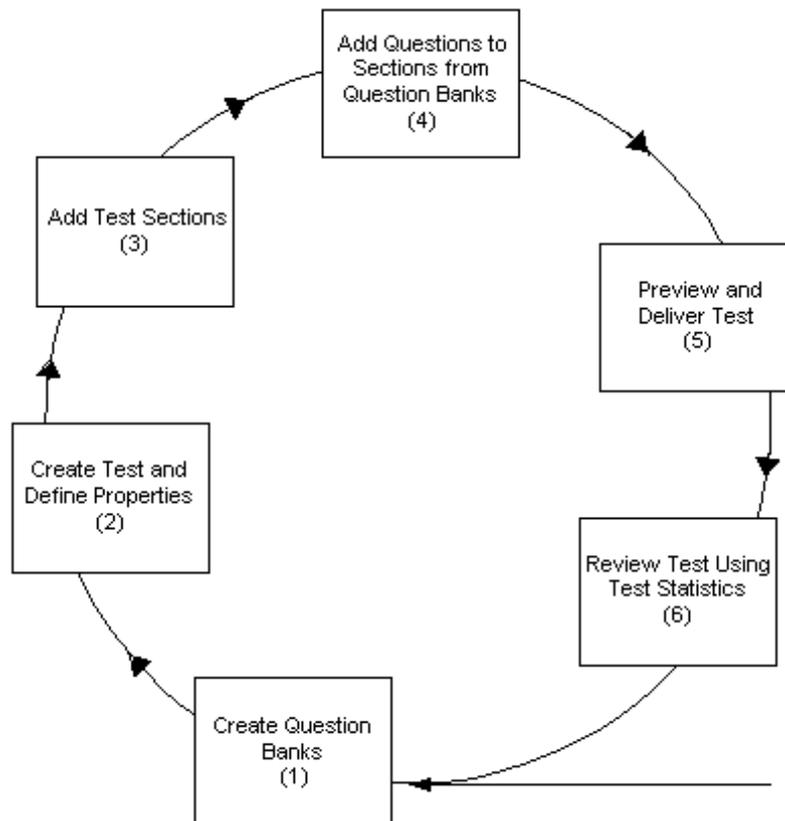
Key Concepts

To use the Test Builder effectively, you must understand the following key concepts:

- Tasks to Assemble a Test, page 7-4

  Before attempting to create and offer a test, first understand the tasks involved.

- Question Banks, page 7-4

  A question bank is a repository of questions and responses. Question banks help you to manage and reuse questions in multiple tests. At least one question bank must exist before you create a test.

- Test Creation, page 7-5

  After you have a created question bank and added the required questions, you can create a test and define the test properties.

- Section Management, page 7-6

  Tests comprise test sections, that contain questions drawn from one or more question banks. You create test sections to organize the questions drawn from a question bank. A test must contain at least one test section and at least one question.

- Test Preview and Delivery, page 7-5

  You can preview questions at different stages of test assembly. Delivering the test is the final step in the test building process. You can deliver a test either as a topic within a course or as a separate course.

- Reviewing Test and Question Statistics, page 7-8

  The Test Builder provides a number of statistical screens for you to analyze learners' performance and test results, either for the test or for individual questions.

Test Builder Requirements

Can you create more than one test that reuses the same questions?

Yes, you can create many questions in a question bank, for example all related questions for a specific subject, and reuse those same questions in many tests.

Can you import tests created by a third party content provider?

Yes, if the tests conform to the IMS QTI (Question and Test Interoperability) specification. Use the Import function at either the folder or the test level to import tests.

See: Importing and Exporting Tests, page 8-5

What question types can you create?

The Test Builder supports the following question types: Fill-in-the-Blank (text response), Fill-in-the-Blank (numeric response), True/False, Multiple Choice Single Response, and Multiple Choice Multiple Response.

Can you display multimedia files and hyperlinks in test questions or responses?

Yes, all text fields support HTML code if you select the Render HTML option when creating or editing your test.

Can you delete questions from a question bank?

Yes, but only if the question has not yet been attempted. Once a learner has attempted the question in any test, you can no longer delete the question from the question bank, since it is required for learning history and performance records. If a question is no longer applicable for future tests, you can make it inactive, to prevent the administrator from selecting the question in any future test.

Can you test learners' knowledge at intervals throughout a course?

Yes, one or more tests can exist as part of a content structure, which is offered as an entire course, so that you test learners' knowledge as they progress through the course.

Alternatively, a test can be a separate course in its own right.

Can you force learners to take a test before launching specific online content?

Yes, you can define the test to be a player prerequisite for another online learning object, to prevent learners from attempting subsequent sections of a course, or a separate course, until they have successfully passed the test.

Can you limit the time a learner takes to complete a test?

Yes, you can specify a time limit for a test (a timed test), to restrict the amount of time a learner has to complete a test and to alert the learner as the time limit approaches.

Test Assembly

Test Assembly Tasks

The first task in creating tests is to ensure that the question banks and questions exist, and if not, to create them. Once the questions exist and the question bank is published, you can create a test by adding the questions required. When preparing to create a test, ask yourself the following:

- Do the questions required already exist? If not, create questions in existing or new question banks.

- Is the test a topic in a course or a standalone course? This placement determines where in the content hierarchy you create the new test object.

- Is the test a simple, one-section test that uses all, or the majority of, questions in a question bank? If so, create a quick test from a question bank, and modify the test properties. If not, create a test object explicitly.

- Do you want to provide random questions from a question bank each time a learner launches the test, rather than providing the same specified questions to all learners? If so, create the test yourself. You cannot use the quick test method, since this builds a test using all questions explicitly from the bank. The quick test method does not support the Rule-Based test option that dynamically extracts a given number of questions from a bank at run time.

Question Bank Creation

You create question banks within a folder. When a question bank is ready for use in a test, you publish the question bank. After publication, you can use the question bank to create tests, or select the Quick Test option to create a test based on all the questions in the bank.

Creating Questions

Question banks consist of questions, each containing the question text (or question stem or prompt), possible responses, and feedback (if any). The feedback typically informs the test taker if they have answered correctly, and can include a learning tip.

When you create a question, you decide what type it is, such as multiple choice or true-or-false. Once you create the question, you cannot change from one type to another, since the style of responses depends on the question type. The exception is for multiple choice, where you can change from a multiple choice single correct response to a multiple choice multiple correct response.

Creating Responses

A response is a possible answer to a question. Each question has a set of responses, depending on the question type:

- True or False: The two values, True and False, are not editable. Select the correct response value, either True or False.

- Fill-in-the-Blank: Enter one or more correct responses. Text responses are case-sensitive, so enter the correct response in both lower and upper case, if either is correct.

- Multiple Choice (Single Correct Response): Enter two or more response values, from which the learner must select one correct choice.

- Multiple Choice (Multiple Correct Responses): Enter three or more response values, from which the learner must select two or more correct choices. Learners must select all the correct responses to gain the points awarded to the question.

Removing Questions or Responses

Once you use a question in one or more tests, and a learner has taken that test, you cannot delete the question from the question bank. Similarly, you cannot delete a response value if the question already appears in a test and if at least one learner has answered that question. You can mark a question or response as inactive, which makes it unavailable for future tests, but does not affect previously created tests and existing performance records.

Creating Quick Tests

You create a Quick Test if the test uses all or majority of questions in a question bank. A Quick Test takes the default properties, and contains a single test section that holds all questions (preselected) from the question bank. You can edit the test to modify the properties, for example to set the scoring option and mastery score, or to add or remove questions.

> **Note:** You cannot use the quick test option to create a rule-based test, in which you display a number of questions extracted randomly from the question bank to the learner.

Test Creation

After you have a created question bank and added the required questions, you can create a test and define the test properties.

Selecting Specific or Random Questions at Run Time

For each test section, you can select exactly the questions you wish to add (pre-selected) or you can enter the number of questions and allow the test to extract a random selection of questions when a learner launches the test (rule-based). The default is pre-selected.

Randomizing the Sequence of Sections and Questions

You can choose whether multiple sections always occur in the same sequence, or in a randomized sequence each time learners launch the test. There is a similar option for sequencing questions within a section. However, you cannot randomize questions across more than one section.

Resuming Tests

Select the Is Resumable box for learners to resume a test if they previously exited or were logged out without submitting the test. Learners are taken to the page where they last left the test. If the time has expired for the test, learners are taken to the page that allows only submission of the test. The Resumable Instructions appear each time a learner resumes a test.

Scoring a Test

The scoring options are percentage scored, or sum of item scores. If your test is rule-based (random questions at run time), be aware that the sum of item scores will vary if some questions have different points from others.

If you select either the percentage or sum scoring options, you can also set the mastery score to indicate the minimum pass mark for the test. For example, using the percentage scored option, enter a mastery score of 75 to indicate a 75 per cent pass mark. Using the sum of item scores option, enter a mastery score of 12, to indicate the learner must obtain at least 12 points to pass the test.

When you set a mastery score for the test, a learner passes or fails a test based on the results. If you do not define a mastery score, the application calculates the points scored, but marks the learner's test attempt as completed, rather than passed or failed.

Providing Feedback

By default, feedback is provided at the end of the test. You can change the feedback type to After Each Page to provide more frequent feedback. You can define the following feedback options:

- Select Questions Inherit Feedback if you have test questions that do not have defined feedback, and you want them to inherit (and display) the section or test feedback.

- Deselect Show Correct Answers During Feedback to prevent learners seeing the correct answers when they review the feedback. This option is useful to encourage learners to retake the test. (The default is selected.)

- Enter text for Correct Response Feedback and Incorrect Response Feedback, to provide different feedback for the learners' responses.

- Enter Post Test Feedback to display a message to learners at the end of the test.

Limiting Test Attempts

You can limit the maximum number of times that a learner can attempt the test before being prevented from launching the test. You can also specify the minimum time that must elapse between each attempt.

Creating a Timed Test

To restrict the time allowed for a learner to complete a test, enter values for the duration properties of the test. If you specify a value for Time Allowed in Minutes, you can optionally set the additional duration fields. For example, if the time allowed is 30 minutes, you can enable the Time Remaining Alert, and display an alert five minutes prior to the end, so the alert appears after 25 minutes into the test.

> **Note:** The timer resides on the server, not on the learner's client, so this message is only updated each time the browser page is refreshed. As long as the learner remains on the same page, the alert is not updated.

Section Management

A test must contain at least one test section and at least one question. You create test sections to organize the questions drawn from a question bank. If your test has multiple sections, you can specify the order in which the sections are displayed to the learner in

the test. However, you can determine a section order only if you have selected the Fixed option in the Section Order field in the test properties. If the Random option has been selected for the Section Order field in the test properties, the test displays a different order of sections on each learner attempt

Deleting Sections

Once you make a test available to your learners, and at least one learner has taken the test, you cannot delete the test section (or the test), since this affects learner performance and test statistics on your production system. If one section becomes invalid, but the test itself is still available, make the section inactive, instead of deleting it. Unpublish a test to make the complete test unavailable to learners. Past performance and test statistics information remain in the system when you unpublish a test.

Test Previews and Delivery

The application provides a Preview option on several different screens, to preview questions at different stages, either when creating questions in a question bank, or when creating a test:

- Question Banks: Click Preview in the tabular list of question banks to preview all questions in a specific bank.

- Manage Questions: Click Preview in the tabular list of questions, within a bank, to preview an individual question.

- Test Section: Click Preview in the tabular list of test sections to preview the questions in a specific section of the test.

- Test Properties: Click Preview to preview all questions in the test.

Delivering Tests

You deliver a test to learners in two ways:

- Topic within a course: Create your test within the structure of an online course, in the content tree. A learner can access the test either directly from the overview in the course details page, or from the outline in the player after launching the course. A course can contain multiple tests (if the tests are grouped within one learning object).

- Separate course: Create your test as a top-level object within a folder in the content tree. The test becomes an individual playable object, for which you then create an offering in the catalog. When learners launch the course, the test appears in the player. A separate course usually consists of only one test.

Offering a Timed Test

You can alter the time of a test as a learner is currently playing the test. The Change Time option enables you to reduce the time allowed for a test, or allocate additional time, for example when a learner encounters a hardware problem during the test. This option is available only if:

- The test is timed and defined as resumable. You can create a timed test by setting the Duration properties during test creation. See: Creating a Timed Test, page 7-6

- The test is an offering in its own right, not a test topic contained within a course.

- The learner is enrolled in a class under that offering. The Change Time option applies only to an individual learner.

- The learner is currently playing the test. You cannot change the time of a test that the learner has not started or that a learner has already submitted.

Reviewing Test and Question Statistics

Statistics are available for you to analyze learners' performance for a given test or question. Statistics exist only after at least one learner has attempted the test or question.

Reviewing Test Statistics

For each test, the Test Statistics page provides a summary of learner scores for the selected test. Use the statistics to analyze both overall performance and individual attempt results. The page initially displays summary results in a tabular format, and provides an option to display a graph for each summary.

The summary statistic sections are:

1. **Score Summary:** Summarizes performance records for all learners. Each learner has one performance record that in turn is a summary of the learner's attempts. A performance record shows the score for the first Pass attempt, or the score for the first Fail attempt. The application updates a performance record from Fail to Pass (including the Pass score), if a learner subsequently passes the test. However, a performance record is never updated from Pass to Fail if a learner subsequently fails the test. A performance record does not change even if the learner score improves. A learner's performance record may show a Pass with a score of 60, even though the learner achieves a Pass with a score of 70 in a later attempt.

   The User Score Summary graph displays the number of users who achieved a specific performance score.

2. **Learner Summary:** Summarizes the total number of learners who launched the test, and the total number of performance records (one record per learner). The summary groups performance records as one of the following:

   - Passed: The learner completed the test and achieved the mastery score or better.

   - Failed: The learner completed the test but failed to achieve the mastery score.

   - Completed: The learner completed the test, but the test has no mastery score, or the scoring option is specified as not scored.

   - Incomplete: The learner started the test but exited the player without submitting the test.

   The table enables you to drill down to more detailed statistics for each learner. Click the Total Learners number to view all learners, or click the Passed number to view only those learners who passed the test. The drill-down table shows one performance record for each learner. Click an individual learner name to view all attempts for the learner. An individual attempt can show a higher score than the learner's performance record, since a performance record stores only the score for the first pass.

   The User Attempt Score Summary graph displays the score for each individual attempt number. Attempts are color coded to show the day of the attempt.

In the table, click a specific attempt number to view the learner's individual attempt details for each question in the test.

The Learner Performance Status graph shows the percentage of Passed, Failed, Completed or Incomplete performance records.

3. **Attempt Summary:** Summarizes all attempt records for all learners, not just performance records.

   The Monthly Attempt Summary graph shows the number of attempts made in each month.

4. **Question Summary:** Summarizes the total number of questions displayed to all learners in all attempts.

Reviewing Question Statistics

For each question bank, the Question Statistics page provides a summary of learners' performance for each question, across multiple tests. Statistics appear in both tabular and graphical formats. The graph shows Correct, Incorrect and Skipped totals as percentages of the total number of attempts for the question.

8

Content Import and Export

Content Import and Export Overview

You use the import and export features to transfer learning objects, content files, and tests across applications, or from one learning management system to another. The Import and Export functions work with XML files and adhere to industry specifications such as IMS and SCORM for sharing content and test information. If you have a content server set up in the application, you can import and export the actual content files along with the content structure, using the SCORM specification.

Third-party content providers often supply their content with XML files that conform to the industry specifications. If your application supports these specifications, you can use the XML files to import the content into you application. The import and export utilities enable you to load content quickly and easily, instead of manually creating the content structure and the content files.

Key Concepts

The Import and Export functions use the following key concepts:

- You can transfer learning objects, tests, and content hierarchies comprising learning objects and tests, using the import and export features. For details see: Import and Export Utilities, page 8-3

- OLM supports industry specifications such as IMS, SCORM, and AICC, which ensure that you can reuse content across learning platforms without making significant changes. See: Supported Specifications, page 8-3

- You can import and export learning objects using XML files that adhere to IMS or SCORM specifications. You can import learning objects using text files that adhere to the AICC specification. For more information see: Learning Object Import and Export, page 8-4

- The IMS Question and Test Interoperability (QTI) specification enables you to import and export tests. See: Test Import and Export, page 8-5

- A non-standard option specific to OLM applications, enables you to import and export a hierarchy containing both learning objects and tests as a one-step process. For further details see: Content Hierarchy Import and Export, page 8-6

- The Upload function enables you to load content files to your content server. For more information see: Content Upload, page 8-6

Content Import and Export Requirements

The import and export utilities simplify the content transfer process and eliminate the need to manually create the content structure and the content files.

When do you use the import functionality?

You import content into your application when the content structure or content that you require exists in another application or learning management system, or you have purchased online content from a third party content provider or have built the content yourself with an authoring tool. You can import the required objects into your application and organize them within your course catalog to make it available to learners.

Can you import and export all types of content in your application?

You can import and export learning objects, tests, and content hierarchies using XML files that adhere to the SCORM or IMS specifications. You can also import content that complies with the AICC specification. You cannot however export AICC content from the application, as the Export function does not support the AICC specification.

What are the import and export specifications and why are they required?

The e-Learning community needs guidelines and specifications for creating and sharing online content. You can create, manage and better distribute online content across learning platforms if the content adheres to common industry specifications. Industry specifications such as IMS, SCORM, and AICC enable reuse of common content across applications without any significant changes.

Content Import and Export

Import and Export Utilities

The import and export utilities enable you to import and export the following:

- **Learning Objects:** You can import and export a single learning object or a hierarchy of learning objects. When you export learning objects, the application creates and stores the information in XML files, zipped in a zip or jar file. The XML files include the information required to create the content structure and the learning objects in the imported application. Similarly, on importing learning objects, the application creates the content structure and the learning objects from the information in the XML files. If you have a content server set up in the application, you can also import the actual content files along with the content structure.

- **Tests:** You can import and export tests, test sections, question banks, questions and responses using the IMS Question and Test Interoperability (QTI) specification. When you import test objects, the application creates tests based on the information available in XML files.

- **Content and Assessment Hierarchy:** A non-standard utility enables you to transfer content hierarchies between OLM applications. You can transfer a content hierarchy comprising learning objects and tests as a one-step process, instead of transferring these objects separately and then reconstructing the hierarchy.

Supported Specifications

Adhering to specifications enables you to share your online content across learning platforms without making significant changes. OLM supports the following specifications for importing and exporting content and tests:

- IMS

- Shareable Content Object Reference Model (SCORM)

- AICC (Import only)

IMS

IMS is a consortium of learning institutions and vendors that formulates standards for learning servers, learning content, and the integration of these capabilities. IMS develops and promotes open specifications for:

- Using and distributing online content

- Tracking learner progress

- Reporting learner performance

- Sharing learner information between learning management systems

In OLM, you can import and export learning objects and tests using the IMS specification. For more information on IMS, see the IMS Web site at: www.imsproject.org

SCORM

The SCORM specification was developed by the Advanced Distributed Learning (ADL) group. ADL collaborates with governments, academia, and the industry to promote effective online learning.

SCORM is a set of interrelated specifications, designed to enable interoperability among content providers. SCORM combines features from other specifications such as IMS and AICC to enable the reuse of online learning content across multiple environments and products. OLM enables you to import and export learning objects as well as the physical content files using SCORM. For more information about SCORM, see the SCORM Web site at: www.adlnet.org

AICC

AICC is an international group of technology-based training professionals who create guidelines related to computer-based training (CBT) for the aviation industry. Because these guidelines apply to any CBT, they are also used by other industries for managing their learning requirements. OLM supports importing content using AICC specification but does not support exporting of AICC content. More details about AICC are available from their Web site: www.aicc.org

Learning Object Import and Export

You can import and export learning objects using IMS, SCORM, or AICC (import only) specifications. If your application has a content server set up, you can use the SCORM specification to import the content files along with the learning objects.

> **Note:** You cannot import or export values in descriptive flexfields. The import and export utilities ignore descriptive flexfields.

Importing Learning Objects

To import learning objects, you use XML files stored in a zip or jar file, that adhere to the IMS, SCORM, or AICC specifications. You can specify during import if the application should create new objects or update existing learning objects. You can use one of the following specifications for importing learning objects:

- **Import Content and Assessment Hierarchy:** Imports all learning objects and tests contained within the selected hierarchy or folder

    > **Note:** Use this option for importing into an OLM application only.

- **SCORM 1.2 Content Aggregation:** Imports both learning objects and content files. Ensure that you have access to an OLM content server before attempting to load content files using this option.

- **AICC Metadata:** Imports an AICC specification file

Importing CMI Objectives

OLM provides default content tracking at the learning object level, for example the application tracks the usage, time spent, and completion status for a learning object. AICC content contains CMI objectives that enable greater level of content tracking such as resetting the topic completion status based on logical conditions defined within

the content. When importing learning objects using the AICC specification, you also can import the CMI objectives contained in the learning object. After importing, you can view the CMI objectives for the learning object and verify that the content was correctly imported.

Creating Learning Objects During Import

During import, the application creates learning objects from the information available in the XML files. Imported learning objects appear in the content hierarchy, just as any other learning object that you create directly in the application. The XML file must include the required information to create a learning object, specifically Identifier and Title. Your XML file can also include the Starting URL, Description, Audience, and other optional attributes for a learning object.

Updating Learning Objects During Import

The application updates existing learning objects during import, by matching the identifier values *(External ID* and the *External Src* tags) found in the XML import file. The "Attempt to Update the Matching Object" box specifies whether the import always creates a new object, or first attempts to update an existing object. To ensure that the import utility always creates a new object, even when the identifier is the same, deselect this box. In this case, the import process creates duplicate objects.

Exporting Learning Objects

You can export an individual learning object, a folder comprising learning objects or a hierarchy of learning objects. The Export function supports the same specifications as the Import function with the exception of AICC, which is valid only for import. When you export learning objects, the utility creates and stores the information in XML files, zipped in a zip or jar file. If your application has a content server, you can also export the content files associated with the learning objects that are exported. The "Download physical content files with metadata" box is visible on the Export: Specifications page only if you have a content server set up.

Test Import and Export

You can import and export test objects adhering to the IMS Question and Test Interoperability (QTI) specification. You can also import and export a content hierarchy comprising learning objects and tests using the Content and Assessment Hierarchy specification.

> **Note:** You cannot import or export values in descriptive flexfields. The import and export utilities ignore descriptive flexfields.

Importing and Exporting Tests

When you export tests, the utility creates and stores the test information in XML files, zipped in a zip or jar file. This information includes both required and optional attributes of a test object. When you import tests, the application creates test objects from the information available in the XML files. You can import and export the following test components in OLM:

Test Component	Properties of the component that are imported
Test	Name, type, feedback message, time allowed, test instructions
Sections	Name, feedback message, number of questions
Questions	Question text, score, question type, feedback message
Responses	Response text, correct response

Updating Test Objects During Import

You can update existing test objects by matching the identifier values *(External ID* and the *External Src* tags) found in the XML import file. When you select the "Attempt to Update the Matching Object" box for updating an existing test object, it updates only the test object, but not the test sections and questions inside. The *External ID* and *External Src* tags are not available for test sections and questions. So, if you import the same test more than once, the import process updates the same test object, as opposed to creating a new test, but it creates new sections and questions every time.

Content Hierarchy Import and Export

You use the Content and Assessment Hierarchy specification to import or export a content hierarchy comprising learning objects and tests. This option eliminates the need to transfer learning objects and tests separately and then reconstructing the hierarchy. Unlike specifications such as IMS and SCORM that are industry specific, this specification is applicable only to OLM.

Importing a Content Hierarchy

You import a content hierarchy into the application using the Import Content and Assessment Hierarchy specification. During import, the application creates learning objects by reading XML files that conform to the IMS or SCORM specifications. Similarly, it creates test objects by reading XML files that adhere to the IMS QTI specification. These XML files are stored either in a zip or a jar file.

Exporting a Content Hierarchy

The Export Content and Assessment Hierarchy specification exports learning objects and tests that are present together in a content hierarchy. The Export function creates a zip or jar file containing IMS or SCORM compliant XML files for learning objects and QTI compliant XML files for test. Administrators can use the zip or jar file to import the content hierarchy comprising learning objects and tests into another OLM application.

Content Upload

OLM provides a separate option for you to upload your physical content files onto the content servers, when the learning objects already exist. Unlike the Import function, the Upload function enables you to load only the content files onto the content servers, without creating the content structure from the XML files.

Options for Uploading

You can upload a single content file or multiple content files to the OLM content server. You can upload multiple files either one at a time, or put them in a zip file and load them all at once. You must specify the location of the single content file or the zip file during upload. If it is a zip file, the application automatically unzips the contents on the content server. During upload, your content files are transferred from your local directory onto the content server. The application updates the content properties of the learning object with the new location, if the content is uploaded from the learning object properties page.

Importing Objects

You can import learning objects, tests, and content hierarchies comprising learning objects and tests.

Steps to import an object:

1. Select the folder or learning object where you want to import the new objects and click Import.

2. Select the appropriate options in the Import File Type and Location page. For more information see: Using the Import File Type and Location page, page 8-7

   > **Note:** An additional page, Import: Select Question Bank, is displayed when you select either IMS QTI or Content and Assessment Hierarchy. You use this page to select a question bank to store the test questions. Select Create New Question Bank to create a new question bank to store the test questions.

3. Specify the following in the Import: Content Location page:

   - **Define path for URL access to content:** specify a starting URL that will be prefixed to all existing content locations during import. This is applicable if the content contains only a directory and file location. This value will not overwrite a complete URL.

   - **Specify content server location:** specify the content server name and a directory on the server, to upload the physical content contained within the import file.

   - **Retain learning object content location:** select this option to retain the content location specified in the import file.

4. The Import: Analysis Results page displays the import results and errors if any. You can view the objects that the application will create or update during import.

5. If you continue to import, a confirmation message appears that the objects are being imported. You can cancel the import at this stage by clicking the Cancel button.

6. Click View Log to view the actions the import details.

Using the Import File Type and Location Page

You use the Import File Type and Location page to specify the filename and other import options.

1. Specify the file name and select the appropriate specification. If the file content does not comply with the specification, an error message appears during import.

> **Note:** First select a specification and then specify a file name. If you select the specification after specifying the file, you must re-enter the file name.

2. Select one of the following tracking types:

    *   **Auto:** The application automatically tracks and records performance at the individual topic level. CMI calls, which can exist within the content, are ignored. This is the default tracking type for importing via the SCORM 1.2 specification. This option is not valid for QTI or AICC specifications.

    *   **CMI:** The application recognizes CMI tracking function calls that exist within the content. The application also records performance at the individual topic level. Select this option when your content contains CMI (SCORM) function calls. This option is not valid for AICC specification.

    *   **HACP:** The application communicates through the HACP protocol. This is the default tracking type for the AICC specification and is not valid for other specifications.

3. Deselect the "Attempt to Update the Matching Object" box if the application must always create a new object and not update even if there is an existing object with a matching identifier. Deselecting this box can result in duplicate objects being created. This box is not valid for the AICC specification.

Exporting Objects

You can export learning objects, tests, and content hierarchies comprising learning objects and tests.

Steps to Export an Object:

1. Select a learning object, test, or a folder comprising a hierarchy of learning object and tests, and click Export.

2. Select the appropriate specification in the Export: Specifications page (except for individual test objects which can have only the QTI specification).

3. The application creates and stores the information in XML files, zipped in a zip or jar file, and prompts you to save the zip file. You can change the default filename and save to a directory.

Uploading Content

To upload the content files to an OLM content server:

1. You can upload either at the folder level or at the learning object level. Either select a folder or a learning object whose content files are to be uploaded, and click Upload.

2. Specify the following details:

    *   **Content Server:** Select a content server from the list of content servers set up in the application.

    *   **Directory:** Select a destination directory on the content server to extract the zip file contents. Enter the highest level directory in the **Directory** field as

necessary, and use the **Initial file** field to specify the sub directories eventually leading to the starting file for that learning object.

- **Initial File:** Specify the initial file to launch when the learner accesses the learning object from the player.

  > **Note:** If you are uploading at the folder level, the Initial File field does not apply.

- **File Location:** Specify the location of the single content file or the zip file.

3. After uploading the files, the application updates the content properties to associate the learning object with the content files.

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Workforce Intelligence for Learning Management

Workforce Intelligence for Learning Management Key Concepts

Workforce Intelligence for Learning Management Overview

To use the Learning Management reports and workbooks, you must install both Oracle HRMS and Oracle Learning Management (OLM, formerly Oracle Training Administration).

The following key concepts enable you to accurately interpret the results of the reports in Learning Management:

- Calculation of Training Event Hours, page 9-2
- Successful Hours, page 9-2
- Calculation of Training Success, page 9-2
- Report Data, page 9-3
- Scope of Training Success Reports, page 9-3
- Training Success Targets for KPIs, page 9-3

Calculation of Training Event Hours

The Learning Management reports calculate the total number of hours employees have spent on training classes. For the reports to include a training class in calculations, the training class must:

- Have ended in the time period defined by the time parameters
- Have a status of Normal or Closed, if the class is scheduled
- Not have a status of cancelled

The reports calculate the hours spent on each training class and multiply them by the number of relevant employees who attended the course.

Because students can be internal or external, the reports use the enrollment status of Attended, rather than assignment budget values, to count employees.

Successful Hours

If a learner has successfully attended a class, the reports calculate the hours of the class using a predefined formula, then calculate the total number of successful hours for all relevant employees.

See: Amending the Default Training Hours, *Oracle HRMS Configuring, Reporting, and System Administration Guide* and Adding Additional Training Time Periods, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Calculation of Training Success

Most reports and workbooks calculate training success as the percentage of total training hours delivered for your employees against the number of those hours that were successful.

The Analytics workbooks, however, calculate training success as the percentage of successful students against the total number of attendees of a class.

Report data

The reports display employee job, grade, position, and organization as of the date the employee enrolled in the class. The reports do not show any updates to these values after enrollment, unless another enrollment occurs.

Scope of Training Success Reports

Training Success reports and workbooks include only employees who:

- Worked in the selected organization on the date they enrolled in the class.

- Have the class enrollment status of Attended.

- Have, on the enrollment date, an assignment that matches the parameters you select.

When you enroll an employee in a class, you record their assignment. The reports and workbooks use this assignment, even if the employee subsequently changed their assignment.

Training Success reports and workbooks include a class only if:

- An employee included in the report attended it.

- The class ended prior to the workbook end date.

- The class status is Normal or Closed.

- The class has not been cancelled.

If a training event runs over two time periods the reports count it only once, since the Training Success reports and workbooks use the class end date to count classes.

Training Success Targets for KPIs

Use the following guidelines when setting up targets for the Human Resources Intelligence (HRI) Training Attendance Key Performance Indicators (KPIs):

- Enter the target as a percentage of the success you expect. For example, enter 90 if the training success target is 90%.

- Only set up Below Target values in the ranges for each notification responsibility. These KPIs indicate when training success falls below the targets level.

- Do **not** set up Above Target values.

Workforce Intelligence for Learning Management

Delegate Chargeback (Training Center Hierarchy) Detail Workbook

This workbook investigates the amount transferred between two cost centers within an enterprise for internal training class enrollments.

Worksheets

This workbook has the following worksheet:

- Delegate Chargeback

Delegate Chargeback Worksheet

This worksheet investigates the amount transferred between two cost centers within an enterprise for internal training class enrollments.

Business Questions

What is the total amount transferred between two different organizations within an enterprise for an internal training class enrollment?

What is the total amount generated for a training organization by chargeback enrollments?

Parameters

You need to specify values for the following parameters:

- Class training center hierarchy
- Top class training center
- Date from
- Date to

Training Class Player Progress Status Workbook

This workbook investigates the progress of your iLearning-hosted training classes.

> **Note:** This workbook reports only on the training classes transferred from iLearning through the OTA-iLearning integration. It does not include classes created in OTA or OLM.

Worksheets

This workbook has the following worksheets:

- By Total Time Taken Status
- By Player Status
- Completion Status

Workbook Calculations

The worksheets in this workbook use the following calculations:

- **Average Number of Modules Completed**

  Calculates the average number of modules that have been completed per training class.

- **Average Time Completed**

  Calculates the average time (in seconds) it takes iLearning delegates to reach the player status of Completed.

- **Average Time Failed**

  Calculates the average time (in seconds) it takes iLearning delegates to reach the player status of Failed.

- **Average Time Incomplete**

  Calculates the average time (in seconds) it takes iLearning delegates to reach the player status of Incomplete.

- **Average Time Passed**

  Calculates the average time (in seconds) it takes iLearning delegates to reach the player status of Passed.

- **Completed – Passed**

  Calculates the total number of delegates that have ether completed or passed the training class. The calculation includes delegates with a player status of Completed or Passed.

- **Not Completed**

  Calculates the total number of delegates that have not completed the training class. The calculation includes delegates with a player status of Not Attempted, Failed, or Incomplete.

- **Player Failed**

  Calculates the total number of delegates with a player status of Failed.

- **Player Incomplete**

  Calculates the total number of delegates with a player status of Incomplete.

- **Player Status Completed**

  Calculates the total number of delegates with a player status of Completed.

- **Player Status Not Attempted**

  Calculates the total number of delegates with a player status of Completed.

- **Player Status Passed**

  Calculates the total number of delegates with a player status of Passed.

- **Time Completed**

  Calculates the total time (seconds) that delegates with a status of Completed have been playing content on the iLearning player.

- **Time Completed To Char**

  Converts the Average Time Completed value to the format HH:MM:SS.

- **Time Failed**

Calculates the total time (seconds) that delegates with a status of Failed have been playing content on the iLearning player.

- **Time Failed To Char**

  Converts the Average Time Failed value to the format HH:MM:SS.

- **Time Incomplete**

  Calculates the total time (seconds) that delegates with a status of Incomplete have been playing content on the iLearning player.

- **Time Incomplete To Char**

  Converts the Average Time Incomplete value to the format HH:MM:SS.

- **Time Passed**

  Calculates the total time (seconds) that delegates with a player status of Passed have been playing content on the iLearning player.

- **Time Passed To Char**

  Converts the Average Time Passed value to the format HH:MM:SS.

- **Total Enrollments**

  Calculates the total number of enrollments for each iLearning training class, based on a sum of Places Booked per Class.

By Total Time Taken Status Worksheet

This worksheet investigates the progress of your iLearning hosted training classes by the total time that delegates have been playing content of a course within the iLearning player.

Business Questions

Does one particular type of course take more time than the others to complete?

What are the average time taken and the average number of modules completed at each player status?

Parameters

You need to specify values for the following parameters:

- Course Name
- Class Name
- Class Start Date
- Class End Date

By Player Status Worksheet

This worksheet investigates the progress of your iLearning hosted training classes by the number of delegates at each Player Status. The Player Status categories are:

- Completed
- Passed

- Incomplete

- Not Attempted

- Failed

Business Questions

Does one particular type of course have higher number of delegates not completing or failing?

Parameters

You need to specify values for the following parameters:

- Course Name

- Class Name

- Class Start Date

- Class End Date

Completion Status Worksheet

This worksheet presents all relevant completion details for training classes transferred from iLearning.

Business Questions

Are a higher percentage of delegates failing a particular class or course?

Are all/some classes within one particular course complete?

What is the completion status of my training classes?

Parameters

You need to specify values for the following parameters:

- Course Name

- Class Name

- Class Start Date

- Class End Date

- Player Status

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Player Progress Detail Workbook

This workbook investigates the progress of individual delegates (learners) on your iLearning-hosted training classes.

> **Note:** This workbook reports only on the training classes transferred from iLearning through the OTA-iLearning integration. It does not include classes created in OTA or OLM.

Worksheets

This workbook has the following worksheets:

- By Total Time Taken Status
- By Player Status

Workbook Calculations

The worksheets in this workbook use the following calculation:

- **Player Status (Inserts Not Attempted)**

    Returns the status of Not Attempted for those delegates that have a Player Status of null.

By Total Time Taken Status Worksheet

This worksheet investigates the progress of individual delegates in your iLearning hosted training classes, by the total time they have been playing content using the iLearning player.

Business Questions

Are delegates spending a significant amount of time taking online training courses?

Are any of the delegates spending a significantly greater amount of time completing a training class than normal?

Parameters

You need to specify values for the following parameters:

- Course Name
- Class Name
- Class Start Date
- Class End Date

By Player Status Worksheet

This worksheet enables you to analyze the progress of delegates in your iLearning-hosted training classes by Player Status.

Business Questions

Are my delegates completing all of their training classes?

Are any of my delegates not progressing their training classes?

Which course has a particular delegate passed and/or failed?

Parameters

You need to specify values for the following parameters:

- Course Name
- Class Name

- Class Start Date
- Class End Date

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Training Class Resource Analysis Workbook

This workbook investigates the classes and resources available in the training organization.

Worksheets

This workbook has the following worksheets:

- Booked Resources per Class
- Class Enrollments
- Classes Without Trainer
- Classes Without Venue
- Overbooked Resources
- Required Resources Missing
- Resource Checklist
- Resource Schedule by Activity
- Suppliable Resources
- Training Classes

Booked Resources per Class Worksheet

This worksheet enables you to analyze the resources booked for specific training classes.

Business Questions

What are the resources booked for a specific class?

Parameters

You need to specify values for the following parameters:

- Class Start Date
- Class End Date
- Training center hierarchy
- Top training center

Class Enrollments Worksheet

This worksheet enables you to investigate the number of students who enroll in a class, and the number of students who successfully attend the class.

Business Questions

Who is enrolled on a specific class?

Parameters

You need to specify values for the following parameters:

- Class Start Date
- Class End Date
- Training center hierarchy
- Top training center

Classes Without Trainer Worksheet

This worksheet enables you to investigate the training classes that have no associated trainer.

Business Questions

Which training classes do not have a trainer booked?

Parameters

You need to specify values for the following parameters:

- Class from date
- Class to date

Classes Without Venue Worksheet

This worksheet enables you to investigate the training classes that have no associated venue.

Business Questions

Which training classes do not have a training location assigned to them?

Parameters

You need to specify values for the following parameters:

- Class from date
- Class to date

Overbooked Resources Worksheet

This worksheet enables you to analyze overbooked resources.

Business Questions

Which resources are booked more than once at the same time for different training classes?

Parameters

You need to specify values for the following parameters:

- Booked from
- Booked to
- Training center hierarchy
- Top training center

Required Resource Missing Worksheet

This worksheet enables you to investigate the resources that are required but have not been booked for a training class.

Business Questions

Which essential resources are not booked for a particular training course?

What required resources are missing?

Parameters

There are no parameters for this worksheet.

Resource Checklist Worksheet

This worksheet displays the list of resources required to successfully run a training course.

Business Questions

What is the minimum resource required to run a specific training course?

Parameters

You need to specify values for the following parameters:

- Course name

Resource Schedule by Activity (Course) Worksheet

This worksheet enables you to view the schedule for each training resource, to ensure that resources are not booked for more than one class at any one time.

Business Questions

At what level is a specific resource booked, for example, for the next 6 weeks?

What is the booking schedule for the available resources in the training organization?

Parameters

You need to specify values for the following parameters:

- Resource required from
- Resource required to
- Training center hierarchy
- Top training center

Suppliable Resource Worksheet

This worksheet enables you to analyze the cost and availability of suppliable resources for your training class.

Business Questions

What are the resources available within a training organization in a given period of time?

Parameters

You need to specify values for the following parameters:

- Resource from date

- Resource to date

Training Classes Worksheet

This worksheet enables you to investigate the location, start date, and duration of specific training classes.

Business Questions

Which training classes are scheduled classes with a class status of normal?

How many students are enrolled on a specific class, and how many free seats remain for that class?

What are the actual, budgeted and standard costs for running specific training classes?

For a specific training course, which training classes are running in a given period of time?

Parameters

You need to specify values for the following parameters:

- Class start date

- Class end date

- Category

- Training center hierarchy

- Top training center

Headings and Calculations

This worksheet uses the following calculation:

- **Class duration days**

  Calculates the number of days between the course start date and the course end date for the page item Class Duration.

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Workforce Intelligence (HRMSi) for Learning Management

Training Class Ranking Status Workbook

This workbook investigates the popularity of training classes within a given period of time, by class days and attendance.

Worksheets

This workbook has the following worksheets:

- By Class Days
- By Attendance

By Class Days Worksheet

This worksheet enables you to investigate the popularity of training classes by ranking them by class days.

Business Questions

Which are the most popular classes by class days?

Which classes could be most profitable?

Parameters

You need to specify values for the following parameters:

- Class From Date
- Class To Date

Headings and Calculations

This worksheet contains the following column:

- **Free Seats**

  Values in this column are based on the Maximum Attendees minus Student Count. The calculation takes into account the number of canceled internal students as well as the number of canceled external students.

By Attendance Worksheet

This worksheet enables you to analyze the popularity of training classes by ranking them by course attendance.

Business Questions

Which are the most popular classes by attendance?

Which classes are in high demand?

Parameters

You need to specify values for the following parameters:

- Class From Date

- Class To Date

Headings and Calculations

This worksheet contains the following column:

- **Free Seats**

  Values in this column are based on the Maximum Attendees minus Student Count. The calculation takes into account the number of canceled internal students as well as the number of canceled external students.

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Student Training Success (External Students) Analysis Workbook

This workbook investigates the training success ratio for external learners (students not employed by the organization running the training). If the SUCCESSFUL_ATTENDANCE_FLAG column of the OTA_DELEGATE_BOOKING table in the OTA schema is set to Yes, that enrollment is considered successful.

Worksheets

This workbook includes the following worksheets:

- By Company

- By Company and Year

Key Concepts

These worksheets use classes to calculate success. For a class to be included it must:

- Have an end date prior to the present date.

- Have a status of Normal or Closed, if the class is scheduled.

- Not be Canceled.

The hours of a class are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of classes, you may need to customize this formula. See Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in OLM and HRMS, the Student Training Success (External Students) Analysis workbook calculates the following:

- **Hours Delivered**

  The total number of training hours of all the relevant classes multiplied by the number of places filled by students on these classes.

- **Successful Hours**

If a student is recorded as successfully having attended the class, then the employee's hours for this class are recorded as successful hours.

In the workbook, the successful hours are the total number of successful hours for all relevant classes.

- **Success Rate Percentage**

Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Company Worksheet

This worksheet enables you to analyze the success of training hours delivered to external students for a company. You can investigate this for a business group and year.

Business Questions

What is the student success ratio for a particular company (or customer)?

Which company has the highest training success ratio?

Parameters

This worksheet has no parameters.

By Company and Year Worksheet

This worksheet enables you to analyze the success of training hours delivered to external students for a company, for different years. You can investigate this for a business group and each company.

Business Questions

In which training year did a particular customer have the highest student success ratio?

Parameters

This worksheet has no parameters.

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Student Training Success (Internal Students) Analysis Workbook

This workbook investigates the training success ratio for internal students (students employed by the organization running the training).

Success ratio is calculated as the number of successful training hours delivered to internal students divided by the total number of training hours delivered to internal students. The number of successful training hours per class is the number of successful internal students enrolled for a class, multiplied by the course duration in days for that class.

The total number of training hours delivered to internal students for a class is the total number of internal students enrolled for a class, multiplied by the course duration in days for that class.

If the SUCCESSFUL_ATTENDANCE_FLAG column of the OTA_DELEGATE_BOOKING table in the OTA schema is set to Yes, that enrollment is considered successful.

Worksheets

This workbook includes the following worksheets:

- By Organization and Year
- By Location and Year
- By Job Category and Year
- By Job and Year
- Attendance Summary

Key Concepts

These worksheets use classes to calculate success. For a class to be included it must:

- Have an end date prior to the present date.
- Have a status of Normal or Closed, if the class is scheduled.
- Not be Cancelled.

The hours of a class are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of classes, you may need to customize this formula. See Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in OLM and HRMS, the Student Training Success (Internal Students) Analysis workbook calculates the following:

- **Hours Offered**

  The total number of training hours for all relevant classes multiplied by the number of places available in all relevant classes.

- **Hours Delivered**

  The total number of training hours of all the relevant classes multiplied by the number of places filled by students in these classes.

- **Hours Received**

  The total number of training hours employees have attended for all relevant training classes.

- **Successful Hours**

  If a student is recorded as successfully having attended the class, then the employee's hours for this class are recorded as successful hours.

  In the workbook, the successful hours are the total number of successful hours for all relevant classes.

- **Utilization %**

The total hours delivered as a percentage of the hours offered. For example, if 5 hours were delivered, and 10 hours were offered, then the utilization percentage would be 50%.

- **Success Rate %**

Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Organization and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students each year, and the success of these hours. You can investigate student success rates for a business group and organization within your enterprise.

Business Questions

What is the training success rate of an organization over a given period of time?

In which year did an organization have highest training success rate?

Parameters

This worksheet has no parameters.

By Location and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students for a location each year, and the success of these hours. You can investigate student success rates for a business group and organization within your enterprise.

Business Questions

What is the training success rate for a training location over a given period of time?

In which training year did a particular training location have the highest training success rate?

Parameters

This worksheet has no parameters.

By Job Category and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students each year for a job by category, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Business Questions

What is the training success rate for a job category over a given period of time?

In which training year was the success rate highest for a particular job category?

Parameters

This worksheet has no parameters.

By Job and Year Worksheet

This worksheet enables you to analyze the number of training hours delivered to internal students for a job by year, and the success of these hours. You can investigate student success rates for a business group and organization within your enterprise.

Business Questions

What is the training success rate for a job over a given period of time?

In which year did a job have the highest training success rate?

Parameters

This worksheet has no parameters.

Attendance Summary Worksheet

This worksheet enables you to analyze the number of internal students attending training classes. You can view internal student attendance by activity type, analyze success rates and information about failures.

Business Questions

How successful are my courses?

Parameters

This worksheet has no parameters.

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Training Cost and Revenue Analysis Workbook

This workbook investigates the costs involved in running training activities (courses), and indicates the revenue generated by these events (classes). It analyzes costs and revenue information by training course, sponsoring organization, training center, training category and competence.

Worksheets

This workbook has the following worksheets:

- By Training Course
- Training Course by Year
- By Sponsoring Organization
- Sponsoring Organization by Year
- By Training Center
- Training Center by Year
- By Training Category
- Training Category by Year

- By Competence
- By Competence and Year

Headings and Calculations

This workbook uses the following headings and calculations:

Currency of Results

Within OLM you can enter your costs in any currency you have set up, so that the worksheets all report in the same currency. HRMSi converts the results into the base currency of the business group.

For more information, see Entering A Conversion Rate Type, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Budget Cost

Budget costs are calculated using the costs of scheduled events (classes). The budget costs for scheduled events (classes) are taken from the budget cost entered in the OLM Class page.

Actual Cost

Actual costs are taken as the actual cost of the scheduled event (class), entered in the OLM Class page, and the cost of resources booked for the event (class).

For the cost of a resource to be included, it must be confirmed and associated with the event (class). Enter the cost for one resource per day. The cost is then multiplied by the quantity of resource required, and number of days.

The actual cost of an event (class) is the actual cost plus the cost of all resources for the event (class).

Actual Revenue

Actual revenue is the sum of internal and external revenue for each scheduled event (class). Internal revenue is calculated using the internal enrollments for a scheduled event (class).

Internal enrollments are entered in the Enrollment Details window using the organization type. For the enrollment to be included, it must have a status of Attended.

> **Note:** The workbook does not use the Internal check box on the Enrollment page.

The number of places for all internal enrollments are then added together. This is then multiplied by the price basis amount for the event (class).

External revenue is calculated using all the external enrollments for a scheduled event (class). For the enrollment to be included, it must have a status of Attended.

External enrollments are linked to a finance line, which includes the cost of the enrollment. For a finance line to be included, it must be of the type Enrollment and must not be cancelled.

The total external revenue is the sum of the finance line amounts, summed over all the external bookings.

Students Enrolled

The total number of external students enrolled, added to the total number of internal students enrolled.

Cost per Student

The actual cost divided by the students enrolled.

Revenue per Student

The actual revenue divided by the students enrolled.

Hours Offered

The total number of training hours for all relevant events (classes) multiplied by the number of places available on these events (classes).

Hours Delivered

The total number of training hours for all relevant events (classes), multiplied by the number of places filled by students on these events (classes).

Cost per Hour

The actual costs divided by the hours delivered.

By Training Course Worksheet

This worksheet enables you to analyze the cost and revenue generated by training events (classes). You can investigate training activities for a specific Business Group, sponsoring organization and year.

Business Questions

What are the costs involved in running training events (classes) by course?

How much revenue is generated by these training events (classes), every year?

Parameters

This worksheet does not use parameters.

Training Course by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities for different years, by business group and sponsoring organization.

Business Questions

What are the costs involved in running a training course?

How much revenue is generated by this course each year?

Parameters

This worksheet does not use parameters.

By Sponsoring Organization Worksheet

This worksheet enables you to analyze the cost and revenue of training events (classes) for different organizations, by business group and year.

Business Questions

For each sponsoring organization, what are the actual and budgeted training costs?

How much revenue is generated during a year?

Parameters

This worksheet does not use parameters.

Sponsoring Organization by Year Worksheet

This worksheet enables you to analyze the costs and revenue associated with training for different years. You can investigate costs and revenue for a Business Group and sponsoring organization.

Business Questions

What are the training costs and revenues generated for a sponsoring organization by training year?

Parameters

This worksheet does not use parameters.

By Training Center Worksheet

This worksheet enables you to analyze the costs and revenue of a training event (classes) for a training center, by business group, sponsoring organization and year.

Business Questions

What are the actual and budgeted training costs for each training center?

How much revenue is generated by each training center by year?

Parameters

You need to specify values for the following parameters:

- Event Training Center Hierarchy
- Top Event Training Center

Training Center by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities for different years. You can investigate by business group, sponsoring organization, and training center.

Business Questions

For each training center, what are the actual and budgeted training costs?

How much revenue is generated for a sponsoring organization by training year?

Parameters

You need to specify values for the following parameters:

- Event Training Center Hierarchy
- Top Event Training Center

By Training Category Worksheet

This worksheet enables you to analyze the cost and revenue of training events (classes) for a training category. You can investigate costs and revenue for a business group, sponsoring organization, and year.

Business Questions

What are the costs involved in running training events (classes) by category?

How much revenue is generated by each category?

Parameters

This worksheet does not use parameters.

Training Category by Year Worksheet

This worksheet enables you to analyze the cost and revenue of training events (classes) in different years. You can investigate costs and revenue for a business group, sponsoring organization, and training category.

Business Questions

What are the costs involved in running training events (classes) for a training category by year?

How much revenue is generated by training events (classes) for a training category by year?

Parameters

This worksheet does not use parameters.

By Competence Worksheet

This worksheet enables you to analyze the cost and revenue of training activities by the competence achieved if a student successfully completes the course.

Business Questions

What are the costs involved in running training events (classes) by year for a training competence?

How much revenue is generated by training events (classes) by year for a training competence?

Parameters

This worksheet does not use parameters.

By Competence and Year Worksheet

This worksheet enables you to analyze the cost and revenue of training activities by competence and year.

Business Questions

What are the costs involved in running training events (classes) for a training competence by year?

Tell me how much revenue is generated by running training events (classes) for a training competence by year.

Parameters

This worksheet does not use parameters.

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Training Course Ranking by Amount Status Workbook

This workbook investigates the total amount of money generated by enrollments in each training class, and allows training classes to be ranked by the enrollment amount generated.

Enrollments for a course may occur using a variety of currencies. The Course Ranking by Amount Workbook can convert foreign currencies to a common currency for reporting purposes. Currencies are converted using exchange rates maintained in a general ledger application.

Enrollments are possible through both OLM and Order Management (OM). This workbook reports on enrollments from both systems to produce a total enrollment amount for each class.

Worksheets

This workbook includes the following worksheet:

- Course Ranking by Amount

Business Questions

Which is the most profitable training class?

Which is the least profitable training class?

What is the total enrollment amount generated within a given period of time?

Parameters

You must specify values for some of the following parameters:

- Category
- Class start date
- Class end date

- Reporting currency

- Exchange rate

- Training class status

- Order header status

- Order line status

- Training center hierarchy

- Top training center

Worksheet Calculations

The worksheet uses the following calculations:

- **Class days**

  Calculates the page item Class Duration Days, based on the Class Duration in days multiplied by the total number of enrollments.

- **Class days – internal**

  Calculates the page item, Class Days--Internal, based on a sum of Total Internal Enrollments multiplied by the Class Duration.

- **Class days – external**

  Calculates the page item, Class Days--External, based on a sum of Total External Enrollments multiplied by the Class Duration.

- **Class duration days**

  Calculates the page item, Class Duration, based on the number of days between the Class Start Date and Class End Date.

- **Reporting currency**

  Populates the Reporting Currency column with the currency code for the currency being used.

- **Total amount per class**

  Populates the page item Total Amount per Class with the sum of Amount per Class.

- **Total attended amount**

  Calculates the page item Total Non Attended Amount, based on a sum of Total Amount where the booking status is equal to Attended.

- **Total enrollments**

  Calculates the total number of enrollments for each iLearning training class, based on a sum of Places Booked per Class.

- **Total external enrollments**

  Populates the variable Total External Enrollments, based on a sum of Places Booked for external bookings only.

- **Total internal booking amount**

  Populates the page item Total Internal Booking Amount, based on a sum of Internal Booking Amount per Class.

- **Total internal enrollments**

    Populates the variable Total Internal Enrollments, based on a sum of Places Booked for internal bookings only.

- **Total non-attended amount**

    Calculates the page item Total Non Attended Amount, based on a sum of Total Amount where the enrollment status is not equal to Attended.

- **Total OM amount per class**

    Calculates the page item, Total OM Amount per Class, based on a sum of OM Amount per Class.

- **Total OTA amount per class**

    Populates the variable Total External Enrollments, based on a sum of Places Booked for external bookings only.

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Training Success Workbook

This workbook investigates the time utilization and success rate of training classes.

To calculate the time utilization of the training classes, the report divides the total number of students confirmed in the class by the maximum number of students allowed to enroll in the class.

To calculate the success rate of the training class the report divides the total number of successful students by the total number of students confirmed in the class.

Worksheets

This workbook includes the following worksheets:

- By Sponsoring Organization
- By Sponsor Organization and Year
- By Training Course
- By Training Course and Year
- By Training Center
- By Training Center and Year
- By Training Category
- By Training Category and Year
- By Competence
- By Competence and Year

Headings and Calculations

The workbook uses the following calculations:

- **Success Rate**

  Success rate is calculated as a number of successful training hours delivered to external students divided by the total number of training hours delivered to external students, where:

  - The number of successful training hours per class is the number of successful external students enrolled, multiplied by the class duration.

  - The total number of training hours delivered to external students for a class is the total number of external students enrolled in the class, multiplied by the class duration in days.

- **Successful Hours**

  This calculation is based on the number of Training Hours multiplied by the number of successful students.

- **Utilization**

  This calculation is based on the Training Hours Delivered divided by the Training Hours Offered.

- **Hours Delivered**

  This calculation is based on the number of training hours required by the class multiplied by the number of enrolled students.

- **Hours Offered**

  This calculation is based on the number of training hours required by the class multiplied by the maximum number of attendees.

Key Concepts

These worksheets use classes to calculate success. For a class to be included it must:

- Have an end date prior to the present date.

- Have a status of Normal or Closed, if the class is scheduled.

- Not be Cancelled.

The hours of a class are calculated using a predefined Oracle FastFormula. Depending on how you record the duration of classes, you may need to customize this formula. See Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

In addition to displaying information you have set up in OLM and HRMS, the Training Success workbook calculates the following:

- **Hours Offered**

  The total number of training hours for all relevant classes multiplied by the number of places available in all relevant classes.

- **Hours Delivered**

  The total number of training hours of all the relevant classes multiplied by the number of places filled by students in these classes.

- **Hours Received**

  The total number of training hours employees have attended for all relevant training classes.

- **Successful Hours**

  If a student is recorded as successfully having attended the class, then the employee's hours for this class are recorded as successful hours.

  In the workbook, the successful hours are the total number of successful hours for all relevant classes.

- **Utilization %**

  The total hours delivered as a percentage of the hours offered. For example, if 5 hours were delivered, and 10 hours were offered, then the utilization percentage would be 50%.

- **Success Rate %**

  Successful hours delivered as a percentage of the total hours delivered. For example, if 10 hours were delivered, and 8 hours were successful, the success rate would be 80%.

By Sponsoring Organization Worksheet

This worksheet enables you to investigate the training success rate of training classes for different sponsoring organizations.

Business Questions

What is the training utilization rate by sponsoring organization for a year?

What is the training success rate by sponsoring organization for a year?

Parameters

This worksheet has no parameters.

By Sponsoring Organization and Year Worksheet

This worksheet enables you to investigate the training success rate of training classes for a sponsoring organization for each year.

Business Questions

What is the training utilization rate for a sponsoring organization by year?

What is the training success rate by sponsoring organization by year?

Parameters

This worksheet has no parameters.

By Training Course Worksheet

This worksheet enables you to investigate the success rate of different training courses. You can investigate courses by year and sponsoring organization.

Business Questions

What is the training utilization rate by training course for a year?

What is the training success rate by training course for a year?

Parameters

This worksheet has no parameters.

By Training Course and Year Worksheet

This worksheet enables you to investigate the success rate of courses each year. You can investigate courses by business group and course.

Business Questions

What is the training utilization rate for a training course by year?

What is the training success rate for a training course by year?

Parameters

This worksheet has no parameters.

By Training Center Worksheet

This worksheet enables you to investigate the training success rate of different training centers, by business group and year.

Business Questions

What is the training utilization rate by training center for a class year?

What is the training success rate by training center for a class year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

By Training Center and Year Worksheet

This worksheet enables you to investigate the training success rate of a training center over a number of years. You can analyze success by business group and training center.

Business Questions

What is the training utilization rate for a training center by training year

What is the training success rate for a training center by training year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

By Training Category Worksheet

This worksheet enables you to investigate the training success rate of classes by training category. You can investigate different training categories for a business group and year.

Business Questions

What is the training utilization rate by training category for a training year?

What is the training success rate by training category for a training year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

By Training Category and Year Worksheet

This worksheet enables you to investigate the training success rate of a training class in different years. You can analyze training success for a business group and training category.

Business Questions

What is the training utilization rate for a training category by year?

What is the training success rate for a training category by year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

By Competence Worksheet

This worksheet enables you to investigate the success rate of a training course by competencies. You can investigate competencies for a sponsoring organization and year.

Business Questions

What is the training utilization rate by training competency for a class year?

What is the training success rate by training competency for a class year?

Parameters

You need to specify values for the following parameters:

- Training center hierarchy
- Top training center

By Competence and Year Worksheet

This worksheet enables you to investigate the training success rate of training activities for a competence over a number of years. You can investigate a competence for each sponsoring organization.

Business Questions

What is the training utilization rate for a training competence by class year?

What is the training success rate for a training competence by class year?

Parameters

You need to specify values for the following parameters:

• Training center hierarchy

• Top training center

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Employee Training Attendance Success (Organization Hierarchy) Status Analytics Workbook

The Training Success (Organization Hierarchy) Status Analytics workbook investigates how successfully employees in different organizations and geographical areas are attending training courses.

Business Questions

How successful is employee training across different organizations or geographical areas?

Which organization is the most successful at training?

Which geographical area is the least successful at training?

Parameters

Before running the worksheets you must enter a value for the following parameters:

• Start Date

• End Date

• Organization Hierarchy

• Top Organization

• Rollup Organizations – Yes/No

• Area (Geography)

• Country (Geography)

• Region (Geography)

• Location (Geography)

- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook has the following worksheets:

- By Organization
- By Geography Area

The worksheets display one row for each grouping. For example, the By Organization worksheet displays one row per organization.

Headings and Calculations

All worksheets contain the following columns:

- **A grouping column**

  The heading depends on the selected worksheet; for example, in the By Organization worksheet, the heading is Organization.

- **Attendees**

  The number of attendees on training courses for each group.

- **Successful Attendees**

  The number of successful attendees of training courses for each group.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Employee Training Attendance Success (Organization Hierarchy) Trend Analytics Workbook

The Training Success (Organization Hierarchy) Trend Analytics workbook investigates how successfully employees are attending training courses over time.

Business Questions

Is the training in my enterprise become more or less successful over time?

Parameters

Before running the worksheets you must enter a value for the following parameters:

- Start Date

- End Date

- Organization Hierarchy

- Top Organization

- Rollup Organizations – Yes/No

- Area (Geography)

- Country (Geography)

- Region (Geography)

- Location (Geography)

- Job Category

- Job Name

- Grade Name

- Position Name

Worksheets

This workbook has the following worksheets:

- By Year

- By Semi Year

- By Quarter

- By Bi Month

- By Month

The worksheets display one row for each time period. For example, the By Month worksheet displays one row per month.

Headings and Calculations

All worksheets contain the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **A time period column**

  The heading depends on the selected worksheet; for example, in the by Year worksheet, this column heading is Year.

- **Attendees**

  The number of attendees of training courses for each time period.

- **Successful Attendees**

  The number of successful attendees of training courses for each time period.

- **Success Rate Percent**

Displays the number of successful attendees as a percentage of the total number of attendees.

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Employee Training Attendance Success (Organization Hierarchy) Template Analytics Workbook

The Employee Training Attendance Success (Organization Hierarchy) Template Analytics workbook provides two worksheets, one for investigating training success over yearly periods, the other providing a detailed analysis of training success in the workforce. These worksheets help you to create reports to analyze the success of your training courses. Training success is defined as the percentage of training courses that are successfully completed.

Parameters

Before running the worksheets you must enter a value for the following parameters:

- Start Date
- End Date
- Organization Hierarchy
- Top Organization
- Rollup Organizations – Yes/No
- Area (Geography)
- Country (Geography)
- Region (Geography)
- Location (Geography)
- Job Category
- Job Name
- Grade Name
- Position Name

Worksheets

This workbook includes the following worksheets:

- By Year
- By Detail

By Year Worksheet

The By Year worksheet enables you to see training success for each year.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Start Date**

  The start date of the time period.

- **End Date**

  The end date of the time period.

- **Year**

  The time period for which this worksheet is run.

- **Attendees**

  The number of attendees on training courses for each group.

- **Successful Attendees**

  The number of successful attendees on training courses for each group.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

Detail Worksheet

The Detail worksheet calculates the training success rates for training classes with the same start and end dates, for attendees in each organization, location, job, grade, and position.

Worksheet Headings and Calculations

This worksheet contains the following columns:

- **Training Class Start Date**

  The date the class started.

- **Training Class End Date**

  The date the class ended.

- **Attendees**

  The number of attendees of classes with the same start and end dates, who are in the same organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Successful Attendees**

  The number of attendees successfully completing the training class, for each organization, location, job, grade, and position, calculated using the selected workforce measurement value.

- **Success Rate Percent**

  Displays the number of successful attendees as a percentage of the total number of attendees.

- **Organization**

The organization of the attendees.

- **Location**

  The location of the attendees.

- **Job**

  The job held by the attendees.

- **Grade**

  The grade held by the attendees.

- **Position**

  The position of the attendees.

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Training Attendance KPI Status PMV Report

The Training Attendance KPI Status PMV report provides you with a view of the HRI Training Attendance Status KPI data including the total number of attendees, the total number of successful attendees, the target values for training attendance success, and the actual values for training attendance success.

See: HRI Training Attendance Status KPI, page 9-35

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates
- Organization
- Business Plan
- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location
- Job
- Grade
- Position

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

HRI Training Attendance Status KPI

Use the HRI Training Attendance Status KPI to notify different responsibilities when your training success falls below your target level. For example, you can notify all users

with a senior management responsibility when the success of your training falls below 50%.

Business Questions

Tell me when training in my organization is unsuccessful, compared to my target for training success.

Target Comparisons

The HRI Training Attendance Status KPI compares your KPI targets with the training hours of employees who:

- Are employed in the selected organization, and defined by the organization dimension on the date they were enrolled in the class.

- Have the enrollment status of Attended for a class.

KPI Parameters

The HRI Training Attendance Status KPI includes the following mandatory parameters:

- Business Plan

- HR Organization

- Start date

- End date

To understand how this KPI calculates training attendance success, see Training Success Targets for KPIs, page 9-3

Related Topics

Training Attendance KPI Status PMV Report, page 9-35

Workforce Intelligence for Learning Management Overview, page 9-2

Training Attendance with Job Category KPI Status PMV Report

The Training Attendance with Job Category KPI PMV report provides you with a view of the HRI Training Attendance with Job Category Status KPI data including the total number of attendees in the selected job category, the total number of successful attendees, the target values for training attendance success, and the actual values for training attendance success.

See: HRI Training Attendance with Job Category Status KPI, page 9-37

Report Parameters

You must specify values for the following parameters:

- Year/Semi Year/Quarter/Bi Month/Month – start and end dates

- Organization

- Job Category

- Business Plan

- View by (Organization, Location, Grade, Job, or Position)

You can use the following optional parameters to further restrict the report:

- Area/Country/Region/Location

- Grade

- Position

- Training Course

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

HRI Training Attendance with Job Category Status KPI

Use the HRI Training Attendance with Job Category Status KPI to notify different responsibilities when your training success for a job category falls below your target level. For example, you can notify all users with a senior management responsibility when the success of your training for a job category falls below 50%.

Business Questions

Tell me when training for a job category in my organization is unsuccessful, compared to my target for training success.

Target Comparisons

The HRI Training Attendance with Job Category Status KPI compares your KPI targets with the training hours of employees who:

- Are employed in the selected organization, and defined by the organization dimension at the date they were enrolled in the class.

- Have the enrollment status of Attended for a class.

- Are employed in the selected job category, and defined by the job category dimension, at the date they were enrolled in the class.

KPI Parameters

The HRI Training Attendance with Job Category Status KPI includes the following mandatory parameters:

- Business Plan

- HR Organization

- Job Category

- Start date

- End date

To understand how this KPI calculates training attendance success, see: Training Success Targets for KPIs, page 9-3

Training Classes by Competence Report

Run this report from the Individual Competencies report.

This report enables you to investigate training classes that provide a selected competence. The report displays:

- Course time
- Competence level delivered
- Dates the course is run
- Class title
- Class status
- Places
- Venue
- Cost

> **Note:** You can run this report only from the Individual Competencies report.

See Individual Competencies Report, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Business Questions

Which training courses are aimed at improving a particular competency?

Parameters

You need to specify values for the following parameters:

- Competence

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

Training Success Report

This report enables you to investigate how successfully employees are attending training courses for a particular organization, location, job, and job category. You can also display your Performance Management Framework (PMF) targets by selecting a business plan.

For a selected time period you can analyze:

- The number of hours you have spent training your employees.
- How many of these hours were recorded as successful by the training organization.

To be able to use this report you must have installed both Oracle HRMS and Oracle Learning Management (OLM). The report only includes training events (classes) that are managed using OLM.

The Training Success report uses a predefined FastFormula to calculate the number of hours in an event (class). You will need to customize the predefined formula if:

- The number of hours per time period do not match those of your enterprise.

- You have set up additional time periods to record the duration of events (classes).

> **Note:** If you set up additional time periods using the predefined formula, these will not be converted to hours. If you want to include these time periods in the report, you must copy and amend the predefined formula.

See Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

Business Questions

How successful are my courses?

Parameters

You need to specify values for the following parameters:

- Organization
- Rollup Organizations (Yes/No)
- Business Plan
- Location
- Job Category
- Job
- Frequency
- Reporting Dates

Key Concepts

To get the most out of this report, you need to understand the following concepts:

Training Success

This report compares the number of hours employees have spent on training events (classes), and how many of these hours have been recorded as successful.

The report includes information only about training events (classes) that have been recorded using OLM. The report excludes any external training courses or internal training events (classes) not recorded using OLM.

Relevant Employees

The report includes the training hours only of employees who:

- Are employed in the selected organization at the date they enrolled in the event (class).

- Have the enrollment status of Attended for the event (class).

- Have an assignment that matches the report parameters you select.

When an employee enrolls in an event (class), their assignment is recorded. The report uses this assignment, regardless of whether or not the employee has subsequently changed their assignment.

Training event (class) Hours for Employees

The report calculates the total number of hours employees have spent in training events (classes). For a class to be included it must:

- Have been attended by an employee selected for the report.

- Have an end date prior to the present date.

- Have a class status of Normal or Closed, if the event (class) is scheduled.

- Not have been Cancelled.

The hours spent on each training event (class) are calculated then multiplied by the number of relevant employees who attended the course.

The Training Success report uses a predefined formula to calculate the number of hours in an event (class). Depending on how you record the duration of events (classes), you may need to customize this formula. See Setting Up and Customizing Training Hours, *Deploy Strategic Reporting (HRMSi)*

Successful Hours

If the student is recorded as successfully having attended the event (class), then the employee's hours for this event (class) are recorded as successful hours.

Block Bookings

You are not required to enter student details when you make bulk enrollments in OLM. Therefore, the report excludes any hours for an event (class) where students have been bulk enrolled in the event (class).

Related Topics

Workforce Intelligence for Learning Management Overview, page 9-2

10

Self-Service Interfaces

Self-Service Interfaces Overview

Self-Service interfaces enable learners, managers, and instructors to access and manage their learning. Learners can use the learner interface to create learning paths and enroll into courses that help meet their learning goals. The manager interface enables managers to track their employees learning activities. Instructors can access the classes they teach and communicate with learners using the instructor interface.

Managing Your Learning through Learner Self Service

The learner interface is a central location where you can find all your learning. From the learner pages, you can:

- View your classes, learning paths, and learning certifications, track status of enrollments that are pending approval, play your online courses, and communicate with instructors and other learners using forums and chats.

- Browse categories and drill down into a category to view the courses, learning paths, forums, and chats within the category.

- View your learning history including cancelled and expired learning.

Managing your Employees through Manager Self Service

The Manager interface is almost identical to the Learner interface. The only difference is that the manager first selects the specific employee for which to view the learning. Every manager is also a learner, so managers can take learning for themselves.

Use the Manager pages to set specific learning goals for your employees and track their learning progress. You can define and manage the training requirements and the corresponding learning paths for your employees. This service is available to you only when you log into Oracle Applications as a manager. Using the Manager pages, for each of your employees you can:

- Access learning details, including the employee's past, current, and future learning.

- Create or delete enrollments.

- Enter or alter external learning records.

- Create a learning path.

    > **Note:** When you log in as a manager, you see the list of employees available to you according to the HR security group.

Managing your classes through Instructor Self Service

The instructor interface provides the following capabilities:

- The home page provides a snapshot view of the classes you are slated to teach.

- You can access class information concerning sessions, enrollments, resource bookings, competencies, course prerequisites, and class forums and chats.

- You can participate in and lead online discussions with learners enrolled in your classes. You can also access the category and class forums and chats you are moderating.

- You can access your supplemental bookings, which are made for non-catalog activities such as vacation or preparation time. Your past bookings are available on the Booking History page.

Key Concepts

To use the self-service interfaces, you must understand the following key concepts:

- You can view and access all your learnings from the Leaner Home. See: The Learner Home, page 10-4

- You can search the catalog for courses that satisfy your learning requirements. See: The Learner's Catalog View, page 10-4

- You can find information on your classes and interact live with learners in your classes. See: Instructor Interface, page 10-6

Self-Service Interfaces Requirements

Employees and managers can set learning goals for themselves and their employees, helping them become ready to take on new responsibilities and roles. Instructors can find information on their classes, communicate with learners, and play their online classes. The learner, manager, and instructor interfaces cater to each of your learning needs individually.

Can a learner record external learning information?

Yes. A learner can use the External Learning page to record the learning details of courses provided by an external training provider, which are not part of the OLM catalog. Learners and managers can record this external learning for information purposes, to retain a comprehensive learning history.

When does a class move to Learning History?

Any class, online or offline, that has passed its end date automatically moves to the Learning History (expired section).

When a learner completes an offline class, as when an administrator marks an instructor-led class as completed by the learner, the class automatically moves to the Learning History (completed section).

When a learner completes an online class, the class remains on the learner home page, so that the learner can easily access the class again. When ready, the learner selects Move to History to move an online class to the Learning History (completed section).

Can a learner update a learning path created by the manager?

No. A learner cannot update a learning path created by their manager, as only the manager has the rights to update a manager-type learning path. This safeguard ensures that the manager retains control over the learning the manager regards as necessary.

Can a learner unenroll from a class after requesting enrollment?

Yes, after the learner is enrolled, but the application disables the Unenroll button until the manager has approved the request for enrollment. Prior to approval, the learner can ask the manager to reject the enrollment request.

Can a learner enroll in a class when the learner has already enrolled in or has requested another class that has overlapping dates?

Yes. A learner can enroll in multiple courses that fall within the same date range.

Can a manager play the online course to which an employee is enrolled?

No. In the Manager Self Service pages, a manager can view the employee's current learning and learning history, but cannot play an online course in which the employee is enrolled (unless they themselves are enrolled).

Why do you require a separate instructor interface?

The instructor interface provides essential information to the instructors at one central location. Instructors have quick and easy access to their classes and do not have to search for required information. Instructors can play their online classes and communicate with learners using chats and discussion forums.

Self-Service Interfaces

The Learner Home

The Learner Home page provides a snapshot view of all your learning. You can view classes that you are currently enrolled in, view learning certifications and learning paths you have subscribed to, track the status of pending enrollments, and communicate with instructors and other learners using forums and chats. You can use the Home page to access your:

- **Current Learning:** The Enrollments section lists all your current enrollments. You can view the enrollment details for your classes and play your online courses (but you must use the Learning Certifications and Learning Paths sections to enroll in and play the online courses in your subscribed certifications and paths). You can search for and subscribe to learning certifications using Search. Use the Learning Paths section to create personal learning paths, subscribe to learning paths created by your manager or a catalog administrator, and access courses within your subscribed learning paths.

- **Requested Learning:** Enrollment in some courses can require the approval of your manager or an approver. For these courses, you request approval instead of enrolling immediately, and await confirmation of approval and enrollment. The Requested Learning page displays the courses that are pending enrollment approval and those where your enrollment is waitlisted.

- **Forums and Chats:** You can access your subscribed category forums and chats using the Forums and Chats page. You can post new topics to a forum or participate in existing discussions. Use chats for online discussions with other learners subscribed to the chat. You can search for and subscribe to forums and chats within a category. Use the Class Details page to access your class forums and chats.

Additional bins on the Home page give you quick access to your subscribed category chats and forums and private forum messages. The Announcements bin displays the announcements and notifications awaiting your attention. From the Browse Catalog bin, you can quickly browse through categories and their contents.

The Learner's Catalog View

Use the catalog page to browse categories, search for and enroll in courses, or request enrollment from an approver.

Searching and Browsing the Catalog

Use the Search window to search for courses, certifications, learning paths, forums, and chats. Note that search and browse show only the learning to which your catalog administrator has granted you access. Use the Browse Catalog window or the catalog page to locate learning by category. Click a category to view the subcategories, learning paths, courses, forums, and chats within that category.

You can drill down to the class level from a category. The class details page displays detailed class information and lists the course prerequisites, competency prerequisites, forums, and chats associated with the class. Class status provides useful information about a class. The class status can be one of the following:

- **Normal:** A scheduled class that has both start and end dates defined, and for which the maximum capacity has not yet been reached. Your enrollment status is **Placed** when you enroll in this class, or **Requested** if your enrollment is awaiting approval.

- **Planned:** A class not yet confirmed. The class information exists primarily to assess interest in the class if it were available. Your enrollment status is **Requested** until the class is confirmed.

- **Full:** A class that has reached its maximum capacity. Your enrollment status is **Waitlisted**when you request enrollment in this class. You are enrolled (placed) only if another learner cancels his enrollment and you are at the top of the waiting list, or if the class maximum increases.

- **Closed:** A class that is closed to further enrollments. You cannot enroll in this class..

- **Cancelled:** A class that has been cancelled.

Enrolling and Unenrolling in a Class

On enrolling in a class, you receive a confirmation that you have successfully enrolled, or a message indicating that you are waitlisted for the class. If the enrollment requires approval, then your enrollment request goes to an approver, usually your manager. You can unenroll from a class that you have enrolled in yourself, but cannot unenroll if your manager or an administrator has enrolled you.

Accessing Class Forums and Chats

You can access the class forums and chats from the Class Details page after you have successfully enrolled in the class. Class forums support private messages that are visible to selected recipients only. Only learners and moderators can post private messages to a class forum. You can use class chats for online discussions with instructors and other leaners enrolled in the class.

Learning History

Use the learning history page to view your completed learning, learning that has expired or was cancelled, and learning that you chose to move from your Home page to the Learning History page.

> **Note:** Click Move to History to move a course, learning certification, or a learning path from the Home page to the Learning History page.

The learning history page displays up to four sections, depending on the setup of your application:

- The Enrollments section presents detailed information for all your past enrollments. You can continue to play completed online courses from the learning history page, but cannot play the courses for which your enrollment is cancelled.

- The Learning Paths section lists the learning paths that have expired, those that you subscribed to and completed or unsubscribed from, and those you have moved from home to learning history.

- The Learning Certifications section displays information on expired certifications, those that you subscribed to and completed or unsubscribed from, and those you moved to the Learning History page.

- The External Learning section shows learning taken externally, such as from an outside vendor, and entered manually.

Instructor Interface

The instructor interface enables you to manage your classes and bookings, communicate with learners online, and carry out your administrative tasks.

Instructor Home

The instructor home page provides a snapshot view of the classes you are teaching or are scheduled to teach. In addition to class details, you can find information on sessions, enrollments, resource bookings, course prerequisites, competency prerequisites, class forums, and class chats. You can mark attendance from the enrollment lists, and, if enabled, update the enrollment status for learners in your classes.

You can also play your online classes from the Home page. The player automatically launches the web conference for classes that you can host and deliver to learners over the Web.

> **Note:** OLM does not track your performance when you play courses.

The Announcements bin displays the latest announcements and notifications requiring your attention. You can access the forums and chats you moderate. Your latest supplemental bookings appear in My Supplemental Bookings.

Forums and Chats

From the Forums and Chats page you can access the forums and chats for your classes and the forums and chats you moderate. Class forums support both public and private messages. Public topics and messages are available to all users for discussion. Only learners and moderators can exchange private messages. A moderator monitors the forum and chat messages and has the privilege to delete messages from a forum.

> **Note:** You can also access your class forums and chats from the Class Details page. Clicking More sends you to the Forums and Chats page, which lists all the forums and chats for the class.

Booking Details

From the Supplemental Bookings page you can access your bookings for non-catalog activities such as vacation or preparation time. The Booking History page lists your past bookings.

11

Setup and Configuration

Setup and Configuration Overview

Setting up, configuring, and extending Oracle Learning Management (OLM) requires an understanding of some basic constituents.

Key and Descriptive Flexfields

Key and descriptive flexfields enable you to configure and extend Oracle Applications. Each flexfield consists of separate fields known as *segments.*

There are two types of flexfield:

- *Key* flexfields are essential, so you must configure them before you can use the application.

  OLM includes one required key flexfield, the Training Resource flexfield. If you have installed other Oracle Applications, they may require you to configure other key flexfields. Oracle Human Resources users, for example, may have to configure the Personal Analysis key flexfield.

- *Descriptive* flexfields are optional and can define additional information you want to record in most of the application's windows.

Lookups

Lookups provide lists of valid values on certain fields. For many types of code you can add your own values and change the values that are predefined. Lookups not only ensure that all users use the same terminology, they also speed up data entry.

Structures and Data

You must also set up other structures and data that all users share across the application. The structures and data include:

- Business groups are the largest organizational unit on the system. You must set up at least one business group, but large or multinational organizations may wish to create multiple groups. Organizations are your internal training departments and other departments.

- Customers and Suppliers are the internal or external agencies with whom your enterprise exchanges goods or services.

- Resources (including instructors) are facilities, people, or equipment that you must book to run a class.

- Competencies hold the qualifications, attributes, and knowledge that learners can expect to attain by attending courses.

- Financial Reference Data enables you to transfer costs and use the Customers and Suppliers windows. If you have not installed Oracle General Ledger in your enterprise, you must set up additional financial information.

  Note: If you do have Oracle General Ledger, some or all of the data you require already exists.

Function and Security Configuration

Function and security options can restrict user access to records, windows, and functions. Setting these options can secure your data and grant users access appropriate to their needs. Function security also regulates the display of the competencies and skills.

Organization security can prevent users outside your HR organization from entering or modifying courses, enrollments, or programs.

Enrollment Status security can prevent users with specific responsibilities from entering or modifying enrollments.

Financial security can prevent users with specific responsibilities from changing or deleting monetary or unitary amounts.

Profile Options

A *user profile* is a set of changeable options that govern a range of features, including waitlisting, interactions with other applications, and the automated creation and transfer of financial details.

Setup and Configuration Requirements

Oracle Learning Management (OLM) enables you to configure important parts of the application, and to define additional information you want to record.

What are the advantages of valid lists of values?

Some fields restrict data entry to items in lists of valid values, which

- ensures that all users use the same terminology, making it easier to enquire and report on the information, and

- speeds data entry because you can enter just enough to identify the value, and the application completes the entry

Can you use more than one business group?

Yes, you can, though enterprises often use just one.

Many enterprises decide to use just one business group to hold "live" information so they can display, report, and manage all their information at the same time. However, if you are a holding company or corporation with a number of subsidiary companies who manage their learning quite separately, you may prefer to set up multiple business groups in the same installation.

How do you handle resources?

You can identify all resources--facilities, people, and equipment--you must book to run classes. You can enter instructors as individual workers. Alternatively, you can simply record that a certain supplier can provide a number of unnamed instructors.

Can you update competencies after completion of a class?

If you have implemented the competency approach, you can automatically add these competencies to a learner's competency profile after successful completion of a class. Once added to the profile, these competencies are available for career planning as well as candidate placements, performance appraisals, and other activities.

Lookups

Lookups

Lookups provide lists of valid values on certain fields throughout the application. These lists:

- ensure that all users use the same terminology, which makes it easier to enquire and report on the information; and

- speed up data entry by enabling you to enter just enough to identify the value, letting the system complete the entry.

Each list of values, called a Lookup type, consists of a code and a meaning. For example, the lookup type YES_NO contains a Code Y, meaning Yes, and a Code N, meaning No. Users do not see the codes.

Each Lookup Type supports a maximum of 250 Lookups.

Predefined Lookup Types

Some Lookup types contain essential codes that you can never delete, though you can change their meaning. For some Lookup types, you can also disable the supplied codes. Your ability to disable and add codes depends on the *access level* of the Lookup type as the table specifies:

Access Level	Meaning
User	You can add codes and disable supplied codes.
Extensible	You can add codes, but you cannot disable supplied codes because the application requires them.
System	You can neither add codes nor disable supplied codes. You can change only the meaning or description of supplied codes.

User and Extensible Lookups, page 11-4 lists the predefined Lookup types with an access level of User or Extensible.

User and Extensible Lookups

You can create new values for the following Lookup types in Oracle Learning Management (OLM). Except where noted in brackets, these lookups belong to the Learning Management application.

User and Extensible Lookups

Field or Function	Lookup
Source of learner enrollment	BOOKING_SOURCE [Human Resources]
Reason a learner failed to successfully complete a class	DELEGATE_FAILURE_REASON [Human Resources]
Cross-charge type	OTA_CROSS_CHARGE_TYPE
Content server protocol types	OTA_CS_PROTOCOL_TYPE
Units of duration	OTA_DURATION_UNITS
Date of enrollment in class	OTA_ENROLL_CLASS_DATE
Interface source	OTA_INTERFACE_SOURCE
Status (of training plan component)	OTA_MEMBER_USER_STATUS_TYPE
Object data source	OTA_OBJECT_DATA_SOURCE
Training plan component cancellation reason	OTA_PLAN_CANCELLATION_SOURCE
Name (of measurement type)	OTA_PLAN_MEASUREMENT_TYPE
Status (of training plan)	OTA_PLAN_USER_STATUS_TYPE
Time periods	OTA_TIME_PERIOD
Status of learning (external learning)	OTA_TRAINING_STATUSES
Types of (additional) training	OTA_TRAINING_TYPES
Learner enrollment priority level	PRIORITY_LEVEL [Human Resources]

Adding Lookup Types and Values

To create a new lookup type, add values to an existing lookup type, or prevent existing values from appearing in a lookup type, use the Application Utilities Lookups window.

Defining Lookup Types

You can create your own Lookup Types to provide lists of values (to validate entries, for example).

To define a new lookup type and the lookup values:

1. Select the access level for the lookup type.

2. Enter the lookup type.

3. Enter the user name of the lookup. This is the name that users see from within the application.

4. In the application field, select Learning Management.

5. Optionally, add a description of the lookup type.

6. Enter the code, meaning and optionally a description for each value.

If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.

7. Save your work.

8. Optionally, click the Usages button and select other Oracle Applications in which you want to use this new lookup type.

To add Lookup values to an existing Lookup type:

1. Query the lookup type to which you want add a value.

   You cannot add values if the access level is System.

2. Enter the code, meaning and optionally a description for each value.

   If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.

3. Save your work.

4. Optionally, click the Usages button and select other Oracle Applications in which you want to use this new lookup type.

Removing Lookup Values

You cannot delete lookup values after saving them, but you can stop them from appearing in lists of values.

To remove a user defined Lookup:

1. In the Lookups window, do one of the following:

   • Enter an end date to prevent users selecting this value after a certain date.

   • Disable the code by deselecting the Enabled check box to prevent users from selecting this value with immediate effect from the current date.

   • Change the meaning and description to create a replacement lookup.

   If you disable the lookup or set an end date, users cannot select this value when they create new records. However, they can continue to see the value when they query records that contain it.

   If you add, disable, or change the meaning of a lookup, users must log out and log back in again for your changes to take effect.

Flexfields

Key Flexfields

You can set up an unlimited number of structures for key flexfields. Each separate structure can contain up to 30 segments.

The Training Resources key flexfield, page 4-3 is an essential feature of the application, but you do not have to define its structures before you begin using OLM. Define them only when you want to define learning resources.

If you do not run Oracle Financials, you must also define an accounting flexfield. If you already run Oracle Financials, the flexfield you require already exists.

> **Note:** Avoid segments containing information that may change regularly. The application does not keep a history of changes to the combinations you create.

Descriptive Flexfields

Many windows include a user-definable descriptive flexfield. You decide the windows in which you want to record additional information. Each user-definable descriptive flexfield contains 20 segments. After you define a descriptive flexfield, the application treats the segments as part of the window.

For each segment, you can define its prompt, the type of data it can contain, and the values a user can enter. You can provide a list or range of valid values. You also control the size and display characteristics of each segment and the order in which the segments appear.

You can define two types of descriptive flexfield segments:

- Global segments, which always appear in the window.

- Context-sensitive segments, which appear only when a defined context exists. You can prompt the user to provide the context, or you can provide the context automatically from a reference field in the same zone.

  For example, a segment to hold a cost code might appear only for internal learner enrollments.

  > **Note:** Some descriptive flexfields appear in more than one window. Check all of the windows that use a descriptive flexfield before you define any of the segments. This check is especially important if you intend to make the flexfield context-sensitive to another field. You must ensure that the reference field is present in all of the windows that use the flexfield.

The following table lists all the user-definable descriptive flexfields in OLM.

User-Definable Descriptive Flexfields in OTA

Descriptive Flexfield Title	Window and Page Titles
Additional Course Information	Courses
Additional Course Version Information	Courses
Additional Address Details (HR)	Address, Applicant Entry Contact
Additional Booking Deal Information	Enrollment Agreements
Additional Booking Status Information	Enrollment Statuses
Additional Budget Values Details	Training Plan Budgets, Training Plan Member Budget, and Training Plan Events Budget
Additional Category Inclusion Details	Category Usages
Additional Delegate Booking [Learner Enrollment] Information	Enrollments
Additional Class Association Information	Customers for Restricted Classes
Additional Class Information	Scheduled Classes, Programs, Development Events, One-Time Events
Additional Finance Header Information	Finance Headers
Additional Finance Line Information	Finance Lines
Additional Learning Object Information	Catalog
Additional Learning Object Folder Information	Catalog
Additional Learning Path Information	Create and Update Learning Path
Additional Learning Path Member Information	Create and Update Learning Path Component
Additional Learning Path Category Inclusion Information	Learning Paths
Additional Letter Details (HR)	Letter
Additional Location Details (HR)	Location
Additional Non-OLM Training History Information	Learning History
Additional Organization Information (HR)	Organization
Additional Organization Unit Details (HR)	Organization
Additional Plan Details	Organization Training Plan
Additional Plan Cost Details	Training Plan Costs, Training Plan Class Costs, or Training Plan Student Costs
Additional Plan Measure Details	Training Plan Measurement Types
Additional Plan Member Details	Organization Training Plan (Training Plan Members)

Descriptive Flexfield Title	Window and Page Titles
Additional Price List Entry Information	Price Lists
Additional Price List Information	Price Lists
Additional Question Information	Questions
Additional Question Bank Information	Question Banks
Additional Resource Bookings	Resource Bookings
Additional Resource Usage Information	Resource Usages
Additional Suppliable Resource Details	Resources
Additional Test Section Information	Test Sections
Additional Training Details--replaced by Additional Non-OLM Training History Info	--
Additional Vendor Supplies Information	Suppliers

The Org Developer Flexfield

Oracle HRMS supplies a predefined descriptive flexfield, the Org Developer flexfield. Your localization team defines this flexfield to meet the specific legislative and reporting needs of your country. When you use the Organization window in OLM, you see different additional organization information depending on the legislation code you selected for your business group. The legislation code controls which segments of the Org Developer DF are visible.

Descriptive Flexfields (with Startup Data)

Oracle HRMS supplies two predefined descriptive flexfields to hold address information in different styles for different countries. These descriptive flexfields are:

- Personal Address Information
- Location Address

Address Styles in Oracle HRMS

Title	Table Name	Window Title
Personal Address Information	PER_ADDRESSES	Address
Location Address	HR_LOCATIONS	Location

You can use these descriptive flexfields to add new address styles or to change the styles provided.

Oracle HRMS also provides *context-sensitive* segments to hold each line of the address. The available address styles represent the contexts for these flexfields. The values used are the territory codes that appear in the FND_TERRITORIES table. You can use only one Address Style for each Territory in the FND_TERRITORIES table.

These flexfields provide address styles as startup data. For additional address styles, you must define a new context and segments.

To change the address style for any country, disable those segments that you do not require. Then define new segments to record your own information.

Warning: If you change the predefined styles, upgrading Oracle HRMS will overwrite your changes. If you add styles, any new startup data that contains address styles for these countries may overwrite your changes.

Organization

Organization Definitions

Define a business group and internal training organizations so that you can select these organizations when you define courses and schedule classes. You can share your organization definitions with other Oracle Applications.

Business Groups

The business group is OLM's fundamental organizational unit. All the other information you enter belongs to one business group. You can set up several default options that apply across the business group. Unless you are implementing a global business group, you cannot view information online for more than one business group at a time.

Many enterprises decide to use just one business group to hold "live" information so they can display, report, and manage all their information at the same time. However, you may want to set up multiple business groups in the same installation because:

- You want to have a copy of your live system with example records for training or testing purposes.

- You are a holding company or corporation with a number of subsidiary companies who manage their learning quite separately.

Global or Local?

You can now implement a Global (single) business group, to define all your training structures only once, and enable learners from other business groups to enroll in classes in the global business group. If you are not running or planning to run a localized version of OLM, you use the OTA:Global Business Group profile to set your business group to global.

Running a globalized training organization can result in a more efficient use of resources, greater flexibility and control over classes, and simplified enrollment and accounting procedures. For example, you can quickly identify a Spanish-speaking instructor from Spain who can teach a class in Argentina. If the class and instructor belonged to different HR business groups, you could not view them together at the same time, leading you to miss the appropriate match. However, if you plan to take advantage of the delivered extensions for French legislation, do not implement this global setup. Instead, implement OLM with a French Legislation for your business group.

> **Warning:** *Once you have set up a global business group, it is impossible to switch to a local business group.* So, if you believe you will require a localized (in other words, country-specific) version of OLM in the future, implement a local OLM business group. Note, too, that any responsibility can view either global *or* local classes, but not both.

For specific procedures, see Creating a Business Group, page 11-13

Organizations

In Oracle HRMS, *organizations* are the internal departments, divisions, sections, and units that comprise the reporting structures within your enterprise. They can also be

external organizations, such as recruitment companies (for HR departments) or tax offices (for Payroll departments). In OLM, you set up your internal training departments as organizations, and your training centers as Training Centers.

> **Note:** *Do not use OLM organizations of the type Training Center in the role of HR Organization*--that is, do not assign people to these Training Centers in Oracle HR, though you must define these centers as HR Organizations in order to add them to Organization Hierarchies. Furthermore, *do not use Training Centers in HR Organization Hierarchies that you intend to use for HR reporting purposes such as head counts*.

Before you define organizations, enter their site addresses using the Location window. Several organizations can share one site address. Use the Organization window to define a business group and internal training organizations.

Key Flexfields Associated with the Business Group

A number of other key flexfields used in Oracle Human Resources require a structure name so that you can associate it with your business group. These are:

- Job Name

- Position Name

- Grade Name

- People Group

- Cost Allocation

The supplied setup business group contains predefined default structure names. If you create a new business group, you must select the default structure names (or your own structures) in the Business Group Information window, which opens from the Organization window.

Creating Business Groups and Organizations

You must create your enterprise business groups and organizations in the following order.

To create Business Groups and Organizations:

1. Create Locations, page 11-12

2. Create a Business Group, page 11-13

3. Create a Training Organization, page 11-14

Creating Locations

Create addresses in the Location window.

> **Note:** Locations are shared across business groups in Oracle HR and with many other Oracle applications. Oracle HR uses only some of the fields in the Location window. The others are disabled for HR users.

To create a location and its address:

1. Enter the name and description of the location.

2. Select a national address style from the list.

   A window opens with the address format for the country you select.

3. Enter address information in this window and click OK.

4. Save your work.

Removing Locations:

You cannot delete locations, but you can make them inactive.

To remove an address from the Location list:

Enter an inactive date from which the location is no longer in use in your enterprise.

Creating a Business Group

If you run Oracle Human Resources, you will probably want to use your HR business group or groups in OLM, to share data on people, organizations, locations, and skills across the applications.

If you are implementing OLM without Oracle HR, use the supplied setup business group, with all of its default definitions, as the starting point for your own. The default responsibility supplied with the application uses this business group.

Global or Local Business Groups

OLM gives you the option of using a global or local business group, page 11-13. If you decide to implement a global business group, you must undertake several additional setup steps, specified below.

The OLM default navigation menus do not include access to an HR Organization Hierarchy window. Depending on your choice of local or global business group, you can manually add either the Global or the Local Organization Hierarchy window.

See Defining Menus, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

To use an HR business group or the setup business group for OLM:

1. Query the business group in the Organization window.

2. Click the Others button and select Business Group Information.

3. Check that the legislation code and currency are appropriate for your business group. The legislation code determines the default style for addresses. The currency selected here is the default currency for the business group, but you can enable and use other currencies.

4. Do not enter any other information in this window, which belongs to Oracle HR, not OLM.

5. Click OK and save your work.

   > **Note:** If you are not implementing Oracle HR, you can ignore the other windows it provides for business groups, such as Work Day Information and Budget Value Defaults.

To set up a global business group:

1. Create your business group in the Organization window, or follow the above procedure to use the setup business group.

2. Switch to the System Administrator responsibility, and open the System Profile window.

3. In the Find System Profile Values window, select the Responsibility check box and enter your responsibility. In the Profile field, enter OTA:Global Business Group and then click Find.

4. In the Responsibility column on the OTA:Global Business Group line, enter the name of your business group.

5. Back in the Find System Profile Values window, select the Site check box, deselect the Responsibility check box (if it has remained selected), and enter HR:Cross Business Group in the Profile field.

6. In the Site column on the HR:Cross Business Group line, enter Yes.

7. Save your work.

8. To ensure that you can view and use competencies, verify that each competency is selected as Global. If you can access an HR responsibility, you can reach the Competencies window from Talent Management on the HR Navigator. If you run Oracle HR but cannot access an HR responsibility, contact your System Administrator.

9. To ensure that you can view all available Training Centers, you must define them in your OLM global business group.

   > **Note:** *Do not use OLM organizations of the type Training Center in the role of HR Organization*--that is, do not assign people to these Training Centers in Oracle HR, though you must define these centers as HR Organizations in order to add them to Organization Hierarchies. Furthermore, *do not use Training Centers in HR Organization Hierarchies that you intend to use for HR reporting purposes such as head counts*.

Creating a Training Organization

Use the Organization window to set up internal organizations, such as training departments.

All Oracle applications you install share the information entered in the Organization window. Organization names must be unique within a business group, and business group names must be unique across your applications network.

To create a new organization:

1. Enter a name that is unique within the business group, and optionally, select an organization type.

2. Enter a start date early enough for any historical information you must enter.

3. Optionally select a location to record the site address. You can also enter an internal address to add more details such as a floor or office number.

4. Select Internal or External.

There is no additional information to enter for a training organization.

5. Save your work.

> **Note:** You do not have to select a classification for a training organization. You can select and enable the *HR Organization* classification to assign employees to this organization in Oracle Human Resources.

Catalog Setup

Class and Enrollment Status Setup

Oracle Learning Management (OLM) provides statuses, such as Planned and Full, that reflect typical stages in the class life cycle. You can use these class statuses as they are, and you can create your own "user" statuses (as values for the lookup type EVENT_USER_STATUS). Although these user statuses do not drive application functionality, you can use them for reporting. Enrollment statuses, such as Requested and Attended, determine waiting lists and drive other processes. Again, you can use these as they are, or you can create your own based on the existing enrollment statuses. The combination of class and enrollment statuses enables you to schedule and track classes and to manage enrollments.

You cannot delete an enrollment status used in any learner enrollment records. However, you can deactivate a status to prevent its use in any new enrollments.

Using Lookups, you can also customize the source of an enrollment, such as a brochure or agency, or the reasons learners fail to complete a class. This enables you to track the effectiveness of your class marketing, or to analyze the success rates of certain classes, for example.

Online Content

Content Servers

Defining a content server is not mandatory. OLM can play content associated with any URL. This can be a third-party web server, or your own web server, inside or outside a firewall.

However, if you define one or more content servers within OLM, you can transfer content to the server through the OLM interface, with no requirement for an ftp server, using the Upload and Import utilities:

- Load files from a local machine to a content server--Upload (on folder or learning object details page)

- Load files contained within a SCORM 1.2 zip file from a local machine to a content server--Import (on folder or learning object details page)

Content Security

An OLM content server does not automatically provide any additional security to your content. Learners can access the content direct from any browser, if they know the URL, unless you explicitly protect the server, using operating system or software authentication.

SCORM Adapters

Set up a SCORM adapter if your content explicitly uses SCORM CMI calls.

The Oracle SCORM adapter enables SCORM-compliant learning objects to communicate with OLM 11i using the SCORM JavaScript API. The adapter is necessary to avoid the JavaScript security restriction that HTML documents in two frames cannot communicate unless they are downloaded from the same Internet domain. Learners cannot launch SCORM-compliant learning objects in the OLM player until you have installed this adapter.

If your content does not contain SCORM CMI calls, the SCORM adapter setup is not necessary. You can perform these steps later, if your company purchases or develops SCORM content at a later time.

Installing the Oracle SCORM Adapter

You require three standard Oracle SCORM adapter files in order for the CMI calls to work. Oracle Learning Management (OLM) provides the following adapter files as a patch, available in the OLM 11i area on Metalink:

```
Oracle_SCORM_Adapter.html
adapter_blank.html
adapter_lms.html
adapter_test.html
browserTest.jar
signedlms.cab
signedlms.jar
signedlms2.jar
```

For the SCORM adapter to function correctly, you must place a copy of all the files in a web-accessible location on **each** web server from which you intend to serve SCORM learning objects, and all three files must exist together in the same directory.

`Oracle_SCORM_Adapter.html` is the primary file, and is the file to which you refer when registering SCORM adapters in the Setup tab in OLM, accessible from the Learning Administrator responsibility.

The URL to the adapter files must have the same protocol, host, and port number as the URL to the content files.

Registering the Oracle SCORM Adapter

Once you have installed the Oracle SCORM adapter in an appropriate location on each web server, you must register the SCORM adapter location in OLM. This enables OLM to determine the URL to the corresponding SCORM adapter, based on the starting URL of each learning object.

If you have multiple business groups, you must register the adapter for each business group.

Diagnosing Problems

If you or your learners encounter problems when playing SCORM-compliant content, and you have verified that the URL properties of the SCORM adapter are correctly set up, select the box, Show diagnostic messages, on the adapter properties page. This option displays diagnostic messages in the browser's Java console, when you launch and play the content. The messages show each CMI function call made by the content, the arguments to the call, the messages sent to and from the server to execute the call, and the value returned from the call.

The Log diagnostic messages box enables the logging of the diagnostic messages to a local file. The logging option is useful for diagnosing problems that are not consistently reproducible. By logging, a permanent record of the SCORM activity is available in the log file, whereas messages in the Java console are lost when the user closes the browser or clears the console. Checking this box implies that the messages are displayed on the Java console, eliminating the need to check Show Diagnostic messages.

> **Note:** The Java console must be enabled in the browser for you to see the diagnostic messages.

Using the Signed SCORM Applet

The adapter properties page includes a check box, Use signed SCORM applet. The default value of this check box is deselected, and is it likely you will never have to select this option. The adapter works in such a way that signing is not necessary.

However, if you experience communication problems in your SCORM-compliant content, and if you have exhausted all other possibilities both in the adapter setup and in the content itself, select the Use signed SCORM applet check box and test your content again. If the problem is fixed, keep the check box selected for that adapter. If not, deselect the select box and keep looking!

Conference Servers

To deliver online synchronous classes, it is mandatory to define a conference server. A conference server integrates your application with Oracle Web Conferencing (OWC). OLM uses the integration with OWC to deliver online synchronous classes over the web.

To set up a conference server, you must know the server URL, which is the URL that OLM uses to make appropriate calls to the conferencing tool. You must also specify the Site ID and the Authentication Token, which are authentication parameters to connect to the OWC server from your application. You can obtain these values from the OWC administrator.

Online Player Setup

Keeping the Player Session Alive

The online player pings the server at a particular interval to ensure that a learner's session is not timed out even if the learner remains in a single learning object for a long period of time. You can control the length of the time out and the interval between pings made to the server, by setting the following profile values:

- **OTA_PLAYER_TIMEOUT_MINUTES:** This is the default number of minutes that the player session is kept alive when a learner remains on a single learning object. For example, if this profile value is set to 60 minutes, then the player continues to ping the server for 60 minutes after the learning object is launched. The learner's session times out when the pinging stops and there is no server activity within the normal session timeout length. Setting this profile value guarantees that the session lasts at least OTA_PLAYER_TIMEOUT_MINUTES after launching the learning object.

- **OTA_PLAYER_PING_INTERVAL:** This is the interval (in minutes) between pings made to the server by the online player. The ping interval should be less than the session timeout length to ensure that the session does not time out between pings.

Supporting Sun Java 2 Security Model

The SCORM API in OLM is compatible with the Sun Java 2 security model, enabling learners to use Netscape 7, IE 6+, Mozilla, and Firefox browsers with SCORM courses. The API works in IE 6+ without any configuration changes. To enable the SCORM API to work in Netscape, Mozilla, or Firefox, you must grant the following permission using your Java Policy file:

permission java.net.SocketPermission " <OTA hostname> : <port>", "connect"; where <OTA hostname> and <port> are the host and port of your application server.

Logging SCORM Debugging Information

You can log the SCORM debugging information that appears in the Java console to a local file on your computer. This feature works in IE 6+ without any configuration changes. To enable logging of SCORM debugging information in Netscape 7, Mozilla, or Firefox, you must grant the following permissions using your Java Policy file:

permission java.net.SocketPermission " <OTA hostname> : <port>", "connect";

permission java.io.FilePermission " ${user.home}$ {/} lms_log.txt", "write";

permission java.util.PropertyPermission " user.home ", "read";

where <OTA hostname> and <port> are the host and port of your application server.

Setting up a Content Server

OLM uses a servlet to upload or download physical content files. So, you do not require an FTP server, nor a middle tier installation on the content server. You simply require one container for the servlet, such as Apache and ApacheJserv. So that only the trusted servers can access OLM content, the IP addresses of the APPS middle tiers are specified in the container property file as arguments passed to the Java interpreter.

> **Caution:** The servlet does not work for a group that has multiple processes (or JVMs).

You set up a content server in two stages:

1. Set up the container.

2. Define the content server in the OLM administration interface.

Steps to set up the container:

1. Install the container, such as Apache and ApacheJserv.

2. Create a servlet repository called `servlets`. For example, in Jserv, the servlets repository exists by default.

3. Copy the following files to your servlet repository directory:
   `$JAVA_TOP/oracle/apps/ota/admin/common/util/ContentServerServlet.class`
   `$JAVA_TOP/oracle/apps/ota/admin/common/util/ProtocolConstants.class`
   `$JAVA_TOP/oracle/apps/ota/admin/common/util/SystemUtils.class`
   `$JAVA_TOP/oracle/apps/ota/admin/common/util/SystemUtils$JarUtility.class`
   `$JAVA_TOP/oracle/apps/ota/admin/common/util/ContentServeerClientData.class`

4. Also ensure the `oracle.apps.fnd.common.VersionInfo.class` file is located under the class path directory that is defined for the repository.

5. In `zone.properties`, add the following:
   `# ----- OLM Content server ----- # servlet.`
   `OtaContentServerServlet.code=oracle.apps.ota.admin.common.`
   `util.ContentServerServlet servlet.OtaProtocolConstants.`
   `code=oracle.apps.ota.admin.common.util.ProtocolConstants`
   `servlet.OtaSystemUtils.code=oracle.apps.ota.admin.common.`
   `util.SystemUtils servlet.OtaSystemUtils$JarUtility.code=`
   `oracle.apps.ota.admin.common.util.SystemUtils$JarUtility`
   `servlet.OtaContentServerClientData.code=oracle.`
   `apps.ota.admin.common.util.ContentServerClientData #`
   `----- END OLM`

6. Create an alias for the directory where the content will be stored. For example, in Apache, to create an alias for the physical directory

`D:/apache/rootdir/`, add the following inside the `httpd.conf` file: `Alias /content/ 'D:/apache/rootdir/'`

7. Add the list of middle tiers and the temporary file location as arguments to the Java Interpreter. For example, in Jserv, add following lines inside the `jserv.properties` file: `wrapper.bin.parameters=-Dmiddletier= 148.87.19.51+148.87.19.50+144.25.78.202+10.10.20.140 wrapper.bin.parameters=-DTemp=D:\temp wrapper.bin. parameters=-Djava.io.tmpdir=/dbfiles/applcsf/log` Here the numbers, such as 148.87.19.51 and 148.87.19.50, are IP addresses of all trusted middle tiers, and + is the separator for multiple addresses. Servers not specified in the list are not able to access the servlet. `D:\temp` is the absolute path of the temp location where files are saved temporarily while handling physical content. `/dbfiles/applcsf/log` is any existing directory for log files.

Steps to define the content server in OLM:

1. Log in to OLM with Learning Administrator responsibility.

2. Click the Setup tab.

3. Click Content Servers.

4. Click Create Content Server.

5. Provide the following information:

   1. **Name:** `XYZ` (your choice of content server name)

   2. **Protocol:** `http` or `https` (generally http)

      > **Note:** To use a content server protocol other than ftp, http, or https, you must add the value to the Content Server Protocol Types lookup.

   3. **Host:** The machine name on which your servlet container is running. Example: `ap1234.oracle.com`.

   4. **Port:** The port at which servlet container is running (by default the port is `80`)

   5. **Physical Directory:** The absolute path of the location where the content will be stored. For example, according to the example above: `D:/apache/rootdir/`

   6. **Virtual Directory:** The alias you created when setting up the container properties. For example, according to the example above: `/content`.

Setting up a SCORM Adapter

You set up a SCORM adapter in two stages:

1. Copy the necessary files to the same web server as your SCORM-compliant content. If you have multiple servers that provide SCORM content, each server requires a copy of the files.

2. Register each adapter in OLM. If you have multiple business groups, you must register the adapter for each business group.

Steps to copy the SCORM adapter files:

1. Download the patch, from the OLM 11i area on Metalink, to a temporary location.

2. Unzip the patch file, and copy the three adapter files to a web-accessible location on **each** web server from which you wish to serve SCORM learning objects. All three files must exist together in the same directory.

Steps to Register a SCORM adapter in OLM:

1. Log in to OLM with Learning Administrator responsibility.

2. Click the Setup tab.

3. Click SCORM Adapters.

4. Create an adapter, and enter the following fields:

   - URL Prefix: A starting URL that commonly identifies the location of content on one web server, for example: `http://www.mycompany.com`

   - Adapter URL: The complete URL for the Oracle SCORM Adapter file on the same server, for example: `http://www.mycompany.com/Oracle_SCORM_Adapter/Oracle_SCORM_Adapter.html`

5. Repeat the previous step for each business group.

Competency Setup

Competencies

If you have installed Oracle Human Resources, you can maintain competencies for courses and learners. Competencies hold the qualifications, attributes, and knowledge that learners gain from attending classes.

You can also allow specific users to add the competencies delivered by the class to a learner's competency profile.

To use competencies, you must set up a framework of competencies.

See Career and Succession Management, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

> **Warning:** *Do not use this software as the sole method of assessment for making judgements about hiring, performance, or deployment. Your company may be held liable if you rely on incorrect computer data or computerized rules to make such judgements.*
>
> It is the customer's responsibility to take all appropriate measures to comply with the Data Protection and Privacy laws of the countries in which they operate.
>
> All personal information that you store or use with this software must be up to date, accurate, and relevant. You should confirm the details of the restrictions that apply to the computerized storage and use of personal information with your own legal department or representative.

Competency Automation Setup

To automate updates to learner competency profiles, you must use Oracle Workflow to configure approval settings, page 11-24. You should also review the default competency-related workflow notifications.

Mapping Competencies to Languages

The Map Competencies to Languages window enables you to link language competencies set up in Oracle HR to the list of languages used in all Oracle Applications. This mapping enables you to search for instructors who fulfill the language requirement of a specific class. You can also add a minimum proficiency level to each mapping, so that your search returns only those instructors who know the language well enough.

See Finding Specific Locales and Instructors, page 4-7

To map competencies to languages:

1. Open the Map Competencies to Languages window from the Navigator.

2. In the Competence field, select a language competence from the list.

3. Optionally, select a minimum proficiency level for the mapping.

4. In the Language field, select a language from the list.

5. Repeat steps 2-4 as needed.

6. Save your work.

Configuring Competency Update Automation

Use Oracle Workflow to enable and configure automatic competency updates.

> **Caution:** Changing the workflow process name or the functionality itself may disable the ability to override the automation rule at the course or offering level.

To enable and configure automatic competency updates:

1. From Workflow Builder, query the workflow process name OTA_COMPETENCE_UPDATE_JSP_PRC.

2. Set the Attribute Name HR_APPROVAL_REQ_FLAG to one of these four options (the default is Notification, Manual Update):

   • Notification, Automatic Update after Approval

   • Notification, Automatic Update without Approval (automatic update occurs without approval)

   • No Notification, No Auto Update

   • Notification, Manual Update (learner or manager notified that they must manually update profile)

Financial Setup

Currencies

You can use multiple currencies to hold price and cost information in OLM.

Your startup data includes the definitions of all world currencies. These definitions are shared by all Oracle Applications and are controlled by the system administrator responsibility. You enable those currencies in the Currencies window.

You can never delete a currency, but you can disable it.

> **Note:** You must enable at least one currency as the default currency for all information related to money. This default is known as the *base currency* for your business group.

Cross-Charging

For internal classes, OLM can charge a learner's cost center when the learner enrolls in an OLM class. The cross-charge accounting window enables implementers to establish links between OLM and Oracle General Ledger. Several system profiles control automatic cross-charging.

Ensuring accurate cross-charging of enrollments takes five steps:

1. The learner enrolls in a class.

2. The application automatically creates finance headers and lines, as long as the implementers have accurately mapped accounting fields between OLM/HR and General Ledger.

   See Setting Up Cross-Charge Accounting, page 11-26

3. Once the course has finished, the learning administrator marks the learner's enrollment status as Attended.

4. The administrator runs the Create Cross Charging GL Lines for Transfer concurrent process.

5. To complete the cross-charge transfer, the administrator runs the Journal Import process in GL.

   > **Note:** For OLM to transfer the costs, the Oracle GL application must contain the Journal Import source Transfer.

Financial Security

Set up financial security to restrict which users can enter, update, and delete financial information, and which ones cannot.

How Financial Security Works

You can prevent users of a certain responsibility from being able to update and delete the following amounts:

- Monetary
- Unitary (invoice)

- Standard

Monetary and Unitary (Invoice) Amounts

To prevent users from updating and deleting monetary and unitary (invoice) amounts, enter the function OTA_FIN_ST_MONEY_NO_UPDATE on the menu for that responsibility.

Standard Amounts

To prevent users from updating and deleting standard amounts, enter the function OTA_FIN_PRICE_NO_UPDATE on the menu for that responsibility.

Which Windows Does Financial Security Affect?

Once financial security has been set up (depending upon whether you are preventing users from updating money, unitary, or standard amounts), it affects the following windows:

- Customers for Restricted Class
- Finance Lines

Enabling Currencies

Use the Currencies window to enable or disable currencies.

To enable a currency:

1. Query the currency you want to enable.

2. Select the Enabled check box.

3. Save your change to enable the currency.

To disable a currency:

1. Query the currency you want to disable.

2. Deselect the Enabled check box or enter an end date for the currency.

3. Save your changes to disable the currency.

Setting Up Cross-Charge Accounting

To enable cross-charging to occur when a learner attempts to enroll in a class, you must fill out the Cross-Charge Accounting window, accessible from the Setup menu. The window maps all defined segments in Oracle General Ledger to a particular table in Oracle HR or to a constant value you specify.

See Cross-Charging, page 11-25

You must fill out this window twice for each combination of business group and set of books, once to specify the account to transfer from (the debit account) and once to specify the account to transfer to (the credit account).

> **Note:** To ensure that workflow notifies the appropriate person if the cross-charge processing fails, you must include a value in the Owner field of the Class or Update Class pages.

Setting Up Cross-Charge Accounting:

1. From the lists of values, select an HR business group and a General Ledger Set of Books. The cross charge type defaults to Enrollment when you click the list of values icon.

2. Select From in the From/To field. Enter a starting date in the Date From field. You can also enter an ending date in the Date To field. Save your work.

3. In the Segment Mapping Details region, the GL Chart of Accounts column automatically fills with segments drawn from the GL Set of Books you have specified.

    > **Note:** *For each row, you must specify at least one value.* The function works in sequence: if it fails to find a legitimate value in the HR Costing Data Source column, it moves on to the HR Costing Segment column; if it fails there, it looks for a Constant Value. Then if no constant exists, it generates an error message.

4. If you use the HR Costing Data Source, select from one of four choices: Assignment, Business Group, Organization from Assignment, or Sponsor Organization. If you select Sponsor Organization, then the Sponsor field in the Scheduled Class window must contain an organization with a cost center value.

5. If you use the HR Costing Segment, select from the list of values taken from the Payroll Cost Allocation flexfield linked to the specified HR business group.

6. In the Constant Value field, select from the list (taken from the corresponding segment in GL) a default value that the function can use if it finds no legitimate value in the previous two columns.

7. Save your work, then repeat the above steps, using To in the From/To field.

Setting Up Financial Security

Use the Menus window to set up financial security.

To set up financial security:

1. Query the OTA_NAV menu.

2. Insert a new line and enter the sequence number.

    > **Note:** Do not enter values in the Navigator Prompt, Submenu, or Description fields.

3. To prevent users from updating and deleting monetary and unitary amounts, enter OTA_FIN_ST_PRICE_NO_UPDATE in the Function field .

4. To prevent users from updating and deleting standard amounts, insert a new line and sequence number and enter OTA_FIN_MONEY_NO_UPDATE in the Function field.

5. Save your changes.

Creating a Calendar

Use the Calendar window to create a calendar for use by supplier and customer windows.

You have to set up only one period for the calendar. You do not have to enter multiple periods or calendars.

> **Note:** This form is shared with other Oracle Applications. OLM does not use some of the fields in this window.

To create a calendar:

1. Enter a name for the calendar; for example, **OLM Calendar**.

2. Enter a description for the calendar.

3. Enter a period prefix; for example, **OLM**.

4. Enter the period type, typically **Year**.

5. Enter the four-digit year.

6. Enter the quarter, **1, 2, 3,** or **4**.

   OLM creates a name (displayed in the Name field in the Periods region) from the prefix and year you entered.

7. Enter the period number, which must be **1**.

8. Enter the start and end dates the period covers; for example, **01-JAN-2000** to **31-DEC-2000**.

   > **Note:** These dates are for reference only. OLM does not use them.

9. Save your work.

Defining a Set of Books

Use the Set of Books window to determine the currency, account structure, and accounting calendar.

> **Note:** This form is shared with other Oracle Applications. OLM does not use some of the fields in this form.

To define a set of books:

1. Name the set of books; for example, **OLM Set of Books**.

2. Enter a short name for the set of books; for example, **OLM**.

3. Enter a description for the set of books.

4. Select the name of your Chart of Accounts (that is, the name of the Accounting Flexfield structure you have set up).

5. In the Functional Currency field, select the functional currency used by your enterprise; for example, **USD**.

6. Select the accounting calendar you created previously; for example, **OLM Calendar**.

Entering Closing Information:

1. Select the Closing tabbed region and enter zeros in all the segments as account information in the Retained Earnings field for Company, Department, and Account.

2. Enter zeros in all the segments as account information in the Translation Adjustment field.

Entering Journalling Information:

1. Ensure that the Balance Intercompany Journals and Suspense check boxes are selected.

2. Enter zeros in all the segments as account information in the (Suspense) Account field.

3. Save your work.

> **Note:** These accounts are for reference only. They are not used by OLM.

Choosing the Set of Books

Use the Choose Set of Books window to select the set of books to use.

To choose a set of books:

1. Select the set of books you previously created.

   OLM displays the Chart of Accounts, currency, and calendar you previously created.

2. Save your work.

Defining Financials Options

Use the Financials Options window to set up your financials options.

> **Note:** This form is shared with other Oracle Applications. OLM does not use some of the fields in this form.

To define financials options:

1. Select the Accounting tabbed region (if not already displayed).

Entering Accounting Information:

1. Enter **1** in the Future Periods field.

2. Ensure that zeros (000.000.000) are displayed in the following fields:

   - Liability
   - Prepayment
   - Future Dated Payment
   - Discount Taken
   - PO Rate Variance Gain
   - PO Rate Variance Loss

Entering Supplier-Entry Information:

1. Select any invoice match option from the list.

2. Select the Supplier Numbers of Automatic as the entry and Numeric as the type from the lists.

Entering Supplier-Payables Information:

1. Select 45 Net as the payment terms.

2. Select Check (cheque) as the payment method.

Entering Supplier-Purchasing Information:

1. Select any Ship to Location from the list.

2. Select any Inventory Organization from the list.

Entering Human Resources Information:

1. Enter a business group; for example, **OLM DEMO Business Group**.

2. Select Home in the Expense Reimbursement Address region.

3. Select Automatic as the payment method.

4. Enter **5** in Next Automatic Number.

5. Save your work.

Defining System Options

Use the System Options window to set up your system options.

> **Note:** This form is shared with other Oracle Applications. OLM does not use some of the fields in this form.

To define system options:

1. Ensure that the Accounting tabbed region is displayed.

Accounting Information:

1. Enter **Cash Basis** as the accounting method.

2. Enter **OLM Set of Books** as the name.

3. Select zeros (000.000.000) in the following fields:

    • Finance Charge Activity (course)

    • Realized Gains Accounts

    • Realized Losses Account

    • Tax Account

4. Leave the default number of days per posting cycle as they are.

Tax Information:

1. Select Sales Tax as the method of paying tax.

2. Select No Validation - Country as the location flexfield structure.

3. Leave 000000 to 99999-99999 as the default postal code range.

4. Select No Validation as the address validation.

5. Select Total Tax Only for printing invoices.

6. Leave the default tax cache size as it is.

7. Select Line as the calculation level.

8. Select Nearest as the rounding rule.

Transaction and Customer Information:

1. Leave the maximum memory in bytes as 65535.

2. Leave the log file message level as 0.

3. Select DEFAULT as the grouping rule name.

Miscellaneous Information:

1. Enter **5000** as the split amount.

2. Enter **90** as the number of days in the Days Sales Outstanding Calculation

3. Leave the Invoices per Commit as 1000.

4. Leave the Receipts per Commit as 1000.

5. Select Open Invoice Due Date as the charge back due date.

6. Select United States as the country.

7. Select None as the source of territory.

8. Select Line First-Tax After as the applications rule set.

Function and Security Configuration

Organization and User Security

OLM offers three methods for determining administrative access to people and functions:

- *Role-Based Access Control* (RBAC) determines administrator access to the range of OLM functions. The application uses permissions to define view and edit access to functions according to a range of roles.

- The *HR Security Group model* specifies the groups of people to which administrators gain data-entry access.

- *Organization Security* enables only those users who belong to the organization sponsoring a class to update and delete classes, enroll learners, and update enrollments.

Role-Based Access Control

OLM uses Role-Based Access Control (RBAC), a core Oracle Applications methodology for controlling administrator access to functions. RBAC uses a hierarchy of roles, permission sets, and permissions to fine-tune the access.

See the Oracle User Management Overview, *Oracle User Management User Guide*

For detailed information about configuring RBAC, see Creating and Updating Roles, *Oracle User Management User Guide* and related help topics. Note the OLM-specific information below.

OLM seeds several roles under the main Learning Administrator role:

- Learning Catalog Administrator

- Learning Content Administrator

- Learning Enrollment Administrator

- Learning Finance Administrator

- Learning Resource Administrator

- Learning Setup Administrator

The Learning Assessment Administrator role is independent of the other administrator roles. Another seeded role, Learning Instructor--Update Enrollment Status, enables instructors to update the enrollment status of learners enrolled in a class they are teaching. Every user who creates and updates roles needs the User Management responsibility and the Security Administrator role.

OLM seeds numerous permissions and permission sets, which appear on Metalink in the document "OLM Seeded Roles, Permission Sets, and Permissions". The seeded permission sets come in two flavors:

- Function security sets (such as Manage Catalog UIs) determine access to functions, menus, individual pages, tabs, sub-tabs, and side navigation menus

- Data security sets (such as Edit Enrollment) grant the ability to view or edit data such as courses and enrollments; these typically work by hiding buttons (such as Create and Update)

The Edit permission sets combine the permissions to create, update, and delete, so you may wish to create your own Update permission sets. You can attach multiple sets to each role.

To configure RBAC for OLM effectively, be aware of the following issues:

- Do not change the seeded roles themselves; copy them and use the copies

- Do not change the Role Code prefix of UMX| (including the "pipe" character)|

- Never grant a role direct access to permissions; always use permission sets

- As other Oracle Applications in your enterprise may use RBAC, it's a good idea to prefix your grants and sets with OLM or some other unique identifier

- Do not attempt to combine function security (menu access) and data security (view and edit capability) in the same permission set

Security Groups

If you enable (or an HR implementation has previously defined) the security group model, you can attach security groups to responsibilities, giving users of those responsibilities access only to the people in those groups. By default, each administrator can enter data for all people in their own organization (typically their business group). To grant those administrators access to people outside their organization, you must create security groups that include those organizations. To restrict administrator access to a subset of people within their business group, you can subdivide the business group into multiple security groups according to its organizational hierarchy.

Security groups control access through people-based lists of values such as those found in enrollments and subscriptions. Notable exceptions are instructor (trainer) and training center.

See Security Models, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Organization Security

If an administrator who belongs to the organization sponsoring (administering) a class selects the Secure box on the Create Class page, only users who belong to the same organization can update and delete classes (including customer-based classes), or enroll and maintain learners in those classes.

Users who do not belong to the sponsoring organization can neither update nor delete classes. They also cannot:

- Enroll learners in those classes (and customers for customer-based classes)

- Update an enrollment

- Delete an enrollment

- Create, delete, or update a session

A user from the sponsoring organization can remove security from a class, providing no enrollments exist for the class.

If you do not set up organization security, all users can update and delete classes and programs and enter, delete, and update enrollments.

Profile Options

A system profile is a set of changeable options that determines how (or whether) a particular function runs. You can set profiles at different levels as described in the following table:

Level	Meaning
Site level	These settings apply to all users at an installation site.
Application level	These settings apply to all users of any responsibility associated with the application.
Responsibility level	These settings apply to all users currently signed on under the responsibility
User level	These settings apply to individual users, identified by their application usernames.

Values set at a higher level cascade as defaults to the lower levels. Values set at a lower level override a default from a higher level. Many profiles enable you to enter a value only at one or more of the levels (see the Configurable Level column in the tables below).

> **Note:** Set site-level options first to ensure that all options contain a default. A profile option without a default value can cause errors when you use windows, run reports, or run concurrent requests.

You use the System Profile Values window, accessible from the System Administrator responsibility, to set profile options at each level for your user community. If you change a user profile option value, the change takes effect as soon as your users log on again or change responsibilities.

Application users can use the Personal Profile Values window to set their own profile options at the user level. Not all profile options are visible to users, and some profile options, while visible, cannot be updated by end users. Changes that users make to their personal profile options take effect immediately.

See Personal Profile Values Window, *Oracle Applications System Administrator's Guide*

Profile Options Tables and Descriptions

The tables and text below list all the OLM profile options, grouped according to category: General, Content, Waitlisting, Order Management integration, and Self-Service.

The tables indicate the levels at which the User or System Administrator can enter values for the profile options.

Some profile options require you to provide a value, and some already provide a default value that you can change.

General Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
HR: Query-Only Mode	All	Yes, **No**	Yes
OTA: Assessment Branding Image	Responsibility	<name of image>, <**null**>	No
OTA: Data Source Module	Responsibility	iLearning, iRecruitment, <**null**>	Yes, if using iRecruitment
OTA: Default Attended Enrollment Status	Responsibility	<enrollment status based on Attended>	Yes
OTA: Global Business Group	Responsibility	<global business group>	Yes if using globalization
OTA: Hide Employee External Address	Site	Yes, No, <**null**>	Yes, at Site level
OTA: Maximum Enrollments Processed Online	Site, Application	<number of minutes>, **3**	No
OTA: Project Accounting Integration	All	Yes, **No**	No
OTA: Oracle Online Learning Option Licensed	Site, Application	Yes, **No**	Yes
OTA: Restrict Employees from Customer-Restricted Classes	Responsibility, Site	Yes, No, <**null**>	No

HR: Query-Only Mode

To restrict access to query-only for all OLM windows on a menu, set HR: Query-Only Mode to Yes.

To grant query-only access to some forms and full access to other forms, set the HR: Query Only Mode profile to No and use the parameter QUERY_ONLY=YES at form function level to restrict access to individual forms.

See Restricting Access to Query-Only Mode, *Oracle HRMS Implementation Guide*

OTA: Assessment Branding Image

Enables other applications to use alternative branding images in assessment headers. Omit any file extension from the name.

OTA: Data Source Module

Restricts access to Generalized Assessment data for users of iRecruitment. Select "iLearning" to enable these users to view data originating in OLM, or "iRecruitment" to enable them to view data only from iRecruitment.

OTA: Default Attended Enrollment Status

Establishes a default value for the Attended enrollment status.

OTA: Global Business Group

Enables globalization. Enter the name of the business group you wish to designate as global.

OTA: Hide Employee External Address

Hides or reveals, at site level, the external (home) addresses of your employees. The default value is null, but is equivalent to Yes (addresses remain hidden).

> **Warning:** To continue to view external employee addresses, existing customers must set this profile to No. For existing enrollments, however, any formerly selectable external address selected remains visible. To ensure data privacy under these circumstances, the user cannot change the address (the lookup contains no items).

OTA: Maximum Enrollments Processed Online

As an administrator selects learners for bulk enrollment, determines the number of enrollments processed immediately; selecting more than the specified number sends the enrollments for processing by the Process Bulk Enrollments concurrent program.

OTA: Oracle Online Learning Option Licensed

Set this value to Yes to enable the setup and play of online classes, if you have licensed OLM with the Online Learning option. If you have not licensed OLM with the Online Learning option, set this profile to No.

OTA: Project Accounting Integration

Identifies whether OLM is integrated with Project Accounting, for reporting purposes only. Entering Yes displays the Project Number and Project Name fields on the Create Class and Update Class pages. You can then enter a Project Number, which displays the corresponding Project Name. You can also write custom reports to list classes held for each project.

OTA: Restrict Employees from Customer-Restricted Classes

Prevents employees in your organization from enrolling in customer-restricted classes.

Content Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
OTA: Default Player Session Length	Site, Application	<number of minutes>, **0**	No
OTA: Player Ping Interval	Site, Application	<number of minutes>, **0**	No
OTA: XSD Server Location	Application	<server address>	Yes if using content

OTA: Default Player Session Length

This is the default number of minutes that the player session is kept alive when a learner remains on a single learning object. Setting this profile value guarantees that the session lasts at least OTA_PLAYER_TIMEOUT_MINUTES (the value set for the Player Timeout field on the learning object page) after launching the learning object. There is no upper limit on this value.

OTA: Player Ping Interval

This is the interval (in minutes) between pings made to the server by the online player. The ping interval should be less than the session timeout length to ensure that the session does not time out between pings. There is no upper limit on this profile value, but if it is greater than the value of OTA_PLAYER_TIMEOUT_MINUTES (the value set for the Player Timeout field on the learning object page), then the player will not ping the server.

OTA: XSD Server Location

Identifies the directory that holds required XSD files used during export of learning objects or tests. Set the value to http://[machine name]:[port]/OA_HTML/

Waitlisting Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
OTA: Activate Automatic Waitlist Enrollments	All	Yes, **No**	Yes, at Site level
OTA: Automatic Waitlist Enrollment Default Booking Status	All	Placed, <value based on Placed>, **<null>**	Yes
OTA: Automatic Waitlist Enrollments: Hours Prior To Class	All	<numeric> (**0**)	Yes, at Site level
OTA: Maximum Enrollments Processed Online	Responsibility, Site	<numeric>, **<null>**	No
OTA: Waitlist Sorting Criteria	All	**Booking Priority**, Date Placed	Yes, at Site level

OTA: Activate Automatic Waitlist Enrollments

Indicates whether you are activating the automatic waitlist enrollments functionality. Enter Yes or No.

OTA: Automatic Waitlist Enrollment Default Booking Status

Holds the default enrollment status for automatic waitlist enrollments. Enter either Placed or a user-defined value based on Placed.

> **Warning:** Select an enrollment status with the same business group that you intend to use for your OLM responsibility. If you do not, OLM cannot use that status to enroll learners from the waitlist.

OTA: Automatic Waitlist Enrollments: Hours Prior To Class

Specifies, in number of hours prior to a class, when you want to stop automatic waitlist enrollments for any class. You must manually control any enrollments for the period specified. Enter a numeric value (0, 1, 2,...n).

OTA: Maximum Enrollments Processed Online

Determines the number of enrollments processed immediately; selecting more than the specified number sends the enrollments for processing by a concurrent program.

OTA: Waitlist Sorting Criteria

Identifies which criterion--booking priority or date and time placed--takes priority on the waitlist. If waitlisted enrollments share the same priority, their enrollment then depends on date and time placed.

Oracle Order Management Integration Profile Options

The profiles in this section apply *only* to classes and enrollments originating in Order Management. Setting a value for OTA: OM Default Class Owner, for instance, does not set the default owner for classes originating in OLM, self-service Training, or OLM.

Oracle Order Management Integration Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
OTA: OM Default Enrollment Cancelled Status	All	\<enrollment status based on Cancelled>	No
OTA: OM Default Class Owner	Responsibility	\<employee from lookup>	No
OTA: OM Default Class Training Center	Responsibility, User	\<training center from lookup>	No
OTA: OM Default Class System Status	Responsibility	Normal, Planned, Full, Closed, Cancelled	No
OTA: OM Default Class User Status	Responsibility	\<status from lookup>	No
OTA: OM Restrict Enrollment by Country	Responsibility	Yes, No, **\<null>**	No
OTA: OM Waitlist Priority	Site	\<user-specified value from lookup>	No

OTA: OM Default Enrollment Cancelled Status

Establishes a default value for the Cancelled enrollment status. Use this profile to use an enrollment status you have created in place of the standard Cancelled status.

OTA: OM Default Class Owner

Sets a default class owner. Enter a person to receive workflow notifications automatically if no other approver is set.

OTA: OM Default Class Training Center

Sets a default training center for each class created in OM.

OTA: OM Default Class System Status

Establishes a default class system status: Normal, Planned, Full, Closed, or Cancelled.

OTA: OM Default Class User Status

Establishes a default value for the user class status, taken from the values for the lookup type EVENT_USER_STATUS.

> **Note:** Do not confuse this status with the class system status.

OTA: OM Restrict Enrollment by Country

Restricts enrollments to only those learners whose Operating Unit's country matches the country where the class takes place. You enforce this restriction by setting the profile value to Yes. Note that this restriction largely defeats the purpose of globalization: learners in Colmar, France, for instance, could not take classes in Basel, Switzerland or Freiburg, Germany, all within an hour's drive of one another.

OTA: OM Waitlist Priority

Sets the default OM waitlist priority value taken from the user-defined values for the lookup type PRIORITY_LEVEL.

Self-Service Learning Profile Options

As with OM, the profiles in this section apply *only* to self-service Learning (enrollments originating in the Learner or Manager interfaces). Setting a value for OLM: Automatic Transfer to GL, for instance, does not automatically transfer headers created in the OLM Finance Headers window.

Profile	Configurable Level	Values (default value in boldface)	Value Required?
OLM: Automatic Creation of Finance Headers and Lines	Site	Yes, **No**	Yes
OLM: Automatic Finance Header Approval	Responsibility, Site	Yes, **No**	Yes
OLM: Default Training Administrator	Responsibility	<Person name>, **<null>**	Yes
OLM: Automatic Transfer to GL	Responsibility, Site	Yes, **No**	Yes
OLM: Minimum Hours to Cancel for Free	Site	<numeric value>, **0**	Yes
OLM: Read-only Enrollment Message	User	<Message text>, **<null>**	No

OLM: Automatic Creation of Finance Headers and Lines

Indicates whether you are activating the automatic creation of finance headers and lines. Select Yes if you are running Oracle General Ledger.

OLM: Automatic Finance Header Approval

Indicates whether automatically created finance headers also receive automatic approval. Select Yes if you are running Oracle General Ledger.

OLM: Default Training Administrator

Set a default training administrator. Enter a person to receive workflow notifications automatically if no other approver is set.

OLM: Automatic Transfer to GL

Indicates whether the application transfers automatically created finance headers to Oracle General Ledger. If you select Yes, the application automatically sets the transfer status to Awaiting Transfer (AT). If you select No, for each header and line you must manually set the transfer status to Awaiting Transfer.

OLM: Minimum Hours to Cancel for Free

Specifies, in number of hours prior to a class, when a learner can no longer cancel an enrollment without being charged. You must manually control any enrollments for the period specified. Enter a numeric value (0, 1, 2,...n).

OLM: Read-only Enrollment Message

Sets a user's access to read-only and specifies the message sent when the user attempts to change any enrollment details.

> **Warning:** Placing any value in the field automatically sets the user's access to read-only.

Publicly Callable Business Process APIs in OLM

Application Programmatic Interfaces (APIs) are a logical grouping of all external process routines. The OLM API strategy delivers a set of PL/SQL packages procedures and functions that provide an open interface to the database.

The following table shows the APIs delivered with OLM.

Business Process APIs in OLM

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
ota_tcc_api	ottccapi.pkh	CREATE_ CROSS_ CHARGE	N	Y	WW
ota_tcc_api	ottccapi.pkh	UPDATE_ CROSS_ CHARGE	N	Y	WW
ota_thg_api	otthgapi.pkh	CREATE_HR_ GL_FLEX	N	Y	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
ota_thg_api	otthgapi.pkh	UPDATE_HR_GL_FLEX	N	Y	WW
OTA_CATEGORY_USAGE_API	otctuapi.pkh	CREATE_CATEGORY	N	Y	WW
OTA_CATEGORY_USAGE_API	otctuapi.pkh	DELETE_CATEGORY	N	Y	WW
OTA_CATEGORY_USAGE_API	otctuapi.pkh	UPDATE_CATEGORY	N	Y	WW
OTA_EVENT_API	otevtapi.pkh	CREATE_CLASS	N	Y	WW
OTA_EVENT_API	otevtapi.pkh	DELETE_CLASS	N	Y	WW
OTA_EVENT_API	otevtapi.pkh	UPDATE_CLASS	N	Y	WW
OTA_LEARNING_PATH_API	otlpsapi.pkh	CREATE_LEARNING_PATH	N	Y	WW
OTA_LEARNING_PATH_API	otlpsapi.pkh	DELETE_LEARNING_PATH	N	Y	WW
OTA_LEARNING_PATH_API	otlpsapi.pkh	UPDATE_LEARNING_PATH	N	Y	WW
OTA_LP_CATEGORY_API	otlciapi.pkh	CREATE_LP_CAT_INCLUSION	N	Y	WW
OTA_LP_CATEGORY_API	otlciapi.pkh	DELETE_LP_CAT_INCLUSION	N	Y	WW
OTA_LP_CATEGORY_API	otlciapi.pkh	UPDATE_LP_CAT_INCLUSION	N	Y	WW
OTA_LP_MEMBER_API	otlpmapi.pkh	CREATE_LEARNING_PATH_MEMBER	N	Y	WW
OTA_LP_MEMBER_API	otlpmapi.pkh	DELETE_LEARNING_PATH_MEMBER	N	Y	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
OTA_LP_MEMBER_API	otlpmapi.pkh	UPDATE_LEARNING_PATH_MEMBER	N	Y	WW
OTA_OFFERING_API	otoffapi.pkh	CREATE_OFFERING	N	Y	WW
OTA_OFFERING_API	otoffapi.pkh	DELETE_OFFERING	N	Y	WW
OTA_OFFERING_API	otoffapi.pkh	UPDATE_OFFERING	N	Y	WW
OTA_RESOURCE_BOOKING_API	ottrbapi.pkh	CREATE_RESOURCE_BOOKING	N	Y	WW
OTA_RESOURCE_BOOKING_API	ottrbapi.pkh	DELETE_RESOURCE_BOOKING	N	Y	WW
OTA_RESOURCE_BOOKING_API	ottrbapi.pkh	UPDATE_RESOURCE_BOOKING	N	Y	WW
OTA_RESOURCE_USAGE_API	otrudapi.pkh	CREATE_RESOURCE	N	Y	WW
OTA_RESOURCE_USAGE_API	otrudapi.pkh	DELETE_RESOURCE	N	Y	WW
OTA_RESOURCE_USAGE_API	otrudapi.pkh	UPDATE_RESOURCE	N	Y	WW
OTA_SKILL_PROVISION_API	ottspapi.pkh	CREATE_SKILL_PROVISION	N	Y	WW
OTA_SKILL_PROVISION_API	ottspapi.pkh	DELETE_SKILL_PROVISION	N	Y	WW
OTA_SKILL_PROVISION_API	ottspapi.pkh	UPDATE_SKILL_PROVISION	N	Y	WW
ota_nhs_api	otnhsapi.pkh	UPDATE_NON_OTA_HISTORIES	N	Y	WW

Workflow Notifications

Workflow notifications are messages that communicate information to learners and managers. Notifications can be delivered to users through e-mail or the web.

See the Oracle Workflow User Guide.

OLM offers various categories of notifications, detailed in tables below:

- Competency Update Notifications, page 11-43

- Class Enrollment Notifications, page 11-46

- Class Cancellation Notifications, page 11-54

- External Learning Notifications, page 11-58

- Learning Path Notifications, page 11-60

- Instructor Notifications, page 11-64

- Learning Certification Notifications, page 11-68

- Other Notifications, page 11-70

Competency Update Notifications

When learners gain a competency, the application sends the following notifications:

Notifies Learner of Competency Update

Short Description	Notify learner that automatic update has occurred.
Sent To	Learner
Process Name	Competency Update (OTA_COMPETENCE_UPDATE_JSP_PRC)
Message Name	Notify Learner of Competency Update
Internal Name	OTA_AUTO_COMP_UPD_TO_EMP
Subject	Competency Profile Has Been Updated
Body Text	Your completion of the Course &COURSE_TITLE has automatically updated your personal competency profile with the following competencies.
	DISPLAY COMPETENCIES AND LEVELS GRANTED.
	No action is required.

Notifies Manager of Competency Update

Short Description	Notify manager that automatic update has occurred.
Sent To	Manager
Process Name	Competency Update (OTA_COMPETENCE_UPDATE_JSP_PRC)
Message Name	Notify Manager of Competency Update
Internal Name	OTA_AUTO_COMP_UPD_TO_MGR
Subject	Competency Profile of &EMPLOYEENAME has been updated
Body Text	&EMPLOYEENAME has completed the Course &COURSE_TITLE, automatically updating the personal competency profile with the following compencies. DISPLAY COMPETENCIES AND LEVELS GRANTED. No action is required.

Competency Update Requiring Manager Approval

Short Description	Notify approver to approver
Sent To	Approver
Process Name	
Message Name	Notify Approver Competency Requires Approval
Internal Name	
Subject	Competency Update for &EMPLOYEENAME Requires Your Approval
Body Text	&EMPLOYEENAME has completed the Course &COURSE_TITLE, which is designed for the learner to attain the competencies listed below. You may approve these competencies, updating &EMPLOYEENAME personal competency profile, or you may reject these competencies, leaving &EMPLOYEENAME personal competency profile unchanged. Click Update Action to delegate or change levels for individual competencies. DISPLAY COMPETENCIES AND LEVELS GRANTED. No action is required.

Notifies Learner of Competency Approval

Short Description	Notify learner of competency approval
Sent To	Learner
Process Name	Competency Update
Message Name	Notify Learner of Competency Approval
Internal Name	OTA_CREATER_OF_COMP_UPD
Subject	Competency Profile of &EMPLOYEENAME Approved by &Approver
Body Text	Following your completion of the Course &COURSE_TITLE, &APPROVER has added the competencies to your personal competency profile.

Notifies Learner of Competency Rejection

Short Description	Notify learner of competency rejection
Sent To	Learner
Process Name	Competency Update
Message Name	Notify Learner of Competency Rejection
Internal Name	OTA_COMP_UPD_REJECT_MSG
Subject	Competency Profile of &EMPLOYEENAME Rejected by &Approver
Body Text	&APPROVER has rejected an update to your personal competency profile, following your completion of the Course &COURSE_TITLE. Competencies have not been added to your personal competency profile.
	Your personal competency profile has not changed.
	No action is required.

Notifies Learner of Manual Competency Update

Short Description	Notify learner comps should be granted, but nothing has happened in system (need to manually update)
Sent To	Learner
Process Name	Competency Update
Message Name	Notify Learner of Manual Competency Update
Internal Name	OTA_COMP_UPD_TO_CREATER_MSG
Subject	Your Competency Profile Eligible for Update
Body Text	After completing the Course &COURSE_TITLE, you are eligible to add the following competencies to your personal competency profile.
	DISPLAY COMPETENCIES AND LEVELS ASSOCIATED w/COURSE
	To add the competencies to your profile, you must manually update your profile. Unless you or your manager perform this update, your personal competency profile will not change.

Notifies Manager of Manual Competency Update

Short Description	Notify manager comps should be granted, but nothing has happened in system (need to manually update)
Sent To	Manager
Process Name	Competency Update
Message Name	Notify Manager of Manual Competency Update
Internal Name	OTA_NOTIFY_OCMPETENCE_INFO_MSG
Subject	Competency Profile of &EMPLOYEENAME Eligible for Update
Body Text	&EMPLOYEENAME has completed the Course &COURSE_TITLE. You can now update their personal competency profile with the following competencies:
	DISPLAY COMPETENCIES AND LEVELS ASSOCIATED w/COURSE
	To add the competencies to your profile, you must manually update your profile. Unless you or the employee perform this update, their personal competency profile will not change.

Notifies Competency Update Correction

Short Description	Notify learner of return for correction
Sent To	Learner
Process Name	Competency Update
Message Name	Notify Competency Update Correction
Internal Name	OTA_NOTIFY_COMPETENCE_CORR_MSG
Subject	&PROCESS_DISPLAY_NAME for &CURRENT_PERSON_DISPLAY_ NAME is cancelled
Body Text	Final Approver: &FORWARD_TO_DISPLAY_NAME
	User Name: &FORWARD_TO_USERNAME
	&FORWARD_TO_DISPLAY_NAME has rejected the competency achievements of &CURRENT_PERSON_DISPLAY_NAME in training class '&OTA_EVENT_TITLE' (course name &OTA_COURSE&_VERSION_NAME). Please contact &FORWARD_TO_DISPLAY_NAME before resubmitting.

Class Enrollment Notifications

When a learner's request to enroll in a class is approved or disapproved, the application sends the following notifications.

Notifies that the Learner Enrollment Status Cancelled for Correction

Short Description	Notify the person who created the booking request of the enrollment if it is cancelled
Sent To	Creator's Username
Process Name	Enroll in Learning
Message Name	Notify Enrollment Status to Enrollee for Correction
Internal Name	OTA_LNR_NOTIFY_ENROLL_CORRECT
Subject	&PROCESS_DISPLAY_NAME request is cancelled
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME,

&FORWARD_TO_DISPLAY_NAME has rejected your enrollment in the class &OTA_CLASS_TITLE (Course name &OTA_COURSE_VERSION_NAME). Your enrollment is cancelled. Please contact &FORWARD_TO_DISPLAY_NAME before reenrolling.

Class Name: &OTA_CLASS_TITLE

Enrollment Number: &BOOKING_ID

Start Date: &OTA_COURSE_START_DATE

End Date: &OTA_COURSE_END_DATE |

Notifies Class Owner CC Transfer To Not Found

Short Description	Notify class owner cc transfer to not found
Sent To	Class Owner's Email ID
Process Name	Enroll in Learning
Message Name	Notify Class Owner CC Transfer To Not Found
Internal Name	OTA_LNR_CC_TRANSFER_TO_NOT_FND
Subject	Cross Charge 'Transfer To' value not found
Body Text	The 'Transfer To' value (the receiving cost center) cannot be found for the enrollment record shown below:

Employee: &CURRENT_PERSON_DISPLAY_NAME

Class Name: &CLASS_TITLE

Enrollment Number: &BOOKING_ID

Please manually create the Finance Header and Line, as these cannot be automatically created. |

Notifies Class Owner CC Transfer From Not Found

Short Description	Notify class owner cc transfer from not found
Sent To	Class Owner Email ID
Process Name	Enroll in Learning
Message Name	Notify Class Owner CC Transfer From Not Found
Internal Name	OTA_LNR_CC_TRANSFER_FR_NOT_FND
Subject	Cross Charge 'Transfer From' value not found
Body Text	The 'Transfer From' value (the paying cost center) cannot be found for the enrollment record shown below:
	Employee: &CURRENT_PERSON_DISPLAY_NAME
	Class Name: &CLASS_TITLE
	Enrollment Number: &BOOKING_ID
	Please manually create the Finance Header and Line, as these cannot be automatically created.

Notifies about the Learner Enrollment Request Status (online sync dm)

Short Description	Notify learner enrollment request status (online sync dm)
Sent To	Creator's Username
Process Name	Enroll in Learning
Message Name	Notify Enrollment Status to Enrollee (online sync dm)
Internal Name	OTA_LNR_NOTIFY_ENROLL_STS_OS
Subject	&PROCESS_DISPLAY_NAME is approved
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME,
	&FORWARD_TO_DISPLAY_NAME has approved your enrollment in the class &OTA_CLASS_TITLE (Course name &OTA_COURSE_VERSION_NAME) beginning on &OTA_COURSE_START_DATE.
	Your enrollment status is: &ENROLL_IN_A_CLASS_STATUS.
	This is your enrollment confirmation for the class below. Please keep a copy of this information for your reference.
	Class Name: &OTA_CLASS_TITLE
	Enrollment Number: &BOOKING_ID
	Start Date: &OTA_COURSE_START_DATE
	Start Time: &OTA_COURSE_START_TIME
	End Date: &OTA_COURSE_END_DATE
	Delivery Mode: &OTA_DELIVERY_MODE_NAME

Notifies about the Learner Enrollment Request Status (offline dm)

Short Description	Notify learner enrollment request status (offline dm)
Sent To	Creator''s Username
Process Name	Enroll in Learning
Message Name	Notify Enrollment Status to Enrollee (offline dm)
Internal Name	OTA_LNR_NOTIFY_ENROLL_STATUS
Subject	&PROCESS_DISPLAY_NAME is approved
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME,
	&FORWARD_TO_DISPLAY_NAME has approved your enrollment in the class &OTA_CLASS_TITLE (Course name &OTA_COURSE_VERSION_NAME) beginning on &OTA_COURSE_START_DATE.
	Your enrollment status is: &ENROLL_IN_A_CLASS_STATUS.
	This is your enrollment confirmation for the class below. Please keep a copy of this information for your reference.
	Class Name: &OTA_CLASS_TITLE
	Enrollment Number: &BOOKING_ID
	Start Date: &OTA_COURSE_START_DATE
	Start Time: &OTA_COURSE_START_TIME
	End Date: &OTA_COURSE_END_DATE
	Delivery Mode: &OTA_DELIVERY_MODE_NAME
	Location: &OTA_LOCATION_ADDRESS

Notifies about the Learner Enrollment Request Status (online async dm)

Short Description	Notify learner enrollment request status (online async dm)
Sent To	Creator's Username
Process Name	Enroll in Learning
Message Name	Notify Enrollment Status to Enrollee (online async dm)
Internal Name	OTA_LNR_NOTIFY_ENROLL_STS_OA
Subject	&PROCESS_DISPLAY_NAME is approved
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME,
	&FORWARD_TO_DISPLAY_NAME has approved your enrollment in the class &OTA_CLASS_TITLE (Course name &OTA_COURSE_VERSION_NAME) beginning on &OTA_COURSE_START_DATE.
	Your enrollment status is: &ENROLL_IN_A_CLASS_STATUS.
	This is your enrollment confirmation for the class below. Please keep a copy of this information for your reference.
	Class Name: &OTA_CLASS_TITLE
	Enrollment Number: &BOOKING_ID
	Delivery Mode: &OTA_DELIVERY_MODE_NAME
	Expiration Date: &OTA_COURSE_END_DATE

Notifies about the change in the Learner Enrollment Status

Short Description	Notify learner of the change in enrollment status from Waitlisted to Placed
Sent To	Learner
Process Name	Learner Enrollment Status Change
Message Name	Inform Learner of Enrollment Status Change
Internal Name	OTA_LRNR_ENRL_STATUS_CHNG
Subject	Your enrollment to the class &EVENT_TITLE is confirmed
Body Text	Your seat in the class &EVENT_TITLE is now confirmed. You have been removed from the waiting List.
	Course Name: &COURSE_NAME
	Delivery Mode: &DELIVERY_METHOD
	Language: &LANGUAGE
	Name: &EVENT_TITLE
	Start Date: &TARGET_DATE
	End Date: &COMPLETION_DATE
	Start Time: &OTA_START_TIME
	End Time: &OTA_END_TIME
	Timezone: &TIMEZONE
	Enrollment Number: &BOOKING_ID
	Cost: &COST
	Location: &LP_NAME

Inform waitlisted learner about the class beginning

Short Description	Notify waitlisted learner that enrollment was unsuccessful and that the class has begun
Sent To	Learner
Process Name	Learner Enrollment Status Change
Message Name	Inform Waitlisted Learner of Class Beginning
Internal Name	OTA_LRNR_WAITLIST_MSG
Subject	Class &EVENT_TITLE has begun
Body Text	Your enrollment in the class &EVENT_TITLE was unsuccessful, as the class has already begun without a place becoming available. Any payment you have made would be refunded.
	Course Name: &COURSE_NAME
	Delivery Mode: &DELIVERY_METHOD
	Language: &LANGUAGE
	Name: &EVENT_TITLE
	Start Date: &TARGET_DATE
	End Date: &COMPLETION_DATE
	Start Time: &OTA_START_TIME
	End Time: &OTA_END_TIME
	Timezone: &TIMEZONE
	Enrollment Number: &BOOKING_ID
	Cost: &COST
	Location: &LP_NAME

Notifies successful learner enrollment (online sync dm) where no approval required

Short Description	Notify learner of successful enrollment in an online synchronous class that does not require approval for enrollment
Sent To	Learner
Process Name	Enroll in Learning
Message Name	Notify Learner Enrollment (online sync dm) Approval OFF
Internal Name	OTA_LNR_NTF_ENROLL_STS_OS_NO
Subject	You have successfully enrolled in the class &OTA_EVENT_TITLE
Body Text	You have successfully enrolled in the class &OTA_EVENT_TITLE (course name &OTA_ACTIVITY_VERSION_NAME) beginning on &OTA_COURSE_START_DATE.
	Your enrollment status is: &ENROLL_IN_A_CLASS_STATUS.
	This is your enrollment confirmation for the class below. Please keep a copy of this information for your reference.
	Class Name: &OTA_EVENT_TITLE
	Enrollment Number: &BOOKING_ID
	Start Date: &OTA_COURSE_START_DATE
	End Date: &OTA_COURSE_END_DATE
	Start Time: &OTA_CLASS_START_TIME
	Timezone: &STATE_LIST
	Delivery Mode: &OTA_DELIVERY_MODE_NAME

Notifies successful learner enrollment (online async dm) where no approval required

Short Description	Notify learner of successful enrollment in an online asynchronous class that does not require approval for enrollment
Sent To	Learner
Process Name	Enroll in Learning
Message Name	Notify Learner Enrollment (online async dm) Approval OFF
Internal Name	OTA_LNR_NTF_ENROLL_STS_OA_NO
Subject	You have successfully enrolled in the class &OTA_EVENT_TITLE
Body Text	You have successfully enrolled in the class &OTA_EVENT_TITLE (course name &OTA_ACTIVITY_VERSION_NAME) beginning on &OTA_COURSE_START_DATE.
	Your enrollment status is: &ENROLL_IN_A_CLASS_STATUS.
	This is your enrollment confirmation for the class below. Please keep a copy of this information for your reference.
	Class Name: &OTA_EVENT_TITLE
	Enrollment Number: &BOOKING_ID
	Delivery Mode: &OTA_DELIVERY_MODE_NAME
	Expiration Date: &OTA_COURSE_END_DATE

Notifies successful learner enrollment (offline dm) where no approval required

Short Description	Notify learner of successful enrollment in an offline class that does not require approval for enrollment
Sent To	Learner
Process Name	Enroll in Learning
Message Name	Notify Learner Enrollment (offline dm) Approval OFF
Internal Name	OTA_LNR_NTF_ENROLL_STATUS_NO
Subject	You have successfully enrolled in the class &OTA_EVENT_TITLE
Body Text	You have successfully enrolled in the class &OTA_EVENT_TITLE (course name &OTA_ACTIVITY_VERSION_NAME) beginning on &OTA_COURSE_START_DATE.
	Your enrollment status is: &ENROLL_IN_A_CLASS_STATUS.
	This is your enrollment confirmation for the class below. Please keep a copy of this information for your reference.
	Class Name: &OTA_EVENT_TITLE
	Enrollment Number: &BOOKING_ID
	Start Date: &OTA_COURSE_START_DATE
	End Date: &OTA_COURSE_END_DATE
	Start Time: &OTA_CLASS_START_TIME
	Timezone: &STATE_LIST
	Delivery Mode: &OTA_DELIVERY_MODE_NAME
	Location: &OTA_LOCATION_ADDRESS

Notifies learner of enrollment cancellation

Short Description	Notify learner of successful enrollment cancellation
Sent To	Learner
Process Name	Cancel Learning Enrollment
Message Name	Notify Learner of Enrollment Cancellation
Internal Name	OTA_LNR_CANCEL_CLASS_MSG
Subject	Your enrollment in the class &EVENT_TITLE is cancelled
Body Text	&APPROVAL_CREATOR_DISPLAY_NAME has cancelled your enrollment in the class &EVENT_TITLE (course name &OTA_ACTIVITY_VERSION_NAME) beginning on &OTA_ COURSE_START_DATE.

Notifies about bulk enrollment completion

Short Description	Notify user who runs a concurrent request for bulk enrollment that it has been completed
Sent To	Requestor
Process Name	OTA_BLK_ENR_NTF_PRC
Message Name	Bulk Enrollment Completion Notification Message
Internal Name	OTA_LNR_CANCEL_CLASS_MSG
Subject	Your Bulk Enrollment has completed
Body Text	Your concurrent request, &CONC_REQUEST_ID, for bulk enrollment into the &OBJECT_TYPE &OBJECT_NAME has completed.
	Total Enrollments Requested: &TOTAL_NUMBER
	Successful enrollments: &SUCCESS_NUMBER
	Unsuccessful enrollments: &ERROR_NUMBER
	See the concurrent program log file to view enrollment details.

Class Cancellation Notifications

When a learner's enrollment in a class is cancelled, the application sends the following notifications

Notifies Learner of Enrollment Cancellation

Short Description	Notify learner of enrollment cancellation
Sent To	Current person's Username
Process Name	Cancel Learning Enrollment
Message Name	Notify Learners of Enrollment Cancellation
Internal Name	OTA_LNR_CANCEL_CLASS_MSG
Subject	Your enrollment in the class &CLASS_TITLE is cancelled
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME,
	&APPROVER_CREATOR_ DISPLAY_NAME has cancelled your enrollment in the class &CLASS_TITLE (course name &OTA_COURSE_VERSION_NAME) beginning on &OTA_COURSE_ START_DATE.

Notifies Learner of Class Cancellation

Short Description	Notify learner of class cancellation
Sent To	Learner
Process Name	Class Cancellation
Message Name	Inform Learner of Class Cancellation
Internal Name	OTA_CLS_CNCL_LRNR_MSG
Subject	Class &EVENT_TITLE is cancelled
Body Text	The class &EVENT_TITLE has been cancelled. Your enrollment in the class has also been cancelled.
	Course Name: &COURSE_NAME
	Delivery Mode: &DELIVERY_METHOD
	Language: &LANGUAGE
	Name: &EVENT_TITLE
	Start Date: &TARGET_DATE
	End Date: &COMPLETION_DATE
	Start Time: &OTA_START_TIME
	End Time: &OTA_END_TIME
	Timezone: &TIMEZONE
	Enrollment Number: &BOOKING_ID
	Cost: &COST
	Location: &LP_NAME

Notifies Instructor of Class Cancellation

Short Description	Notify instructor of class cancellation
Sent To	Instructor
Process Name	Notify Instructor
Message Name	Notify Instructor of Class Cancellation
Internal Name	OTA_INST_CLASS_CANCEL_MSG
Subject	&SECTION_NAME &EVENT_TITLE has been cancelled
Body Text	A &SECTION_NAME &EVENT_TITLE you were scheduled to teach has been cancelled.
	Course Name: &COURSE_NAME
	Delivery Mode: &DELIVERY_METHOD
	Language: &LANGUAGE
	Name: &EVENT_TITLE
	Start Date: &TARGET_DATE
	End Date: &COMPLETION_DATE
	Start Time: &OTA_START_TIME
	End Time: &OTA_END_TIME
	Timezone: &TIMEZONE
	Booking Status: &LP_ENROLEE
	Location: &LP_NAME

Notifies Instructor of Class Location Change

Short Description	Notify instructor of change in class location
Sent To	Instructor
Process Name	Notify Instructor
Message Name	Notify Instructor of Location change
Internal Name	OTA_INST_LOC_CHANGE
Subject	&SECTION_NAME &EVENT_TITLE has been relocated
Body Text	A &SECTION_NAME &EVENT_TITLE you were scheduled to teach has been relocated. Course Name: &COURSE_NAME Delivery Mode: &DELIVERY_METHOD Language: &LANGUAGE Name: &EVENT_TITLE Start Date: &TARGET_DATE End Date: &COMPLETION_DATE Start Time: &OTA_START_TIME End Time: &OTA_END_TIME Timezone: &TIMEZONE Booking Status: &LP_ENROLEE Location: &LP_NAME

Notifies Instructor of Class Rescheduling

Short Description	Notify instructor of change in class schedule
Sent To	Instructor
Process Name	Notify Instructor
Message Name	Notify Instructor of Class Rescheduling
Internal Name	OTA_INST_CLASS_RESCHEDULE_MSG
Subject	&SECTION_NAME &EVENT_TITLE has been rescheduled
Body Text	A &SECTION_NAME &EVENT_TITLE you were scheduled to teach has been rescheduled
	Course Name: &COURSE_NAME
	Delivery Mode: &DELIVERY_METHOD
	Language: &LANGUAGE
	Name: &EVENT_TITLE
	Start Date: &TARGET_DATE
	End Date: &COMPLETION_DATE
	Start Time: &OTA_START_TIME
	End Time: &OTA_END_TIME
	Timezone: &TIMEZONE
	Booking Status: &LP_ENROLEE
	Location: &LP_NAME

Notifies Manager of Cancellation of Enrollment

Short Description	Notify Manager of cancellation of enrollment
Sent To	Current person's Username, Manager's Username
Process Name	Cancel Learning Enrollment
Message Name	Notify Learners of Cancellation of Enrollment
Internal Name	OTA_LNR_CANCEL_CLASS_SUP_MSG
Subject	&APPROVAL_CREATOR_DISPLAY_NAME has cancelled an enrollment in &CLASS_TITLE
Body Text	&APPROVER_CREATOR_ DISPLAY_NAME has cancelled your enrollment in the class &OTA_CLASS_TITLE (course name &OTA_COURSE_VERSION_NAME) beginning on &OTA_COURSE_START_DATE.

External Learning Notifications

When an external learning record of a learner is added, deleted, updated, or corrected, the application sends the following notifications:

Notifies Enrollee of External Learning Delete

Short Description	Notify enrollee of external learning delete
Sent To	Current person's Username
Process Name	External Learning
Message Name	Notify External Learning Deleted
Internal Name	OTA_NOTIFY_EXTLRNG_DEL_MSG
Subject	&PROCESS_DISPLAY_NAME record has been deleted
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME,
	The record of your attendance in the class &OTA_CLASS_TITLE has been deleted. If this is an error, you must re-enter the record as external learning. You do not have to take any further action.

Notifies Enrollee of External Learning Create

Short Description	Notify enrollee of external learning create
Sent To	Current person's Username
Process Name	External Learning
Message Name	Notify External Learning Created
Internal Name	OTA_NOTIFY_EXTLRNG_INS_MSG
Subject	&PROCESS_DISPLAY_NAME record has been created
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME,
	Your attendance in the external class &OTA_CLASS_TITLE ending on &OTA_COURSE_END_DATE has been recorded.

Notifies Enrollee of External Learning Update

Short Description	Notify enrollee of external learning update
Sent To	Current person's Username
Process Name	External Learning
Message Name	Notify External Learning Updated
Internal Name	OTA_NOTIFY_EXTLRNG_UPD_MSG
Subject	&PROCESS_DISPLAY_NAME record has been updated
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME,
	The record of your attendance in the external class &OTA_CLASS_TITLE ending on &OTA_COURSE_END_DATE has been updated.

Notifies External Learner of Return for Correction

Short Description	Notify external learner of return for correction
Sent To	Current person's Username
Process Name	External Learning
Message Name	Notify External Learner Correction to Initiator
Internal Name	OTA_NOTIFY_EXTLRNG_CORR_MSG
Subject	&PROCESS_DISPLAY_NAME for &CURRENT_PERSON_DISPLAY_NAME has been returned for correction
Body Text	Final Approver: &FORWARD_TO_DISPLAY_NAME
	User Name: &FORWARD_TO_USERNAME
	Comments: &WF_NOTE
	WF_NOTIFICATION (HISTORY)
	This notification is for information only.

Learning Path Completion Notifications

When a learning path is completed or is scheduled for completion, the application sends the following notifications:

Notifies Learner of Learning Path Complete

Short Description	Notify learner of learning path complete
Sent To	Learner
Process Name	Learning Path Notifications (OTA_LRNG_PATH_NOTIFY_PRC)
Message Name	Successful Completion of Learning Path
Internal Name	OTA_LP_COMPLETE_NTF_MSG
Subject	Learning Path successfully completed
Body Text	Dear &LP_ENROLLEE:
	You have successfully completed the Learning Path &LP_NAME. You can view this learning path in your Learner History.
	Completion Date: &COMPLETION_DATE
	This notification requires no action.

Notifies Manager and/or Creator of Learning Path Complete

Short Description	Notify manager and/or creator of learning path complete
Sent To	Manager and/or Creator
Process Name	Learning Path Notifications (OTA_LRNG_PATH_NOTIFY_PRC)
Message Name	Notify Manager of Learning Path Completion
Internal Name	OTA_LP_COMPLETE_MGR_NTF_MSG
Subject	Learning Path successfully completed
Body Text	Dear &LP_CREATOR_NAME:
	&LP_ENROLLEE successfully completed the Learning Path &LP_NAME on &COMPLETION_DATE.
	This notification requires no action.

Notifies Learner of Completion Target for Self-Subscribed Learning Path

Short Description	Notify learner of completion target for self-subscribed learning path
Sent To	Learner
Process Name	Learning Path Notifications (OTA_LRNG_PATH_NOTIFY_PRC)
Message Name	Reminder for Learner Subscribed Learning Path
Internal Name	OTA_LRN_LP_REMINDER_NTF_MSG
Subject	Learning Path needs completion
Body Text	Dear &LP_ENROLLEE,
	You are scheduled to complete the Learning Path &LP_NAME in &NOTIFY_DAYS_BEFORE_TARGET days, by &TARGET_DATE.

Notifies Learner of Completion Target for Manager-Subscribed Learning Path

Short Description	Notify learner of completion target for manager-subscribed learning path
Sent To	Learner
Process Name	Learning Path Notifications (OTA_LRNG_PATH_NOTIFY_PRC)
Message Name	Reminder for Manager Subscribed Learning Path
Internal Name	OTA_MGR_LP_REMINDER_NTF_MSG
Subject	Learning Path needs completion
Body Text	Dear &LP_ENROLLEE,
	&LP_CREATOR_NAME has scheduled you to complete the Learning Path &LP_NAME in &NOTIFY_DAYS_BEFORE_TARGET days, by &TARGET_DATE.

Notifies Learner of Completion Target for Self-Subscribed Learning Path Component

Short Description	Notify learner of completion target for self-subscribed learning path component
Sent To	Learner
Process Name	Learning Path Notifications (OTA_LRNG_PATH_NOTIFY_PRC)
Message Name	Reminder for Learner Subscribed Learning Path Component
Internal Name	OTA_LRN_CTG_LPM_NTF_MSG
Subject	Learning Path course needs completion
Body Text	Dear &LP_ENROLLEE,
	You have scheduled yourself to complete the course &COURSE_NAME in &NOTIFY_DAYS_BEFORE_TARGET days, by &TARGET_DATE.
	Learning Path: &LP_NAME
	Learning Path Section: &SECTION_NAME

Notifies Learner of Completion Target for Manager-Subscribed Learning Path Component

Short Description	Notify learner of completion target for manager-subscribed learning path component
Sent To	Learner
Process Name	Learning Path Notifications (OTA_LRNG_PATH_NOTIFY_PRC)
Message Name	Reminder for Manager Subscribed Learning Path Component
Internal Name	OTA_MGR_CTG_LPM_NTF_MSG
Subject	Learning Path course needs completion
Body Text	Dear &LP_ENROLLEE,
	&LP_CREATOR_NAME has scheduled you to complete the course &COURSE_NAME in &NOTIFY_DAYS_BEFORE_TARGET days, by &TARGET_DATE.
	Learning Path: &LP_NAME
	Learning Path Section: &SECTION_NAME

Notifies Learner of Completion Target for Self-Created Learning Path Component

Short Description	Notify learner of completion target for self-created learning path component
Sent To	Learner
Process Name	Learning Path Notifications (OTA_LRNG_PATH_NOTIFY_PRC)
Message Name	Reminder for Learner Created Learning Path Component
Internal Name	OTA_LRN_LPM_NTF_MSG
Subject	Learning Path course needs completion
Body Text	Dear &LP_ENROLLEE,
	You have scheduled yourself to complete the course &COURSE_NAME in &NOTIFY_DAYS_BEFORE_TARGET days, by &TARGET_DATE.
	Learning Path: &LP_NAME

Notifies Learner of Completion Target for Manager-Created Learning Path Component

Short Description	Notify learner of completion target for manager-created learning path component
Sent To	Learner
Process Name	Learning Path Notifications (OTA_LRNG_PATH_NOTIFY_PRC)
Message Name	Reminder for Manager Created Learning Path Component
Internal Name	OTA_MGR_LPM_NTF_MSG
Subject	Learning Path course needs completion
Body Text	Dear &LP_ENROLLEE,
	&LP_CREATOR_NAME has scheduled you to complete the course &COURSE_NAME in &NOTIFY_DAYS_BEFORE_TARGET days, by &TARGET_DATE.
	Learning Path: &LP_NAME

Notifies Learner of Learning Path Subscription

Short Description	Notify learner of successful subscription to learning path
Sent To	Learner
Process Name	Learning Path (OTA_LP_JSP_PRC)
Message Name	Inform learner of Learning Path subscription
Internal Name	OTA_LP_SUBSCRIBE_LRNR_MSG
Subject	Successfully subscribed to Learning Path &OTA_ACTIVITY_VERSION_NAME
Body Text	&CREATOR_PERSON_DISPLAY_NAME have successfully subscribed you to the Learning Path &OTA_ACTIVITY_VERSION_NAME starting on &OTA_COURSE_START_DATE

Notifies Learner of Unsubscription from Learning Path

Short Description	Notify learner of unsubscription from learning path
Sent To	Learner
Process Name	Learning Path (OTA_LP_JSP_PRC)
Message Name	Inform learner of Learning Path unsubscription
Internal Name	OTA_LP_UNSUBSCRIBE_LRNR_MSG
Subject	Successfully unsubscribed from Learning Path &OTA_ACTIVITY_ VERSION_NAME
Body Text	&CREATOR_PERSON_DISPLAY_NAME have successfully unsubscribed you from the Learning Path &OTA_ACTIVITY_VERS ION_NAME starting on &OTA_COURSE_START_DATE

Instructor Notifications

When an instructor booking for a class is planned, confirmed, or cancelled, or when a class is cancelled or relocated, the application sends the following notifications:

Notifies Instructor of Booking for Class

Short Description	Notify instructor of booking for class
Sent To	Instructor
Process Name	Notify Instructor
Message Name	Booking an instructor
Internal Name	OTA_INST_BOOK_MSG
Subject	You have been booked for &SECTION_NAME &EVENT_TITLE
Body Text	&LP_CREATOR_NAME has booked you to teach the &SECTION_NAME &EVENT_TITLE detailed below:
	Course Name: &COURSE_NAME
	Delivery Mode: &DELIVERY_METHOD
	Language: &LANGUAGE
	Name: &EVENT_TITLE
	Start Date: &TARGET_DATE
	End Date: &COMPLETION_DATE
	Start Time: &OTA_START_TIME
	End Time: &OTA_END_TIME
	Timezone: &TIMEZONE
	Booking Status: &LP_ENROLEE
	Location: &LP_NAME

Notifies Instructor of Booking Confirmation

Short Description	Notify instructor of booking confirmation
Sent To	Instructor
Process Name	Notify Instructor
Message Name	Confirm Instructor Booking
Internal Name	OTA_INST_BOOK_CONFIRM_MSG
Subject	Your booking to &SECTION_NAME &EVENT_TITLE has been confirmed
Body Text	Your booking to the &SECTION_NAME &EVENT_TITLE detailed below has been confirmed.
	Course Name: &COURSE_NAME
	Delivery Mode: &DELIVERY_METHOD
	Language: &LANGUAGE
	Name: &EVENT_TITLE
	Start Date: &TARGET_DATE
	End Date: &COMPLETION_DATE
	Start Time: &OTA_START_TIME
	End Time: &OTA_END_TIME
	Timezone: &TIMEZONE
	Booking Status: &LP_ENROLEE
	Location: &LP_NAME

Notifies Instructor of Booking Cancellation

Short Description	Notify instructor of booking cancellation
Sent To	Instructor and Learner
Process Name	Notify Instructor
Message Name	Cancel Instructor Booking
Internal Name	OTA_INST_BOOK_CANCEL_MSG
Subject	Your booking to &SECTION_NAME &EVENT_TITLE has been cancelled
Body Text	&LP_CREATOR_NAME has cancelled your booking to teach the &SECTION_NAME &EVENT_TITLE detailed below:
	Course Name: &COURSE_NAME
	Delivery Mode: &DELIVERY_METHOD
	Language: &LANGUAGE
	Name: &EVENT_TITLE
	Start Date: &TARGET_DATE
	End Date: &COMPLETION_DATE
	Start Time: &OTA_START_TIME
	End Time: &OTA_END_TIME
	Timezone: &TIMEZONE
	Booking Status: &LP_ENROLEE
	Location: &LP_NAME

Reminds Instructor of Booking for Class

Short Description	Remind instructor of booking
Sent To	Instructor
Process Name	Notify Instructor
Message Name	Remind Instructor of Booking
Internal Name	OTA_INST_REMIND_MSG
Subject	Teaching Reminder
Body Text	You are scheduled to teach the &SECTION_NAME &EVENT_TITLE detailed below: Course Name: &COURSE_NAME Delivery Mode: &DELIVERY_METHOD Language: &LANGUAGE Name: &EVENT_TITLE Start Date: &TARGET_DATE End Date: &COMPLETION_DATE Start Time: &OTA_START_TIME End Time: &OTA_END_TIME Timezone: &TIMEZONE Booking Status: &LP_ENROLEE Location: &LP_NAME This is just a reminder notification.

Notifies Instructor of Class Location Change

Short Description	Notify instructor of change in class location
Sent To	Instructor
Process Name	Notify Instructor
Message Name	Notify Instructor of Location change
Internal Name	OTA_INST_LOC_CHANGE
Subject	&SECTION_NAME &EVENT_TITLE has been relocated
Body Text	A &SECTION_NAME &EVENT_TITLE you were scheduled to teach has been relocated. Course Name: &COURSE_NAME Delivery Mode: &DELIVERY_METHOD Language: &LANGUAGE Name: &EVENT_TITLE Start Date: &TARGET_DATE End Date: &COMPLETION_DATE Start Time: &OTA_START_TIME End Time: &OTA_END_TIME Timezone: &TIMEZONE Booking Status: &LP_ENROLEE Location: &LP_NAME

Learning Certification Notifications

When a learner subscribes to or unsubscribes from a certification, or when a certification is due for completion, the application sends the following notifications:

Notifies Learner of Certification Coming Due

Short Description	Notify learner of certification coming due
Sent To	Learner
Process Name	Certification Notifications
Message Name	Certification Reminder
Internal Name	OTA_CERT_REMINDER_MSG
Subject	Certification needs completion
Body Text	&OTA_NTF_EMBEDDED_REGION

Notifies Learner of Certification Completion

Short Description	Notify learner of certification completion
Sent To	Learner
Process Name	Certification Notifications
Message Name	Certification Completion
Internal Name	OTA_CERT_COMPLETION_MSG
Subject	Certification is completed
Body Text	&OTA_NTF_EMBEDDED_REGION

Notifies Learner of Certification Renewal

Short Description	Notify learner of certification renewal
Sent To	Learner
Process Name	Certification Notifications
Message Name	Certification Renewal
Internal Name	OTA_CERT_RENEWAL_MSG
Subject	Certification is available for renewal
Body Text	&OTA_NTF_EMBEDDED_REGION

Notifies Learner of Certification Cancellation

Short Description	Notify learner of certification cancellation
Sent To	Learner
Process Name	Certification Notifications
Message Name	Certification Cancellation
Internal Name	OTA_CERT_CANCELLATION_MSG
Subject	Certification &OTA_CERTIFICATION_NAME is becoming obsolete
Body Text	The certification &OTA_CERTIFICATION_NAME will become obsolete on OTA_END_TIME. &OTA_NTF_COMMENTS

Notifies Learner of Subscription to a Certification

Short Description	Notify learner of subscription to a certification
Sent To	Learner
Process Name	Certification Notifications
Message Name	Notify Learner of enrollment in a certification
Internal Name	OTA_CERT_ENROLL_LRNR_MSG
Subject	Enrollment in certification &OTA_ACTIVITY_VERSION_NAME is confirmed
Body Text	Your enrollment into the certification &OTA_ACTIVITY_VERSION_NAME &TEXT &OBJECT_DATE has been confirmed. The certification contains the following components :

Notifies Learner of Unenrollment (Unsubscription) from a Certification

Short Description	Notify learner of unenrollment from a certification
Sent To	Learner
Process Name	Certification Notifications
Message Name	Certification Unenrollment
Internal Name	OTA_CERT_UNENROLL_MSG
Subject	You have successfully unenrolled from &OTA_CERTIFICATION_NAME
Body Text	Your enrollment in certification &CERTIFICATION_NAME starting on &CERT_PRD_START_DATE has been cancelled. The certification components are: (A table showing the certification components is displayed)

Notifies Learner of Certification Expiry

Short Description	Notify learner of a certification getting expired
Sent To	Learner
Process Name	Certification Notifications
Message Name	Certification Expiration
Internal Name	OTA_CERT_EXPIRATION_MSG
Subject	Your certification has expired
Body Text	&OTA_NTF_EMBEDDED_REGION

Other Notifications

Notifies Learner of Forum Message

Short Description	Notify learner of new message posted to forum
Sent To	Learner
Process Name	Forum Messages Notification
Message Name	Notify Learner of Forum message
Internal Name	OTA_FORUM_NOTIFY_LRNR_MSG
Subject	New message posted to forum : &COURSE_NAME
Body Text	Forum: &COURSE_NAME Topic: &EVENT_TITLE Message: &SECTION_NAME Please do not respond to this email.

Notifies Manager of Learner Test Results

Short Description	Notify learner of new message posted to forum
Sent To	Manager
Process Name	Assessment Submission
Message Name	Inform Manager of Learner Test Results
Internal Name	OTA_MGR_TEST_RESULT_MSG
Subject	&CURRENT_PERSON_DISPLAY_NAME has submitted the test &EVENT_TITLE
Body Text	&CURRENT_PERSON_DISPLAY_NAME has completed the following test Test Name: &EVENT_TITLE Score : &LINE_NUMBER Time Spent : &OTA_START_TIME

Notifies Learner of Test Results

Short Description	Notify learner of test results
Sent To	Learner
Process Name	Assessment Submission
Message Name	Inform Learner of Test Results
Internal Name	OTA_LRNR_TEST_RESULT_MSG
Subject	&EVENT_TITLE successfully submitted
Body Text	Your test has been successfully submitted. Test Name: &EVENT_TITLE Score : &LINE_NUMBER Time Spent : &OTA_START_TIME

Enrollment Status Security

Set up enrollment status security to prevent users with specific responsibilities from entering, updating, or deleting enrollments of a certain status. For example, your enterprise can allow all users to request enrollments, but allow only the course administrator to place an enrollment.

Once you set up enrollment status security, users with a specific responsibility cannot enter, update, nor delete enrollments of the statuses you specify.

Order Management and OLM

Using OLM with Order Management

The linkage of OLM (formerly Oracle Training Administration) with Oracle Order Management (OM) enables independent training vendors to manage the ordering and pricing of classes through a standard interface. Your customers can contact your organization's call center and order a class or enroll a learner just as they would order a chair or a software package. OM then generates invoices and bills the customers through its interface with Oracle Accounts Receivable.

> **Note:** In some cases, the OM interface uses Oracle Training Administration terminology: "event" or "EVT" for "class", "activity" for "course", and "OTA" for "OLM".

Before you can order classes and enrollments, you must add units of measure, place items in inventory, set up price lists, and link courses to inventory. Then you can add classes and enrollments, and change the maximum number of attendees for a class.

Setting Up Order Management for OLM

For OM to recognize OLM courses, you must set up an OLM-specific Unit-of-Measure Class and two Units of Measure (UOMs). To transfer financial information to Accounts Receivable, you must set up OLM-specific transaction types. To enable direct access from the OLM Enrollment Details window to the OM Sales Order window, you must add two form functions to the OLM menu of the responsibility to which you wish to grant access.

To add the Units Of Measure:

1. From the OM responsibility, navigate to the UOM Classes window under Setup.

2. Create a new UOM class called "Training". Enter a description.

3. Enter a Base Unit of "Enrollment" and a UOM of "ENR". Save your work.

> **Note:** Do not use other names for the UOMs.

4. Click the Units of Measure button. In the UOM window, go to the second line and create a new item with the name of "Class" and a UOM of "EVT". Make sure that the Base Unit check box remains set to Enrollment. Save your work.

5. Return to the UOM Classes window and click the Conversions button. Set the first line to Unit "Enrollment" and a Conversion of 1. Set the second line to Unit "Class" and a Conversion of 1. Save your work.

See Defining UOM Classes, *Oracle Inventory User Guide* and Defining UOMs, *Oracle Inventory User Guide*.

To set up OLM-specific transaction types:

1. Navigate to Setup > Transaction Types > Define.

2. Set up 3 transaction types:

   - Type: Invoice in Advance; Type Code: Line; Order Category: Order; in the Finance tab, set the Invoicing Rule to Advance and Accounting Rule to Immediate

- Type: Invoice Upon Attendance; Type Code: Line; Order Category: Order; in the Finance tab, set the Invoicing Rule to Arrears and Accounting Rule to Immediate

- Type: RMA; Type Code: Line; Order Category: Return; in the Finance tab, set the Invoicing Rule to Arrears (or Advance, depending on your policy) and Accounting Rule to Immediate

3. Query the transaction type that includes the Order Category of Order and the Order Workflow of Order Flow-Generic. Click on Assign Line Flows.

4. In the Line Workflow Assignments window, select the Order Type you just queried. You must create two new rows.

5. Create a new row with Line Type: Invoice in Advance; Item Type: Standard item; Process Name: Line Flow - OLM Item; and Start Date as early as possible.

6. Create another new row with Line Type: Invoice in Arrears; Item Type: Standard item; Process Name: Line Flow - OLM Item; and Start Date as early as possible. Click OK.

7. Query the transaction type that includes the Order Category of Return and the Order Workflow of Order Flow-Generic. Click on Assign Line Flows.

8. In the Line Workflow Assignments window, select the Order Type you just queried.

9. Create a new row with Line Type: RMA; Item Type: Standard item; Process Name: Line Flow - OLM Return for Credit Only; and Start Date as early as possible.

10. Save your work.

To grant OLM users direct access to the Sales Order window:

1. From the System Administrator responsibility, navigate to the Menus window.

2. Using the standard procedure for adding items to menus, add two functions to the OLM responsibility to which you want to grant access:

   --Order Organizer, ONT_OEXOEORD_SUMMARY

   --Order Organizer View, ONT_OEXOEORD_VW

   See Defining Menus, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Save your work.

4. If you want the Sales Order window under such access to be Read Only, in the Form Functions window you must query the Enrollment Details form OTAEDB, then set the Parameter ORDER_QUERY_ONLY=YES. The default value is NO.

Placing Items in Inventory

Once you have created the Units of Measure, you can enter training as items in Oracle Inventory, which you can access directly through OM.

See Defining Inventory Items, *Oracle Inventory User's Guide*

To place an activity (course) in inventory:

1. Under Items, navigate to the Master Items window.

2. Select your inventory organization from the list of values.

3. To ensure that your system recognizes the links you create between inventory and OLM, you must set the HR: Security Profile (a System Profile under the System Administrator responsibility) to equal your HR business group in the "Responsibility" column.

4. Name the item. We suggest that you begin each item name with a fixed prefix, which will group all training items alphabetically on any long list of items.

> **Warning:** Inventory training item names must contain fewer than 80 characters.

5. Under the Main tab, select your primary UOM (Enrollment) from the list of values. User Item Type is optional, though you may wish to fill in a value to enhance reporting.

6. Under the Inventory tab, select two boxes: Inventory item and Reservable.

7. Under the Order Management tab, select the boxes Customer Ordered and Customer Orders Enabled.

8. Under the Invoicing tab, select Invoiceable Item and Invoice Enabled, if applicable. Save your work.

As a final step before linking OLM courses with OM, you must set up price lists and formulas.

Creating Price Lists for OLM Classes

Oracle Advanced Pricing requires you to set up price lists and pricing formulas. As a prerequisite, you must set up (or verify) an Oracle Advanced Pricing descriptive flexfield.

> **Note:** Oracle Advanced Pricing offers two options, Advanced and Basic. If you have not licensed the Advanced option, you may not be able to complete all the steps below. You can, however, still set up basic price lists that can drive the OLM-OM integration.

To set up the Pricing Contexts descriptive flexfield:

1. From the System Administrator responsibility, navigate to Application > Flexfield > Descriptive > Segments.

2. Query the flexfield Pricing Contexts, and enter a Context Field Value with the code OTA, Name OTA Pricing, and Description OTA Pricing Context. Select the Enabled check box.

3. Click the Segments button to bring up the Segment Summary window. Enter the Number 10, Name Number of students, Window Prompt Number of students, Column PRICING_ATTRIBUTE1, and Value Set QP: Number. Select the Displayed and Enabled check boxes.

4. Save your work.

To set up Pricing Formulas for restricted events:

1. From the Order Management responsibility, navigate to Pricing > Pricing Formulas > Formulas Setup.

2. Name your formula--for instance, OLM Restricted 5-day Classes. Enter 1 in the Formula field. Save your work.

3. For Formula Type, select Factor List. The Component depends on the list of values set; you may use Number of Trainees or OLM Restricted 5-Day Classes, for example. In the Step column, type 1.

4. Click the Factors button. For Base Pricing Attribute Context, select OTA Pricing. For Base Pricing Attribute, select Number of Students. The Operator is Between. Repeat these values for each row you need.

5. In the Value From, Value To, and Adjustment Factor columns, you configure your price points. For instance, to charge $4,000 for 1 to 8 students and $10,000 for 9 to 20 students, you set up two rows as described in the table:

Value From	Value To	Adjustment Factor
1	8	4,000
9	20	10,000

6. Click OK and save your work.

To set up Price Lists:

1. Navigate to Pricing > Price Lists > Price List Setup.

2. Create a price list as instructed in the Overview of Price Lists document in the *Oracle Pricing User's Guide*.

3. In the List Lines region, enter all the inventory items (courses) you wish to sell. Note that, to sell a course both as a restricted class and as enrollments in a public class, you must create one line for EVT and one for ENR. Note also that EVT items need only a formula, not a price.

4. Save your work.

For further instructions, see Overview of Price Lists, *Oracle Pricing User Guide* and Overview of Formulas, *Oracle Pricing User Guide*

Linking Courses to Order Management

Once you have inventoried and priced training items in OM, you can link them to OLM.

To link an inventoried course to OLM:

1. Navigate to the Courses window in OLM. Create a new course or query an existing course.

2. Enter or select your inventory organization from the list of values.

3. Enter or query an inventory item you have already entered in OM. The course name populates automatically, but you can modify this field so you can link various courses with a single inventory item.

4. Save your work.

Changing the Maximum Number of Attendees

When you decide to raise or lower the maximum number of attendees for a class initiated in OM, you must alert the system by changing the OLM Pricing Attribute from within OM.

Changing the Maximum Number of Attendees in OM:

1. In the Line Items tabbed region of the Sales Orders form, query or select the class you wish to change.

2. Confirm that the Quantity is 1 and the Unit of Measure is EVT.

3. Click the Actions button and select Promotion/Pricing Attribute from the list of values.

4. In the Pricing Context field of the Pricing Attribute tabbed region, confirm or select OLM from the list of values.

5. In the Number of Students field of the Pricing Contexts window, enter the new maximum number of attendees for the class.

> **Note:** If the Pricing Contexts window does not open automatically, click on the Pricing Attribute descriptive flexfield block just to the right of the Pricing Context field.

6. Save your work.

Ordering Classes and Enrollments

In OM, to order classes and enrollments, you initially follow the standard OM Sales Order Form procedures, then click Actions, to detail the enrollment or class request.

> **Note:** Cancelling a class (an order line of the type EVT) in OM automatically cancels the class in OLM. However, you must manually cancel any resources already booked.

For step-by-step details on creating orders in OM, see Overview of Sales Orders, *Oracle Order Management User Guide*

To Order a Public Class Enrollment in OM:

1. Once you have entered or queried the order number and entered the standard OM ordering information, select a line item and click Actions.

> **Note:** The enrollee defaults as the customer contact in OLM. If you want the student to show up as a learner in OLM, you must enter the student as the Ship To Contact under the Addresses tab of the order line.

2. Select Training from the list of values.

3. If the unit of measure of the selected line is ENR, selecting Training brings up the Class Availability form, which gives you a read-only list of the classes scheduled for the course you have selected. Select the class.

4. Click the Select Enroll button, which brings up the Enter New Student Enrollment window. Fill out the form and save your work.

To Change a Public Class Enrollment in OM:

1. Query the existing order line and click Actions.

2. Select Training from the list of values.

3. When the Modify Student Enrollment window opens, change the Class Title or make other permitted changes. Save your work.

To Order a Restricted Class in OM:

1. Once you have entered or queried the order number and entered the standard OM ordering information, select a line item and click Actions.

> **Note:** Before you can enter a new class in OM, you must be sure that you have entered a value in the Number of Students field of the OTA Pricing Attribute. This number serves as the maximum number of students for the class and automatically creates an equal number of enrollments.
>
> See Changing Maximum Attendees in Order Management, page 11-76

2. Select Training from the list of values.

3. If the unit of measure of the selected line is EVT, selecting Training brings up the Enter New Restricted Class form. Fill out the form and save your work.

> **Note:** If you specify a class status of Full, the student enrollment status is Placed. If you specify a class status of Normal, the student enrollment status is Requested. See Class and Enrollment Statuses, page 3-7

Ordering a Restricted Class Enrollment in OM

You cannot directly enroll a student in a restricted class from within OM. Ordering a restricted class automatically creates a number of enrollments equal to the Number of Students you set in the OLM Pricing Attribute.

To add enrollments to a restricted class, you must query the enrollments in OLM, then create a new line in the enrollment summary window and fill out the enrollment details form. Note that if you do so without decreasing the number of places specified in the original enrollment, the learners you enroll will be waitlisted.

To specify learner names for the block of enrollments created when you created the event in OM, you must query the enrollments in OLM, then decrease the number of places (to 1, typically) and add each student as a new enrollment.

See Entering an Enrollment, page 3-6

Attendance and Processing

OM interfaces to Accounts Receivable on the date when OLM marks the enrollment as Attended. Therefore, you should *not* mark attendance before the last day of the class, nor too long after the class has concluded.

Processing service revenue before the service has concluded may violate national or local accounting principles, and marking attendance long after the class may cause revenue to be recognized in a later accounting period.

Restricting Enrollments by Country

The *OTA: Restrict Enrollments by Country* profile option can restrict enrollments to only those learners whose Operating Unit's country matches the country where the class takes place. To enforce this restriction, set the profile value to Yes. The Operating Unit must also include a location in a specified country.

Note that this restriction largely defeats the purpose of globalization: employees in Colmar, France, for instance, could not take classes in Basel, Switzerland or Freiburg, Germany, all within an hour's drive of one another.

The application determines the class's country by searching for:

- primary venue--the country of the resource venue; if none is specified, then

- event location--the country of the class's location; if none is specified, then

- training center--the country of the training center sponsoring the class

OLM - OTA Glossary

The following table displays terms used in OLM and the OTA terms they replaced.

OLM	OTA	Notes
Asynchronous, page Glossary-1	Self-Paced	-
Catalog Category, page Glossary-1	Activity Category	-
Class, page Glossary-2	Event, Scheduled Event	-
Competency, page Glossary-2	Skill, Competence	-
Completed, page Glossary-2	Completed	-
Course, page Glossary-2	Activity	-
Customer Restricted, page Glossary-3	Event Types: restricted	-
Delivery Mode, page Glossary-3	Delivery Method	-
Enrollment End , page Glossary-3	Enrollment To	-
Enrollment Start, page Glossary-3	Enrollment From	-
Instructor, page Glossary-4	Trainer, Instructor	Note that for backward compatibility, we use Trainer as the resource type in OLM
Invoice Total, page Glossary-3	Finance Total	-
Learner, page Glossary-4	Student, Delegate, or User	-
Learning History, page Glossary-4	Training History	-
Learning Path, page Glossary-5	Training Path	-
LMS Administrator, page Glossary-5	User, Training Administrator	-
Price, page Glossary-5	Amount	-
Proficiency Level, page Glossary-5	Proficiency, skill, or performance level	HRMS has proficiency and performance level. OTA supports proficiency. Only the appraisal function supports performance.
Room, page Glossary-6	Venue	-
Session, page Glossary-6	Event Types: session	-
Successfully Completed, page Glossary-6	Successfully Attended	-
Training Center, page Glossary-6	Training Center	-

Glossary

Asynchronous

An attribute of Delivery Mode, to define learning that does not require a time, place, or live instructor. Asynchronous learning is also known as self-paced learning. Asynchronous learning can be either online, such as a recorded seminar or other self-paced web content, or offline, such as a book or a CD-ROM

See also Delivery Mode, page Glossary-3

Attended

A status that verifies that a learner has participated in a synchronous offering. For online offerings, the application can capture the change in status; for offline offerings, an instructor can record the change in status.

Blended Learning

The ability to employ multiple delivery modes in delivering a single piece of learning or a series of learning events. Blended learning describes both the ability to deliver a single piece of learning through multiple modes, and the ability to construct a series of learning events that employ different delivery modes.

Catalog

What the learner sees when browsing through available courses and learning paths. You can divide the Oracle Learning Management (OLM) catalog into categories to facilitate the learners' search for related learning. The single catalog organizes and displays all learning, regardless of delivery mode.

Catalog Category

A subdivision of the catalog. You create categories to organize courses in the catalog, and to help learners search for related learning. You can create a hierarchy of categories, and a course can be a part of more than one category.

Catalog Prerequisites

Courses and competencies that a learner must or should complete before enrolling in a given class. Mandatory prerequisites prevent learners from enrolling in the class, while advisory prerequisites merely inform the learner of courses they should take or competencies they should acquire prior to enrollment.

Chat

A scheduled live discussion that enables learners and instructors to exchange messages online. You can create a chat within a category or for a specific class.

Class

The entity that is an individual instance of an offering, and in which learners enroll, typically for synchronous offerings. For each class, you can create multiple sessions.

See Session, page Glossary-6

CMI Adapter

See SCORM Adapter, page Glossary-6

CMI Objectives

Data elements contained in AICC content to enable greater content tracking. As part of the AICC specification, you can import CMI Objectives contained in a learning object. You can also view the CMI Objectives contained in a learning object post import.

Competency

A measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competence can be a piece of knowledge, a skill, an attitude, or an attribute.

Completed

A status that indicates a learner has taken the course. The completed status depends on the delivery mode of the offering: for online asynchronous offerings, Completed is when the learner has played the offering, dependent on the type of tracking; for offline asynchronous offerings, it is when the learner has read a book or other offline material; for offline or online synchronous offerings it is when the learner has attended the class.

Content

A piece of online learning material that is delivered to the learners through offerings.

Content Folder

An organizing container for online learning objects. You set up content folders to reflect the structure of your content, for example, by subject matter, curriculum, or learner job roles. You create content folders and sub folders to organize and group related learning objects.

See also Learning Object, page Glossary-4

Content Location

A URL that identifies and locates your physical content that is located on a content server, either an external server or an OLM content server.

Content Tree

The content hierarchy consisting of content folders, its sub folders, learning objects and tests.

See also Learning Object, page Glossary-4,Test, page Glossary-6

Course

A catalog entity that is described by attributes such as objectives and learner competencies. It is the entity that defines and describes the learning, without specifics such as content and delivery mode which are defined in the offering. An offering is a child of a course.

Cross Charge

The transfer of the cost of training fees or resources between organizations, departments, or cost centers within an enterprise.

Customer Restricted

Offerings or classes that are restricted to one or more customers (learner or customer/order priced).

Delivery Mode

Identifies the style in which learning is delivered. Delivery modes are either synchronous (real time) or asynchronous (self -paced), and either online (viewed through the player) or offline (such as a class in a classroom, or a book to be read). The four combinations are: online synchronous, online asynchronous, offline synchronous, and offline asynchronous. Once defined, customers can name the delivery modes whatever they wish, to describe their different styles of learning.

Descriptive Flexfields

A field that your organization configures to capture additional information required by your business but not otherwise tracked by Oracle Applications.

See also Key Flexfield, page Glossary-4

Enrollment

A status describing a learner's engagement with a learning catalog entity. For example, a learner must enroll in a class in order to access it. You must set appropriate learner access conditions for your offering or class to ensure that only specific learners enroll in the class.

Enrollment End

Date by which an offering or class no longer shows in the learner catalog. Learners cannot enroll after that date.

Enrollment List

List of enrollments against an offering or class.

Enrollment Start

Date on which an offering or class shows up in the learner catalog.

Finance Header

A record of a monetary amount against a learner enrollment or a resource booking. A finance header can consist of multiple finance lines.

Finance Line

An individual financial transaction within a finance header.

Finance Total

Total of finance lines against enrollment for a class. Finance can be of type Receivable or Cross Charge.

See also Finance Line, page Glossary-3, Cross Charge, page Glossary-3

Flexfields (Key And Descriptive)

Configurable additional data entry fields that are not predetermined by Oracle Applications. They are not altered by patch install or upgrades.

See also Key Flexfields, page Glossary-4, Descriptive Flexfields, page Glossary-3

Forum

A message board that learners and instructors use to post general learning topics for discussion. Users can subscribe to a forum and post topics and messages for discussion. You can create forums within a category or for a specific class.

Instructor

A person in charge of delivering a synchronous offering. Note that for backwards compatibility, "Trainer" is the predefined name of the resource type.

Key Flexfield

A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups.

See also Descriptive Flexfield, page Glossary-3

Learner

One who enrolls and takes up a course on OLM. There can be different types of learners: internal learners, or external learners such as customers and partners.

Learner Access

A definition of the list of learners who can access a catalog object. You can define learner access at the category, course, offering, and class levels. An object lower in the hierarchy derives access from the parent object (inherited access). For example, a course inherits access that is defined for the category above it. You cannot modify access inherited from another object.

Learning Certification

A catalog object that offers learners the opportunity to subscribe to and complete one-time and renewable certifications. The learning certification is primarily a container for a logical grouping of existing courses, with added attributes such as renewability and deadlines.

Learning History

The list of past courses a learner has taken that are captured on the system.

Learning Object

An entity that defines online course content within OLM. Learning objects provide the metadata to represent and describe the actual physical content located on the content server. You can structure online content as a hierarchy of learning objects, to be delivered as a single offering. OLM automatically tracks learner progress at the learning object level.

Learning Path

A sequence of two or more courses that enables tracking of learner progress against a higher level learning objective than is associated with an individual course. A learning path can be created by a learner, manager, or administrator.

LMS Administrator

A role of a user in the system. This is the role of a user who is tasked with managing the system, entering and maintaining data, and handling the setup related tasks.

Location

The physical address of a particular class or other.

Manager

The manager to whom one or more learners report.

Offering

An entity under a course. Attributes such as delivery mode, language, and content define offerings. An offering consists of one or more classes.

See also Synchronous, page Glossary-6

Offline

Learning that a learner can complete while not logged into the learning management system. Examples include instructor led training in a classroom, paper-based study, or CD-ROM offerings.

Online

Learning for which the learner must log into the learning management system to participate. Online learning content is delivered and tracked by the learning management system.

Player

The functionality within the learning management system that delivers online content.

Price

The price at which a class is charged for attendance. The price can be overwritten by administrators and is not relevant if OM is used.

Proficiency Level

The perceived level of expertise of a person in a competence, in the opinion of the assessor, over a given period. For example, a person may demonstrate the communication competence at Expert level.

Question Bank

A storage of questions that are used in one or more tests.

Resource

A person or object that is necessary to deliver a class, for example, a named instructor or a specific classroom required for a synchronous offline offering. In OLM, you create resource types and define the resources that are available for each resource type.

Room

The physical room identifier where a class takes place.

Schedule

A list of learning, and associated dates, that is due to take place for a learner or for an instructor.

SCORM Adapter

A set of files enabling communication between your content and OLM when your content contains SCORM CMI calls, and when your content is outside the Oracle domain. With the SCORM adapter, the content can successfully communicate tracking information to the learning management system irrespective of the content location. The SCORM adapter files reside on the same content server as your content.

Session

A catalog entity that is a subset of a class. Used when a single synchronous class meets at more than one time, or in more than one location, on more than one date, or with more than one instructor.

Successfully Completed

A learner has successfully completed a class when the learner is verified as not only having attended or attempted the offering, but having demonstrated competency sufficient to achieve the competencies associated with the course.

Synchronous

An attribute of delivery mode for learning that requires a time, place, or live instructor. Synchronous learning can be either online, such as a live web seminar, or offline, such as an instructor led class in a physical room.

See also Delivery Mode, page Glossary-3

Test

A grouping of questions taken from question banks and delivered through the player. Tests are designed to test explicit knowledge, skill level, and/or ability of a learner.

See also Question Bank, page Glossary-5

Trainer

A predefined resource type. The Trainer resource type is named for backward compatibility. However, the application refers to the resources of this type as instructors.

Training Center

A place where learning occurs, or a hierarchy used for reporting on classes and resources.

Transcript

An official report that shows whether a learner has completed, attended, or failed a class. Transcript covers for instance one larger goal such as a degree or comprehensive goal that perhaps could be attained through successfully completing a learning path.

Web Conference

An entity that you use to deliver online synchronous classes and record these classes for on-demand playback. You can create a Web conference for an online synchronous

class or enter recorded Web conference information for the class to associate it with a recorded Web conference.

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