SIEBEL eTRAINING GUIDE

VERSION 7.5, REV. A

12-FRLSJU

MAY 2003

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Introduction

This guide describes how to install and configure Siebel eTraining, a training management solution, and how to set up and administer a Siebel eTraining Web site.

This guide also describes how employees, partners, and customers can use a Siebel eTraining Web site to learn about any subject for which you offer training.

This book will be useful primarily to people whose title or job description matches one of the following:

Curriculum Designers	Persons responsible for creating materials for training courses, including self-paced, Web-based learning, live instructor-led courses, and Siebel Distance Learning sessions.
Installers	Persons responsible for setting up Siebel systems for initial use.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications, including Siebel eTraining.
Training Coordinators	Persons responsible for day-to-day administration of training programs; duties include registering students for courses and handling payments and cancellations.
Training Instructors	Persons responsible for leading classes and grading tests.
Training Managers	Persons responsible for setting up and maintaining a training department; duties include designing and managing training programs.

Persons responsible for installing and configuring Siebel eTraining need a thorough knowledge of the architecture of Siebel eBusiness Applications and standard Siebel installation and configuration procedures. A working understanding of specific applications, including eSales, eService, and Partner Management, is strongly recommended.

Persons responsible for setting up Siebel eTraining Web sites also need a thorough understanding of the training or certification programs they plan to offer, plus basic knowledge of how to use a Siebel application.

Persons responsible for training department operations need basic knowledge of how to use a Siebel application.

This guide may also be of interest to Siebel system administrators, Siebel database administrators, and Siebel application developers.

How This Guide Is Organized

This guide is organized into two parts: Administering Siebel eTraining and Using Siebel eTraining.

Administering Siebel eTraining

Administering Siebel eTraining is covered in the following chapters and provides detailed instructions for anyone involved in setting up or maintaining eTraining software or an eTraining Web site.

■ "Installing and Configuring Siebel eTraining" on page 15

■ "Preparing for Administration Tasks" on page 25

■ "Setting Up Courses" on page 35

■ "Using the Training Library" on page 55

■ "Adding Training Locations" on page 61

■ "Setting Up Curriculums" on page 73

■ "Setting Up Skills Tests and Assessments" on page 83

■ "Working with Customer Information" on page 99

Using Siebel eTraining

Using Siebel eTraining is covered in the following chapters and provides instructions appropriate to potential training course attendees who view an eTraining Web site using their Web browsers. The instructions in this section may be useful to you if you want to modify or expand the online help that such a user can see.

■ "Entering an eTraining Web Site" on page 115

■ "Viewing Training Information" on page 123

■ "Using the eTraining Web Site" on page 135

Within each part of this guide, each chapter addresses similar kinds of activities, such as setting up the Web site, working with customer information, or participating in eTraining. If you are setting up a new eTraining Web site, read each chapter that pertain to your responsibilities, in the order in which they appear in this guide.

Revision History

Siebel eTraining Guide

Version 7.5, Rev. A

Table 1. Changes Made in Version 7.5, Rev. A

Topic	Revision
"Adding or Modifying a Training Course" on page 36	Revised procedure.
"Creating Training Test Questions and Answers" on page 86	Added step in procedure to explain the Renumber button in the Answers subview.
"Specifying Skills Test Details" on page 95	In the table describing Test Questions fields, removed statement that Sequence value is read only.

Additional Changes
■ Removed subprocedures documented in *Fundamentals*.

Installing and Configuring Siebel eTraining ###### 1

This chapter describes the installation and configuration of Siebel eTraining. The installation and configuration process depends on whether eTraining is used for employee deployments or for customer and partner deployments.

If Siebel eTraining is used for:

- Enterprise, employee deployments, then it is used with a Siebel base application, such as ERM (Employee Relationship Management), Sales, Call Center, Service, Marketing, or Siebel Partner Manager.

- Customer and partner deployments using the Web, then it is sold and installed as a stand-alone application, through either Siebel eTraining or Siebel Partner Portal.

Siebel eTraining also uses Siebel Workflow to control enrollment processes, and it integrates with Siebel eSales to control order management processes.

Siebel eTraining Installation Process

Most Siebel eTraining software is installed as part of your Siebel Server installation. Your unique license key enables Siebel eTraining along with your other Siebel software purchases.

NOTE: The following steps outline the installation and configuration procedures that directly affect eTraining. Be sure to follow your overall installation plan.

The process for installing and configuring eTraining is as follows:

1 Install and test a standard Web server.

2 Verify that you have a supported database server ready to work with your Siebel software.

3 Install the Siebel Gateway Server.

4 Install the Siebel Server.

Use the instructions in *Siebel Server Installation Guide* for the operating system you are using.

When your Siebel software has been installed, configured, and tested, you can set up your eTraining Web site.

Customizing the eTraining User Interface

Some of the modifications that you might want to perform to change the look and feel of your Siebel eTraining Web site include the following:

- Modifying Web templates

- Changing colors

- Modifying the behavior caused by clicking a button

- Adding or removing applets

- Changing controls

- Making fields in forms required

- Deploying Siebel eTraining without using frames

For information on customizing the user interface, see *Siebel Tools Reference*.

Modifying Business Processes for eTraining

Siebel Workflow provides you with a graphical interface for designing and implementing business processes and user interactions. Siebel eTraining uses Siebel Workflow to control enrollment processes, and it integrates with Siebel eSales to control order management processes.

Siebel eTraining Processes and the Process Designer

Workflow processes are created using the Process Designer in the Workflow Processes view in the Business Process Administration screen. The Workflow Processes view is shown in Figure 1.
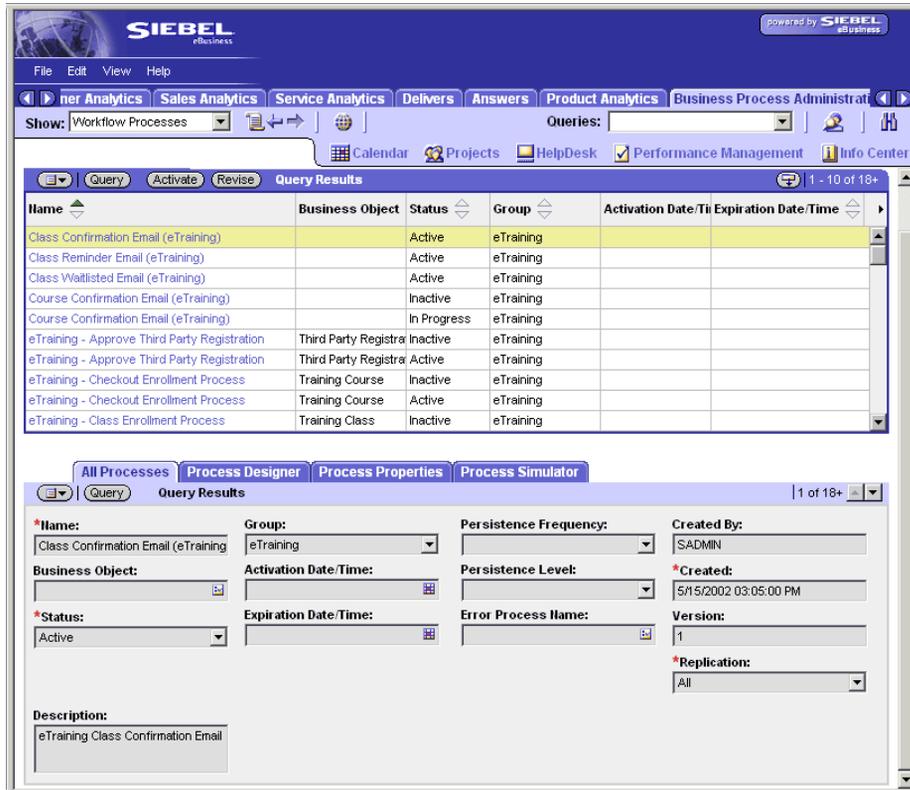
Figure 1. Workflow Processes View

Accessing the Process Designer

In the Workflow Processes list, drill down on the name of a workflow process to access the Process Designer. You can also select the process and click the Process Designer view tab. The Process Designer is shown in Figure 2.
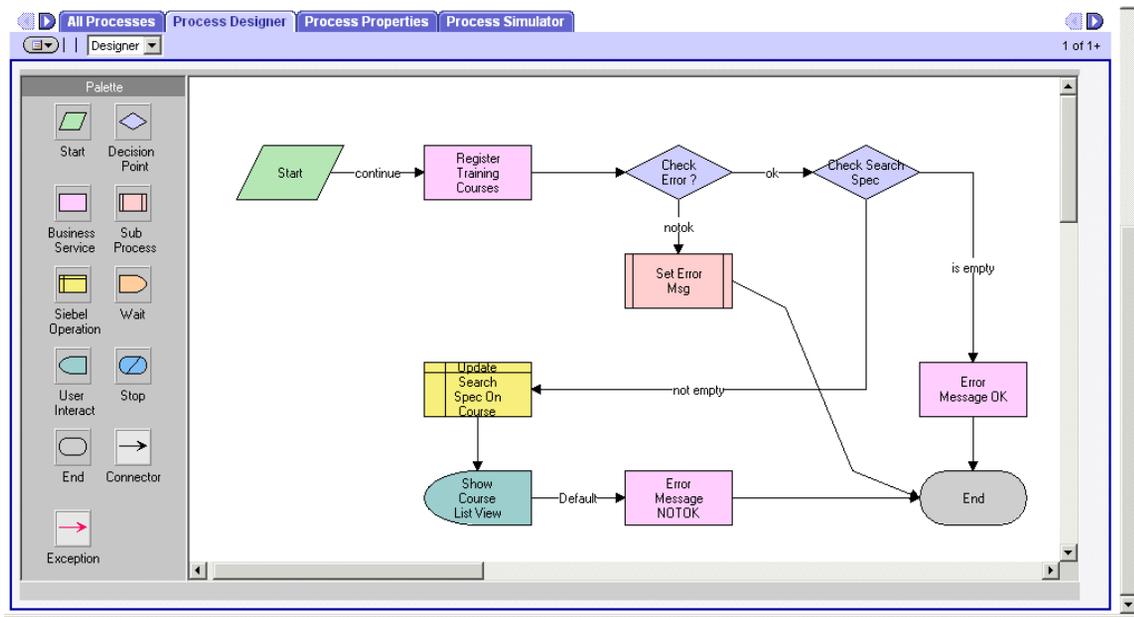
Figure 2. Siebel Workflow Process Designer

For information on creating and managing workflow processes, see *Siebel Business Process Designer Administration Guide*.

Siebel eTraining Workflow Processes

This section describes the following:

■ Features Built Using Siebel Workflow

■ Deploying Siebel eTraining with Siebel Analytics on page 22

Features Built Using Siebel Workflow

The following list includes features in Siebel eTraining that are built using Siebel Workflow. For information on Siebel eSales workflows, see *Siebel eSales Administration Guide*.

■ eSales—Display Error Process

■ eTraining—Class Enrollment Process

■ eTraining—Class Reg Enroll Process

■ eTraining—Course Enrollment Process

■ eTraining—Course Reg Enroll Process

■ eTraining—Checkout Enrollment Process

■ eTraining—Drop Class Process

■ eTraining—Drop Course Process

■ eTraining—Drop Enrollment Process

■ eTraining—Go to Shopping Cart Process

■ eTraining—Leftover Course View

■ eTraining—Show Course Details Process

■ eTraining Enrollment Process

■ Show Course Detail (Int Prod) Process

■ Show Course Detail Add To Cart Process

■ Show Course Detail Favorite List

■ Show Course Detail Quote Comparison

■ Show Course Detail Quote Template

■ Training Course Enrollment Process

■ Class Confirmation Email (eTraining)

■ Class Reminder Email (eTraining)

■ Class Waitlisted Email (eTraining)

■ Course Confirmation Email (eTraining)

■ eTraining—Approve Third Party Registration

■ eTraining—Decline Third Party Registration

■ Training—Third Party Registration - Submit

Deploying Siebel eTraining with Siebel Analytics

For customers who deploy Siebel eTraining with Siebel Analytics, the following additional workflows can be configured. If Siebel Analytics is not being deployed, then these workflows can be disabled to improve application performance. For more information, see *Siebel Analytics Installation and Configuration Guide*.

■ ERM Training Org Hierarchy Stamp

■ ERM Training Stamp Get Org L1 Name

■ ERM Training Stamp Get Org L2 Name and Id

■ ERM Training Stamp Get Org Names subprocess

■ ERM Training Stamp Get Org_L3 Name and Id

■ ERM Training Stamp Get Pr_postn_Id subprocess

■ ERM Training Stamp Position to Org subprocess

Siebel eTraining Business Services

The following is a list of predefined business services provided by Siebel eTraining. Business services allow you to execute predefined or custom actions in a workflow process. You can change these business services or define your own custom business services using Siebel Tools or Siebel Administration views. For more information on working with business services, see *Siebel Business Process Designer Administration Guide, Siebel Tools Online Help*, and *Siebel Tools Reference*.

■ eTraining Course Launch Service

■ eTraining Curriculum Service

■ eTraining Recommended Course Service

■ eTraining Test Engine Service

■ eTraining Course Registration Service

Siebel eTraining Business Services

Preparing for Administration Tasks   2

This chapter describes how to enter the information for your Siebel eTraining Web site. Siebel eTraining allows you to provide Web users with the following services:

- A catalog of the training courses you offer

- Curriculum information for certification or degree programs you offer

- An automated course registration system

- A library of training materials

- A skills testing system

If you have purchased Siebel Distance Learning in addition to your Siebel eBusiness Applications, then eTraining also provides a convenient way to manage and provide access to Distance Learning sessions.

Before You Begin Working with eTraining

To use the instructions in this chapter, you must have a Siebel system login and password with sufficient privileges to let you use Training Administration screens and Application Administration screens. Most administration activities for eTraining are performed using Training Administration screens.

Depending on your license key, eTraining screens may be available in the following applications:

■ Siebel Sales

■ Siebel Call Center

■ Siebel Service

■ Siebel Employee Relationship Management (ERM)

■ Siebel Partner Manager

■ Siebel Partner Portal

■ Siebel Marketing

Lists of Values (LOVs) for eTraining

You may also find it helpful to review and expand the following lists of values (LOVs) before you begin to set up your eTraining Web site. You can work with lists of values by navigating to the Applications Administration screen and choosing the List of Values view. For information about adding entries to lists of values, see *Applications Administration Guide*.

■ LOCATION_STATUS (status of a location)

■ LOCATION_URL_STATUS (status for location links)

■ LOCATION_URL_TYPE (type of location link)

■ TRAINING_ACTION_TYPE (links for browsing and course enrollment)

■ TRAINING_AUD_TYPE (job roles for courses)

■ TRAINING_CATEGORY_TYPE (categories of your choosing that you can use to group training courses together as needed)

■ TRAINING_CLASS_STATUS (status of a particular class)

■ TRAINING_COURSE_CRITERIA (how course completion is defined)

■ TRAINING_COURSE_FORMAT (type of course being taught)

■ TRAINING_COURSE_LAUNCH_STATUS (status of course launch links)

■ TRAINING_COURSE_PERSON_STATUS (status values for user enrollment)

■ TRAINING_COURSE_REL (relationships between associated courses)

■ TRAINING_CRSE_AUD_TYPE (audiences for courses)

■ TRAINING_CRSE_LIT_REL (course literature types)

■ TRAINING_CRSE_SKILL_LEVEL (skill levels)

■ TRAINING_CRSE_STATUS (status of the course)

■ TRAINING_CURR_AUD_TYPE (audiences for curriculums)

■ TRAINING_CURR_CATEGORY_TYPE (categories for curriculums)

- TRAINING_CURR_CRSE_TYPE (relationship between the course and curriculum, such as optional or required)

- TRAINING_CURR_JOB_TYPE (job roles for curriculums)

- TRAINING_CURR_LIT_REL (curriculum literature types)

- TRAINING_CURR_PER_STATUS (levels of completeness within curriculums)

- TRAINING_CURR_TYPE (curriculum type)

- TRAINING_LOC_REGION (regions for grouping training locations; useful for searches by location)

- TRAINING_LOC_ROOM_TYPE (types of rooms where training may be held)

- TRAINING_LOC_TYPE (types of venues where training may be held, such as training centers, convention centers, and hotels)

- TRAINING_QUES_CAT (question categories)

- TRAINING_QUES_TYPE (types of questions available for use in skills tests)

- TRAINING_REG_STATUS (test results status values)

- TRAINING_STEP_PERSON_STATUS (status for a curriculum step)

- TRAINING_TESTRUN_STATUS (test completion status values)

- TRAINING_TEST_SCORING_TYPE (test scoring methods)

- TRAINING_TEST_STATUS (test status values)

- TRAINING_TEST_TYPE (test types)

The eTraining Home Page

The following figures are examples of home pages that appear after you enter the correct user ID and password.

■ Figure 3 shows the home page for Web users who view your eTraining Web site. It always starts out at the anonymous users' version of the eTraining home page.

Figure 3. eTraining Home Page for Web Users

■ Figure 4 shows the home page for users who access eTraining using a Siebel application such as Employee Relationship Management (ERM), Sales, or Call Center.
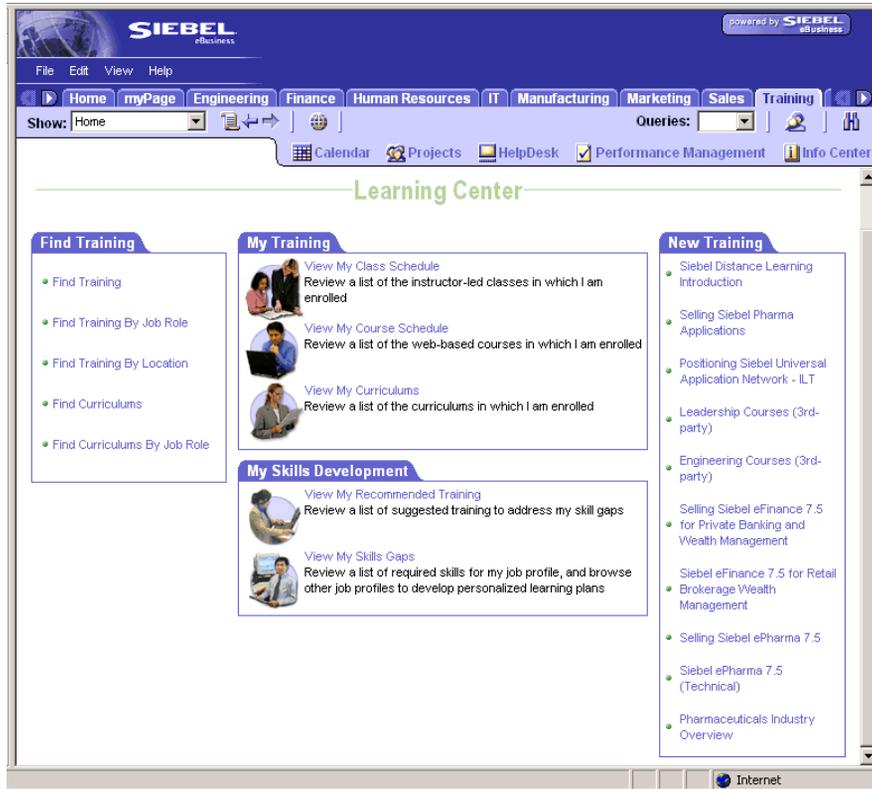
Figure 4. eTraining Home Page for Enterprise Applications Users

Information Available Without Entering a Login or Password

Siebel eTraining Web site users can view the following kinds of information without entering a login and password:

■ **Home page and course descriptions.** Descriptions of top 10 new courses listed on the home page. This list is compiled automatically.

The courses that appear are those most recently created. The list of courses can be kept constant by using Siebel Tools to turn off the applet properties. For more information about using Siebel Tools, see *Siebel Tools Reference* and *Siebel Tools Online Help*.

■ **Find Training page.** This page provides links to additional pages, which include the following lists:

- ■ Find Courses

- ■ Find Courses By Job Role

- ■ Find Courses By Location

- ■ Find Curriculums

- ■ Find Curriculums By Job Role

■ **My Training page.** This page provides links to class schedules, course schedules, and curriculums.

■ **My Skills Development page**. This page provides links to your recommended training and your skill gaps.

The My Skills Development page is available in employee applications where Siebel Competency Management has also been purchased.

Entering eTraining from the Home Page

From the home page, users can enter the rest of the site in two ways:

■ Log in as a previously registered Siebel user.

■ Register as a new user.

Anonymous users must register before they can sign up for any class or curriculum. Users who register using eTraining become Siebel users in your Siebel application. For information about setting up user access for eTraining, and for Siebel customer applications see *Security Guide for Siebel eBusiness Applications*.

Navigating to Training Administration Screens

Most Siebel eTraining administration tasks are performed using the following Training Administration screens.

■ Class Details

■ Course Details

■ Courses

■ Curriculums

■ Enrollments

■ Test Questions

■ Test Results

■ Tests

■ Training Library

To navigate to a training administration screen, you must, as an administrator, log in to the Siebel application that is licensed to include Training Administration screens. For example, these screens may be included in Siebel Sales, Siebel Call Center, Siebel Service, Siebel Partner Manager, Siebel Marketing, and Siebel ERM (Employee Relationship Management). For basic information about using Siebel applications, see *Fundamentals*.

To navigate to a Training Administration Screen

1 Start the Siebel application that is licensed to include Training Administration screens.

2 Enter the appropriate administrative login information in the User ID and Password fields, and then click OK.

3 From the application-level menu, choose View > Site Map > Training Administration to display the detailed list of hyperlinks to individual training administration screens.

4 Drill down on the link for the screen you want to use.

NOTE: If you drill down on the Training Administration link, the Courses screen appears as the default. You can navigate from the Courses screen to other training administration screens using the Show drop-down list.

Setting Up Courses   3

This chapter describes how to add or modify a course and how to specify course details.

Adding or Modifying a Training Course

Before eTraining Web site users can learn about a course that your organization offers, you must add a listing for the course. A course listing can be modified at a later time if you choose.

Some of the available course setting values depend on records in the Application Administration > List of Values list. List of Values setting names are mentioned throughout the eTraining administrative procedures in this guide. For information about editing lists of values to make additional values available, see *Applications Administration Guide*.

To add or modify a course

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, create a new record and complete the fields.

The following table describes the fields. For information on adding a new record in a selection dialog box, see *Fundamentals*.

Field	Comments
Access Period (Days)	Number of days the course may be accessed. Typically used to manage how long users have access to Web-based training courses.
Accrue Units	Select the check box to allow units to accrue as part of student transcript or as part of a curriculum. Default value is selected.
Allow Waitlist	Select the check box to manage the waitlist to unlimited size or Max Size, depending on user-defined criteria.
	If the waitlist is not allowed, then overflow enrollees receive a message that the class is full and class enrollment is no longer allowed.
Auto Confirm	Select the check box to allow administrators to manage restricted-enrollment courses and classes.
	When this check box is not selected, enrollment defaults to Pending Approval status until administrator confirms enrollment. The default value is selected.

Field	Comments
Code	Shortened identifier for the course. Defaults to a unique, read-only row ID number.
Completion Criteria	Determines criteria for defining course completion. The values are Test Based or Launch Based.
	Typically, this is set to Test Based so that the course is complete after a test is taken and passed.
Expiration	Expiration date for the course. Typically used for Web-based courses.
	If a date is specified, then no associated class sessions can be held later than this date. Sessions are removed from the catalog.
	If the date is not specified, then the course does not expire.
	If the course is self-paced, then the course cannot be run later than this date.
	If you specify a value, be sure to choose a future date. Using a past date or today's date prevents the course from appearing in end user screens.
Format	The medium in which the course is delivered.
	The values are Instructor-Led, Web based, CD-ROM, Distance Learning, Exam, Third-party, Document, Bundle, Subscription, Recorded Event, and Competency.
Hours	Numeric value for course.
Job Profiles	Associates the course with one or more specific job roles. End users can then locate the course using a search by job role.
	For information on creating new job profiles, see *Siebel Employee Relationship Management Administration Guide*.
Language	Language in which the class is taught.
Max. Attendees	Use to manage number of enrollments for a course. Typically used for Web-based courses where network bandwidth may be constrained.
Max Waitlist Count	Use this value to manage maximum number of waitlisted students enrolled for a course.
Name	Course name.
Organization	The company sponsoring or teaching the course, which may differ from course vendor.

Field	Comments
Overview	Use this field to provide descriptive text about the course, which can be viewed by potential attendees in eTraining Web site screens.
Provider	General information about the provider for the course.
Rating	Popularity rating for the course.
Status	The current status of the course. By default, a course must have Status set to Active to be listed on the eTraining Web site and allow registration.
	The values are Active, Inactive, End of Life, Pre-Release, Pending, QA, and Near Term.
	Use another value for this setting until you are ready to accept registrations. Use Siebel Tools to alter the course Status values that appear on the Web site and allow registration.
	For more information, see *Siebel Tools Reference*.
Tests	Associates one or more skills tests with the course.
	For information about creating skills tests, see "Manually Viewing and Scoring Skills Tests" on page 108.
Units	Numeric value for course.
Version	The version of the course. The version is used internally within your organization to identify different versions of the same course.

Specifying Training Course Details

Before a prospective training course attendee can use eTraining to register for a listed course, the course status must be set to Active. If the course format is Instructor-Led or Distance Learning, you must specify additional details about the course, including when the course is scheduled. For Instructor-Led courses, you must also specify where the course will be held. If a course is offered at more than one time or more than one location, each offering of the course is called a *class* or a *class session.* Each class session is identified by a unique numerical code.

Navigating Between Courses and Course Details

There are two primary methods for navigating between Courses and Course Details views. These methods are as follows:

■ When working with only one course record, navigate to the Courses view, select the course record, and then drill down on the hyperlink in the course Name field to open the Course Details view.

   This method makes sure that you remain on the same record throughout course administration. This navigation method is used throughout this guide.

■ When working with details across multiple records, navigate directly to the Course Details view, and edit details for each course.

   This approach allows you to navigate through the course list using the Previous and Next Record buttons in the Courses form. When using this approach, it is often useful to query for the courses for which you want to edit details.

Additional Course Details

Course details may include additional information, which can be accessed by clicking the appropriate view tab. The view tabs are:

■ **Topics.** For more information, see Specifying Training Course Topics on page 40.

■ **Objectives.** For more information, see Specifying Training Course Objectives on page 41.

■ **Skills.** For more information, see Specifying Training Skills on page 42.

■ **Associated Training.** For more information, see Specifying Associated Training on page 43.

■ **Materials.** For more information, see Specifying Training Course Materials on page 44.

■ **Course Launching.** For more information, see Specifying Course Launching Information on page 45.

■ **Class Details.** For more information, see Scheduling Classes and Class Sessions on page 46.

■ **Add Enrollments.** For more information, see Adding and Viewing Course Enrollments on page 49.

■ **Partner Enrollments.** For more information, see Viewing Partner Enrollments on page 51.

■ **Bundled Courses.** For more information, see Creating Training Bundles on page 52.

NOTE: A class only needs to be defined if the course is being held at a specific time. Instructor-Led courses and Distance Learning classes must have classes defined, but Web-based courses, CD-ROM courses, and exam courses do not need defined classes.

Specifying Training Course Topics

You may find it useful to list the topics that are covered in a particular training course. Topic information specified using eTraining is visible to employees, partners, and customers, and indicates whenever the course status is set to Active and the user views detailed course information.

When a topic has been specified for any course in the system, other courses may be associated with that topic.

NOTE: If you edit an existing topic record, the changes you make are effective for each course that is associated with that topic.

To specify course topics

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course, and drill down on the hyperlink in the course Name field.

The Course Details form appears, with the Topics view tab selected by default.

3 In the Topics list, click New.

4 In the Add Topics dialog box, select the topics you want to add, and then click Add.

This dialog box lists topics that have previously been created, whether for the current course or another course. You can select multiple topics by holding down SHIFT or CTRL when you select records.

To add items to the dialog box list, click New. For more information, see *Fundamentals*.

Specifying Training Course Objectives

Objectives specified using eTraining are visible to employees, partners, and customers, whenever the course status is set to Active and the user views detailed course information.

When an objective has been specified for a course in the system, other courses may be associated with that objective,

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NOTE: If you edit an existing objective record, changes you make are effective for any courses that are associated with that objective.

To specify course objectives

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course, and then drill down on the hyperlink in the course Name field.

3 Click the Objectives view tab, and in the Objectives list, click New.

4 In the Add Objectives dialog box, select the objective, and then click Add.

The dialog box lists objectives that have previously been created, whether for the current course or another course. To add items to the dialog box list, click New. For more information, see *Fundamentals*.

Specifying Training Skills

You may also find it useful to specify the skills that are achieved by completing a particular training course. Skills specified using eTraining are visible to employees, partners, and customers, whenever the course status is set to Active and the user views detailed course information.

Skills and ratings are defined using the Siebel Competency Management module. For information on adding and changing skills and ratings, see *Siebel Employee Relationship Management Administration Guide*.

When a skill has been specified for any course in the system, other courses may be associated with that skill.

NOTE: If you edit an existing skill record, any changes you make are effective for any courses that are associated with that skill.

To specify skills

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select a course, and then drill down on the hyperlink in the course Name field to view Course Details.

3 Click the Skills view tab, and in the Skills list, click New.

4 In the Skill Name field, click the select button.

5 In the Skills dialog box, select the skill that you want to associate with the current course, and then click OK.

This dialog box lists skills that have previously been created, whether for the current course or another course. The Skill Description and Skill Rating Types fields are filled in with information from the selected skills.

6 In the Skill Level field click the select button, and in the Pick Rating dialog box select a rating, and then click OK.

Repeat the procedure to associate additional skills with the selected course.

Specifying Associated Training

Some of the training courses you offer may be related to each other in specific ways. For example, a course called Introduction to Web Design might be a prerequisite for a course called Intermediate Web Design. You can specify any other courses that are related to any course you offer using eTraining, and whether each course is a prerequisite to the current course or not.

To specify related training

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course, and then drill down on the hyperlink in the course Name field.

3 Click the Associated Training view tab, and in the Associated Training list, click New.

4 In the new record, click the select button in the Name field, and in the Pick Course dialog box, select a related course and then click OK.

To add items to the dialog box list, click New. For more information, see *Fundamentals*.

5 In the Relationship Type field, select the value that indicates whether or not the associated course is a prerequisite.

If the associated course must be completed before registering for the current course, select Prerequisite. If the associated course does not need to be completed before registering for the current course, select Optional.

6 Save the changes.

Repeat the procedure to associate additional courses with the selected course.

Specifying Training Course Materials

For each course you offer using eTraining, you can designate one or more files as course materials. Students can view these materials as part of their course work. The course material files are stored in the Training Library.

You can place each file in the library ahead of time, as described in "Adding a File to the Training Library" on page 56, or you can add it to the library when you designate it as course material.

To specify materials (training literature) for a selected course

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course, and then drill down on the hyperlink in the course Name field to navigate to Course Details.

3 Click the Materials view tab, and in the Materials list, click New.

4 In the Add Literature dialog box, select the literature item you want to designate as course material, and then click Add.

The new item appears in the Materials list.

You can select multiple items by holding down SHIFT or CTRL when you select records. To add items to the dialog box list, click New. For more information, see *Fundamentals*.

5 Save the materials.

Specifying Course Launching Information

The following procedure describes how to allow course launching. If you offer online classes in multiple formats, each format may require different launching information.

To specify technical launching information for a Web-based course

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course, and then drill down on the hyperlink in the course Name field to view Course Details.

3 Click the Course Launching view tab, and in the Course Launching list, click New.

4 Complete the fields, and save the record.

The following table describes the fields.

Field	Comments
Label	The text that eTraining users see when they want to start the selected course.
	If you offer different versions of the course based on the speed of the attendee's network connection, include speed-identifying text in the label.
URL	The URL for the specific version of the course that will be launched and is visible to attendees.
	Provide a URL as follows:
	■ For a Siebel Distance Learning class, provide the URL for the Distance Learning Conference Center or for an individual Distance Learning session that uses the HTML Viewer. For more information, see *Siebel Distance Learning Guide*.
	■ For a self-paced (Web-based) course, provide a URL address for the location of the file directory or specific course file.
Status	Values are Active, Inactive, and Pending.

Repeat this procedure to create additional records for different versions of the course.

Scheduling Classes and Class Sessions

The following procedures describe how to schedule classes for a course and how to schedule class sessions for a class.

You can schedule class sessions for the same day and the same time, but in different rooms. Instructors and students can be associated with a class. Though not required, class sessions allow for greater flexibility in managing time, room, and instructor changes that may occur during the course of a multiday classroom event.

To schedule classes for a course

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course, and then drill down on the hyperlink in the Course Name field to view Course Details.

> **NOTE:** The format for the course must be Instructor-Led or Distance Learning. You should not create a new class schedule record for other formats.

3 Click the Class Details view tab, and in the Class Details list, click New.

4 Complete the fields, and save the new record.

The following table describes the fields.

Field	Comments
Cancellation Deadline	The last date that users can cancel the class. After this date has passed, the Drop button is removed from the user's class details.
	This field is located in the Class Details view as part of the More Info view tab.
Class Status	Use to indicate the current status of the selected course. Available values include Active, Inactive, End of Life, Pre-Release, Pending, QA, and Near Term.
	In order for information about the selected course and class to be visible to nonadministrative users of the eTraining Web site, this setting must have the value Active.
Classroom	The classroom that the class session will use, based on the location selected.
Code	Shortened identifier for the class. Defaults to a unique, editable row ID number.
End	Date and time.
Instructor	Read-only field used to display instructor's first and last name in one field for the student.
Instructor First Name	Read-only field that is automatically populated with the instructor's first name.
Instructor Last Name	Use to specify one or more instructors who are teaching the class. In the Class Instructor dialog box, click the Primary check box to designate the primary instructor.
Location	Training location. Only existing locations can be selected from the Class Schedule form. To define locations, see "Adding Training Location Information" on page 62. Click the Primary check box to designate primary class location.

Field	Comments
Max Seats	The maximum number of seats available for the class. Can also be used to limit enrollment in Distance Learning classes, where there is no physical limit on number of seats. Defaults to 100,000 for a new class record before a location and classroom has been selected.
	If you:
	■ Specify a classroom with a nonzero value for Seats, the Max Seats value for the class automatically changes from 0 to the value of Seats for the classroom.
	■ Enter a nonzero value for Max Seats, the value you enter is used, regardless of classroom size.
Name	Name of the course.
Open Seats	The number of seats currently available in the class. The value is automatically calculated by subtracting the value of Taken Seats from the value of Max Seats.
Taken Seats	Total number of enrollments for this class that are confirmed or pending.
Tests	Read-only field associated with course tests.
Version	Read-only field associated with course version.

To schedule class sessions for a class

1 Complete the relevant class information in the Class Details view.

For more information, see .

2 Navigate to the Class Details view.

3 Click the Sessions view tab.

4 Add specific Start Time and End Time values if desired.

5 In the Classes form, click Create Sessions.

Class sessions are created automatically, and class values are copied to session records.

If desired, use the Sessions view to change individual values for each session, for example location, classroom, start and end times, instructors, and so on.

Adding and Viewing Course Enrollments

Use the procedures in this section to add enrollments to self-paced courses and scheduled classes, and to view current enrollments.

NOTE: Registered contacts who are not associated with an account cannot register for a class unless a system default price list is set up. For more information, see *Siebel eSales Administration Guide*.

To add enrollments to self-paced courses

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course, and drill down on the hyperlink in the course Name field to view Course Details.

3 Click the Add Enrollments view tab, and in the Add Enrollments list, click Add User.

4 In the Contact Last Name field, click the select button, and in the Pick Contact dialog box, select a name and then click OK.

5 Select the Override Prerequisites check box to override any conflicts that occur from adding a user who has not met prerequisites.

6 When you are done adding names, click Finish.

7 In the Shopping Cart view, verify that the appropriate training charges appear, and then click Check Out.

8 Enter the attendee credit card information and any other information, and confirm the order.

To add enrollments to scheduled classes

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course and drill down on the hyperlink in the course Name field to view Course Details.

3 Click the Class Details view tab.

4 In the Class Details list, review the dates In the Start field, and select the class session for the class to which you want to add enrollments.

5 Drill down on the hyperlink in the Start field to navigate directly to the Classes form.

6 Click the Add Enrollments view tab, and in the Add Enrollments list, click Add User.

7 In the Last Name field, click the select button, and in the Pick Contact dialog box, select a name and click OK.

8 In the Add Enrollments list, select the Override Prerequisites check box to override any conflicts that occur from adding a user that has not met prerequisites.

9 When you are done adding names, click Finish.

The Shopping Cart view appears.

10 Verify that the appropriate training charges appear, and then click Check Out.

11 Enter the attendee credit card information and other information for which you are prompted, and confirm the order.

NOTE: There is an alternate method for adding enrollments to scheduled classes. Navigate to the Class Details view, and in the Classes list, query to find the specific class for which you want to add enrollments. Select the appropriate class record and click the Add Enrollments view tab. Follow Step 7 through Step 11 to complete the enrollment process.

To view current enrollments

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course, and then drill down on the hyperlink in the course Name field to view Course Details.

3 Click the Class Details view tab, and in the Class Details list, drill down on the hyperlink in the Start field for the session.

4 Click the Current Enrollments view tab to view a list of enrolled students.

Viewing Partner Enrollments

The Partner Enrollments view is typically used for Siebel eTraining partner-specific deployments, but other users may find this information useful. Partner enrollments are also viewable from the Enrollment List.

To view partner enrollments

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course, and then drill down on the hyperlink in the course Name field to view Course Details.

3 Click the Partner Enrollments view tab.

The following table describes the fields.

Field	Comments
Enroll Date	Date and time of the enrollment.
Enroll Status	Status of the enrollment.
	This field is read-only. Use the Enrollment List view tab to edit enrollment status.
First Name	Partner student's first name.
Last Name	Partner student's last name.

Field	Comments
Location	Training location.
Name	Course name. Drill down on the hyperlink to view associated training.
Registration #	Unique identifier for the partner enrollment. Drill down on the hyperlink to view associated tests.
Start	Course start date.

4 Query to find the course for which you want to view partner enrollments.

5 Select the listing for the course you are defining.

Creating Training Bundles

You can create any type of Web-based course or class as a training bundle, with supporting materials packaged and sold as one item, and with one enrollment and purchase process. However, bundles typically are priced independently. Examples of bundled products are packaged Web courses, pre-exams, CD-ROMs, workbooks, and videos.

To create training bundles

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, click New.

3 In the More Info form, enter a name for the bundled or packaged courses, and in the Format field, select Bundle from the drop-down list.

4 Complete the remaining fields, and save the record.

For more information, see "To add or modify a course" on page 36.

5 In the saved record, drill down on the hyperlink in the course Name field to view Course Details.

6 Click the Bundled Courses view tab, and in the Bundled Courses list, click New.

7 In the new record, click the select button in the Name field.

8 In the Pick Course dialog box, select the course that you want to add to the bundle, and then click OK.

Only Web-based courses appear in the Pick Course dialog box.

Repeat this procedure for each course you want to add to the bundle. When you have completed the process, save the changes.

Setting Up Training for Customers and Partners

When courses are used to sell training to customers and partners, you may need to perform additional activities to prepare the items for sale. These activities might include the following:

■ Adding prices to courses, which includes creating price lists, course prices, pricing models, discounts, and so on.

■ Setting up access groups, which includes creating access restrictions that define the audiences that can view certain training courses.

■ Setting up catalogs and categories, which includes creating catalog structures and navigation paths to allow for course grouping and display.

■ Setting up parametric search, which includes creating a structure that allows users to search for products based on values of the attributes of those products. For example, searching by course format, location, price, and so on.

For more information on these procedures, see *Siebel eSales Administration Guide, Pricing Administration Guide*, and *Product Administration Guide*.

Using the Training Library 4

This chapter describes how to use the Training Library, which is included with eTraining, to store files that are related to the courses and curriculums you offer. The Training Library can store many types of files, in formats that include .pdf, .xls, .doc, and .ppt. Users can view these files, which may include reading material, self-paced learning topics, training presentations, curriculum guides, course syllabus information, audio and video clips, and other training information.

You can store Web page URLs instead of actual files. When users attempt to view course or curriculum material that is stored on a Web page, instead of in the Training Library, a new browser window opens to display the designated Web page.

Adding a File to the Training Library

You can add a file associated with the training course to the training library.

To add a file to the Training Library

1 From the application-level menu, choose View > Site Map > Training Administration > Training Library.

2 In the Training Library list, click New.

3 Complete the fields in the form, and save the record.

The fields are described in the following table.

Field	Comments
Author	Author of the file you are storing.
Description	Allows you to enter a brief description of the item.
Distribution Method	Intended method for distributing the file, such as email, direct mail, and so on. For informational purposes only.
Expiration	Allows you to specify a date after which the file automatically become unavailable to Training Library end users.
	An expired file listing is visible to administrators but not to end users.
File Name	The name of the file to be placed in the Training Library, without the filename extension. Click the select button to navigate to the file. The extension appears in the File Type field. The file size automatically appears in the read-only Size field.
	May also be referred to as Attachment Name.
File Type	The extension of the filename of the item, such as .doc or .txt. Automatically populated when you fill in the File Name field.
Internal	Select the check box to make the item available to employees only.
Literature Type	Allows you to specify the purpose or category of the item. The default value is Training Literature. Other values may include Technical Reference Material, White Paper, and so on.
Organization	Allows you to specify document ownership to facilitate inquiries about updates or other maintenance.

Field	Comments
Release	Allows you to specify a date when the item becomes visible and available to end users. Before this date, only administrators see the listing and can access to the item. Useful for preventing distribution before appropriate conditions are met.
Title	A text field that you can use to enter the name of the item you are storing.

Adding a Web Page URL to the Training Library

You can store a Web page URL in the Training Library.

Training Library items are also listed in the Literature screen with Literature Type set to Training Literature. However, it is strongly recommended that you always administer Training Library items from the Training Library screen.

To add a Web page URL to the Training Library

1 From the application-level menu, choose View > Site Map > Training Administration > Training Library.

2 In the Training Library list, click New.

3 In the new record, click the select button in the File Name field.

4 In the Add Attachment dialog box, enter the address of the Web page in the URL field, and then click Add.

   Leave the File Name field blank.

   The URL appears in the File Name field in the More Info form.

5 If you want to associate an author with the URL, enter the name of the file's creator in the author field.

6 Complete the rest of the fields as needed, and then save the record.

Modifying a File in the Training Library

You can modify a file in the training library and make other changes to the training library record.

To modify the content of a file in the Training Library

1 Modify a copy of the file located in your regular file system (rather than within the Siebel application).

2 Add the modified file to the Training Library.

To modify a Training Library record

1 In the Training Library list, select the record and change the information.

2 Step off the record to save the changes.

To undo the changes you have made to a Training Library record

1 In the Training Library list, select the record.

2 Click the menu button, and choose Undo Record.

NOTE: Undo must be performed before you save or leave the record.

To delete a Training Library record

1 In the Training Library list, select the record.

2 Click the menu button, and then choose Delete Record.

Adding Training Locations 5

This chapter describes how to add training locations and how to set up eTraining automatic email notification messages.

Adding Training Location Information

You can provide detailed information about training locations for instructor-led classes. Location information might include the following:

■ Address of each training location.

■ Directions for reaching each training location.

■ Individual classrooms available within each training location, showing available seating, equipment, and other classroom-specific resources.

You can use the same screens to store information about hotels that are located near training locations.

Process for Defining a Training Location

The overall process for defining a training location and associating it with specific classes is as follows:

1 **Add a location record.** For more information, see "Adding a Training Location Record" on page 63.

2 **Add classroom information.** You can enter information about the classrooms available at the specified location. For more information, see "Entering Classroom Information" on page 64.

3 **Add hotel information.** You can optionally enter information about hotels located near the training location. For more information, see "Specifying Hotels Located Near a Training Location" on page 65.

4 **Add class listings.** You can create new class listings or edit existing class listings to associate the location with classes at the location. For more information, see "Assigning a Class to a Training Locations" on page 67.

Adding a Training Location Record

Use the following procedure to create a training location record.

To add a location record

1 From the application-level menu, choose View > Site Map > Location Administration.

2 In the Locations list, click New.

3 Complete the fields and save the new record.

The following table describes some of the fields.

Field	Comment
Account	Account associated with a particular location. Several read-only fields are automatically populated with the information included in the Account Addresses form.
Address	Address of the training facility.
City	City where the training facility is located.
Contact	Contact person at the training facility.
Country	Country where the training facility is located.
Description	Description of the location, or any other information useful to the user.
Email	Location (or contact) email address.
Fax #	Fax number for the training facility.
Hotel Rate	The room rate.
Name	Name of the training facility.
Notes	Administrator-defined notes.
Phone #	Phone number of the training facility.
Region	Region where the training facility is located. Typical values are North America, Europe, Asia, and Latin America.
State	State where the training facility is located.

Field	Comment
Status	Typical values are Candidate, Qualified, Active, Customer, Inactive, and Marked for Deletion.
Time Zone	Time zone of the training facility.
Type	Type of training facility. Typical values include Convention Center, Corporate Training Center, Hotel, and Third Party Training Center.
URL	URL associate with the training facility.
Zip Code	ZIP Code of the training facility.

Entering Classroom Information

Use the following procedures to assign a classroom, and specify its characteristics and resources.

To assign a room and specify the characteristics of a particular classroom

1 From the application-level menu, choose View > Site Map > Location Administration.

2 In the Locations list, select the location of the classroom you want to enter, and click the Rooms view tab.

3 In the Rooms list, click New.

4 Complete the fields, and save the record.

The following table describes the fields.

Field	Comments
# of Computers	Number of computers in the classroom.
# of Seats	Maximum number of seats in the classroom. This number does not include a seat for the instructor.
Drops	Number of computer network connections available in the classroom.
Name	Classroom name.

Field	Comments
Operating System	Operating system used by the computers in the classroom.
Phone #	Phone number of the classroom.
Room Rate	Daily rental rate for the classroom.
Type	Type of room being classified as a classroom. Values are Ballroom, Bar, Conference Room, Dinner Room, Exhibition Hall, Hotel Room, Lecture Hall, Lounge, Office, and Outdoors.

To specify classroom resources

1 From the application-level menu, choose View > Site Map > Location Administration.

2 In the Locations list, select the location of the classroom you want to enter, and click the Rooms view tab.

3 In the Rooms list, select the room, and then scroll down to the Equipment subview tab.

4 In the Equipment list, click New to add a record, and then complete the fields to specify an available classroom resource.

Typical classroom resources might include projectors, whiteboards, printers, flip charts, and so on.

5 Save the record.

Repeat this procedure for each classroom resource.

Specifying Hotels Located Near a Training Location

The following procedure describes how to record information about hotels located near the selected training facility. This information is made available to potential trainees when they use eTraining to browse or register for classes.

Before you begin, make sure each hotel is entered as a location record. For information on entering a hotel as a location, see "Adding a Training Location Record" on page 63.

To specify hotels located near a training location

1 From the application-level menu, choose View > Site Map > Location Administration.

2 In the Locations list, select the location of the training facility, and click the Hotels view tab.

3 In the Hotels list, click New.

A Hotels form appears, consisting of a single Name field and a select button.

4 In the Name field, click the select button, and in the Pick Hotel dialog box select a hotel listing and then click OK.

5 Save the record.

Repeat Step 3 through Step 5 for each additional hotel you want to associate with the selected location.

Assigning or Changing a Training Location of an Existing Class

The following procedure describes how to assign a training location of an existing class. You can also associate a new class with a training location, provided that the training location information is available within your eTraining system before you create the class.

To assign or change a training location of an existing class

1 From the application-level menu, choose View > Site Map > Location Administration.

2 In the Locations list, select the location of the classroom you want to assign, and click the Scheduled Classes view tab.

3 Select the session for which you want to assign or change the classroom location, and in the Classroom field, click the select button.

4 In the Pick Classroom dialog box, select a location, and then click OK.

Assigning a Class to a Training Locations

The following procedure describes how to assign a class to a training location. You must assign a location to a class before you can assign a classroom.

To assign a class to a training location

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course for which you want to specify a location, and drill down on the hyperlink in the course Name field to open Course Details.

NOTE: The format for the course must be Instructor-Led or Distance Learning. You should not assign a training location for other formats.

3 Click the Class Details view tab, and in the Class Details list select the class session for which you want to specify a location.

For information on scheduling a class session, see "Scheduling Classes and Class Sessions" on page 46.

4 In the Location field, click the select button, and in the Locations dialog box, select the class location, and click OK.

Make sure that the Primary check box is selected for the class location.

5 Save the changes.

Checking for Scheduling Conflicts

You can verify that there are no scheduling conflicts for a location and classroom.

To check for location and classroom scheduling conflicts

1 From the application-level menu, choose View > Site Map > Location Administration.

2 In the Locations list, select the location, and then click the Scheduled Classes view tab.

3 In the Scheduled Classes list, review the classes scheduled at this location and verify that classes are not scheduled to use the same room at the same time.

NOTE: You may find it helpful to sort the records by Start or by Classroom. Click the up arrow or down arrow in the header of the column to sort in ascending or descending order.

4 If necessary, select any class that needs to be rescheduled or relocated, change the appropriate settings, and save the changes.

Setting Up eTraining Automatic Notification Messages

Siebel eTraining is designed to send the following types of automatic email notification messages:

■ Confirmation that a user has successfully used eTraining to register for a self-paced course.

■ Confirmation that a user has successfully used eTraining to register for an Instructor-Led or Distance Learning class.

■ Notification that a class is full and the user has been placed on the waiting list.

■ Reminder that a class for which the user is registered starts in a few days.

For these messages to be sent automatically, eTraining must be configured to work with Siebel Workflow and Siebel Communications Server. This section provides a brief overview of that process. For more information, see *Siebel Communications Server Administration Guide*, *Siebel Server Administration Guide*, and *Siebel Business Process Designer Administration Guide*.

Setting Up Workflow Policies and Workflow Processes

You can set up workflow policies and activate workflow processes.

To set up workflow policies and activate workflow processes

1 From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Policies.

The Policies List appears with the Conditions, Actions, and Arguments forms.

2 In the Policies List, set Activation Date and Expiration Date for each of the following workflow processes:

■ eTraining Course Confirmation Email

■ eTraining Class Confirmation Email

■ eTraining Class Reminder Email

■ eTraining Class Waitlisted Email

3 In the Workflow Processes, activate the following processes:

- Course Confirmation Email (eTraining)

- Class Confirmation Email (eTraining)

- Class Reminder Email (eTraining)

- Class Waitlisted Email (eTraining)

Setting Up Communications Drivers and Modifying eMail Templates

You can set up communication drivers.

To set up communications drivers and modify eMail templates

1 From the application-level menu, choose View > Site Map > Communications Administration > Communications Drivers and Profiles.

2 In the Communications Drivers and Profiles view, set up any necessary profiles for your communications drivers.

3 In the All Templates view, modify the following email templates:

- Course Confirmation Email Package (eTraining)

- Class Confirmation Email Package (eTraining)

- Class Reminder Email Package (eTraining)

- Class Waitlisted Email Package (eTraining)

4 Start the Outbound Communication Manager server component.

5 Start the Generate Triggers server task.

6 Start the Workflow Monitor Agent server task for eTraining Group.

Additional Information on Training Registration Processes

After these steps are complete, automatic email messages are generated when eTraining course or class registration records have a Registration Status set to Confirmed or Waitlisted. For more information about registration processes, see the following sections of this guide:

■ "Registering Training Customers" on page 102

■ "Registering for a Self-Paced Course" on page 137

■ "Registering for a Scheduled Class" on page 139

Setting Up eTraining Automatic Notification Messages

Setting Up Curriculums 6

This chapter describes how to add or modify curriculums and how to specify curriculum details.

Training Curriculum Elements

A curriculum is a set of courses designed to fulfill a specific educational requirement such as a certification program or degree program. In eTraining, you can specify the courses that make up a curriculum.

Curriculums are predefined, ordered sequences of training elements. Each curriculum consists of a sequence of required steps. Each step can consist of one or more individual training elements (courses, events, exams, and so on) with specifications of how many elements are required to pass each step. This allows for electives (for example taking three courses from a set of six) to be mixed with standard required elements. Each element and step can be individually weighted for tracking purposes.

Users of eTraining can enroll in curriculums and can review their progress as they take successive courses within their curriculums.

Adding a Training Curriculum

The following procedure describes how to add a curriculum to a training database. For information on establishing the courses that make up the curriculum, see "Specifying Training Curriculum Details" on page 78.

To add a curriculum

1 From the application-level menu, choose View > Site Map > Training Administration > Curriculums.

2 In the Curriculum list, click New, and complete the fields for the new record.

The following table describes the fields.

Field	Comments
Audience	Use this field to create visibility restrictions. Click the select button and choose an audience type in the Curriculum Audience dialog box.
Categories	The curriculum category. Category examples are Communications Skills and Computer Science. Available values for Category are set in the TRAINING_CURR_CATEGORY_TYPE list of values. For more information about editing lists of values, see *Applications Administration Guide*.
Check Transcript	Select this check box to automatically credit courses that users have completed as part of a curriculum.
Description	Curriculum description.
Job Profiles	Use this field to associate the course with one or more specific job roles. End users can locate the course using a search by job role.
Maximum Points	Sum of the course points for the step
Minimum Points	Minimum number of points required to complete the step based on the number of courses required and their respective point values.
Name	Curriculum name.
Release	Select this check box to lock the curriculum and make it available to end users. Administrators must create a new curriculum to change the curriculum visible by users.

Field	Comments
Status	Use this field to indicate the status of the curriculum and determine its availability.
	When the value is Active, the curriculum can be taken by any student enrolled in a course associated with the curriculum.
	After the curriculum is released, change the Status to Inactive.
Type	Use this field to indicate why courses in the curriculum are grouped together. The values are Course Bundle and Training Plan.

Modifying, Canceling Changes, and Deleting Curriculums

The following procedures describe how to modify, delete, and cancel changes in curriculums. To navigate to curriculum records, from the application-level menu, choose View > Site Map > Training Administration > Curriculums.

To modify a curriculum record

1 In the Curriculums list, select the curriculum record, and make the changes.

2 Save the modified record.

To undo changes to a curriculum record

1 In the Curriculums list, select the curriculum record.

2 Click the menu button and choose Undo Record.

Undo must be performed before you save or leave the record.

To delete a curriculum record

1 In the Curriculums list, select the curriculum record.

2 Click the menu button and choose Delete Record.

Specifying Training Curriculum Details

Before eTraining users can enroll in a curriculum, you must provide detailed information about the curriculum and the courses included. You can also specify literature materials that are associated with the curriculum itself, rather than being associated with individual courses. Curriculum materials and course materials are designated separately and are visible to eTraining users using different screens.

When you are satisfied with the attributes of the curriculum, select the Release check box in the Curriculum form to lock the curriculum and make it available to users.

Specifying Training Curriculum Steps

The following procedure describes how to specify a series of steps that the user must complete in a curriculum.

To specify curriculum steps

1 From the application-level menu, choose View > Site Map > Training Administration > Curriculums.

2 In the Curriculum list, select the curriculum for which you want to specify courses, and then click the Curriculum Steps view tab.

3 In the Curriculum Steps list, click New, complete the fields, and save the record.

The following table describes the fields.

Field	Comments
# of Required Courses	Number of courses required to complete the step.
Description	Curriculum description.
Max Points	Sum of the course points for the step.
Min Points	Minimum number of points required to complete the step based on the number of courses required and their respective point values.

Field	Comments
Name	Description of the step.
Step #	A unique step number is automatically assigned to each step in the curriculum. You can edit the step number before the curriculum is released. Renumber the steps (prior to curriculum release) by manually changing the numbers in the Step field.

Specifying Courses for the Training Curriculum Steps

The following procedure describes how to designate courses for each of the Training curriculum steps.

To specify courses for the steps

1 From the application-level menu, choose View > Site Map > Training Administration > Curriculums.

2 In the Curriculum list, select the curriculum for which you want to specify courses, and then click the Curriculum Steps view tab.

3 In the Curriculum Steps list, select the step for which you want to specify courses.

4 In the Curriculum Courses subview list, click New.

5 In the Name field, click the select button, and in the Pick Course dialog box, select a course and click OK.

6 In the Required field, select Y or N from the drop-down list.

This value determines if the course is optional or required.

7 (Optional) In the Points field, edit the point value for the course.

The default value for each course is 10 points.

NOTE: The # of Required Courses field in the Curriculum Steps list determines how many courses are required to complete the step. If all of the courses are set to Optional, then any course is part of the step requirements. However, users may also set which courses are required by selecting Required in the Curriculum Courses list. These two fields allow flexibility in setting and enforcing required courses and electives.

Repeat Step 4 through Step 7 for each course you want to add to each curriculum step.

8 When you have finished adding the courses, save the changes.

Viewing and Adding Training Curriculum Enrollments

Use the following procedures to view user enrollment details, and add curriculum enrollments.

To view curriculum enrollments

1 From the application-level menu, choose View > Site Map > Training Administration > Curriculums.

2 In the Curriculum list, select the curriculum, and then click the Enrollments view tab.

The following table describes the fields.

Field	Comments
Depth	The student's depth score.
	This score is the calculated percentage value representing the sum of the points of the completed courses divided by the value of minimum requirements and completion points.
Enrolled	The date the student enrolled in the course.

Field	Comments
First Name	Student's first name.
Last Name	Student's last name.
Max Points	Total for point values for courses in the step.
Min Points	Minimum number of points required to complete course.
Progress	Student's progress score. Progress scores are updated as users complete each step in the curriculum. The score is a calculated percentage value representing the minimum completion points (sum of the minimum step points), divided by the sum of the points of the completed courses and limited by the defined weight of the step. For example, for a step with a minimum point value of 40, the maximum point value for the step as applied to the progress value would be 40; any additional course points accrued beyond 40 would only apply to the Depth calculation. As a result, the progress calculation indicates how close an individual is to completing the minimum requirements for the curriculum, while the Depth value indicates how completely the individual explored the curriculum.
Total Points	Total number of curriculum points earned.

To add curriculum enrollments

1 From the application-level menu, choose View > Site Map > Training Administration > Curriculums.

2 In the Curriculum list, select the curriculum, and then click the Enrollments view tab.

3 In the Enrollments list, click New.

4 In the Last Name field, click the select button, and in the Pick Contact dialog box, choose a name and click OK.

To add a name to the Pick Contact dialog box, click New.

Specifying Training Curriculum Materials

Use the following procedure to specify existing curriculum materials (literature), and to add new curriculum materials.

To specify curriculum materials (literature)

1 From the application-level menu, choose View > Site Map > Training Administration > Curriculums.

2 In the Curriculum list, select the curriculum for which you want to specify materials, and then click the Materials view tab.

3 In the Materials list, click New.

4 In the Add Literature dialog box, select the literature item you want to associate with the curriculum, and click Add.

If the literature item that you want to add is not listed in the Add Literature dialog box, click New. For more information about adding items to a dialog box list, see *Fundamentals*.

5 Save the record.

Repeat these steps for each additional item you want to specify as curriculum literature.

Setting Up Skills Tests and Assessments 7

This chapter describes skills tests and assessments, how to add skills test questions and other elements, how to add or modify a skills test, and how to specify skills test details. You can use eTraining to create and administer skills tests that check how well students have learned the course material. Students take the tests at whatever time is convenient for them, using ordinary Web browsers.

Process for Creating Skill Tests and Questions

Skills tests can include the following kinds of questions:

■ True-or-false questions

■ Single-choice questions with one correct answer

■ Multiple-choice questions with multiple correct answers

■ Questions that require the student to type in a text answer

■ Questions to which the student chooses a response from a numerical range

True-or-false, single-choice, multiple-choice, and range questions can be graded automatically within eTraining. Text answers must be read, evaluated, and graded by a person with administrator privileges. Questions with a range of responses are often used to allow the student to evaluate the effectiveness of the course or instructor and are not graded.

You can define stand-alone questions that can be used in multiple tests. Similarly, you can define stand-alone tests that are not associated with training courses, allowing you to associate a test with multiple courses. You also can define pools of questions from which individual test questions are randomly drawn each time a student takes the test. For more information, see "Taking a Skills Test" on page 155.

To create a skills test for a training course, the administrator performs the following procedures:

1 Creates questions and answers. The administrator creates new questions as needed for the test and specifies the answers. For more information, see "Creating Training Test Questions and Answers" on page 86.

2 Creates question pools. The administrator creates new question pools for the test as needed. For more information, see "Creating and Verifying Training Question Pools" on page 88.

3 Creates other test elements. For more information, see "Creating Headers and Footers for Training Test Elements" on page 90.

4 Modifies the test record. For more information, see "Adding a Skills Test for Training" on page 91.

5 **Associates questions with the test.** For more information, see "Specifying Skills Test Details" on page 95.

Creating Training Test Questions and Answers

The following procedures describe how to create a question that can later be associated with one or more skills tests and how to create an answer for each question.

To create a question for use in skills tests

1 From the application-level menu, choose View > Site Map > Training Administration > Test Questions.

2 In the Questions list, click New, complete the fields, and save the new record.

The following table describes the fields.

Field	Comments
Category	Use this field to indicate the general type of information sought in the question. The choices are All, Industry, Product, Job Role, and Organization.
Explanation	A text field optionally used to specify a single question pool to which the question belongs.
Points	The default point value of the question within a test. You can specify a different point value when you specify test details.
Release	Select this check box to lock the test and release it to end users. After release, administrators have to create a new test version to change the test.
Text	The question text that appears to test takers.
Type	The type of question you are defining. This value is used to determine how the question appears, and what options are available. Choices include True or False, Text, Essay, Multiple Choice, Single Choice, Header, Range, Random Pool, Footer, Sub-Header, Ranged Response, and Survey. If you want to randomly draw a question from a pool, you must create a placeholder question by choosing the type Random Pool.

To create an answer to the question

1 From the application-level menu, choose View > Site Map > Training Administration > Test Questions.

2 In the Questions list, select the question, and click the Answers view tab.

3 In the Answers list, click New, and complete the fields.

A number is automatically entered in the Sequence field.

The following table describes the fields.

Field	Comments
Answer Text	The text of a possible answer that test takers see.
Correct	When selected, indicates that the current answer is correct. When there are multiple correct answers, select this field for all of them.
Partial Value %	Point value for the selected answer.
Sequence	Indicates the order in which possible answers appear to test takers.

Repeat Step 3 for each possible answer you want to appear to test takers.

4 Click the up arrow or down arrow in the header of the column to sort the column in ascending or descending order, respectively.

5 If you remove an answer, leaving a gap in the sequence numbers, click Renumber.

Creating and Verifying Training Question Pools

Question pools are grouping of many questions that can then be randomly pulled when a user takes a test. Questions can be shared among multiple pools, that is, a single question can be selected as part of any number of pools. You can also use one random pool many times in the same test, and you can create tests from various test questions and predefined question pools.

For example, if you want to create a test with 10 randomly selected questions, you can create 10 pools or create one pool and use it 10 times.

■ When you are using 10 different question pools, each pool should contain a unique set of questions.

■ When you are developing one large question pool, be sure to add enough questions to the pool to avoid duplicate questions. Then, create a test that uses the same pool for every test question.

To create a question pool

1 Create the individual questions for the pool.

For more information, see "Creating Training Test Questions and Answers" on page 86.

2 Create and save an additional question with its Type set to Random Pool.

You do not need to specify answers for this question. It acts as a placeholder in tests, indicating that a randomly chosen question from the pool should be inserted at that point.

3 In the Questions list, select the question that you set to Random Pool and click the Question Pool view tab.

NOTE: The release check box must be selected in the Question list to be listed in the Question Pool.

4 In the Question Pool list, click New, and in the new record, click the select button in the Text field.

5 In the Pick Child Questions dialog box, select the question you want to include in the question pool and then click OK.

6 Save the changes.

Repeat Step 4 through Step 6 for each additional question you want to place in the pool.

To verify that all questions for the pool appear in the list

1 In the Question list, select the placeholder question, and then click the Question Pool view tab.

2 In the Question Pool list, verify that all the questions for the pool appear in the list.

Administrators can allow multiple questions from single-question pools. The test question sequence can be renumbered.

To create tests from various test questions and predefined pools

1 From the application-level menu, choose View > Site Map > Training Administration > Tests.

2 In the Tests list, select a test to which you want to add test questions and question pools, and then click the Test Questions view tab.

3 In the Test Questions list, add a record, and then click the select button in the Text field.

4 In the Pick Question dialog box, select a question or a question pool question, and then click OK.

Repeat Step 3 and Step 4 for each question or question pool question you want to add to the test.

To view the answers for a question

1 In the Tests list, select the test, and then click the Test Questions view tab.

2 In the Test Questions list, select the question, and click the hyperlink in the Text field.

The Answers view appears with the list of answers.

Creating Headers and Footers for Training Test Elements

You can create a text header that can be included in a skills test as a title, a subtitle for a group of questions, or a generic visual separator between questions or question groups. A text footer can also be created.

To create a header, subheader, and footer for use in skills tests

1 From the application-level menu, choose View > Site Map > Training Administration > Test Questions.

2 In the Questions list, click New.

3 In the new question, enter the text of the header in the Text field, and select Header in the Type field.

4 Select the Release check box, and save the record.

You can leave the other fields in the form as is.

Repeat Step 2 through Step 4, selecting Sub Header, and then Footer from the Type field.

Adding a Skills Test for Training

You can add a skills test and then associate the skills test with one or more courses. For Instructor-Led and Distance Learning classes that have multiple class sessions, all class sessions of the course are automatically associated with the same test or tests. In previous releases of eTraining, skills tests were associated with individual class sessions.

To add a skills test

1 From the application-level menu, choose View > Site Map > Training Administration > Tests.

2 In the Tests list, click New, and complete the fields for the new record.

The fields are described in the following table.

Field	Comments
Associated Courses	One or more courses with which the test is associated. Students enrolled in these courses can access the test when the status of the test is active. In the Add Course dialog box, select the check box is the primary field to designate the main course associated with this test.
Auto Grade	If this field is: ■ Selected, the test taker's curriculum Weighted Completion value is automatically updated after the grading of any test that has no questions of type Text or Essay. ■ Cleared, or when a test contains Text or Essay questions, the curriculum Weighted Completion value is updated when an administrator selects the Update Grade command from the Test Results form menu after manually grading the test.
Footer Text	Text to display in the footer of the test.
Header Text	Text to display in the header of the test.
Language	Language in which the test is written.

Field	Comments
Max Attempts	Number of times a student may take the test.
	If you enter a value for Max Attempts that is greater than 1, you should use extra care in selecting the value for the Scoring field, as this determines whether or not users can see correct answers to test questions after their first attempt to take the test.
Min Review Score (%)	Numeric value that sets the point at which users can see correct, graded test questions upon completion.
	If users:
	■ Fail, and are less than the % set by this value, then they see no test results.
	■ Fail, but are greater than the % set by this value, then they see all test results and can tell which questions they missed (correct answers are not provided).
	■ Pass, then they see all test results with correct answers.
Name	A name you choose to identify the test.
Partial Grade	If this field is:
	■ Selected, then users receive partial credit for any multiple-choice test question for which they choose a correct response.
	■ Cleared (normal method of use), then users get all multiple-choice selections correct or they get no points for that question.
Pass Score %	The score required to pass the test. It is best to leave this field blank until you know the total number of points that are available in the test.
Release	Select this check box to lock the test and release the test to end users. Administrators must create a new test version to change a test that is locked.

Field	Comments
Scoring	The method used for grading the test results. The values are: ■ No Score. Displays a test and calculates results, but does not compute a score or grade for the end user. Typically used for surveys or evaluations. ■ Standard. Displays number of points earned and pass-fail status. Allows test taker to click test name for details on correct answers to test questions. ■ Category. Grades tests using two methods—Standard and Category. With category scoring, each question is assigned a particular category, for example Product, Industry, and so on. Then results are calculated and reported to the user by category type. Users, managers, and administrators use this functionality to assess scoring trends and identify particular areas of user strengths and weaknesses. ■ Knowledge Check. Same as Standard scoring.
Status	Use to indicate the status of the test and determine its availability. When value is Active, the test can be taken by any student enrolled in a course associated with the test.
Time Allowed	Amount of time a test taker may spend before submitting the test. Siebel eTraining does not enforce this time limit. You can manually verify how much time the test taker used by comparing starting and ending timestamps. If the test taker exceeded the time limit, you can manually change pass/fail results, but automatic scoring still takes place and displays its results as specified by the selected scoring method.
Total Points	The total number of points available from the test.
Type	The kind or purpose of the test. Typical values include Evaluation, Certification Exam, Course Survey, and Instructor Survey.

Modifying a Skills Test Record

You can modify, undo, and delete a skills test record.

To modify a skills test record

1 From the application-level menu, choose View > Site Map > Training Administration > Tests.

2 In the Tests list, select the test, and modify the record.

3 Save the changes.

To delete a test record

1 In the Tests list, select the test.

2 Click the menu button, and choose Delete Record.

Specifying Skills Test Details

Before a student can take a skills test, you must specify the details of the test, including test questions, answers, and the number of points each answer is worth.

To specify skills test details

1 From the application-level menu, choose View > Site Map > Training Administration > Tests.

2 In the Tests list, select the test for which you want to specify details, and drill down on the hyperlink in the Name field.

The Tests form appears in the upper part of the screen, and a Test Questions list appears in the lower part of the screen.

3 Click the Test Questions view tab, and in the Questions list, click New.

4 In the new record, click the select button in the Text field, and in the Pick Question dialog box, select a question or another test element, and click OK.

■ To include a specific question in the test for every test taker, select the question and then click OK.

■ To indicate that a question should be randomly drawn from a pool of questions for each separate test taker, select the placeholder record of the pool of questions and then click OK.

■ To indicate header, subheader, or footer text, select that value in the Type field, and then click OK.

5 Complete the rest of the fields in the Test Questions record, and then save the record.

The following table describes the fields.

Field	Comments
Category	Automatically populated to show the category associated with the particular test question selected.
Points	The number of points the question is worth in this test.
	Defaults to the number of points currently assigned to the question, independent of tests.
	If you enter a different value here, this value takes precedence for this test, but does not affect the test-independent value.
Sequence	Use to indicate the order in which the questions appear within the test.
Text	Question text.
Type	Use to indicate the type of question or other test element chosen. Automatically populated based on the value chosen in the Text field.

Repeat Step 3 through Step 5 for each additional question or other element you want to include in the test.

6 Make a note of the total number of points that test takers can earn if they answer all questions correctly.

7 In the Test form, click Preview to verify that your questions and answers appear correctly in a Web browser.

8 After you have inspected the test, navigate to the Tests list, make sure that the test you are defining is still selected, and click the More Info view tab.

9 In the Total Points field, enter the total number of points available in the test.

10 In the Pass Score % field, enter the minimum number of points necessary to pass the test.

11 When you are satisfied with all the attributes for the test, save the record, and then click the Release flag.

Releasing the test locks the test attributes and makes the test available for use with courses.

Working with Customer Information   8

This chapter describes how to work with customer information in Siebel eTraining.

Viewing Training Course Registration Information

After you make course information available on your eTraining Web site, prospective attendees can use their Web browsers to register for training, and you can register prospective attendees using administrative screens.

This section includes the following topics:

■ Viewing Registration Information for a Self-Paced Course

■ Viewing Registration Information for a Scheduled Class on page 101

■ Viewing All Course and Class Registration Information on page 101

Viewing Registration Information for a Self-Paced Course

You can view available information about persons who have registered for a self-paced course. A self-paced course, such as a Web-based course or a CD-ROM course, does not have class sessions.

To view registration information for a self-paced course

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course, and drill down on the hyperlink in the Name field.

3 Click the Enrollment List view tab.

The Enrollment list includes information such as the names of course enrollees, the enrollment status and registration number, and so on.

Viewing Registration Information for a Scheduled Class

You can view enrollment information for a particular class session of an Instructor-Led course or Distance Learning session. For information on adding enrollments, see "Adding and Viewing Course Enrollments" on page 49.

To view registration information for a scheduled class

1 From the application-level menu, choose View > Site Map > Training Administration > Class Details.

2 In the Classes list, select the class session for which you want to view enrollment information, and click the Current Enrollments view tab.

The Current Enrollment list appears, showing all enrollments for the selected class session.

Viewing All Course and Class Registration Information

You can view enrollment information for all courses listed in the system, including class sessions.

To view all course and class registration information

1 From the application-level menu, choose View > Site Map > Training Administration > Enrollments.

The Enrollments list shows all registered participants and the classes for which they have registered. The list also includes information about all registration for all classes and courses in the system. You can sort records or use queries to find information of particular interest.

2 Click the Associated Tests view tab to review a list of tests taken by the enrollee.

Registering Training Customers

Prospective training customers can use their Web browsers to register for courses and classes at an eTraining Web site, and you can use administrative screens to register a student who has contacted your organization by telephone, fax, mail, or in person.

This section includes procedures on the following topics:

■ Registering a Customer for a Self-Paced Course

■ Registering a Customer for a Scheduled Class Session on page 104

Registering a Customer for a Self-Paced Course

The following procedure describes how to register a customer for a self-paced course, such as a Web-based course or a CD-ROM course. This procedure assumes that the prospective attendee is already listed as a contact.

To register a customer for a self-paced course

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the self-paced course, and then drill down on the hyperlink in the course Name field.

3 Click the Add Enrollments view tab, and in the Add Enrollments list, click Add User.

4 In the Contact Last Name field, click the select button, and in the Pick Contact dialog box, select the prospective attendee, and then click OK.

5 In the Add Enrollments list, click Finish.

A read-only value appears in the Status field, reflecting the attendee's registration status.

NOTE: If users have not met certain course prerequisites, a message appears indicating that prerequisite courses must be completed before this enrollment can be confirmed. Administrators can select the Override Prerequisites check box on the Add Enrollments view tab, and click Finish to bypass all prerequisites and complete the current enrollment. Prerequisite override capability can be used for single or multiple enrollments.

If you want to register another attendee:

- Who uses the same credit card for fee payment, or who is also exempt from paying a fee, repeat Step 4 through Step 5. When you have registered all the attendees, click Finish.

- Who has fees to be paid, go to Step 6. The Shopping Cart appears.

For more information on Shopping Cart functionality, see *Siebel eSales Administration Guide*.

6 Verify that the appropriate training charges appear, and click Check Out.

7 Enter the attendee credit card information and other information for which you are prompted, and confirm the order.

NOTE: Users can edit and save quotes as well as add details to the order if necessary. For more information on quotes and orders, see *Product Administration Guide*.

8 Click the Enrollment List view tab to verify that the attendee or attendees have a registration status of Confirmed.

Registering a Customer for a Scheduled Class Session

You can register a prospective student for a scheduled class session of an Instructor-Led or Distance Learning class. This procedure assumes that the prospective student is already listed in the Person table.

To register a customer for a scheduled class session

1 From the application-level menu, choose View > Site Map > Training Administration > Class Details.

2 In the Classes list, click the Sessions view tab, and in the list, select the class session for which you want to view enrollment information.

3 Click the Add Enrollments view tab, and in the Add Enrollments list, click Add User.

4 In the new record, click the select button in the Last Name field, and in the Pick Contact dialog box, select the prospective student, and then click OK.

5 Click Finish, and then save the changes.

A read-only value appears in the Status field, reflecting the attendee's registration status.

If you want to register another attendee who will use the same credit card for fee payment, or who is also exempt from paying a fee, repeat Step 4 through Step 5.

If fees need to be paid, the Shopping Cart appears.

NOTE: If users have not met certain course prerequisites, a message appears indicating that prerequisite courses must be completed before this enrollment can be confirmed. Administrators can select the Override Prerequisites check box on the Add Enrollments view tab, and click Finish to bypass all prerequisites and complete the current enrollment. Prerequisite override can be used for single or multiple enrollments.

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6 Verify that the appropriate training charges appear, and then click Check Out.

7 Enter credit card information for the prospective student and other information for which you are prompted, and confirm the order.

To verify registration status for students

1 From the application-level menu, choose View > Site Map > Training Administration > Class Details.

2 In the Classes list, select the class, and then click the Current Enrollments view tab.

The enrolled students should have a registration status of confirmed.

Canceling Training Enrollments

An eTraining administrator can cancel customer or employee enrollment for training.

When a customer or employee cancels that person's own training enrollment for an Instructor-Led class or a Distance Learning class, the number of seats available is updated automatically. However, if an administrator cancels an enrollment, the administrator must manually update the number of seats that are taken. In all cases of cancellation, refunds must be calculated and given manually.

To cancel an enrollment for an attendee

1 From the application-level menu, choose View > Site Map > Training Administration.

- For a self-paced course, navigate to the Courses screen.

- For an Instructor-Led class or a Distance Learning class, navigate to the Classes screen.

2 Select the course or class for which you want to cancel an enrollment.

- For a course, drill down on the hyperlink in the Name field, and then click the Enrollment List view tab to display a list of current enrollments.

- For a class, navigate to the Class Details list, select the class, and then click the Current Enrollments view tab to display a list of current enrollments.

3 Select the enrollment record you want to cancel.

Do not click the hyperlink in the Registration # field.

4 In the Status field, note whether the current value is Pending or Confirmed, and then select Cancelled.

5 Save the changes.

6 If you are canceling enrollment in a Distance-Learning class, or an Instructor-Led class, reduce the value in the Taken Seats field using the following instructions:

- ■ **Distance Learning class.** In the More Info form, review the number of seats in the Taken Seats field, reduce the number by 1, and save the record.

- ■ **Instructor-Led class.** In the Classes form, review the number in the Taken Seats field, reduce the number by 1, and then save the changes.

  The number of Open Seats is automatically recalculated.

7 If the course or class involved a fee, and if the enrollee's status was Confirmed, follow your organization's standard procedures for refunding any amount due.

Manually Viewing and Scoring Skills Tests

A Siebel eTraining skills test can be scored automatically if all the questions in the test are multiple choice. In such a case, viewing skill test results is an option for the eTraining administrator, but it is not a necessity.

If a skills test includes Text or Essay type questions, a person with administrator privileges for eTraining must evaluate students' answers to those questions and assign appropriate scores.

Viewing Skill Test Results

The following procedures describe how to view skills test results and how to manually score questions of type Text or Essay.

To manually view skills test results

1 From the application-level menu, choose View > Site Map > Training Administration > Test Results.

Each Test Results list record shows the name of a person who took a test, the test that person took, the score, and other information.

2 To view detailed information about a user's performance on a test, select the appropriate record in the Tests list, and click the Result Details view tab.

The User Answers list shows the selected user's answers to the selected question.

3 To view detailed information about the selected user's answers to a particular question, select the question in the Result Details list, and then scroll down to view the User Answers and Answers lists.

The Answers list shows the available answers for multiple-choice questions. Each correct answer is indicated by a check mark in the Correct field.

Manually Scoring Skills Test Questions

Automatically graded test scores and correct answers become available to students almost immediately after they submit their tests. For tests that include questions that must be manually graded, test scores become available to students shortly after grading is complete.

For information about how students view test results, see "Viewing Skills Test Results" on page 157.

NOTE: When a student has passed all required tests for a course, that student's enrollment status for the course is automatically updated to Completed. If the student is enrolled in a curriculum that includes the course, the curriculum Weighted Completion value is updated when the course is completed. Use the Update Grade command when manually grading a test to make sure that the curriculum Weighted Completion value is updated correctly. Do not directly set the student's enrollment status to Completed.

To manually score skills test questions of type Text or Essay

1 From the application-level menu, choose View > Site Map > Training Administration > Test Results.

2 In the Test Results list, select any test result record that you want to grade manually, and then click the Result Details view tab.

3 For each question that has the value of Essay or Text in the Type field:

   a Select the question in the Result Details list.

   b Compare the user's answers in the User Answers list with the correct answers in the Answers list.

   c In the Result Details list, enter the appropriate number of points in the Question Point field for the user's answers, and save the changes.

4 After you have finished assigning points to all questions that require manual scoring, click the menu button in the Test Results form, and choose Update Grade.

A new value reflecting the points manually assigned appears in the Points Received field.

5 Click the More Info view tab to return to the Tests Results list to grade another set of test answers.

Generating Training Reports

A variety of standard reports are included with eTraining. These reports provide information on the following:

■ **Items in the Training Library.** For more information, see "Generating a Training Library List Report" on page 111.

■ **Courses.** For more information, see "Generating a Course List Report" on page 112.

■ **Course schedule detail.** For more information, see "Generating a Course Schedule Report" on page 112.

■ **Course registration detail.** For more information, see "Generating a Course Registration Report" on page 113.

■ **Curriculum registrants.** For more information, see "Generating a Curriculum Registrants Report" on page 113.

■ **Test details.** For more information, see "Generating a Skill Test Detail Report" on page 114.

After generating the report, you can view data on screen, save report data to disk, or print report data. You can also create additional reports to meet your needs. For more information, see *Siebel Reports Administration Guide*.

Generating a Training Library List Report

The Training Library List report provides information about all the Training Literature items that are available in the system. It displays the same data as the Training Library list, except that the File Name field is omitted.

To generate a Training Library List report

1 From the application-level menu, choose View > Site Map > Training Administration > Training Library.

2 In the View menu, click Reports.

A Reports dialog box appears, with Training Library List already selected in the Select a Report field.

3 Click Run Now or click Schedule to choose a date and time to run the report.

If you clicked Run Now, the dialog box closes, and the report appears in its own Siebel Report Viewer window.

Generating a Course List Report

The Course List report provides information about all the courses in the current query of the Courses list. It displays the same data as the Courses list, except that the Created By field is omitted.

To generate a Course List report

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the View menu, click Reports.

A Reports dialog box appears, with Training Library List already selected in the Select a Report field.

3 Click Run Now or click Schedule to choose a date and time to run the report.

If you clicked Run Now, the dialog box closes, and the report appears in its own Siebel Report Viewer window.

You can save or print the report.

Generating a Course Schedule Report

The Course Schedule report provides information about all the dates and times when a course is scheduled to be held. It displays selected fields from the Course form and the Class Schedule list.

To generate a Course Schedule report

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course for which you want a Course Schedule report, and drill down on the hyperlink in the Name field.

3 In the Course Details view, click the Enrollment List view tab.

4 In the View menu, click Reports.

5 In the Select a Report field, choose Course Schedule Report.

6 Click Run Now or click Schedule to choose a date and time to run the report.

Generating a Course Registration Report

The Course Registration report provides information about all the people who are registered to attend a selected course. It displays selected fields from the Course form and the Class Registration list.

To generate a Course Registration report

1 From the application-level menu, choose View > Site Map > Training Administration > Courses.

2 In the Courses list, select the course for which you want a Course Registration report, and then drill down on the hyperlink in the Name field.

3 In the Course Details view, click the Enrollment List screen tab.

4 In the View menu, click Reports, and in the Select a Report field choose Course Registration Report.

5 Click Run Now or click Schedule to choose a date and time to run the report.

Generating a Curriculum Registrants Report

The Curriculum Registrants report lists the individuals who are registered for any of the curriculums defined in the system. The report displays selected fields from the Curriculum form and the Enrollments list.

To generate a Curriculum Registrants report

1 From the application-level menu, choose View > Site Map > Training Administration > Curriculums.

2 In the View menu, click Reports, and in the Select a Report field choose Curriculum Registrants.

3 Click Run Now or click Schedule to choose a date and time to run the report.

Generating a Skill Test Detail Report

The Skills Test Detail report provides a detailed summary of all the questions and answers on each of the tests available in the system.

To generate a Skills Test Detail report

1 From the application-level menu, choose View > Site Map > Training Administration > Tests.

2 In the Tests list, select the test for which you want to see a detailed report, and drill down on the hyperlink in the Name field.

3 In the View menu, click Reports, and in the Select a Report field choose Skills Test Detail.

4 Click Run Now or click Schedule to choose a date and time to run the report.

Entering an eTraining Web Site 9

This chapter describes how to find the Siebel eTraining Web site and how to log in.

Finding the eTraining Web Site

An eTraining Web site provides information and services related to training. Any of the following communication methods can help you find the URL for an eTraining Web site:

■ Web links from the corporate home page of the organization offering the training.

■ Advertisements or press releases from the organization offering the training.

■ Web searches.

■ Word of mouth.

About the Home Page

When you provide your Web browser with the URL for an eTraining Web site and navigate to the site, a home page appears. The page displays login prompts in the User Log In area and contains numerous links to training information. For information about logging in to an eTraining Web site, see "Ways to Log In" on page 120.

The following figures are examples of home pages that appear after you enter the correct user ID and password.

■ Figure 5 shows the home page for Web users who view your eTraining Web site. It always starts out at the anonymous users' version of the eTraining home page.

Figure 5. eTraining Home Page for Web Users

■ Figure 6 shows the home page for users who access eTraining using a Siebel base application, such as Employee Relationship Management (ERM).

Figure 6. eTraining Home Page for Enterprise Applications Users

Locating eTraining Screens within Siebel eBusiness Applications

If you are an employee of an organization that uses eTraining to conduct its own internal training programs, eTraining screens may be available to you through a Siebel employee application, such as Siebel Sales or Siebel Marketing, rather than through a separate Web site.

If you use eTraining screens within another Siebel application, you may see that application's login prompts and home page, rather than the eTraining login prompts and home page.

The following procedure describes how to locate eTraining screens within another Siebel application.

To locate eTraining screens within another Siebel application

1 Start your Siebel employee application and log in according to the procedures for that application.

2 From the application-level menu, choose View > Site Map > Training.

A list of eTraining end-user links appears. For information about viewing the information available to you through those links, see Chapter 10, "Viewing Training Information."

NOTE: If you use eTraining screens within the Siebel ERM (Employee Relationship Management), Siebel Sales, or Siebel Partner Relationship Management application, you may also be able to navigate to Training screens by clicking a Training screen view tab, as an alternative to using the Site Map.

Ways to Log In

This section describes three ways to log in to an eTraining Web site, depending on what you want to accomplish and whether you have previously registered at the site.

■ Browsing an eTraining Site Anonymously

■ Requesting a New User ID on page 121

■ Logging in with an Established User ID and Password on page 122

Browsing an eTraining Site Anonymously

You can browse the training site anonymously. This option provides access to the site's home page. From the home page there are training links, but there is no access to other views.

To browse an eTraining site anonymously

1 Using your browser, enter the URL for the eTraining site, and navigate to the site.

2 Click any of the following links:

■ **Find Training links.** Provides information about available training.

■ **My Training links.** Provides a list of the Instructor-Led classes, Web-based courses, and curriculums in which you are enrolled. These links are inactive until a new user profile is created or an existing user logs in.

■ **New Training links.** Provides information about recently added training.

Requesting a New User ID

If you want to sign up for training, you must log in to the eTraining Web site with a user ID and password. The following procedure describes how to register for a user ID and password.

To request a new user ID

1 Using your browser, enter the URL for the eTraining site, and navigate to the site.

2 Click the New User link in the User Log In form.

A Personal Information form appears, prompting you to supply information about yourself, including a user ID that you will use in the future and a password to accompany that user ID.

3 Complete the fields in the Personal Information form, enter your user ID and password, and then click Next.

A Contact Information form appears, prompting you to supply your address and work phone number.

4 Complete the fields in the Contact Information form, and then click Next.

A Usage Terms form appears, containing license agreement information.

5 Read the license agreement, and then click I agree.

A Registration Confirmation message appears.

6 Click Finish to complete the new user registration process.

Logging in with an Established User ID and Password

If you log in to an eTraining site with an established user ID and password, you can view information about training for which you have registered, view the associated training materials, and take skills tests associated with those courses.

To log in using an established user ID and password

1 Using your browser, enter the URL for the eTraining site, and navigate to the site.

2 At the home page, enter your user ID and password, and then click OK.

A greeting appears, and My Training links become available for your use.

If you are using an eTraining Web site, a My Training tab appears near the top of the display. Depending on your Siebel responsibility setting, a Managers tab may also appear. For more information about using the Managers tab, see "Viewing Training Progress of Employees (Managers)" on page 159.

Viewing Training Information 10

This chapter explains how to view training information.

Viewing Available Training

One of the main functions of an eTraining Web site is to provide information about available training, including Instructor-Led classes, Distance Learning classes, and self-paced courses.

To view available training

1 Log in to the eTraining site.

For more information, see "Ways to Log In" on page 120.

By default, the home page shows a list of New Courses links both before and after you log in. The courses that appear are the most recently created courses. The list of courses can be kept constant by using Siebel Tools to turn off the applet properties. For more information about using Siebel Tools, see *Siebel Tools Reference*.

In the home page, the term courses applies to all training offerings, including Instructor-Led classes, self-paced courses, and Distance Learning classes.

2 Click the Find Training view tab, shown in the figure that follows.

Find Training links may appear on your home page.
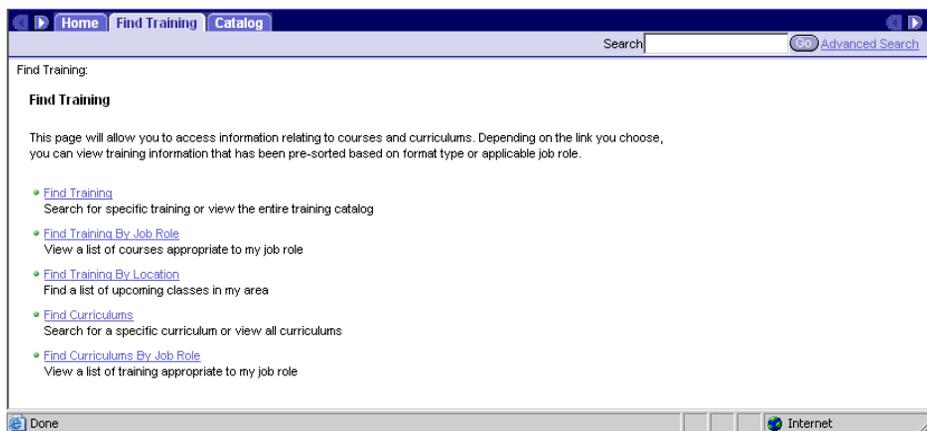
3 Drill down on one of the following links to locate information about the kinds of training that interests you:

Find Training. Displays a list of courses of all types, including Instructor-Led classes, self-paced courses, and Distance Learning classes.

You can:

- Search the list for courses of particular interest.

- Click a course name for more detailed information about the course.

- Click the Query button to search for courses that have specific attributes.

Detailed information may include course objectives, topics to be covered, materials to be used, and information about other courses that are associated with the selected course.

If the course is instructor-led, you can view course detail information by clicking the name in the Class Schedule view.

Find Training By Job Role. Displays a list of all training offerings, and indicates the job profile for which each offering is appropriate. You can run a query or sort the list by job role.

Find Training by Location. Displays a list of training locations, from which you can display a schedule of training events for any location you select.

For information on finding curriculums, see .

Viewing Available Curriculums

Training offerings may be grouped together into curriculums that allow you to accomplish a specific educational goal, such as completing a professional certification program or degree program.

To view available curriculums

1 Log in to the eTraining site.

For more information, see "Ways to Log In" on page 120.

2 Navigate to the Find Training view.

Find Training hyperlinks may appear on your eTraining home page. For more information, see "Viewing Available Training" on page 124.

3 Drill down on the following links to find information about the kinds of curriculums that interest you:

■ **Find Curriculums.** Shows a list of predefined training paths for a variety of specialized needs. You can search the list for curriculums of particular interest. You can also drill down on any curriculum name to display the Curriculum Details view.

■ **Find Curriculums By Job Role.** Shows a list of predefined training paths and indicates the job role for which each path is appropriate. In the Curriculums by Job Roles list, you can run a query, sort the list by job role, and drill down on any curriculum name to display the Curriculum Details view.

The Curriculum Details view includes a list of the courses that make up the curriculum and a list of materials that are associated with the curriculum as a whole, rather than being associated with individual courses in the curriculum.

Viewing Available Training Library Materials

This section describes procedures for:

■ Viewing Training Library Materials

■ Viewing Training Library Materials for a Course or Curriculum on page 128

Viewing Training Library Materials

Each eTraining Web site includes a Training Library that stores files related to the kinds of training and curriculums being offered. You can view these files, which may include reading material, self-paced learning topics, training presentations, curriculum guides, course syllabus information, audio or video clips, or other training information.

To view materials in the Training Library

1 Log in to the eTraining site.

For more information, see "Ways to Log In" on page 120.

2 Click the Training Library view tab.

3 To download or view a particular item, click the item name.

4 Use one of the following methods to view or download the selected item:

■ Click Open this file from its current location, and then click OK to view the file without downloading.

■ Click Save this file to disk, and then click OK to download the file. Use standard Windows navigation methods to specify a location for the file.

NOTE: The Training Library stores a file in the file's original format. To open and view the file, the appropriate application must be installed on your computer.

Viewing Training Library Materials for a Course or Curriculum

You can locate Training Library materials for a specific course or curriculum.

To view Training Library materials for a specific course or curriculum

1 Navigate to the Find Training screen.

2 Click Find Courses or Find Curriculums.

3 Select the course or curriculum that interests you, and drill down on the hyperlink in the Name field.

Additional details about the course or the curriculum appear, including a Materials list, which specifies the training library items that are associated with the course or curriculum.

4 In the Materials list, click the name or title of any training library item that interests you.

A File Download dialog box appears.

5 Use one of the following methods to view or download the selected item:

- Click Open to open this file from its current location, and then click OK to view the file without downloading.

- Click Save to save this file to disk, and then click OK to download the file. to a location on your disk.

Using the Siebel Catalog

Users can browse the Siebel Catalog to find and purchase products, including training. The Siebel Catalog offers customer and partner training in such areas as pricing, access control, and user interface options. For more information on setting up and using Siebel Catalog, see *Siebel eSales Administration Guide*.

This section describes the following procedures:

■ Viewing the Siebel Catalog on page 129

■ Searching the Siebel Catalog on page 131

Viewing the Siebel Catalog

Use the following procedure to view the Siebel Catalog.

To view the catalog

1 Log in to the eTraining site, and click the Catalog view tab.

Log in methods are described in "Ways to Log In" on page 120.

The following figure is an example of the Siebel Catalog and the list of categories and subcategories that appear. These catalog sections contain the courses that can be purchased.
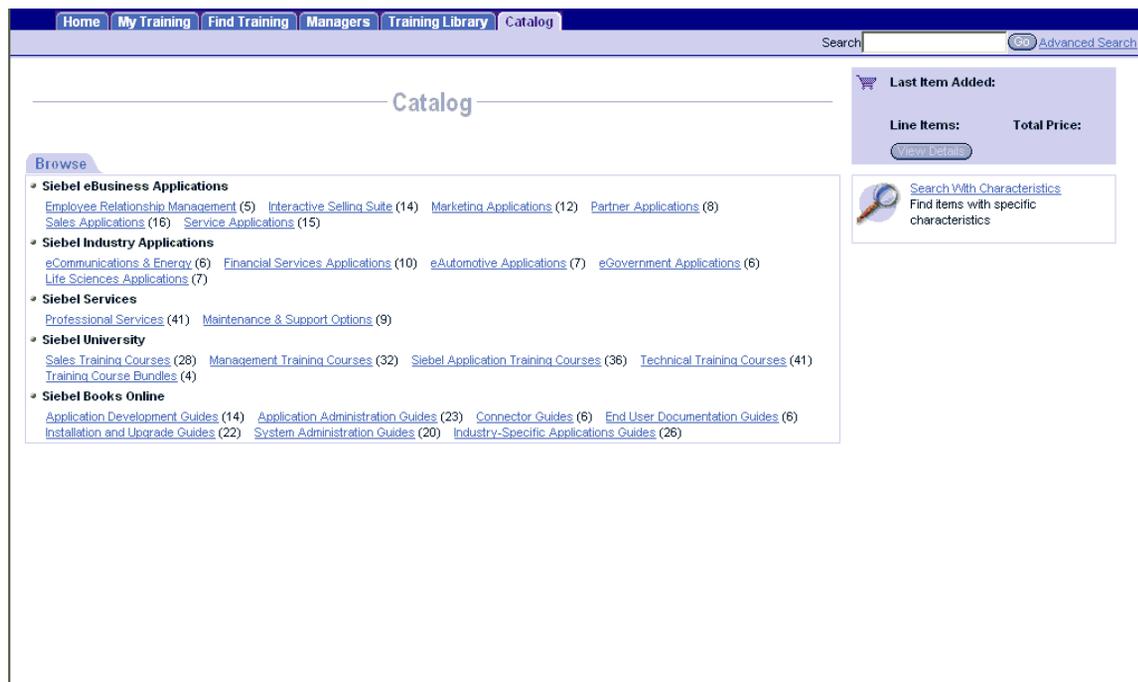
2 Drill down on the Category hyperlinks to view courses.

3 Drill down on the Course hyperlinks to view Course Details.

Searching the Siebel Catalog

Parametric search allows users to take advantage of the class system. Instead of entering free-form search strings into a full-text search engine, users of parametric search can select from known attributes (for example course format, location, subject, and price) of a particular class of products.

To access parametric search

■ Click the hyperlink next to the magnifying glass in the Siebel eTraining Catalog view.

For more information on setting up and using parametric search, see *Siebel eSales Administration Guide*.

Viewing My Account Information

The My Account page allows customers to update their user profiles, and to view their favorites, saved quotes, and saved orders. Customers can also reorder items from their favorites list, templates, and orders.

Viewing My Skills Development

The My Skills Development tab is visible in Siebel eBusiness Applications when Siebel Competency Management is installed.

For more details on setting up and managing employee skills and competencies, see *Siebel Employee Relationship Management Administration Guide*.

Viewing Recommended Training

The following section describes how to view recommended training and skill gaps.

To view My Recommended Training

1 Log in to the eTraining site.

   Log in methods are described in

2 From the eTraining home page, drill down on the View My Recommended
   Training hyperlink.

   A list of courses appear that address the current skill gaps in the user's current
   job profile. After these courses are completed, the user's skills are updated with
   the skill types and levels taught by each training course.

3 Click Browse Other Job Profiles to find other jobs of interest and match current
   skills to those jobs.

   The Recommended Training list appears, suggesting courses that would fulfill
   other job requirements.

To view My Skill Gaps

1 Log in to the eTraining site.

2 Select the View My Skill Gaps link in the eTraining home page.

   A list of current skills appears for the user's current job profile. This list also
   contains required competency levels and calculates skill gaps that are used to
   derive Recommended Training courses.

Using the eTraining Web Site **11**

This chapter explains how to use the Siebel eTraining Web site.

Training Registration

An eTraining Web site may offer several different kinds of training, including traditional Instructor-Led classes, Web-based courses, and Distance Learning classes. If you use an eTraining Web site to register for training, the registration procedure varies slightly depending on the type of training you choose.

For registration, training offerings can be grouped as follows:

■ **Self-Paced training**. This type of training, including Web-based courses and CD-ROM courses, can be taken at any time until an optional Expiration Date or Access Period deadline.

■ **Instructor-Led courses.** These courses are offered at specific times and locations, and Distance Learning courses are offered at specific times, through the Web.

To register for each of these types of training, see the following procedures:

■ Registering for a Self-Paced Course on page 137

■ Registering for a Scheduled Class on page 139

■ Registering for Third-Party Training Events on page 142

Registering for a Self-Paced Course

Use the following procedure to register for any course that is not scheduled to take place at a particular time, such as a Web-based or CD-ROM course.

NOTE: Registered contacts who are not associated with an account cannot register for a class unless a system default price list is set up. For more information, see *Siebel eSales Administration Guide*.

To register for a self-paced course

1 Log in to the eTraining Web site as a registered user or a new user.

For more information, see .

2 Click the Find Training view tab, and click the Find Training link.

Find Training hyperlinks may be displayed on the eTraining home page.

3 In the Courses list, drill down the name of the course for which you want to register.

4 In the header of the Course Detail form, click Enroll.

- If there is no fee for the training you have selected**,** the registration process is complete. The My Courses list appears. A registration number and a confirmed status for your registration is listed.

  The Course Details view appears, and it now contains a Course Launch button where the course can be immediately accessed. At the same time, the My Courses view is updated to include a registration number and confirmed status.

  This occurs both for cases where no one is charged a fee for the selected training, and for cases where you are exempt from the fee.

NOTE: If the administrator did not select the Auto-Confirm flag (check box cleared), then enrollment status is set to Pending-Approve. This functionality allows administrators to manually manage the enrollment process.

■ If there is a fee for the training, the Shopping Cart appears. The Shopping Cart contains information about the charge for the training.

If you want to register for more courses before paying, navigate to the appropriate screen and continue registering. Your registration status is Pending until you pay. When you are ready to pay, continue to the next step.

5 Click Check Out to display the Payment Method form, and enter your credit card and billing information.

If you have used the Shopping Cart before, your previously entered information may appear for you to edit or confirm.

6 Click Continue to display the Order Summary, verify that all the information is correct, and click Confirm Order.

If your registration is successful, you automatically receive an email confirming your course enrollment.

7 Click Return to Home Page, and click View Your Course Schedule to display the My Courses list.

NOTE: The list includes the training you selected, with the Status field set to Confirmed, showing that you have been registered for the training. Users can also view quote and order details from the My Account page. For more information, see *Siebel eSales Administration Guide.*

Registering for a Scheduled Class

If an Instructor-Led or Distance Learning class is being offered at various times or locations, each offering of the course is called a *class* or *class session*. Use the following procedure to register for any class listed on the eTraining Web site.

Registered contacts who are not associated with an account cannot register for a class unless a system default price list is set up. For more information, see *Siebel eSales Administration Guide*.

To register for a scheduled class

1 Log in to the eTraining site as a registered user or a new user.

For more information, see "Ways to Log In" on page 120.

2 Click the Find Training view tab, and drill down on the Find Training hyperlink.

Find Training hyperlinks may appear on the eTraining home page.

3 In the Courses list, drill down on the name of the course for which you want to register.

4 Click Enroll for the class session you want to attend.

5 In the Class Detail form, verify the values in the Name, Start, End, and Location fields.

■ If there is no fee for the training you have selected, and if space is still available, the registration process is complete. Skip the remaining steps of this procedure.

If it is a Distance Learning class, then the page contains a Course Launch button where the course can be immediately accessed. For any type of class, the My Classes and My Distance Learning Classes views are updated to include a registration number and confirmed status.

NOTE: If the administrator did not select the Auto-Confirm flag (check box cleared), then enrollment status is set to Pending-Approve. This functionality allows administrators to manually manage the enrollment.

- If there is no room in the course (maximum enrollment has already been reached), you are automatically placed on a waiting list for any open spaces. Skip the remaining steps of this procedure.

  The Course Details view appears, showing a registration number and a status of Waitlisted for the registration. The My Classes and My Distance Learning Classes views are updated to include a registration number and wait-listed status.

  NOTE: If the administrator has specified a maximum waitlist size and the waitlist has been filled, then the user receives a message saying that no space is available on the waitlist. At this point, go to the Class Schedule view and select another class session.

- If there is a fee for the training, and if space is still available, the Shopping Cart appears, containing information about the charge for the training.

  If you want to register for more training before paying, navigate to the appropriate screen and continue registering. Your registration status is Pending until you pay. When you are ready to pay, continue to the Step 6.

6 Click Check Out to display the Payment Method form, and enter your credit card and billing information.

  If you have used the Shopping Cart before, your previously entered information may appear for you to edit or confirm.

7 Click Continue to display the Order Summary, verify that all information is correct, and click Confirm Order.

8 Click Return to Home Page, then use one of the following methods to view the appropriate registered class list:

- For an Instructor-Led class, click View My Class Schedule to display the My Classes list.

■ For a Distance Learning class, click the My Training screen tab.

If you are using eTraining screens within another Siebel application, and no My Training screen tab is available, select My Training in the Show drop-down list, and click the My Distance Learning Classes link to display the My Distance Learning Classes list.

The list that appears includes the training you selected, with the Status field set to Confirmed, showing that you have been registered for the training.

If your registration is successful, you automatically receive an email confirming your course enrollment. A reminder email is also sent three days before the course is scheduled to begin.

NOTE: Users can also view quote and order details from the My Account page. For more information, see *Siebel eSales Administration Guide*.

Registering for Third-Party Training Events

Employees can enter third-party training records into their transcripts. This allows managers to approve, decline, or return the training records.

To register for third-party training events

1 Log in to the eTraining site as a registered user or a new user.

   For more information, see "Ways to Log In" on page 120.

2 Click the Find Training view tab.

   Find Training hyperlinks may appear on the home page.

3 Click the My 3rd-Party Training link.

4 In the My 3rd-Party list, click New.

5 In the new record, click the select button in the Name field.

6 In the Pick 3rd-Party Course dialog box, select the course, and then click OK.

7 Complete the remaining fields, and save the record.

   The following table describes the fields.

Field	Comments
# of Hours	The number of hours for the course.
Completed Date	Date the course was completed.
Description	Description of the course.
	This field may be used to include location and instructor details or more information about the course
Units	The number of hours for the course.

8 Drill down on the hyperlink in the Registration # field, and select Submit to route the course to your manager for approval.

Using the Siebel Catalog to Register for Training

Use the Siebel Catalog offers to browse and purchase training from your company's Web site. The following procedures are described in this section:

■   "Registering for Training Using the Siebel Catalog" on page 143

■   "Adding Courses to a Favorites List" on page 145.

■   "Using Parametric Search for Training Courses" on page 145.

For more detailed information, see *Siebel eSales Administration Guide.*

Registering for Training Using the Siebel Catalog

You can register for training using the Siebel Catalog.

To register for training using the Siebel Catalog

1   Navigate to the Catalog screen.

2   Click a category link to navigate to a group of courses that are part of the category.

   For example, click the Management Training category to get a list of management courses.

3   Click Show Course Details to view more information about the course.

4   In the header of the Course Detail form, click Enroll.

■ If there is no fee for the training you have selected, the registration process is complete. The My Courses list appears. A registration number and a confirmed status for your registration are listed.

This occurs both for cases where no one is charged a fee for the selected training, and for cases where you are exempt from the fee.

The Course Details view appears, and it now contains a Course Launch button where the course can be immediately accessed. At the same time, the My Courses view is updated to include a registration number and confirmed status.

NOTE: If the administrator did not select the Auto-Confirm check box, and then enrollment status is set to Pending-Approve. This functionality allows administrators to manually manage the enrollment process.

■ If there is a fee for the training, the Shopping Cart appears. The Shopping Cart contains information about the charge for the training.

If you want to register for more courses before paying, navigate to the appropriate screen and continue registering. Your registration status is Pending until you pay. When you are ready to pay, continue to Step 5.

5 Click Check Out to display the Payment Method form, and enter your credit card and billing information.

If you have used the Shopping Cart before, your previously entered information may appear for you to edit or confirm.

6 Click Continue to display the Order Summary, verify that all the information is correct, and click Confirm Order.

If your registration is successful, you automatically receive an email confirming your course enrollment.

7 Click Return to Home Page, and click View Your Course Schedule to display the My Courses list.

The list includes the training you selected, with the Status field set to Confirmed, showing that you have been registered for the training.

NOTE: Users can also view quote and order details from the My Account page. For more information, see *Siebel eSales Administration Guide*.

Adding Courses to a Favorites List

Users can also use the Catalog to add courses to their favorites list for efficient reordering.

To add courses to their favorite list

1 After the course list is generated, drill down on the hyperlink in the course Name field to view summary information about the course.

2 Click Add to Favorites to include the course in the My Favorites list found in My Account.

Using Parametric Search for Training Courses

Use parametric search to take advantage of the class system. Instead of entering free-form search strings into a full-text search engine, users can select from known attributes (for example course format, location, subject, and price) of a particular class of products.

To use parametric search

■ Click the Search With Characteristics link on the Siebel eTraining Catalog view tab.

For more information on setting up and using parametric search, see *Siebel eSales Administration Guide*.

Enrolling in a Curriculum

If you are seeking a professional certification or degree that requires you to take several courses that are offered using eTraining, you can enroll in a curriculum to help you keep track of your progress. There is no fee for enrolling in a curriculum. However, the courses that make up the curriculum may have fees.

To enroll in a curriculum

1 Log in to the eTraining site as a registered user or a new user,

For more information, see "Ways to Log In" on page 120.

2 Use one of the following methods to navigate to a list of available curriculums:

■ From the home page, in the Find Training list, drill down on the Find Curriculums hyperlink or the Find Curriculums By Job Role hyperlink.

■ Navigate to the Find Training screen and drill down on the Find Curriculums link.

If you drill down on Find Curriculums, the Curriculum list appears.

If you drill down on Find Curriculums By Job Role, the Curriculums By Job Role list appears.

3 In the Curriculums list, select the curriculum, and then drill down on the hyperlink in the Name field.

The Curriculum Details form, the Curriculum Steps list, and the Materials list appear.

4 To enroll in the curriculum, click Enroll in the Curriculum Details header.

The My Curriculums list appears, listing the curriculum you selected.

Viewing Your Progress Within a Curriculum

You can view your progress in completing the courses that make up a curriculum.

To view your progress within a curriculum

1 Log in to the eTraining Web site with the user ID and password you used when you enrolled in the curriculum.

2 Click the My Training view tab.

My Training hyperlinks may appear on the home page.

3 Drill down on the View My Curriculums hyperlink.

4 In the My Curriculums list, select the curriculum, and then drill down on the hyperlink in the Name field.

The My Curriculum Details form, the Curriculum Step list, and the Materials list appear.

The following table describes the fields in the My Curriculum Details form.

Field	Comments
Completed	The date the user completed all steps in the curriculum.
Depth	Calculated percentage value representing the sum of the points of all completed courses divided by the value of minimum requirements and completion points.
Enrolled	The date the user enrolled in curriculum.

Field	Comments
Name	Name of the curriculum.
Progress	Calculated percentage value that represents the minimum completion points (sum of the minimum step points) divided by the sum of the points of all completed courses, limited by the defined weight of the step.
	For example, for a step with a minimum point value of 40, the maximum point value for the step as applied to the progress value would be 40; any additional course points accrued beyond 40 would apply only to the Depth calculation.
	As a result, the progress calculation indicates how close an individual is to completing the minimum requirements for the curriculum, while the Depth value indicates how completely the individual explored the curriculum.

Withdrawing from a Course or Class

If you have registered for a course or class that is offered using eTraining, but later need to cancel your registration, use the following procedure to request a cancellation.

For information on withdrawing from a curriculum, see "Withdrawing from a Curriculum" on page 151.

NOTE: Many organizations specify the last date on which a cancellation is accepted. You cannot automatically cancel your registration after this date has passed; in order to cancel, you must obtain special approval from the instructor or training administrator.

To cancel your registration for an upcoming course or class

1. Log in to the eTraining Web site with the user ID and password you used to register for the course or class.

2. Click the My Training view tab.

3. Click one of the following links, depending on the type of training you want to cancel:

   ■ My Instructor-Led Classes

   ■ My Web-Based Courses (includes Web-based and CD-ROM courses)

   ■ My Distance Learning Classes

4. Drill down on the hyperlink in the Registration # field for the course or class you want to drop.

   A My Course Details or My Class Details form appears. The information about the selected course or class appears.

5. In the header, click Drop to withdraw.

   ■ If cancellation are allowed for the course or class at the time when you click Drop, your cancellation is accepted automatically, and the course or class no longer appears.

■ If cancellation are not allowed for the course or class at the time you intend to cancel, the Drop button is removed from the Course Details page. You can check the cancellation period for a class by viewing the Cancellation Deadline field in the Class Details view page. The Cancellation Deadline is the date on which users no longer have access to the Drop button for course cancellation.

Withdrawing from a Curriculum

If you have enrolled in a curriculum that is offered through eTraining, but later need to cancel your enrollment, use the following procedure.

To withdraw from a curriculum

1 Log in to the eTraining Web site with the user ID and password you used to enroll in the curriculum.

2 Navigate to the My Training view, and then drill down on the My Curriculums link to display the My Curriculums list.

3 Drill down on the name of the curriculum from which you are withdrawing.

A Curriculum Details form, a Curriculum Step list, and a Materials list appear.

4 In the header, click Drop.

Taking a Distance Learning Class

Siebel Distance Learning lets users participate in Instructor-Led training sessions using corporate intranets or the Internet. People who attend a Distance Learning session see the contents of the presenter's computer screen on their own monitors, and receive audio using a telephone conference call or the Voice Over IP feature in Distance Learning.

Siebel Distance Learning and Siebel eTraining are separate but complementary products. If the presenting organization has purchased both products, you can use eTraining to register for any Distance Learning session that is included in the list of courses or classes.

You can also use eTraining to join a Distance Learning session at its start time, as described in the following procedure.

To join a Distance Learning session from eTraining

1 Log in to the eTraining Web site with the user ID and password you used to register for the Distance Learning session.

2 Click the My Training view tab.

3 Click the My Distance Learning Classes link.

4 In the My Distance Learning Classes list, drill down on the hyperlink in the Reg. # field for the course you want to join.

   A Course form and several lists appear.

5 In the heading of the Course form, click the Course Launch button.

   A shorter Course form and a Course Launching list appear. The Course Launching list may display one or more options for launching the course, to allow you to optimize performance for your network connection speed.

6 In the Course Launching list, select the option that best fits your situation, and click Launch.

Depending on how the training organization has configured its system, the course may start immediately, using an HTML viewer, or the Distance Learning Conference Center may appear.

For more information about using the Conference Center and attending Distance Learning classes, see *Siebel Distance Learning Guide*.

Launching a Web-Based Course

Siebel eTraining allows you to start your registered Web-based courses from eTraining screens.

To start a Web-based course from eTraining

1 Log in to the eTraining Web site with the user ID and password you used to register for the Web-based course.

2 Click the My Training view tab.

3 Drill down on the My Web-Based Courses hyperlink.

4 In the My Courses list, select the course, and then drill down on the hyperlink the Reg. # field.

5 In the heading of the Course form, click Course Launch.

A shorter Course form and a Course Launching list appear. The Course Launching list may display one or more options for launching the course, to allow you to optimize performance for your network connection speed.

6 In the Course Launching list, select he option that best fits your situation, and then click Launch.

Depending on how the training organization has configured its system, the course may start immediately, or your browser may display a new page that provides start capabilities.

Taking a Skills Test

When you take a course or class that is offered using eTraining, the course or class may include one or more skills tests to find out whether you have mastered the material presented in the course. Your instructor may direct you to take skills tests at a specific time, or you may choose to take them at a time that is convenient for you.

NOTE: You may not be able to take a skills test more than once. Consult your instructor if you are in doubt about when it is appropriate for you to take a test.

Skills tests can include multiple-choice questions with single or multiple correct answers, true-or-false questions, and questions for which you must supply a short text answer or a text essay. Multiple-choice questions and true-or-false questions are automatically graded immediately. An instructor or another individual in the training organization must grade questions that require the test takers to supply an answer.

To take a skills test

1 Log in to the eTraining Web site with the user ID and password you used to register for the course or class.

2 Click the My Training view tab.

3 Drill down on the My Instructor-Led Classes, My Web-Based Courses, or My Distance Learning Courses hyperlinks, depending on the type of training associated with the test.

4 Select the class or course for which you want to take a test, and then drill down on the hyperlink in the Registration # field.

5 Scroll down until you can see the Tests list, and click Take Test for the test you want to take.

6 Answer the test questions, and then click Submit.

Depending on the kind of questions included in the test, and the type of scoring that the training administrator has set for the test, you may not see your test results immediately. If you do not see results immediately, ask your instructor when the results will be available, and use the instructions in the following section to view your test results at that time.

Viewing Skills Test Results

After you have taken a skills test, use the following procedure to view your test results.

To view the results of a skills test you have taken

1 Log in to the eTraining Web site with the user ID and password you used to register for the class.

2 Navigate to the My Training screen.

3 Drill down on the My Test Scores hyperlink.

The Test Result list appears, showing information about tests you have taken. If the value of the Status field is Pending, your test has been partially graded, but the value of Your Points may change after text and essay questions have been manually graded.

Viewing Your Transcript

You can view information about the courses, classes, and tests you have completed.

To view your transcript

1 Log in to the eTraining Web site with the user ID and password you used to register for the class.

2 Click the My Training view tab.

3 Drill down on the My Transcripts hyperlink.

   The My Transcript list appears, showing all courses you completed as well as the date on which you have completed each course.

To view descriptive information about training

■ Find the appropriate record for an offering, and drill down on the hyperlink in the Reg. # field.

Viewing Training Progress of Employees (Managers)

You can use the eTraining Web site to view training-related information about the progress of users, if the following conditions are met:

■ You are registered in the Siebel eTraining system with a Siebel responsibility that gives you access to the Training Managers screen.

■ Your Siebel position is set to show that you are the manager of specific other eTraining users.

For general information about user access to Siebel applications, see *Security Guide for Siebel eBusiness Applications*.

Employee Training Information Available to Managers

Within eTraining, you can view the following information about training users that you manage.

■ Information about the classes and courses in which employees have enrolled.

■ Status of each enrollment (Confirmed, Pending, Waiting List, Cancelled, Completed, and so on).

■ Scores for any skills tests taken by employees that you manage.

■ Information about the curriculums in which your employees have enrolled.

■ Progress of your employees in the curriculums.

Viewing an Employee's Curriculum Information (Manager)

The following procedures describe how to view information about employees that you manage.

To view employee enrollment information and test scores

1 Log in to the eTraining system.

2 Navigate to the Managers screen.

The following links appear:

- My Team's Curriculums

- My Team's Enrollments

- My Team's 3rd Party Training

3 Drill down on the My Team's Enrollments hyperlink.

4 Select a record, and then drill down on the hyperlink in the Registration # field.

The following additional information appears:

- Description of the course or class associated with the selected enrollment.

- Information about tests associated with the course or class.

- User's test scores for those tests.

Viewing Curriculum Information for an Employee (Manager)

The following procedure describes how a manager can view the curriculum progress of a direct report. A curriculum is a specific set of training offerings that address a particular goal, such as earning a certification or degree. Curriculums are established by the training organization.

To view curriculum information and progress for your employees

1 Log in to the eTraining system.

2 Navigate to the Managers screen.

The following links appear:

- My Team's Curriculums

- My Team's Enrollments

- My Team's 3rd Party Training

3 Click the My Team's Curriculums link.

A summary of curriculum enrollment information about all your subordinates appears.

4 Find the record for the curriculum enrollment that interests you, and click the Curriculum Name link for that record.

The following information appears. It includes the progress of the selected report through the selected curriculum.

- Status of the report's progress through the curriculum, such as Not Started, In Progress, or Completed.

- Weighted completion percentage.

- Date the report enrolled in the curriculum.

- Date the report completed the curriculum, if applicable.

In addition, information appears about each course in the curriculum:

- The percentage weight given to the course in the curriculum.

■ The report's status for the course, such as Confirmed, Canceled, or Completed.

Viewing and Approving Third-Party Training

You can view and approve third-party training for your subordinates.

To view and approve enrollment information for your subordinates

1 Log in to eTraining.

2 Navigate to the Managers screen.

The following links appear:

- My Team's Curriculums

- My Team's Enrollments

- My Team's 3rd Party Training

3 Click the My Team's 3rd Party Training link.

A summary of third-party enrollment information for the employees you manage appears.

4 Select the third-party enrollment record, and then drill down on the user's name for that record.

5 View enrollment details for the course, and then click Approve or Decline.

If Approve is selected, the user's course status changes from Pending-Approve to Completed, and the course becomes part of the user's transcript.

If Decline is selected, the user's course status changes from Pending-Approve to Declined. The course becomes part of the user's transcript but shows a status of Declined.

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