Oracle Training Administration™ User's Guide

Release 11.0

Part No. A58282–01

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Oracle Training Administration User's Guide, Release 11.0
Part No. A58282–01

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Contents

Preface

Welcome to Release 11.0 of the *Oracle Training Administration User's Guide.*

This guide contains the information you need to set up and use Oracle Training Administration (OTA) to meet the training requirements of your enterprise. It enables you to define activities for any educational development, manage enrollments, generate standard letters and set up special training packages and discount agreements for customers. It also contains detailed information about the following:

- Overview and reference information
- Oracle Training Administration system setup
- Oracle Training Administration implementation suggestions
- Specific tasks you can accomplish using Oracle Training Administration
- How to use Oracle Training Administration windows
- Oracle Training Administration programs, reports and listings
- Oracle Training Administration functions and features

This preface explains how this user's guide is organized and introduces other sources of information that can help you.

About This User’s Guide

The first part of this guide explains how you can set up Oracle Training Administration to meet the training requirements of your enterprise.

- Chapter 1 introduces the major features of Oracle Training Administration. It also describes the main stages of the training cycle and explains how you can use Oracle Training Administration with Oracle Human Resources to support each stage of the cycle.
- Chapters 2 to 5 explain how you can set up Oracle Training Administration to meet your enterprise’s training needs. For example, it describes how to set up and define your reference data, such as your customers, suppliers, trainers, resources and skills or competencies. It also describes how you set up your training activities, such as your course events, on–the–job training events, work experience events, and so on.
- Chapter 6 explains how to maintain price lists for your training activities. It also explains how to set up special discount or prepurchase agreements for selected customers and events.

Once you have set up this key information, you are ready to use Oracle Training Administration to help you with your day–to–day training activities.

- Chapters 7 to 10 cover the key areas:
  - scheduling and resourcing events
  - setting up enrollments and enrolling students onto events
  - handling financial information
  - generating letters for enrollments

The final chapters of this guide focus on tasks for the system administrator and the set up team.

- Chapters 11 and 12 explain the following:
  - setting up QuickCodes and user tables to add lists and tables of valid values to the system.
  - customizing functions and setting up security

Appendix A lists the default menus that give you access to all the windows on the system. Appendix B provides an introduction to flexfields and explains how you can customize and extend Oracle Applications. It also lists the flexfields in Oracle Training

Administration and summarizes what you need to set up. Appendix C provides a template SQL*Plus script for use with standard letters.

Appendix D provides you with the implementation steps. It includes modular implementation flowcharts and checklists to assist with your project planning. It also contains a summary of the sequence of recommended steps for implementing Oracle Training Administration. Full instructions for each implementation step are contained in this guide.

This user's guide is available online

All Oracle Applications user's guides are available online, in both HTML and Adobe Acrobat format. Most other Oracle Applications documentation is available in Adobe Acrobat format.

The paper and online versions of this guide have identical content; use whichever format is most convenient.

The HTML version of this guide is optimized for onscreen reading, and enables you to follow hypertext links for easy access to guides across our entire library. You can also search for words and phrases if your national language is supported by Oracle's Information Navigator. The HTML documentation is available from the Oracle Applications toolbar, or from a URL provided by your system administrator. Note that the HTML documentation is translated into over twenty languages.

You can order an Oracle Applications Documentation Library CD containing Adobe Acrobat versions of each guide in the Oracle Applications documentation set. Using this CD, you can search for information, read it onscreen, and print individual pages, sections, or entire books. When you print from Adobe Acrobat, the resulting printouts look just like pages from an Oracle Applications hardcopy guide.

Finding the Latest Information

For information about any new features that were not available when this user's guide was printed, look at the What's New? section on the main help menu. This information is updated for each new release of Oracle Training Administration HTML help.

Assumptions

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

- the principles and customary practices of your business area
- Oracle Training Administration

  If you have never used Oracle Training Administration, we suggest you attend one or more of the Oracle Training Administration training classes available through Oracle Education.
- the Oracle Applications graphical user interface

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

See Other Information Sources for more information about Oracle Applications product information.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

Consequently, we STRONGLY RECOMMEND that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to

modify Oracle Applications tables, unless we tell you to do so in our guides.

Other Information Sources

You can choose from many sources of information, including documentation, training and support services, to increase your knowledge and understanding of Oracle Training Administration.

Most Oracle Applications documentation is available in Adobe Acrobat format on the *Oracle Applications Documentation Library* CD. We supply this CD with every software shipment.

If this guide refers you to other Oracle Applications documentation, use only the Release 11 versions of those guides unless we specify otherwise.

Oracle Applications User's Guide

This guide explains how to navigate, enter data, query, run reports, and introduces other basic features of the graphical user interface (GUI) available with this release of Oracle Training Administration. This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent requests.

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

Related User's Guides

Oracle Training Administration shares business and setup information with other Oracle Applications products. Even if you have not installed them as separate products, your Oracle Training Administration application includes some forms and functionality from other Oracle Applications. Therefore, you may want to refer to other user's guides when you set up and use Oracle Training Administration.

If you do not have the hardcopy versions of these guides, you can read them by choosing Library from the Help menu, or by reading from the Oracle Applications Document Library CD, or by using a web browser with a URL that your system administrator provides.

Oracle Applications Flexfields Guide

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

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications–embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow–enabled processes.

Oracle Alert User's Guide

Use this guide to define periodic and event alerts that monitor the status of your Oracle Applications data.

Oracle Applications Implementation Wizard User's Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards*. It also provides information to help you build your custom Developer/2000 forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards

This manual contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms 4.5.

Installation and System Administration

Oracle Applications Installation Manual

This manual and the accompanying release notes provide information you need to successfully install Oracle Financials, Oracle Government Financials, Oracle Manufacturing or Oracle Training Administration in your specific hardware and operating system software environment.

Oracle Applications Upgrade Manual

This manual explains how to prepare your Oracle Applications products for an upgrade. It also contains information on finishing the upgrade procedure for each product. Refer to this manual and the *Oracle Applications Installation Manual* when you plan to upgrade your products.

Oracle Applications Product Update Notes

These notes describe the new features added to Oracle Training Administration, and also describe the changes made to database objects, seed data and profile options for the same interval.

Oracle Applications System Administrator's Guide

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

Oracle Oracle Training Administration Applications Technical Reference Manual

The *Oracle Oracle Training Administration Applications Technical Reference Manual* contains database diagrams and a detailed description of Oracle Training Administration and related applications database tables, forms, reports, and programs. This information helps you convert data from your existing applications, integrate Oracle Training Administration with non–Oracle applications, and write custom reports for Oracle Training Administration.

You can order a technical reference manual for any product you have licensed. Technical reference manuals are available in paper format only.

Other Information

Training

Oracle Education offers a complete set of training courses to help you and your staff master Oracle Applications. We can help you develop a training plan that provides thorough training for both your project team and your end users. We will work with you to organize courses appropriate to your job or area of responsibility.

Training professionals can show you how to plan your training throughout the implementation process so that the right amount of information is delivered to key people when they need it the most. You can attend courses at any one of our many Educational Centers, or you can arrange for our trainers to teach at your facility. In addition, we can tailor standard courses or develop custom courses to meet your needs.

Support

From on–site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Training Administration working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support and office automation, as well as Oracle Applications, an integrated suite of more than 45 software modules for financial management, supply chain management, manufacturing, project systems, human resources and sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers, and personal digital assistants, enabling organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and application products, along with related consulting, education and support services, in over 140 countries around the world.

Thank You

Thank you for using Oracle Oracle Training Administration and this user's guide.

We value your comments and feedback. At the end of this guide is a Reader's Comment Form you can use to explain what you like or dislike about Oracle Training Administration or this user's guide. Mail your comments to the following address or call us directly at (650) 506–7000.

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CHAPTER

1

Introducing Oracle Training Administration

This chapter describes a training cycle and explains how you can use Oracle Training Administration with Oracle Human Resources to support each stage of the cycle. It also introduces the major features of Oracle Training Administration. In each section there are cross references to help you find further information on each topic introduced in this chapter.

Overview of Oracle Training Administration – Meeting Your Business Needs

As a powerful, integrated and fully tailorable training system, Oracle Training Administration provides all the facilities which you would expect of an advanced training administration system, and more. It has been developed to commercial principles and therefore offers a sound business–based solution for all your training administration needs.

Now that you have Oracle Training Administration, you are able to do the following:

Set Up Flexible Activities (Courses)

You can set up **activities** to describe any educational or developmental undertaking designed to enhance competencies, qualifications or experience. Activities are not restricted to conventional training courses—you can use them for on–the–job training, work experience, apprenticeships, tests, computer–based training, and so on.

You can create multiple versions of an activity type and group related types into categories for analysis and reporting.

Control Activity Versions

You can maintain **concurrent versions** of an activity, using dates to control when it can be scheduled. You use concurrent versions of an activity, for example, when you need to teach the activity in more than one language. The content of the activity is the same, but there is a choice of languages (versions) in which to teach it.

If an activity becomes outdated (for example, changes in technology or teaching methods), you can create a new version of an activity and run it concurrently with, or instead of, the old version. This enables you to phase out old activities or immediately switch to new ones.

Develop and Budget for Activities

You can assign budgets both for the development of new activities and for the running costs of all events scheduled for an activity. You can assign trainers and other resources for course development, and for scheduled events, report on the total resource costs over time. You can do this for individual events or for events grouped by activity, program or category.

Create Events for Every Occasion

Oracle Training Administration enables you to create all types of event to meet your business needs. A **scheduled event** is a fixed date and time during which you teach an activity. Students sign on for an event, pay for it and complete it. However, you might need to create other types of event as well as scheduled events in your enterprise. For example, you might need to create an event to record conference or informal training information, or you might want to design and cost an event, assign budgets both for the development of new activities and for the running costs of the event.

The types of event you can create in Oracle Training Administration are:

- scheduled

  Create scheduled events when you are ready to run an activity, for which you can book resources and enroll students. An event may run for any period of time you choose, such as several hours, days or weeks.

- one time

  Create one time events when you want to record unique or informal events (these can be in the past, if required).

- program

  Create programs when you want to group scheduled events into programs and enrol students onto the events through the program.

- development

  Create development events when you want to assign budgets both for the development of new activities and for the running costs of all events scheduled for an activity.

Create Sessions and Programs

An event can run for any period of time you choose, such as several hours, days or weeks. To help you create a detailed agenda for an event, you can break it down into shorter sessions, specifying the location and start and end times of each session.

You can book resources, such as venues and trainers, for the whole event or for individual sessions.

You can also group scheduled events into programs and enrol students onto the events through the program. You can specify that some of the events are required, and that other events are optional. This enables students to see which events they must attend, and to select their choice of optional units or modules. You can charge students for the whole program rather than the individual events

Track and Manage Enrollments onto Events

Using event statuses, you can control student enrollments on an event throughout its lifecycle.

For example, you can create a **Planned** event to monitor student interest and investigate resource availability. You might then enter enrollments with the status **Requested** as students express an interest in the event and you can update their status to **Waitlisted** when the students confirm their interest. You might update the event status to **Normal** when you have sufficient Waitlisted enrollments and to meet the minimum numbers required to run the event.

If you have to cancel an event, Oracle Training Administration cancels all student enrollments and warns you if any of the students have been invoiced.

You can also use these statuses to trigger the generation of standard letters and alerts, for example to inform students when an enrollment has been confirmed or waitlisted.

Manage Waiting Lists

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

You can select on the basis of:

- enrollment date (”first come, first served”)
- enrollment priority
- sponsoring organization or customer
- enrollment status

Restrict Enrollments

You can restrict enrollments to students from one or more selected customers. If you are using Oracle Human Resources, you can also restrict enrollments on internal events to employees assigned to a particular organization, job or position.

Record Outcomes of Attendance

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

If you are holding competence or skills information for employees in Oracle Human Resources, you can update their records to show the new qualifications, knowledge or experience they have gained from the event.

Hold and Manage Price Lists

You can hold prices for activities on price lists. Prices can be expressed in any currency or in training units, which have a meaning and value that you define. You can quote prices per student enrollment or per customer for a range of student numbers, such as $10 000 for up to 10 students and $15 000 for 11 to 20 students. You can create multiple price lists, for example for different suppliers, different seasons, or different categories of activities. You can easily copy information from one price list to another and change prices by a percentage.

When you create an event, you can select a price from a price list or, if your responsibility permits it, enter a new price.

Offer Discounts

You can offer discounts to one customer or all customers for:

- one event
- all events scheduled for an activity
- all activities on a price list, or
- all activities in a package that you have defined

Offer Prepurchase Agreements

You can also create a prepurchase agreement where a customer pays an agreed sum in advance. The customer can then draw upon this prepaid balance during the agreement's period of validity to pay for any enrollments on activities on a given price list. Prepurchase agreements can be expressed in money or training units, and can also incorporate a discount.

Understanding The Training Cycle

The training function within an enterprise can be depicted as a cycle such as the one shown in Figure 1–1. The main stages in the cycle are as follows:

Setup Stages

1. Define competence / skill requirements of business: define the competencies / skills (qualifications, knowledge and experience) your enterprise requires from its current staff and future applicants.
2. Assign competence / skill requirements to organizations, jobs, and positions: assign your overall business requirements to particular structures within your enterprise.
3. Assess competence / skill achievements and competence / skills gap: evaluate your current employees and applicants, then conduct a development needs analysis to identify the gap.
4. Design or identify development activities: develop new internal training activities or identify external activities that will supply the competence / skills required to close the gap.
5. Price activities: create budgets for running activities and enter them on price lists, if appropriate.
6. Group activities into programs: group activities into training programs that will be advertised on your schedules.
7. Identify resources and suppliers: identify the equipment, venues, trainers and other resources required to run your activities, and build up a database of resources you can book.

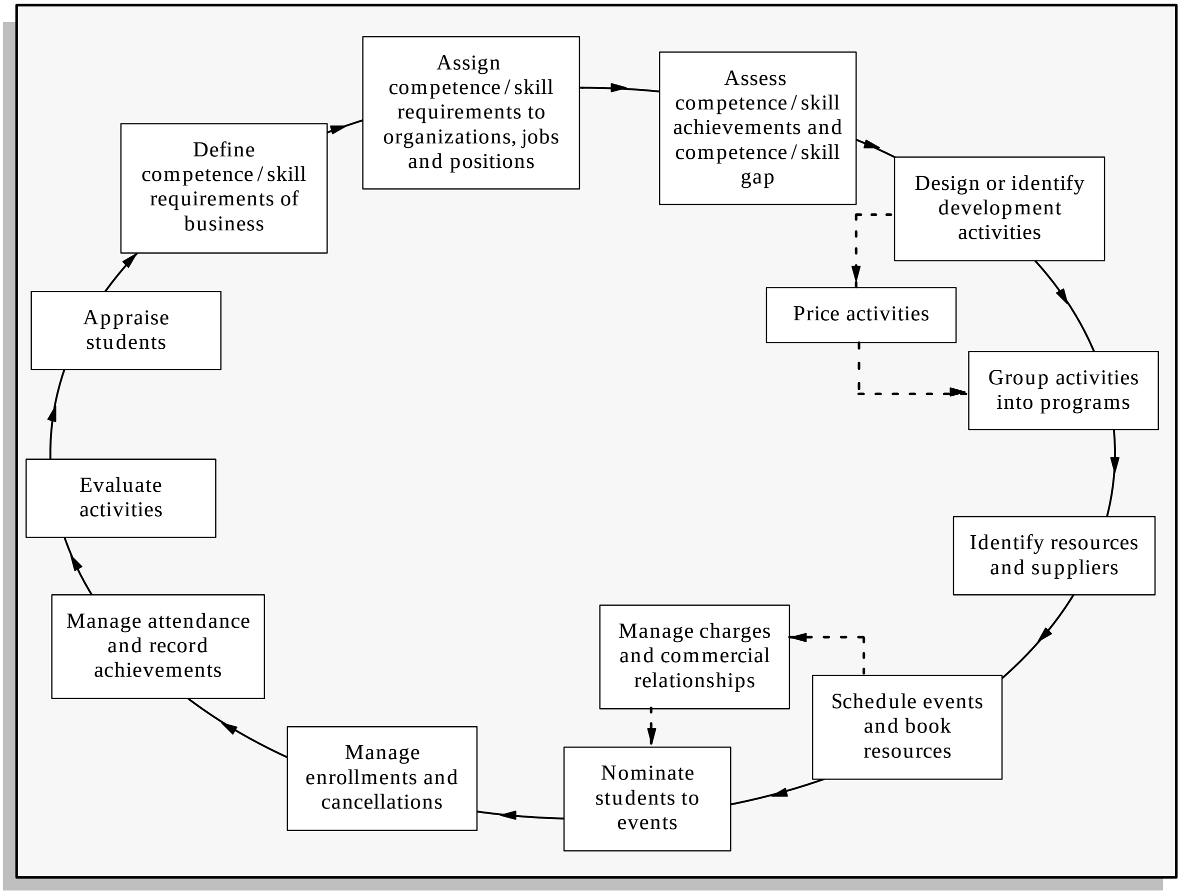
User Stages

8. Schedule events and book resources: create events, with dates, for your training activities and book the resources required to run them. Manage payments to resource suppliers.
9. Manage charges and commercial relationships: set up special discount and bulk purchase agreements for customers, if appropriate.
10. Nominate students to events: begin enrolling students on events.
11. Manage enrollments and cancellations: handle multiple enrollments through stages such as nominated, waiting list, confirmed or cancelled, issuing standard letters as required. Manage invoicing to paying customers.
12. Manage attendance and record achievements: after events, record results including attendance levels and competencies / skills attained.

13. Evaluate activities: assess their effectiveness and compare actual revenues and spending with budgets.

14. Appraise students: evaluate the longer term impact of training activities.

Figure 1 – 1



You can use Oracle Training Administration, with the other Oracle Applications, to support just as much of the training cycle as you require.

Setup Overview

Before you set up Oracle Training Administration so that users can perform their tasks, Oracle Corporation recommends that you plan carefully.

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

Oracle Training Administration is integrated with Oracle Human Resources, and together these applications can support all stages of the training cycle.

You may not be concerned with every stage in this training cycle. For example, commercial training agencies need not identify internal training requirements nor maintain detailed student records. Their main focus is in the maintenance of training schedules or calendars, and the management of enrollments and financial transactions.

Internal training departments that do not open up their events to external students on a commercial basis, may be less interested in the management of price lists, discounts, and other financial information.

You can use Oracle Training Administration, with the other Oracle Applications, to support as much of the training cycle as you require.

What Decisions Do You Need to Make?

To understand the decisions you have to take before you set up Oracle Training Administration, see Implementing Oracle Training Administration: page D – 2

What To Do Next

Before you can begin using Oracle Training Administration to schedule training events and enrol students, you must define the training activities to appear on your schedules, the resources they require and the suppliers of resources and activities.

If you want to record competencies or skills supplied by your training activities, you must also define the types of information you want to hold. If you want to classify your activities and group them into discount packages and programs, you must set up activity categories.

You also need to set up a business group. This is the largest organizational unit you set up in Oracle HRMS, and it represents your enterprise. All the other information you enter in Oracle HRMS belongs to one Business Group. After the Business Group, you can set up other organizations, such as training departments.

To control the actions that groups of users can perform, you need to define ***responsibilities***. A responsibility is a level of authority. Each responsibility lets the user access the menus, forms, reports, and data that they need to fulfil their business role. For each responsibility, you can specify which functions users can access on the navigation menus.

If you want to hold financial information, you must enable the currencies you plan to use and define price lists for your activities. You may also want to implement processes to transfer financial information from Oracle Training to Oracle Payables and Oracle Receivables, or another financial system.

When you have completed the setup, you are ready to enter information about customers, events, and enrollments.

To follow the correct implementation sequence, see: Implementation Steps: page D – 8.

See Also

Implementing Oracle Training Administration: page D – 2

Implementation Checklist: page D – 5

CHAPTER

2

Setting Up Organizations, Suppliers, Customers and Accounting Information

This chapter explains how to set up:

- your internal training departments and other organizations
- your training administrators and managers
- your accounting information (only if you do not have Oracle Financials)
- the suppliers of training activities, venues, trainers and other resources to your enterprise
- the customers to whom you supply training events

As part of your initial implementation, you must also define a business group, which is the largest organizational unit in Oracle HRMS. This chapter explains how to define your business group and to enter defaults that apply across the business group.

Using Organizations, Suppliers and Customers

In Oracle HRMS, *organizations* are the internal departments, divisions, sections, or units that comprise the reporting structures within your enterprise. They can also be external organizations, such as recruitment companies (for HR departments) or tax offices (for Payroll departments). In Oracle Training Administration, you set up your internal training departments as organizations.

Suppliers are internal or external agencies who supply your enterprise with goods or services. In Oracle Training Administration, you enter the names, addresses and contacts for the suppliers who provide training or resources for training (such as venues or equipment). These are the only names and addresses you can enter on payable finance headers.

Customers are internal or external agencies to whom you supply goods or services. In Oracle Training Administration, you set up as customers:

- the names and addresses of the organizations where external students work, or through which they can be contacted
- the names and addresses to appear on invoices for student enrollments
- any third party agencies through whom you handle enrollments
- the customers for which you run private events and those for which you create special enrollment agreements

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

Accounting Reference Data

You need to set up additional accounting reference data for use by supplier and customer windows only if you do not have Oracle Financials in your enterprise. If you do have Oracle Financials, some of the data you require already exists.

Business Groups and Training Organizations

Use the Organization window to define a business group and internal training organizations that develop training activities and administer events.

You can then select these organizations when you define training activities and schedule events. You can share your organization definitions with other Oracle Applications.

Before you define organizations, enter their site addresses using the Location window. Several organizations can share one site address.

The Business Group

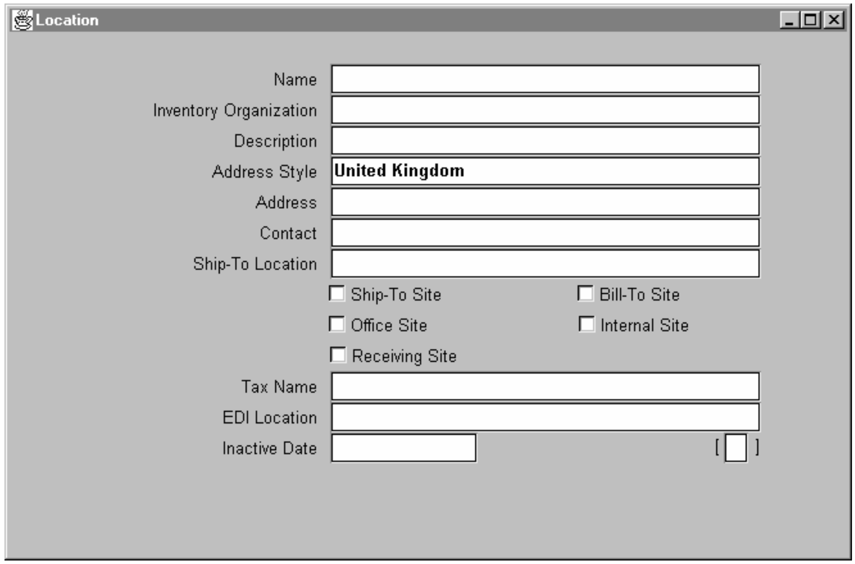
The business group is the largest organizational unit on the system and all the other information you enter belongs to one business group. You can set up several default options that apply across the business group. You cannot view information online for more than one business group at a time.

Many enterprises decide to use just one business group to hold 'live' information so they can display, report and manage all their information at the same time. However, you may want to set up multiple business groups in the same installation for the following reasons:

- You want to have a copy of your live system with example records for training or testing purposes.
- You are a holding company or corporation with a number of subsidiary companies who manage their training quite separately.

Setting Up Site Locations

Enter site addresses in the Location window.



Note: Locations are shared across business groups in Oracle HRMS and with many other Oracle applications. Oracle HRMS does not use some of the fields in the Location window. These fields are disabled for HRMS users.

▶ **To enter a site location and its address:**

1. Enter the name of the location, and a description, if required.
2. Select a national address style from the list.

   A window opens with the address format for the country you select.
3. Enter address information in this window and choose the OK button.
4. Save your work.

Removing Site Locations

You cannot delete locations, but you can make them inactive.

▶ **To remove an address from the Location list:**

- Enter an inactive date from which the location is no longer in use in your enterprise.

Creating a Business Group for Oracle Training Administration

If you are implementing Oracle Human Resources, or have done so already, you will probably want to use your HR business group or groups in Oracle Training Administration. This enables you to share data on people, organizations, locations and skills across the applications.

If you are implementing Oracle Training Administration without Oracle Human Resources, use the supplied setup business group, with all of its default definitions, as the starting point for your own business group. This business group is used by the default responsibility, supplied with the system.

Prerequisites

❑ Enter the names and addresses of your work sites in the Location window

See: Setting Up Site Locations: page 2 – 4

❑ Enter any organization types you need in the QuickCodes window, for the QuickCode Type ORG_TYPE

See: Adding QuickCode Values: page 11 – 3

❑ Enable the currencies you need. Normally your system administrator does this.

See: Enabling Currencies: page 9 – 13

▶ **To use an HR business group or the setup business group for Oracle Training Administration:**

1. Query the business group in the Organization window.
2. Choose the Others button and select business group Information.
3. Check that the legislation code and currency are appropriate for your business group. The legislation code determines the default style for addresses in Oracle Training Administration. The currency selected here is the default currency for the business group, but you can enable and use other currencies as you require.

   The other information in this window is used by Oracle Human Resources but not by Oracle Training Administration.
4. Choose OK and save your work.

Other Information for Business Groups

If you are not implementing Oracle Human Resources, you can ignore the other windows that are provided for business groups, such as Work Day Information and Budget Value Defaults.

See Also

Employer and Organization Setup in the *(Oracle Human Resources User's Guide).*

Creating a Training Organization

Use the Organization window to set up internal organizations, such as training departments.

All Oracle applications you install share the information entered in the Organization window. Therefore organization names must be unique within a business group, and business group names must be unique across your applications network.

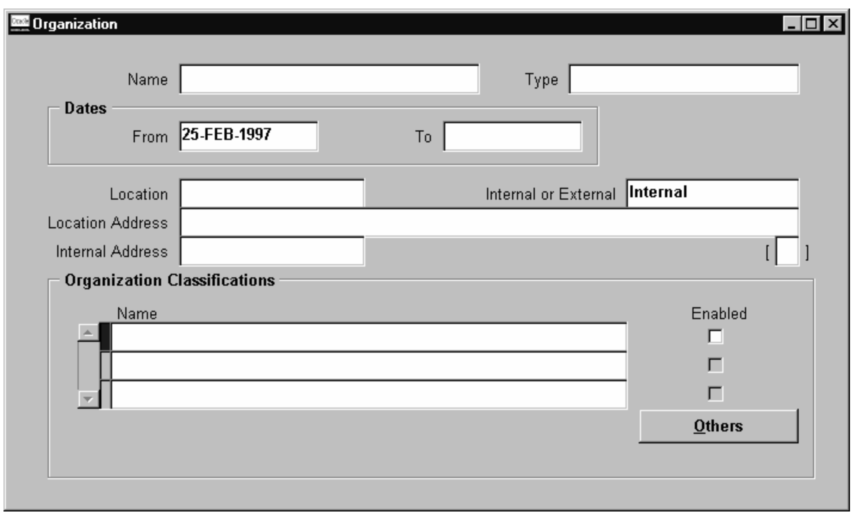
Prerequisites

❑ Enter the names and addresses of your work sites in the Location window

See: Setting Up Site Locations: page 2 – 4

❑ Enter any organization types you need in the QuickCodes window, for the QuickCode Type ORG_TYPE

See: Adding QuickCode Values: page 11 – 3



▶ **To create a new organization:**

1. Enter a name that is unique within the business group, and optionally, select an organization type.

2. Enter a start date early enough for any historical information you must enter.

3. Select a location to record the site address, if one exists. You can also enter an internal address to add more details such as a floor or office number.

4. Select Internal or External.

5. Save your work. You do not have to select a classification for a training organization. You can select and enable the *HR Organization* classification if you want to assign employees to this organization in Oracle Human Resources.

There is no additional information to enter for a training organization.

Creating Dummy Accounting Reference Data

You need to set up dummy accounting reference data if you do not have Oracle Financials in your enterprise. You need this dummy data for supplier and customer windows to operate.

If you do not have Oracle Financials, set up the following:

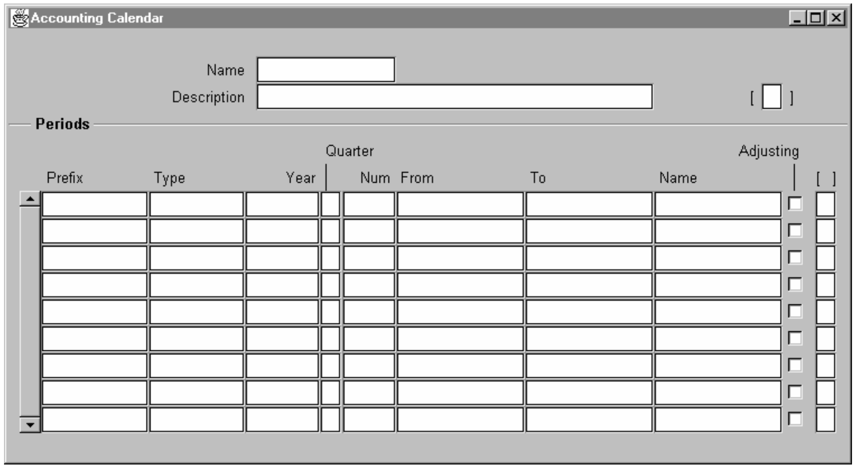
- a calendar
- a set of books
- financials options
- system options

> **Note:** If you do have Oracle Financials, some or all of the data you require already exists, depending upon which Financials products you have.

Creating a Calendar for Oracle Training Administration

Use the Calendar window to create a calendar for use by supplier and customer windows. You only need to create a calendar if you do not have Oracle Financials in your enterprise.

You only need to set up one period for the calendar. You do not need to enter more than one period or multiple calendars.



Note: This form is shared with other Oracle Applications. Oracle Training Administration does not use some of the fields in this form.

▶ **To create a calendar:**

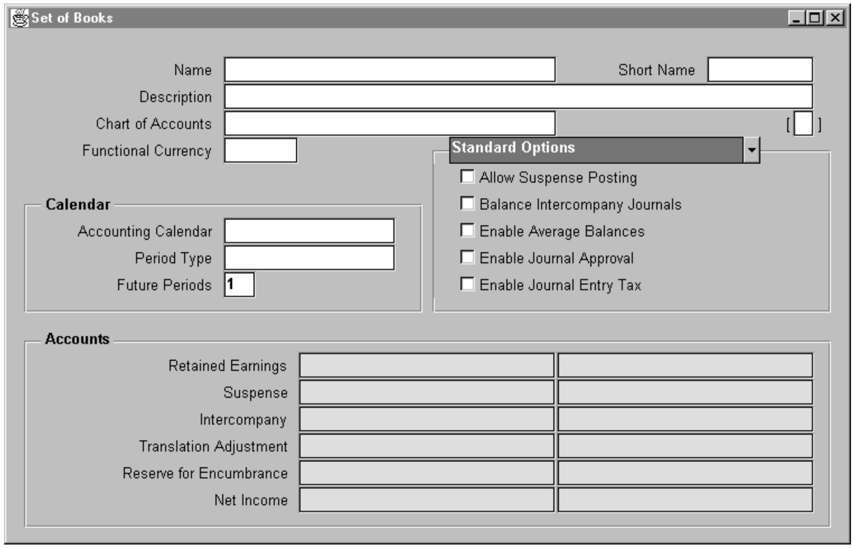
1. Enter a name and description for the calendar, for example, **`OTA Calendar`** and **`Dummy Calendar for OTA`**.
2. Enter a period prefix, for example, **`OTA`**.
3. Enter the period type, for example, **`Year`**.
4. Enter the year, for example, **`1997`**.
5. Enter the quarter, for example, **`1`**.

   Oracle Training Administration creates a name (displayed in the Name field in the Periods region) from the Prefix and year you entered.
6. Enter the number, for example, **`1`**.
7. Enter the start and end dates the period covers for example, **`01–JAN–1997`** to **`31–DEC–1997`**.

   Note: These dates are for reference only. They are not used by Oracle Training Administration.
8. Save your work.

Defining a Set of Books for Oracle Training Administration

Use the Set of Books window to determine the currency, account structure and accounting calendar. You only need to define a set of books if you do not have Oracle Financials in your enterprise.



Note: This form is shared with other Oracle Applications. Oracle Training Administration does not use some of the fields in this form.

▶ To define a set of books:

1. Enter a name and description for the set of books, for example, **`OTA set of Books`** and **`Dummy Set of Books for OTA`**.
2. Enter a short name for the set of books, for example, **`OTA`**.
3. Enter the name of the Chart of Accounts you are using, for example, **`OTA Accounting Flexfield`**.
4. Select the base currency used by your enterprise in the Functional Currency field, for example, **`UKS`**.
5. Select the accounting calendar you previously created, for example, **`OTA Calendar`**.
6. Ensure that the Allow Suspense Posting and Balance Intercompany Journals check boxes are checked.
7. Enter **`000.000.000`** as dummy account information in the Retained Earnings field. Company000.Dept000.Account000 displays in the opposite column.

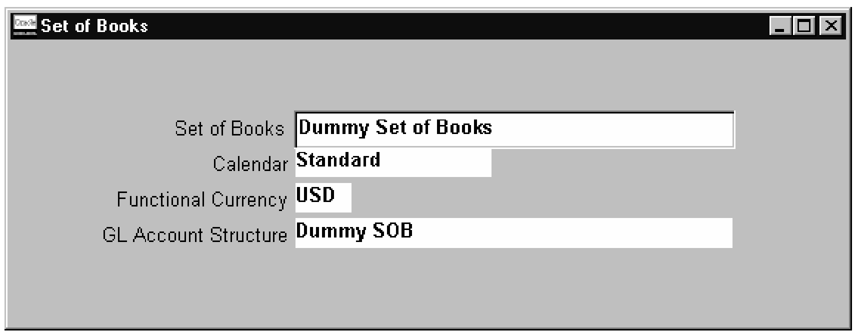
8. Continue to enter **000.000.000** in the following fields:
   - Suspense
   - Intercompany
   - Translation Adjustment
   - Reserve for Encumberance

     Note: These accounts are for reference only. They are not used by Oracle Training Administration.

9. Save your work.

Choosing the Set of Books for Oracle Training Administration

Use the Choose Set of Books window to choose the set of books to use. You only need to choose a set of books if you do not have Oracle Financials in your enterprise.



▶ **To choose a set of books:**

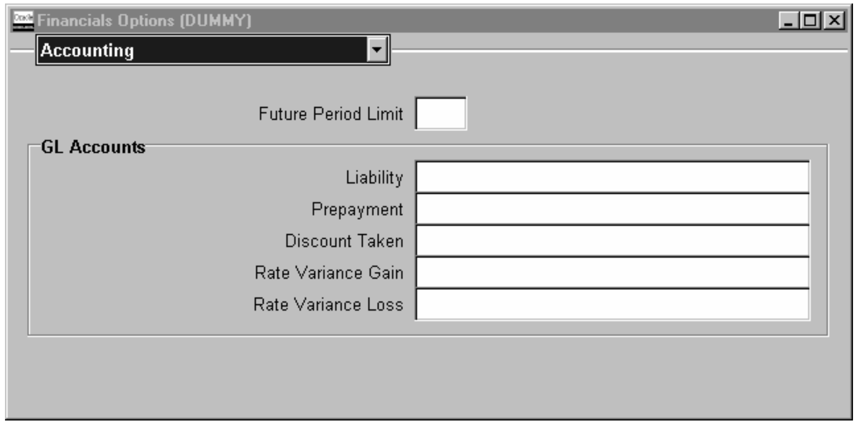
1. Select the set of books you previously created, for example, **`OTA set of Books`**.

   Oracle Training Administration displays the calendar, currency and GL accounting structure you previously created.

2. Save your work.

Defining Financials Options for Oracle Training Administration

Use the Financials Options window to set up your financials options. You only need to define financials options if you do not have Oracle Financials in your enterprise.



Note: This form is shared with other Oracle Applications. Oracle Training Administration does not use some of the fields in this form.

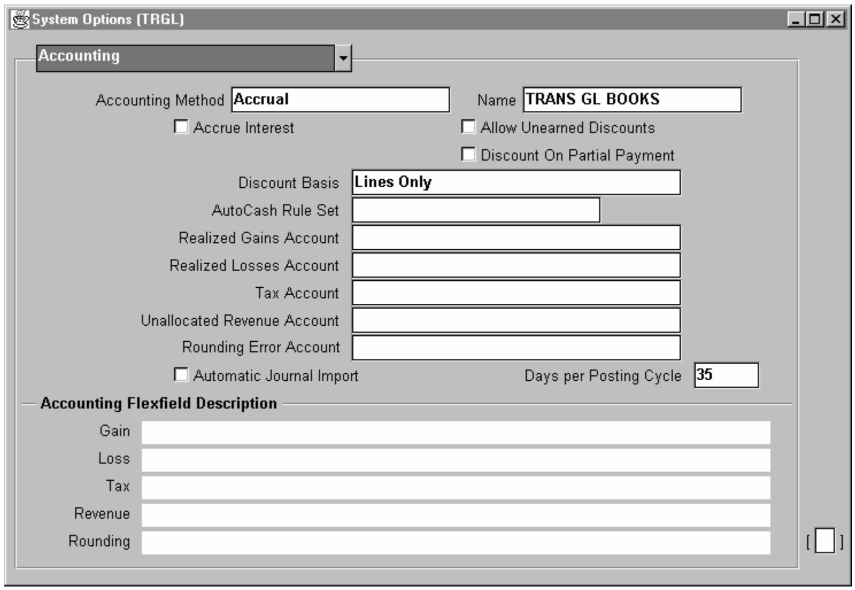
▶ **To define financials options:**

1. Enter **1** in the Future Period Limit field (in the Accounting region).
2. Ensure that 000.000.000 is displayed in the following fields:
   - Liability
   - Prepayment
   - Discount Taken
   - Rate Variance Gain
   - Rate Variance Loss
3. Enter **OTA DEMO Business Group** (in the Human Resources region).
4. Select Home in the Expense Check Address region.
5. Select Automatic as the payment method and enter **5** in Next Automatic Number.
6. Select Check payment as the payment method (in the Supplier – Payables region).
7. Select any Ship to Location (in the Supplier – Purchasing region).

8. Save your work.

Defining System Options for Oracle Training Administration

Use the System Options window to set up your system options. You only need to define financials options if you do not have Oracle Financials in your enterprise.



Note: This form is shared with other Oracle Applications. Oracle Training Administration does not use some of the fields in this form.

▶ **To define system options:**

1. Ensure that the Accounting region is displayed.
2. Enter **`Cash Basis`** as the accounting method.
3. Enter **`OTA set of Books`** as the name.
4. Select 000.000.000 in the following fields:
   - Realized Gains Accounts
   - Realized Lossess Account
   - Tax Account

Oracle Training Administration displays a default number of days per posting cycle and Company000.Dept000.Account000 is in the Tax field.

Entering Tax Information

5. Select Sales as the method of paying tax.
6. Select No Validation – Country as the location flexfield structure.
7. Select No Validation as the address validation.
8. Select Total Tax Only for printing invoices.

   Oracle Training Administration displays 00000 to 99999–99999 as the postal code range and 1000 as the tax cache size. Leave these values as they are.

Entering Invoices and Customers Information

9. Select DEFAULT as the grouping rule name.

   Oracle Training Administration displays 65535 as the maximum memory in bytes and 0 as the log file message level. Leave these values as they are.

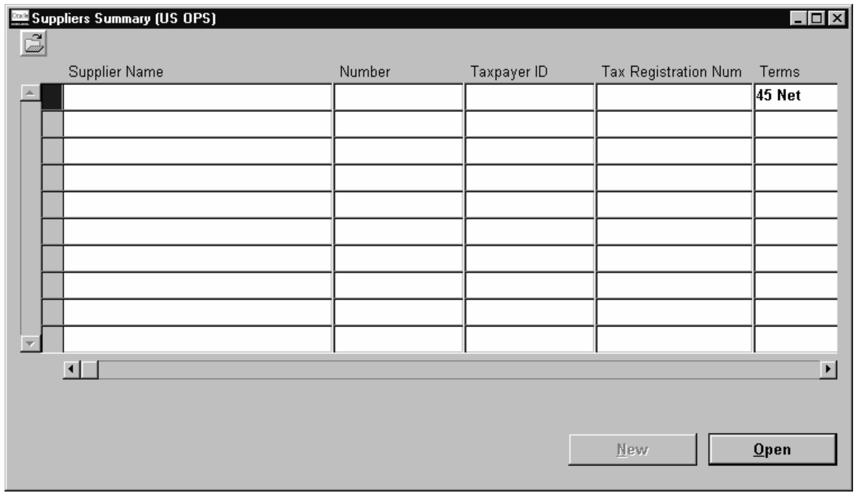
Entering Miscellaneous Information

10. Enter **`5000`** as the split amount.
11. Enter **`90`** as the number of days in the DSO calculation.

    Oracle Training Administration displays 1000 as the auto receipts invoices / receipts per customer. Leave this value as it is.
12. Select Open Invoice Due Date as the chargeback due date.
13. Select None as the source of territory.

Creating a Supplier

Use the Supplier window to define both internal and external organizations that supply training activities, trainers, venues, equipment, or other resources required for your training activities. You can then select these suppliers when you create activities, define resources and create payable finance headers.



Note: This form is shared with other Oracle Applications. Oracle Training Administration does not use some of the fields in this form, including Classifications and Contact Roles.

▶ **To enter a new supplier:**

1. Enter the supplier name and a unique number. (Depending on your setup options, OTA may be enter the supplier number for you.)
2. Choose the Open button to access the Suppliers window.
3. Select the Sites region and choose the Open button to open the Supplier Sites window.
4. Enter the site name. This is for your reference only and does not appear on finance headers.
5. Select a Country to determine the address style, then enter the address details. The Site Uses fields are not used by Oracle Training Administration.
6. Select the Contacts region. Enter the names, details and telephone numbers of as many contacts as you require for this supplier.
7. Save your work.

Creating a Customer

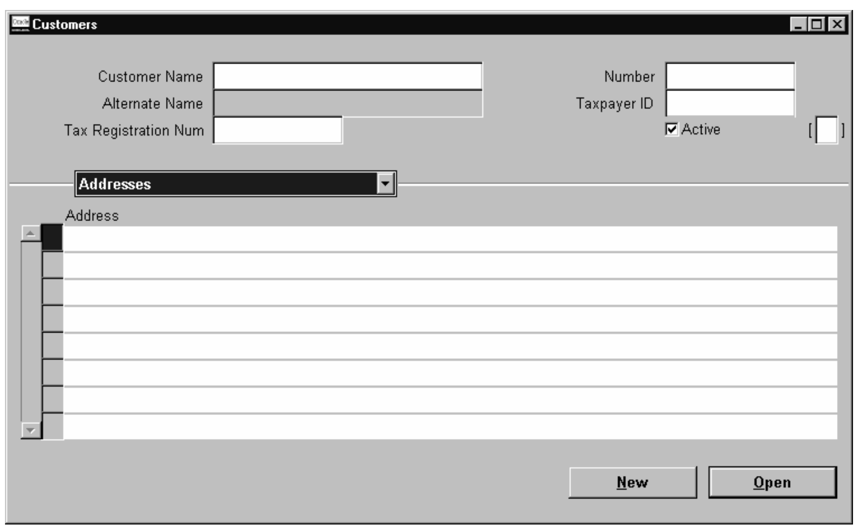
In Oracle Training Administration, you set up as customers all the *external* organizations for which you run events and enroll students. This includes:

- the names and addresses where students work, or through which they can be contacted
- the names and addresses to appear on invoices for student enrollments
- any third party agencies through whom you handle enrollments
- the enterprises for which you run restricted events and those for which you create special enrollment agreements

You must also set up your *internal* organizations as customers if you:

- do not use Oracle Human Resources and you want to enroll internal students. You enter your employees as contacts for these customers.
- use Oracle Human Resources but you want to create finance headers for your internal organizations to facilitate internal cross–charging for enrollments.

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



Note: The Customers window is shared with other Oracle Applications. Oracle Training Administration does not use some of the fields in this window, including Classifications and Contact Roles.

If you plan to use customers in other Oracle Applications, refer to the full documentation on this window.

See: Entering Customers, *Oracle Receivables User's Guide*

▶ **To enter a new customer:**

1. Enter the customer name and a unique customer number.

   Depending on your setup options, the customer number may be entered for you automatically.
2. Save your work.
3. Choose the New button.

   Oracle Training Administration opens the Customer Addresses window for your new customer.
4. Select a Country.
5. Enter the address details. Some of the address components may be required if you are using address validation.

   The Business Purposes fields are not used by Oracle Training Administration.
6. Save your work.

   Oracle Training Administration enter a unique reference number for the customer at that address.
7. Select the Contacts: Telephones region and enter the names and telephone numbers of as many contacts as you require for this customer. If you enter a telephone number, you must select a Type, such as General or Fax.
8. Ensure that the Active box remains checked for all active contacts.
9. Save your work.
10. Select the Contacts: Roles region and select a role description for the contacts in the Description field. Ensure that the Active box remains checked for all active roles.
11. Save your work.

Customizing the Customer Form

System administrators can use function security to control which alternative regions of this form are displayed. They can specify parameters when defining menus to control which alternative region is visible when you first open the window.

CHAPTER

3

Setting Up Resources

This chapter explains how to define resource types and enter the resources you use for your events. You need to set up this information before you can associate resources with training activities and book them for events.

Resources

Resources are any facilities, people, or equipment that you need to book to run an event. You can define generic resource types, such as overhead projector and networked PCs. You define these as QuickCode values. You can also define specific resources that are available from a particular supplier.

For example, you could record that the Grove International Hotel (the supplier) has one venue holding 500 people and four venues holding 100 people.

Two resource types are predefined: venues and trainers. You cannot delete these types because they are used by the system.

Training Resource Key Flexfield

For each resource type, you set up a structure of the Training Resource key flexfield to hold the information that you want. This gives you complete control over the information held for each resource type, and how it is formatted and validated.

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

For example, you might set up the following segments for the Trainer resource type:

- Full Name
- Main Expertise

For the Venue resource type, you might define the following segments:

- Name
- Center
- Capacity
- Seating Arrangements
- Main Purpose
- Fixed Equipment

You can define the same segment in multiple structures. For example, you might include the Center segment in the structures for all resource types so that you can report on all resources held at your training centers.

Entering Training Administrators and Trainers

You can enter training administrators and trainers as people on the system, with their own addresses. Or, you can simply record that a certain number of unnamed trainers can be provided by a certain supplier.

There are a number of possible ways to enter trainers on the system:

- If Oracle Training Administration is installed without Oracle Human Resources, use the OTA Enter Person window to enter your trainers.

  See: Entering Trainers: page 3 – 3

- If Oracle Training Administration is installed with Oracle Human Resources, use the HR Person window instead to enter your trainers, training administrators and managers.

  See: Entering a New Person, *Oracle Human Resources User's Guide*

- If you want to enter the trainer as a contact associated with the supplier, use the Suppliers window.

  See: Creating a Supplier: page 2 – 14

- If you want to enter the trainer as a contact associated with the customer, use the Customers window.

  See: Creating a Customer: page 2 – 15

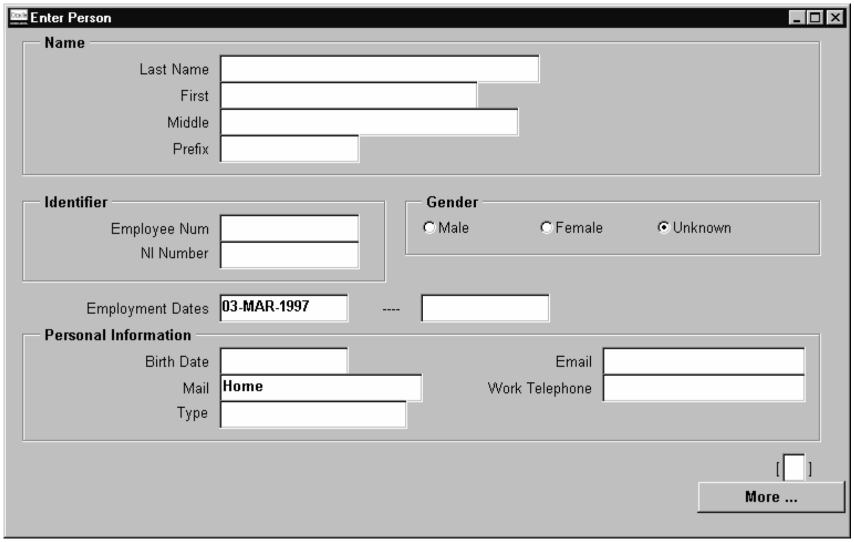
- If you want to hold names and addresses of trainers, set up segments of the Training Resource Key Flexfield structure.

  See: Oracle Applications Flexfields Guide

If you choose one of the first four options, you can set up a segment of the Training Resource Key Flexfield structure for trainers to hold a trainer's full name. Then you can define a table–validated value set to provide a list of trainer names from the appropriate table for this segment. This means that users cannot enter new trainer names when they define resources. Instead they select trainers already entered on the system as people or contacts.

Entering Trainers (Using the OTA Enter Person Window)

If Oracle Training Administration is installed without Oracle Human Resources, use the Enter Person window to enter your trainers (although this depends on how you choose to set up the Resource Name key flexfield for trainers).



Before You Start

Set up any address types you want to use (such as home or office) using the QuickCode ADDRESS_TYPE.

▶ To enter trainers

1. Enter the person's name and other details in the Name region. Only the last name is required.
2. Enter a title such as Ms. or Doctor for the person in the Prefix field.
3. Enter the person's identification information in the Identifier region.

   If your enterprise uses manual number entry, use the Employee Num field to enter an employee number as appropriate. If your enterprise uses automatic number generation, the employee number automatically displays when you save your entries.
4. Enter the person's employment dates.
5. Enter details for the person as required in the Personal Information region:
   - In the Birth Date field, enter their date of birth.
   - In the Mail field, select Home or Office to indicate the person's preferred mail destination
   - In the Type field, select External or Contact to indicate the type of mail address
   - If the Work Telephone field is displayed, enter the person's work telephone number. Otherwise, use the Phone Numbers window to enter this information.

- In the Email field, enter the person’s email ID

6. Save your work and choose the More... button to enter the person’s address.
7. Select a national address style.
8. Enter your address information in this window and choose OK. OTA returns you to the Address window.
9. Select an address type, such as home or weekend.
10. Check Primary to identify that this is the person’s main address (the first address you enter is the Primary address, by default).

    Note: Only one address at a time can be the Primary address.

11. Enter the dates the person resides at this address. You must enter a start date, but you can leave the end date blank.
12. Save your work.

Entering Resources

You can enter and maintain resources, their suppliers and their costs using the Resources window.

Prerequisites

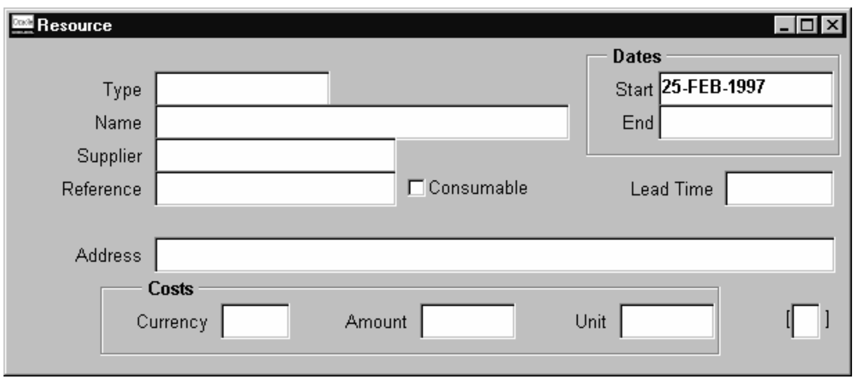
- ❑ Define resource types as values for the QuickCode Type RESOURCE_TYPE.

  See: Adding QuickCode Values: page 11 – 3

- ❑ Define a structure of the Training Resource Key Flexfield for each resource type.

- ❑ If your Training Resource Key Flexfield structures include a segment for training center, enter your centers as values for the QuickCode Type TRAINING_CENTRE.

- ❑ If you want to record the names of individual trainers, enter them using the Enter Person window, or the Customers or Suppliers window. The correct form to use depends on how the Training Resource Key Flexfield structure for trainers is set up at your site.



▶ To enter a resource:

1. Select a resource type.
2. When you enter the Name field, a window opens for you to enter the information appropriate to this resource type. The combination of information you enter must uniquely identify the resource.
3. Enter a start date when the resource becomes available for booking. You can also enter an end date.
4. Select the supplier. You can also enter a reference, such as a code used by the supplier to identify the resource.

5. Check the Consumable check box if the resource is consumed when it is used, and is not reusable. For example, pens and paper are normally consumable, whereas computers and venues are reusable.

   Note: Oracle Training Administration assumes you have an unlimited supply of consumable resources, so there are no restrictions on the number of concurrent bookings you can enter for these resources. If you try to double–book a non–consumable resource (using a Confirmed booking status), you receive a warning or, for trainers and venues, an error.

6. Enter, as a number, the normal lead time required for booking.
7. Enter the address for the resource. For example, this might be the internal address within a training center.
8. Enter the cost per unit of the resource and select a currency. Enter the unit of measurement, such as one computer or one day's hire.
9. Save your work.

Using Resources

There are two ways to use resources in the system:

- You can associate required or useful resources with a training activity to provide a checklist when you are resourcing an event.

  See: Entering Resource Requirements of Activities: page 5 – 11

- You can book resources for a particular event and at the same time create a payment header to the supplier, if appropriate. You can also make a block booking of a resource to temporarily remove it from the list of available resources.

  See: Booking Resources: page 7 – 27

CHAPTER

4

Using Skills or Competencies

This chapter explains how you can use skills or competencies to record the qualifications, attributes and knowledge that students can expect to attain by attending training activities. You can use this information to search for scheduled events that can be expected to provide certain skills.

Using Competencies or Skills

If you have Oracle Human Resources and Oracle Training Administration installed in your enterprise, you can hold the qualifications, attributes and knowledge that students can expect to attain by attending training activities as:

- competencies
- skills
- a mixture of both (competencies and skills)

If you are developing the competence approach, we suggest you hold the qualifications, attributes and knowledge gained from training activities as competencies. If you only have Oracle Training Administration, you can hold the qualifications, attributes and knowledge as skills.

For a full discussion of the competence approach see *Introducing Career Management Activities, (Oracle Human Resources User's Guide)*

Attention: This software should not be used as the sole method of assessment for making judgements about hiring, performance or deployment. Your company may be held liable if you rely on incorrect computer data or computerized rules to make such judgements.

It is the customer's responsibility to take all appropriate measures to comply with the Data Protection and Privacy laws of the countries in which they operate.

All personal information that you store or use with this software must be up to date, accurate and relevant. You should confirm the details of the restrictions that apply to the computerized storage and use of personal information with your own legal department or representative.

Phasing in Delivered Competencies

If you are developing the competence approach, but you have already set up skill types in Oracle Training Administration, you can:

- continue to use skill types
- switch straight away to using competencies
- phase in competencies, over time

Implementing Competencies or Skills

To phase in the delivery of competencies through training activities, we enable you to indicate whether you want the Skills or the Competencies buttons to be available from the Activities window.

For more information, see: Defining Functions to Implement the Competence Approach: page 12 – 12.

See Also

If you are using competencies, see Delivering Competencies Through Training Activities: page 5 – 6.

If you are using skills, see Skills Information: page 4 – 4.

Skills Information

You can define skill types to record the qualifications, knowledge and experience provided by training activities.

You have considerable freedom in how you hold skills information in Oracle Training Administration. You can define each skill type as a Special Information Type using the Personal Analysis key flexfield. This means that you can define different data entry fields for each skill type if you want to vary the information that you hold or the way it is recorded. You can also determine how each field (or *segment* of the flexfield) is validated.

For example, you might set up a skill type called Management with the following segments:

- competence (with a list of valid values such as Project Planning, Negotiation and Budgeting)
- level (with a list of valid values such as A.1, B.1, B.2, and so on.)

You can record skills against training activities, as expected outcomes. You can also use skills as selection criteria when you are searching for events that match a particular profile.

If you use Oracle Human Resources, you can record the skills held by employees, applicants, external students, trainers,and other people held in your system. You can also select skills as requirements for particular jobs and positions in your enterprise, and use this information for skills matching.

See Also

Entering Skills Against an Activity: page 5 – 8

Matching People to Vacancies, *(Oracle Human Resources User's Guide)*

Defining Special Information Types

In Oracle HRMS, you use the *Personal Analysis key flexfield* to define any special information, not provided by the main system, you want to hold about people, jobs and positions and training activities.

You set up each Special Information Type as an instance of the Personal Analysis key flexfield. This means that each field that is displayed for a Special Information Type is a *segment* of the flexfield.

You can set up more than one Special Information Type to hold skills information, such as Language Skills, Management Experience and Driving Licenses. This is the right approach if you want to give different sets of people access to each Information Type.

Alternatively, you could define several categories of information as one Information Type, provided that they do not require more than 30 segments in total. You can set up cross–validation to ensure that users enter correct combinations of segments. For example, you could ensure that when a language skill is entered, a fluency level is also selected.

If you want to match on a *range* of skills levels, it is easier to use numeric values. Use a description field to provide the meaning for each level. The description appears automatically when the number is chosen.

You can speed up data entry and minimize errors by defining an 'Alias' for common combinations of segment values. For example, completion of a course might always give a specific certificate from a particular licensing body. A user could enter all of these values with a single Alias.

Suggestion: In a human resources system, the information you set up for skills matching may be useful in recruitment, succession planning, resource management (to find particular skills for a project), and in providing career planning advice. Consider your requirements for each of these purposes before you define the segments.

Other Uses of Special Information Types

Special Information Types are not restricted to use for skills information. You might also set up types to hold performance reviews, or medical details, for example. There is no limit on the number of Special Information Types you can define.

When you enable Special Information Types for your Business Group, you select how you plan to use each type.

In Oracle Human Resources, you can use Special Information Types for:

- job requirements
- position requirements
- personal information
- OSHA and ADA reporting

In Oracle Training Administration, you can use Special Information Types for:

- skills provided by training activities

Each Special Information Type can be used for one or more of these purposes. The options you select control the windows in which each Special Information Type appears.

Special Information Setup Steps

▶ **To set up Special Information Types:**

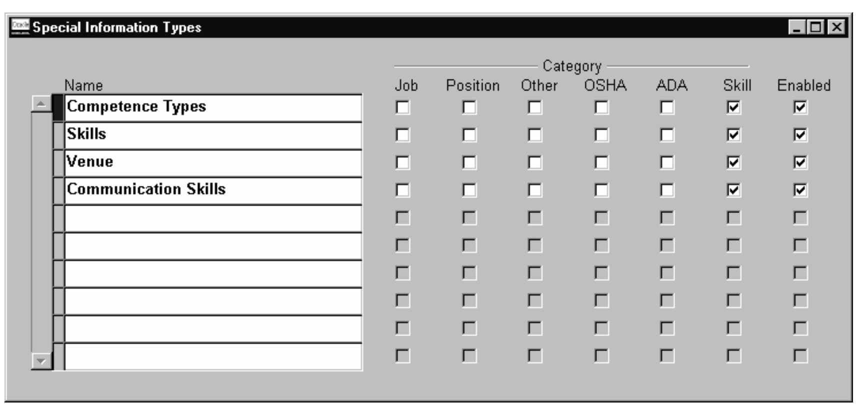
1. Define each Special Information Type as an instance of the Personal Analysis key flexfield.

   See: *Oracle Applications Flexfields Guide*

2. Enable the Special Information Types you want to use in your Business Group and select how you want to use them.

Enabling Special Information Types

Use the Special Information Types window to enable Special Information Types for the Business Group, and to select how you want to use them.



▶ **To enable Special Information Types:**

1. Select the Special Information Types you want to use in your Business Group.
2. Enable each Type by checking the Enabled check box.
3. Check the other boxes to specify how you plan to use the Special Information Type. This makes it available in the list of values in other windows as follows:
   - **Job**: in the Job Requirements window
   - **Position**: in the Position Requirements window
   - **Other**: in the Special Information window
   - **Skill**: in the Skill Provisions and Search for Event windows in Oracle Training Administration

   The OSHA and ADA check boxes are used in Oracle Human Resources in the US only.

CHAPTER

5

Setting Up Training Activities

This chapter explains how to set up activities that you regularly schedule and run. You can maintain multiple versions of these activities, and for each version you can specify the resources it requires, and the competencies or skills it provides.

This chapter also explains how to set up a development event, which is a mechanism for scheduling employee time and other resources required to develop new training activities or to enhance existing ones.

What is a Training Activity?

A ***training activity*** is an abstract term for any planned undertaking that improves a student's qualifications, knowledge or expertise. A training activity is prepared in advance by your enterprise (or an outside supplier) to teach specific abilities to a specific audience. You can teach this activity many times.

A training activity can be any of the following:

- a training course run internally or bought from an external supplier
- on–the–job training and apprenticeships
- work experience and secondments (that is, temporary placements in other organizations to gain experience)
- an educational activity undertaken at the student's own initiative
- a revenue–raising training activity for external delegates
- a test or any other sort of follow–up activity

Each time you teach an activity, at dates and times scheduled by your enterprise, it is a **scheduled event**. You can have many events for one activity—that is—you can teach one course many times.

See Also

Scheduled Events: page 7 – 2.

Scheduling a Single Event: page 7 – 8.

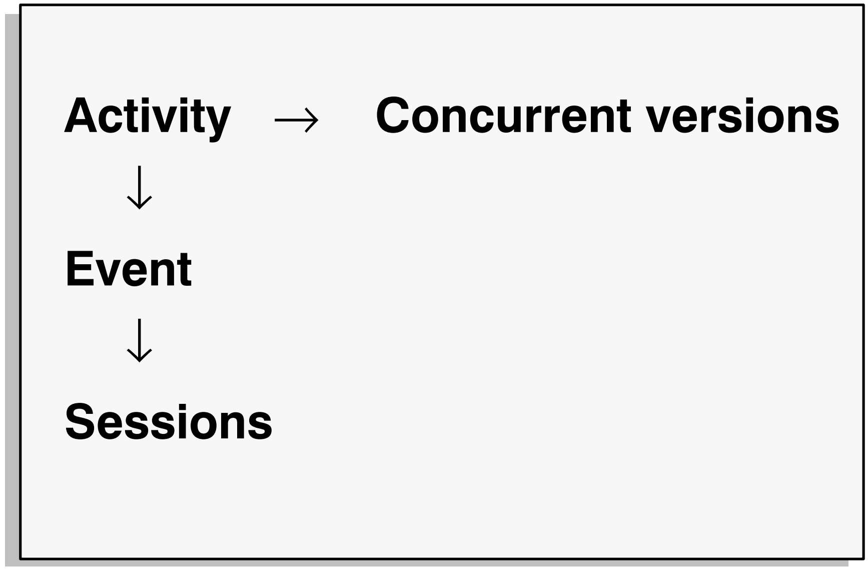
Sessions

An event can run for any period of time you choose, such as several hours, days or weeks. To help you create a detailed agenda for an event, you can break it down into shorter sessions, specifying the location and start and end times of each session.

You can book resources, such as venues and trainers, for the whole event or for individual sessions.

See: Creating Event Sessions: page 7 – 14.

Figure 5 – 1
Training Activity, Event and Sessions



What Information Does a Training Activity Hold?

For each training activity, you can hold the following information:

- objectives and duration
- minimum and maximum number of students required
- skills or competencies its expected to deliver

  Note: You can hold skills or competencies (or a mixture of both), depending upon how your system administrator has set up OTA.
- categories and information to help you search for appropriate events when you are enrolling students
- resources that should be booked when an event is scheduled

Activity Types, Concurrent Versions and Versions

Each activity is a version of an *activity type*.

You can have multiple activities of the same type with different validity dates (such as a current version and a new version under development).

You can also specify if the activity can run concurrently or not. If you want to run ***concurrent versions*** of an activity, you use dates to control when it can be scheduled. You use concurrent versions of an activity, for example, you might have an activity type called Account Management for which you have two activities: one is delivered in English and the other in French. You might have another activity type called Introduction to the Banking Industry with one activity delivered as a day release course and another activity delivered as an evening course.

If an activity becomes outdated (for example, changes in technology or teaching methods) you can create an new version of an activity and run it concurrently with, or instead of, the old version. This enables you to phase out old activities or immediately switch to new ones.

What About Unique or Informal Events?

This level of information is appropriate for activities that you regularly schedule and make available to students. However, if you want to record attendance at a unique or informal event, you do not need to define an activity and then a scheduled event. You can create a *one time event*.

See: Creating a One Time Event: page 7 – 24.

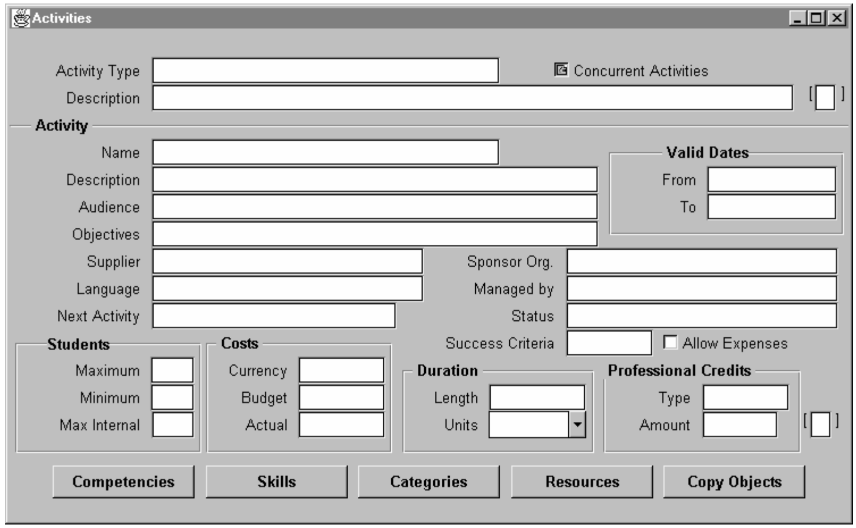
Resourcing the Development of New Activities

If you want to use Oracle Training Administration to schedule and manage the development of new training activities, you can create a Development Event. You can allocate resources, such as trainer time, to a development event as you would allocate resources to a scheduled training event. You can also enter a budget and actual costs for the development event for reporting.

See: Creating a Development Event: page 5 – 16.

Creating an Activity

Use the Activities window to create training activities.



▶ **To create an activity:**

1. Enter a name and description for the activity type.
2. Uncheck the Concurrent Activities box if you want to prevent the creation of multiple activities of this type with overlapping validity dates. If you uncheck the Concurrent Activities check box, you cannot create an activity with validity dates that overlap another activity of this type.
3. Enter a name and description for this activity. It is this name (not the activity type name) that you see elsewhere in Oracle Training Administration.
4. Enter the validity dates for the activity. You must enter the start date, but the end date is optional.

   You cannot run events for the activity earlier than the start date or later than the end date.
5. Enter the intended audience for this activity and the activity objectives.
6. Select the supplier of the activity.
7. Select the organization that sponsors (administers) the activity, and select the name of the manager responsible for it.
8. Select a language and status for the activity, if appropriate.

The status is for information and reporting only. Use the validity dates, not the status, to control whether events can be created for the activity.

9. Select the measure you use to determine successful completion of the activity (such as ”Satisfactory Attendance” or ”Pass Examination” or ”Positive Appraisal”) in the Success Criteria field.

10. Check the Allow Expenses box if you want to allow internal student to claim expenses against events scheduled for this activity.

    This is for information only.

11. Enter the minimum and maximum number of students required to run the activity, and the maximum number of internal students. These provide a default when you create events for the activity.

12. Select a currency and enter the budget for running events for this activity if you want to hold cost information. You can also enter the actual cost.

13. Enter the normal duration of the activity. This provides a default for events based on the activity.

14. Select the type and amount of credits that can be awarded if successful completion of this activity entitles students to accumulate professional credits.

15. Save your work.

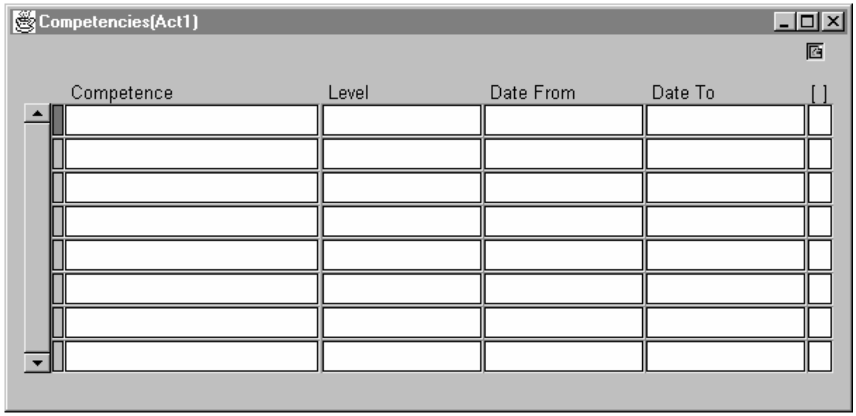
Performing the Next Steps:

- To enter the skills students should attain from undertaking the activity, see: Entering Skills Against an Activity: page 5 – 8.
- To enter the competencies students should attain from undertaking the activity, see: Delivering Competencies Through Training Activities: page 5 – 6.
- To categorize the activity for reporting and for creating programs and discount packages, see: Entering Activity Categories: page 5 – 9.
- To enter the resources that are required or useful for running the activity, see: Entering Resource Requirements of Activities: page 5 – 11.

Delivering Competencies Through Training Activities

You can deliver competencies at a specific proficiency level through training activities your enterprise (or an outside supplier) provides. A training activity is an abstract term for any planned undertaking that improves a student's competencies (qualifications, experience, and so on).

You can enter the competencies and proficiency levels that your training activities are expected to deliver using the Delivered Competencies window. You can then update a person's Personal Competence Profile after they have successfully gained the competence.



▶ **To enter the competencies delivered by an activity:**

1. Enter or query the activity in the Activities window.
2. Choose the Competencies button.
3. Select the competence delivered by the activity.
4. Select the proficiency level at which the competence is delivered by the activity.
5. Enter the dates between which the competence is valid. You must enter a From date but you can leave the To date blank.
6. Continue to enter competencies and proficiency levels for the activity, then save your changes.

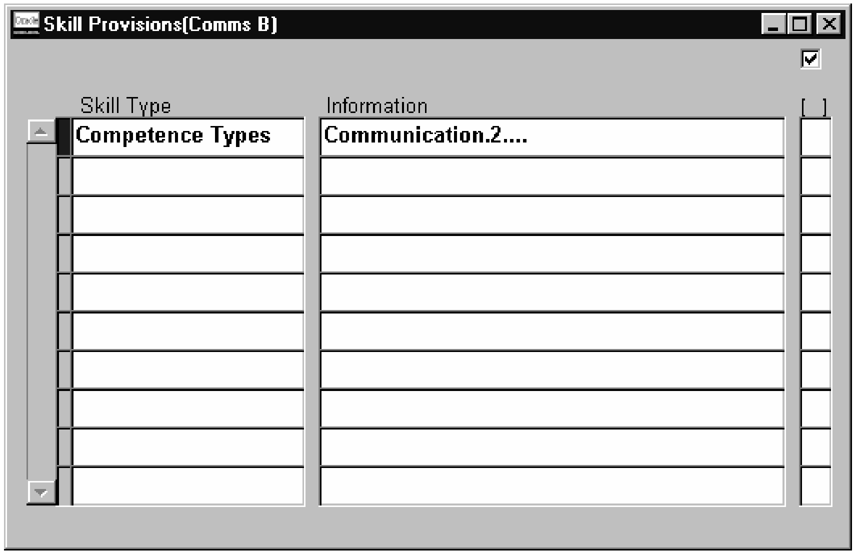
See Also

Entering the Resource Requirements of Activities: page 5 – 11.

Using Competencies or Skills: page 4 – 2.

Entering Skills Against an Activity

If you have set up skill types, you can enter information about the skills that your activities are expected to provide. The information you enter in the Skill Provisions window depends on how skill types are defined at your site.



▶ **To enter the skills delivered by an activity:**

1. Enter or query the activity in the Activities window.
2. Choose the Skills button.
3. Select the skill delivered by the activity.
4. Select the information about the skill delivered by the activity.
5. Continue to enter skills and information for the activity, then save your changes.

See Also

Entering the Resource Requirements of Activities: page 5 – 11.

Skills Information: page 4 – 4.

Entering Activity Categories

You can group training activities into three types of category:

- programs
- classifications
- packages

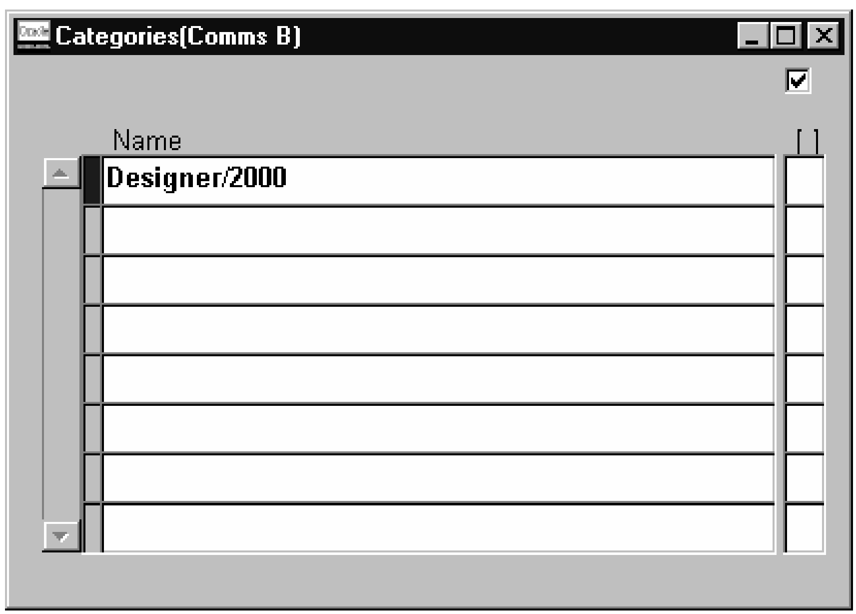
A *program* is a series of events that you schedule and administer as a group. Students can enroll on these events through the program. You create a program by scheduling some or all of the activities in a particular program category. You can include an activity in any number of program categories.

A *classification* is a category for reporting and inquiry purposes. For example, you might set up classifications that define the audience for an activity, such as Management, or Sales Staff. Also you might set up classifications that define the activities' mode of delivery, such as Day Release, Full Time Training and Structured Work Experience.

A *package* is a group of activities that, together, are subject to a special enrollment agreement.

> **Note:** These three types of activity category do not need to be separate. When you define a category, you specify in which of these ways it can be used.

If you enter a category for an activity, then the category applies to all events for that activity.



▶ **To set up categories:**

1. Define the categories you plan to use as values for the QuickCode Type ACTIVITY_CATEGORY.

   See: Adding QuickCode Values: page 11 – 3.

2. In the Category Usages window, select the categories you have defined. For each category, check one or more of the usages (Classification, Program, Package) to define how you plan to use it.

▶ **To categorize an activity:**

1. Enter or query the activity in the Activities window.
2. Choose the Categories button.
3. Select as many categories as you require to classify the activity and to include it in programs and discount packages.
4. Save your work.

See Also

Programs: page 7 – 18.

Enrollment Agreements and Training Packages: page 6 – 14.

Entering the Resource Requirements of Activities

You can specify resources that are required or useful to run events for a particular activity version, and the quantity that should be booked. You can list resources types (such as 10 networked PCs) or specific resources (such as a named trainer or venue).

In the case of trainers, you can specify the role (such as, demonstrator, or primary presenter) for which the trainer is required.

Why Specify Resources as Required or Useful?

Once you specify that a resource is required or useful for an event, it enables you and other users to book resources later, using the Resource Bookings window, in one of two ways:

- automatically

  This retrieves all the **required** resources you specify for the event. This provides a short cut as you do not have to book the resources manually. Then, you can delete any, or all of the required resources, if you do not want to book them.

- individually

  This displays a checklist of **required** and **useful** resources to enable you to see the resources before you book them. You can recognise required resources in the checklist as they have the value Y(es) in the Required column.

Suggestion: If you specify that a resource is required for an event, it appears on both the Required Resources and Resources Checklist. If you specify that a resource is useful to run an event, it only appears on the Resources Checklist. So, if you want to use the automatic method to book resources, specify that all resources are required for the event (rather than useful)—you and other users can then delete any of the resources, you do not want to book.

Checking the Resource Dates

If you specify that resources are required or useful, ensure that the start and end dates for the resource cover a wide enough period to enable you or other users to book the resource for events for a particular activity version in the future. The resource must be available on or before the start date of the event for which it is required (but not necessarily on the end date).

For example, if you run an event from December 16th to the 19th, the resource dates you specify for the activity could be December 1st to the

17th. The resource in this example is available before the start date of the event for which it is required.

> **Note:** If you do not enter a wide enough period, you or other users are unable to book the required resources from the Required Resources button.

Prerequisites

❑ Define resource types as values for the QuickCode Type RESOURCE_TYPE.

See: Adding QuickCode Values: page 11 – 3.

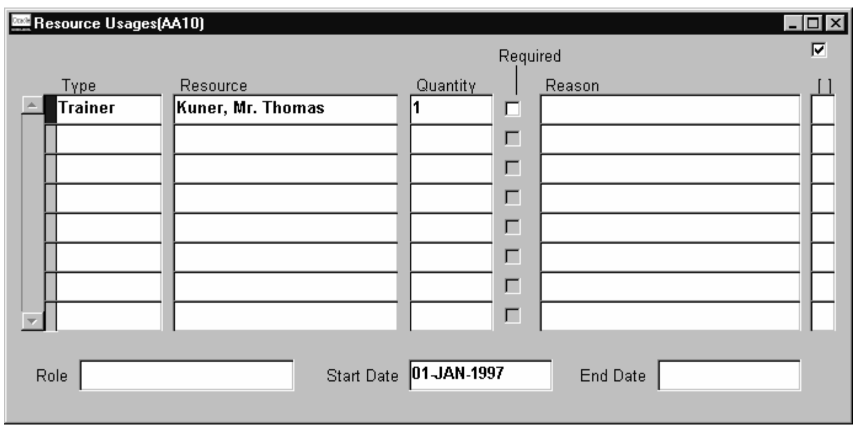
❑ Define resources in the Resources window.

See: Entering Resources: page 3 – 6.

❑ Define the roles trainers can play in facilitating events as values for the QuickCode Type TRAINER_PARTICIPATION.

❑ Define usage reasons as values for the QuickCode Type RESOURCE_USAGE_REASON.

See: Adding QuickCode Values: page 11 – 3.



▶ **To enter the resources required by an activity:**

1. Enter or query the activity in the Activities window.
2. Choose the Resources button.
3. Select a resource type, and optionally select a resource of this type.
4. Enter the quantity required to run the activity.
5. Check the Required check box if the resource or resource type is required for the activity. Remember, if you want users to be able to book this resource automatically, you must make it Required.

6. Select a reason why the resource is used, if required.
7. Select the role the trainer performs in delivering the activity for the resource type of Trainer.
8. Enter the start date for the use of this resource, and optionally, the end date. You must enter a start date for each resource you enter.

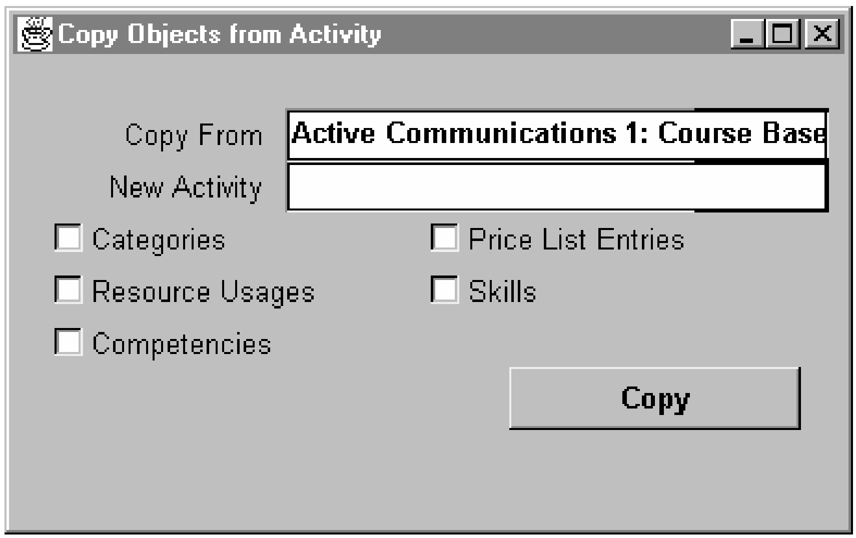
   > **Note:** Ensure that the dates you enter cover a wide enough period to enable you or other users to book the resource for events in the future. For more information, see Entering the Resource Requirements of Activities: page 5 – 11.

9. Continue to enter useful or required resources for the activity version, if required, then go to the next step.
10. Save your work.

Copying an Activity

If you are creating a new activity that is based on an existing one, you can copy some or all of the features of the existing activity. In addition to the basic activity information, such as objectives and duration, you can choose to copy:

- the categories you have entered to classify the activity and to include it in programs and discount packages
- the resources that are required or useful for the activity
- all the entries of this activity on price lists
- the competencies or skills that students normally achieve by undertaking the activity



▶ **To copy an existing activity:**

1. Enter or query the activity type for which you want to create a new activity.
2. Ensure that the Concurrent Activities check box is checked.
3. Choose the Copy Objects button.
4. Enter the name of the activity you want to copy from and the new activity you want to copy to.
5. Check the boxes corresponding to the objects you want to copy. For example, if you want to copy categories and resources to the new activity, check the Categories and Resource Usages check boxes.

6. Choose the Copy button to save your work.
7. You can now change the start and end dates of the new activity, if required.

Ending an Activity and Entering a Next Activity

You can end an activity by entering an end date. You cannot create scheduled events for an activity after its end date.

For example, suppose you have an activity type A for which concurrent activities are not allowed. You end the current version A1 and you enter a Next Activity of a different activity type. This means that you are ending this activity type and you cannot create any new activities of this type.

▶ **To end an activity and enter the next activity:**

1. Query the activity type for which you want to end.
2. Select the next activity in the Next Activity field. Notice that you can select an activity from a different activity type in this field, if required.
3. Save your changes.

   Oracle Training Administration asks you if you want to end the resource usages (if appropriate), and enters an end date for you. It enters today's date, or the start date of the Next Activity, if this is later.

Creating a Development Event

You can create a *development event* to help you design and prototype new training activities, or to enhance existing ones.

The main advantage of creating a development event is that you can plan for and control the cost of events. For example, you can set a budget for the development event, then allocate resources, such as trainers and equipment, and calculate the actual costs for the event. You can also cost the event in detail by being able to book resources down to the minute.

Other uses of creating development events include helping to evaluate the cost of booking resources from different suppliers or venues, for example.

You can set this up in the Development Events window.

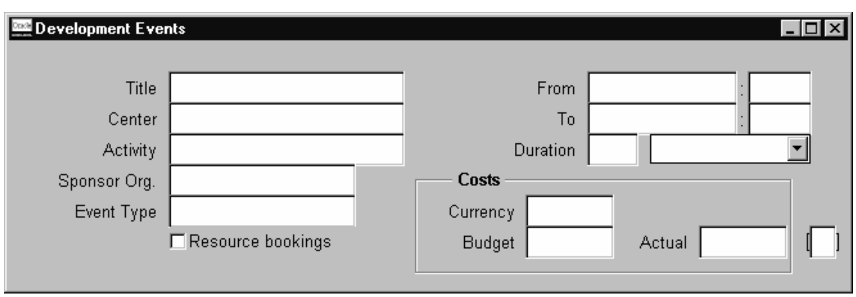
Prerequisites

❑ Define the activity for which you want to schedule a development event.

See: Creating an Activity: page 5 – 5.

❑ If you want to classify development events by type, create your classifications as values for the QuickCode Type DEV_EVENT_TYPE. For example, you might define types for different stages of the development process, such as Activity Design, Testing and Review.

See: Adding QuickCode Values: page 11 – 3.



▶ To create a development event:

1. Enter a title to identify the development event.
2. Select the center where the work is to be done, and select the activity to be developed.

3. Select the sponsoring (administering) organization.
4. Select the event type to classify development events for reporting purposes, if required.
5. Enter the start and end dates for the development work and its duration.

   Note: If you want to enroll students onto this development event later, you must enter the start and end dates for the event.
6. Enter a budget for the cost of the work, if required.
7. Save your work.

Booking Resources

You are now ready to book resources for the development work. See Booking Resources: page 7 – 27.

8. Add up the costs of each resource you book (displayed in the Cost field) to calculate the overall cost for the development work.

Checking Actual Versus Budgetted Costs

9. Query the development event in the Development Events window.

   The Resource Bookings box is now checked as resources are booked for the event.
10. Enter the actual cost of the development work (that you calculated from the resources) in the Actual field.

    You can now see the actual cost of the development work versus the budgetted cost.
11. Save your work.

CHAPTER

6

Setting Up Price Lists and Special Agreements

This chapter explains how to maintain price lists for your training activities. It also explains how to set up special discount or prepurchase agreements for selected customers and events.

Price Lists

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

You can define any number of price lists. For example, you might define price lists for:

- each year or season
- different discount bands
- different suppliers
- different categories of activities

You can mark one price list per currency as the default to help users select the normal price when they create an event. You can also create discounts on price list entries using enrollment agreements.

An activity can be listed more than once on a price list, and can appear on several price lists. For example, an activity may have several entries on a price list if:

- there are different prices between different dates
- there are different prices depending on the number of students attending the activity

Overlapping Price List Entries

You cannot have overlapping entries for student–based price list entries for the same activity.

Price Basis

Each price can be per student attending the activity or per customer paying for a number of students to attend. The customer must be *associated* with the event to be eligible for a Per Customer price. You associate a customer with an event in the Customers for Restricted Events window.

Per Customer entries must include the minimum and maximum number of students to which the price applies. For example:

Activity	Min	Max	Price	Start Date	End Date
PL*SQL Basics	1	9	4000	01–JAN–1997	31–DEC–1997
PL*SQL Basics	10	19	7000	01–JAN–1997	31–DEC–1997
PL*SQL Basics	20	25	12 000	01–JAN–1997	31–DEC–1997

Creating Price Lists in Training Units

You can create price lists in the following:

- monetary terms (for example, in a particular currency)
- training units

A *training unit* is a way of costing a training activity not in monetary terms. For example, you might want to express the cost of training activities in trainer time. You, or your supervisor, might have defined the training unit as Half an Hour, so that a full day's training activity costs 16 training units, at ten pounds per unit.

If you want to express prices in training units (including Half an Hour, if appropriate), you can define types of training unit as values for the QuickCode Type TRAINING_UNIT.

How Do You Use Training Units?

You use training units, for example, if a customer wants to buy 100 hours of trainer time.

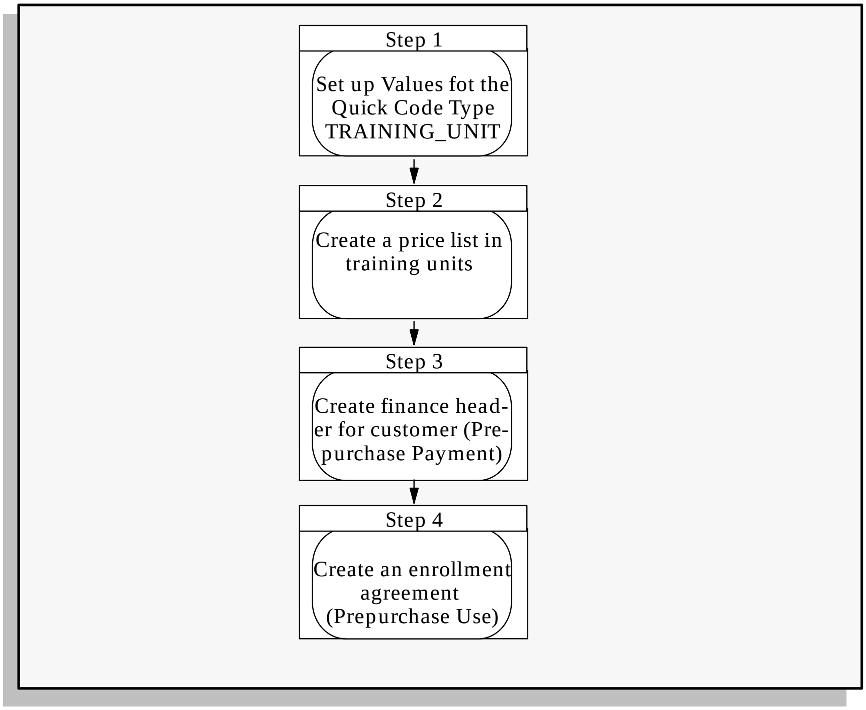
To do this, first you create a price list that expresses the cost of training units in trainer time, and define the value in monetary terms. In our example, this is Half an Hour at ten pounds per unit.

You also create a finance header of the type Prepurchase Payment for that customer.

The next thing that you need to do is to create an enrollment agreement (of the type Pre–Purchase) based on the price list you created. You need to do this so that you can charge a customer using training units. You enter the number of units that you want. In our example, this is 16 (as the unitary amount). Oracle Training Administration can now calculate the amount from the number of units and the price per unit.

The tasks you need to perform to set up and use a price list in training units is shown in Figure 6 – 1.

Figure 6 – 1
Creating Price Lists in Training Units



To set up values for the QuickCode type TRAINING_UNIT, see Adding QuickCode Values: page 11 – 3.

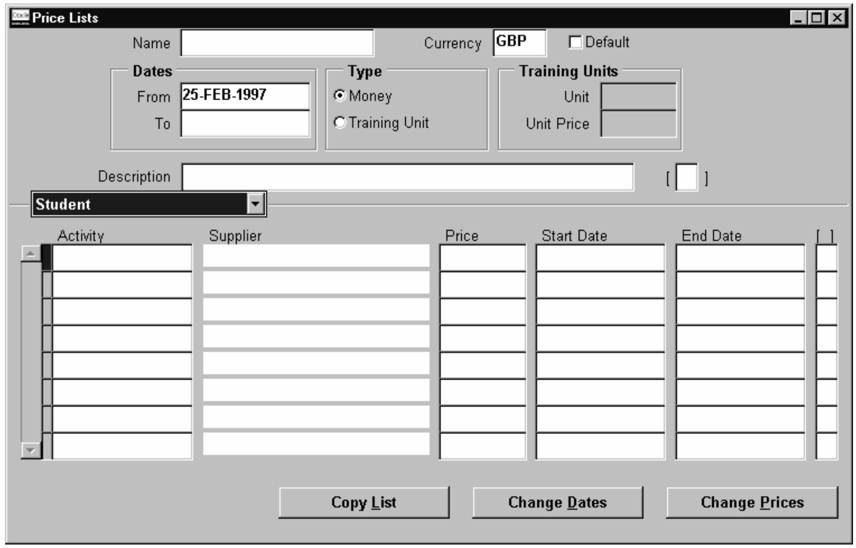
To create a price list in training units, see Creating a Price List: page 6 – 5.

To create a finance header for that customer of the type Prepurchase Payment, see Creating a Finance Header: page 9 – 5.

To create an enrollment agreement of the type Prepurchase Use, see Defining a Prepurchase Agreement: page 6 – 17.

Creating a Price List

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



▶ **To create a price list:**

1. Enter a unique name for the price list.
2. Select a currency for the prices.
3. Check the Default box if you want the prices on this list to appear as the default standard price for events (in the Scheduled Events window).

   Note: You can only have one price list in each currency as the default.

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

In Training Units

5. Select Training Unit as the price list Type to create the price list for use by a prepurchase agreement in training units instead of money.
6. Select the type of training unit in the Unit field. for example, Half an Hour.
7. Enter the value of one unit in the Unit Price field, for example, 10.00.

   You have now entered all the information you need for a price list in training units, so go to the last step.

In Money

8. Ensure that the Student alternative region is displayed to make entries priced on a per student basis.
9. Select the activity, enter the price, and enter a start date. The start and end dates of an entry must be within the start and end dates of the price list.
10. Display the Customer alternative region to make entries priced on a per customer basis.
11. Select the activity, enter the price and the range of student numbers to which it applies. Enter a start date for the entry.
12. Save your work.

Extending a Price List

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

How Does Oracle Training Administration Calculate the Price List Entries?

Oracle Training Administration calculates the dates of the entries for the new, extended price list based on the following:

- the end dates of existing price list entries
- the end dates of the activity
- any price list dates you enter
- today's date

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

Example 1

Price List 1 is effective for the period 01–JAN–1997 to 31–DEC–1997, and today's date is 01–SEP–1997. Enterprise Z wants to extend Price List 1 to 31–DEC–1998, starting from 01–JAN–1998. They also want to increase the prices by 10 per cent.

The activity for which the price list entries apply is effective from 01–JAN–1997 onwards.

	Start Date	End Date	Price
Price List 1	01–JAN–1997	31–DEC–1997	
Entry 1	01–JAN–1997	30–JUN–1997	200.00
Entry 2	01–JUL–1997	31–AUG–1997	100.00
Entry 3	01–SEP–1997	31–DEC–1997	150.50

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

	Start Date	End Date	Price
Price List 2	01–JAN–1998	31–DEC–1997	
Entry 3	01–JAN–1998	31–DEC–1997	165.50

Notice that only entry 3 appears on Price List 2. Entries 1 and 2 do not appear because they were manually–terminated to end on 30–JUN–1997 and 31–AUG–1997 respectively (and today's date is 01–SEP–1997), while Price List 1 ran to 31–DEC–1997. Oracle Training Administration only extended entry 3 because it can be extended (it only ended because the price list ended), while the other two entries were already ended.

Example 2

Price List 1 is effective for the period 01–JAN–1997 to 31–DEC–1997. Enterprise Z wants to extend Price List 1 to 31–DEC–1998, starting from 01–JAN–1998. They also want to increase the prices by 15 per cent.

The activity for which the price list entries apply is effective from 01–JAN–1997 to 31–JUL–1998.

	Start Date	End Date	Price
Price List 1	01–JAN–1997	31–DEC–1997	
Entry 1	01–JAN–1997	30–JUN–1997	200.00
Entry 2	01–JUL–1997	31–AUG–1997	100.00
Entry 3	01–SEP–1997	31–DEC–1997	150.50

In this example, Enterprise Z is able to copy and Price List 1 to create the new, extended Price List 3, with the following entry:

	Start Date	End Date	Price
Price List 3	01–JAN–1998	31–DEC–1998	
Entry 3	01–JAN–1998	31–JUL–1998	172.50

Notice that while entry 3 appears on Price List 3 it ends on 31–JUL–1998. This is because the activity on which the price list is based ends on 31–JUL–1998. Entries 1 and 2 still do not appear on the new price list.

▶ **To extend a price list:**

1. Query the price list to extend and choose the Copy List button.
2. Enter the name of the new, extended price list.
3. Enter the start and end date of the new list. The start date of each entry changes in line with the change for the list.
4. Enter the percentage if you want the prices on the new list to be increased (the amount must be between 0 and 100). Otherwise, leave this field as it is.
5. Select the direction in which the new prices should be rounded, and the unit to which they should be rounded. For example, if the prices are in US dollars and you want to round the new prices up to the nearest 10 cents, select Up and enter 0.1 in the Nearest To field.
6. Choose the Copy List button and Oracle Training Administration creates the new price list for you.

Changing Price List Dates

After you have saved a price list, you cannot edit the Start and End Date fields directly.

▶ **To change the price list dates:**

1. Query the price list in the Price List window.
2. Choose the Change Dates button.
3. Enter the new start and / or end dates.
4. Check the Alter Entry Dates check box if you want to affect the dates of price list entries.
5. Choose the Change Dates button. Oracle Training Administration applies and saves your work.

Alter Entry Dates

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

If you do check the Alter Entry Dates check box, the dates of the entries on the price list are changed as follows:

- If you make the new start date earlier, any entries that started on the old start date are given the new start date. Other entries are unchanged.
- If you make the new start date later, any entries that start before the new start date are changed to start on this date. Other entries are unchanged.
- If you make the new end date later, any entries that ended on the old end date are given the new end date. Other entries are unchanged.
- If you make the new end date earlier, any entries that end after the new date are changed to end on this date. Other entries are unchanged.

Changing Prices for Entries Within a Price List

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

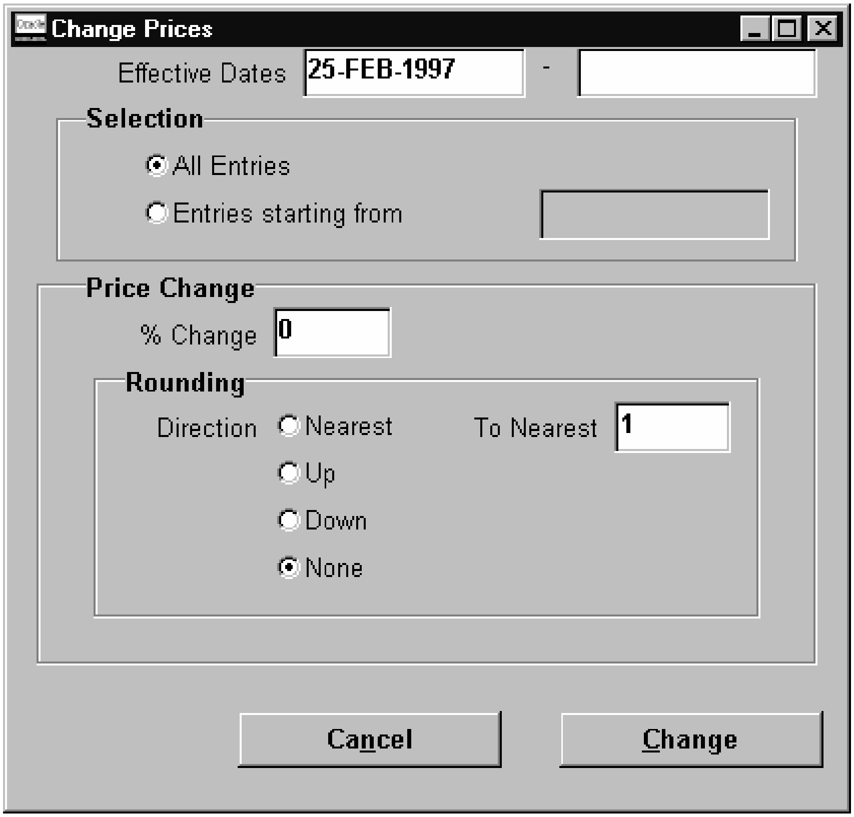
Oracle Training Administration calculates the dates of the entries based on the following:

- the end dates of existing entries
- the end dates of the activity
- any price dates you enter
- today's date

Example

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

For all the entries you copy, Oracle Training Administration enters an end date of the activity end date (if present), or the day before the start date of the new entries.



▶ **To change prices for entries within a price list:**

1. Query the price list on which you want to change prices.
2. Choose the Change Prices button.
3. Enter the effective date for the new entries. You can also enter a new end date. If you leave the end date blank, the new entries have the same end date as the price list.
4. Select Entries Starting From and enter the start date only if you want to copy entries starting after a given date, otherwise go to the next step.
5. Ensure All Entries is checked if you want to copy all entries.
6. Enter the percentage (between 0 and 100) if you want the prices of the new entries to be increased by a percentage.
7. Select the direction in which the new prices should be rounded, and the unit to which they should be rounded. For example, if the prices

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

8. Choose the Change button. Oracle Training Administration applies and saves your work.

Enrollment Agreements and Training Packages

An enrollment agreement is an arrangement with a customer about the price or method of payment for one or more events. You can set up two types of enrollment agreement:

- discount
- prepurchase

Discount Agreements

A discount agreement offers a percentage discount on the price of one event, all events on a price list, all events in a training package, or all events scheduled for one activity. The standard price to be discounted is the one defined on the event or, in the case of agreements based on a price list, the amount defined on the price list.

A discount agreement may be limited to a maximum number of places per customer for each event or for all events to which the agreement applies.

The agreement may be open to all customers or restricted to one customer. When you create an enrollment for an eligible customer and event, you can select the discount agreement. The amount on the enrollment charge finance line is discounted automatically. You receive a warning if the enrollment will make the customer exceed the maximum number of places that can be enrolled under the agreement.

Prepurchase Agreements

A prepurchase agreement is always an agreement with one customer, based on a price list. The customer agrees to spend a certain sum of money (or training units) on events listed on the price list. The agreement may incorporate a percentage discount on the prices defined on the price list.

You define the agreement then create a finance line specifying the amount of money or training units the customer wants to prepurchase. The customer can supplement this amount at any time before the end date of the agreement. The Enrollment Agreement window always shows the amount prepurchased, which is the sum of all finance lines of type Prepurchase Charge that reference the agreement. It also shows the balance remaining to be used, which is the amount purchased minus the sum of all the finance lines on a Prepurchase Use finance header that reference the agreement.

If the customer is allowed to have a negative balance for the agreement, you can specify the amount by which the customer can go into overdraft.

Defining a Discount Agreement

Define discount agreements in the Enrollment Agreements window.

Prerequisites

❑ If the agreement applies to a specific customer, enter the customer using the Customer window.

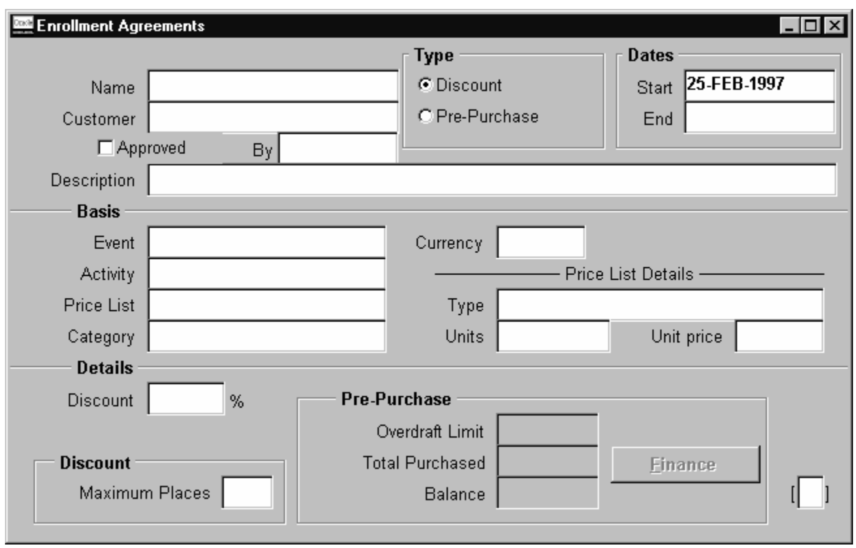
See: Creating a Customer: page 2 – 15

❑ If the agreement is based on a training package, create the package category and categorize the activities you want to include in the package.

See: Entering Activity Categories: page 5 – 9

❑ If the agreement is based on a price list, create the price list.

See: Creating a Price List: page 6 – 5



▶ To set up a discount agreement:

1. Enter a name to identify the agreement.
2. Select the customer name if the agreement is specific to one customer. Leave the Customer field blank if the agreement is available to all customers.
3. Check the Approved check box if you are authorized to approve the enrollment agreement.

   Note: You cannot use an agreement until you, or another user, approves it.
4. Select the Type Discount.
5. Select the Basis of the agreement. The agreement can apply to one event only or all events scheduled for:
   - all entries on a price list
   - a selected activity
   - all activities in a training package

   If you select a price list or a single event, the currency defined for the list or event is displayed.
6. Enter the start and end dates to restrict the events covered by the agreement. You must enter an end date if the activity on which it is based has an end date. If you selected an event as the basis of the agreement, these dates are automatically set to the event dates.

   You cannot use the agreement for events that start before the agreement's start date or after its end date. These dates must be within the start dates of the price list or activity, if you have specified one.
7. Enter the percentage discount to be applied to each price.

Restricting the Number of Places

8. Enter the maximum number of places that a customer can purchase under the agreement (if the Maximum is a limit on the number of places in each event). If you do not enter the number of places, the maximum is the total limit on the number of places that the customer can purchase under the agreement.
9. Save your work.

See: Deleting an Enrollment Agreement (Prepurchase and Discount): page 6 – 19.

Defining a Prepurchase Agreement

Define prepurchase agreements in the Enrollment Agreements window.

Prerequisites

- ❑ Enter the customer using the Customer window.

  See: Creating a Customer: page 2 – 15.

- ❑ Create the price list on which the agreement is based.

  See: Defining a Price List: page 6 – 5.

- ❑ If you want to enter the value of the prepurchase agreement, create a Prepurchase Payment finance header.

▶ **To set up a prepurchase agreement:**

1. Enter a name to identify the agreement.
2. Select the customer for the agreement.
3. Check the Approved check box if you are authorized to approve the enrollment agreement.

   Note: You cannot use an agreement until you, or another user, approves it.

4. Select the Type Pre–Purchase.
5. Enter the start and end date for the agreement.
6. Select the price list on which the agreement is based.

   The Type and Currency of the price list are displayed.

7. Enter the percentage discount to be applied to each price if the agreement includes a discount to the prices on the price list.
8. Enter the amount by which the agreement can go into overdraft if you want to enable the customer to make enrollments that cause a negative balance for the agreement.

   If you enter an overdraft amount, Oracle Training Administration displays a warning if you make an enrollment that pushes the balance over this limit. If you leave this field blank, you receive a warning if you try to make an enrollment that will push the balance into overdraft.

9. Save your work.

Entering Financial Information

10. Choose the Finance button if you have already created a finance header. Oracle Training Administration displays the Prepurchased Amount window.

If you have not yet created a finance header, see Creating a Prepurchase Payment Finance Header: page 6 – 18.

11. Select the finance header of the subtype Prepurchase Payment for this customer.
12. Enter the amount of money or training units that the customer is purchasing in this agreement in the Unitary Amount field.

    For example, if you are entering training units and the unit was defined as Half an Hour (and a full day's training activity costs 16 training units), enter 16. Oracle Training Administration now calculates the amount from the number of units (16) and the price per unit (from the price list).
13. Save your work. This creates a finance line of type Prepurchase Charge.

Checking the Balance

14. Close the Prepurchased Amount window to return to the Enrollment Agreements window,

    The Balance field shows the amount purchased minus the sum of all the finance lines on a Prepurchase Use finance header that reference the agreement.

See: Deleting an Enrollment Agreement (Prepurchase and Discount): page 6 – 19.

Creating a Prepurchase Payment Finance Header

The finance lines that show the amount of training a customer is purchasing under a prepurchase agreement must be associated with a finance header of subtype Prepurchase Payment.

You can create this type of header in the Finance Header window.

▶ **To create a finance header of type Prepurchase Payment:**

1. Select the type Receivable and the subtype Prepurchase Payment.
2. Select the organization that is raising the header in the Raised By field.
3. Select the customer and select a contact and an address for the customer.
4. Select the appropriate payment method.

5. Save your work.

See: Introducing Finance Headers and Lines: page 9 – 2

Deleting an Enrollment Agreement (Prepurchase and Discount)

You can delete an enrollment agreement up until you use the agreement for a customer and you create finance lines.

If there are finance lines associated with the enrollment agreement, you must delete the finance lines first before you can delete an enrollment agreement.

▶ **To delete an enrollment agreement:**

1. Ensure that you have deleted the finance lines for the enrollment agreement.

   See Cancelling Finance Headers and Lines: page 9 – 10 for more information.

2. Query the enrollment agreement you want to delete.
3. Select Delete Record from the Edit menu.
4. Save your work.

CHAPTER

7

Scheduling and Resourcing Events

This chapter explains how to create new events and programs of multiple events based on your training activities. It also explains how to set up special one time events that are not based on an activity. It describes how to book venues, trainers and other resources for an event.

Scheduled Events

When you are ready to run an activity, you create a *scheduled event* for which you can book resources and enroll students. An event may run for any period of time you choose, such as several hours, days or weeks. There is no limit on the number of events you can schedule for an activity.

You can also:

- Break down an event into sessions
- Restrict an event to internal employees or customers
- View or enter categories for the event

Event Sessions

You can break down events into sessions, if required. Sessions are discrete topics or time slots within an event. For example, you may run the event *Setting Up and Using Oracle Training Administration* over three days. The first session on Day 1 might be *Introducing Oracle Training Administration*, the second session on Day 2 might be *Setting Up the Application* and the third session on Day 3 might be *Scheduling Events and Enrolling Students*. The sessions may or may not be held at the same venue.

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

You can book resources, such as trainers or venues, for individual sessions.

Why Create Event Sessions?

You can create event sessions for a variety of reasons, including:

- You might run an events as a series of evening classes or two mornings a week for three months
- Parts of events are held in different locations
- You need to provide topic listings
- You want to book resources at session level rather than at event level to use resources more effectively

- You can budget and cost the resources you use at a detailed level, enabling you to see the profitability of events your enterprise runs

See: Creating Event Sessions: page 7 – 14

Event Programs

A program is a series of related events that you schedule together, such as an Induction program for new starters, or a Retirement Preparation program.

Why Set Up Programs?

You set up programs to manage enrollments on a sequence of events. You can specify that some of the events are required, and that other events are optional. This enables students to see which events they must attend, and to select their choice of optional units or modules. You can charge students for the whole program rather than the individual events.

You create a program by selecting a category of activities. This creates an event for each activity in the category. You can then customize the program by:

- deleting some of these events
- adding repeat events if an activity runs more than once in the program
- adding events based on other activities
- rearranging the sequence and dates of events within the program

See: Programs: page 7 – 18

Restricted Events

An event can be public, which means that students from any customer or internal organization can enroll, or it can be restricted. There are two ways to restrict an event:

- You can associate one or more customers with the event. For example, you would set up training held at a customer site as a restricted event.
- If you use Oracle Human Resources, you can restrict an internal event to employees with assignments to selected organizations,

jobs and positions. For example, you could restrict an event to personal assistants in the Sales, Finance and Human Resources departments.

Internal Students

If you use Oracle Human Resources in your enterprise, you can set a maximum on the number of employees who can enroll on an event. This operates in addition to a maximum total number of students who can enroll on an event.

One Time Events

Scheduled events are based on predefined training activities. If you simply want to record enrollments and the name and date of an event, you do not need to maintain activities and scheduled events. Instead you can create a one–time event.

Event Statuses

Oracle Training Administration provides five predefined system statuses for scheduled events (see Figure 7 – 1). These statuses reflect typical stages in the life cycle of an event. They also control the type of student enrollments and resource bookings that you can enter for the event.

For example, you might follow this sequence of steps:

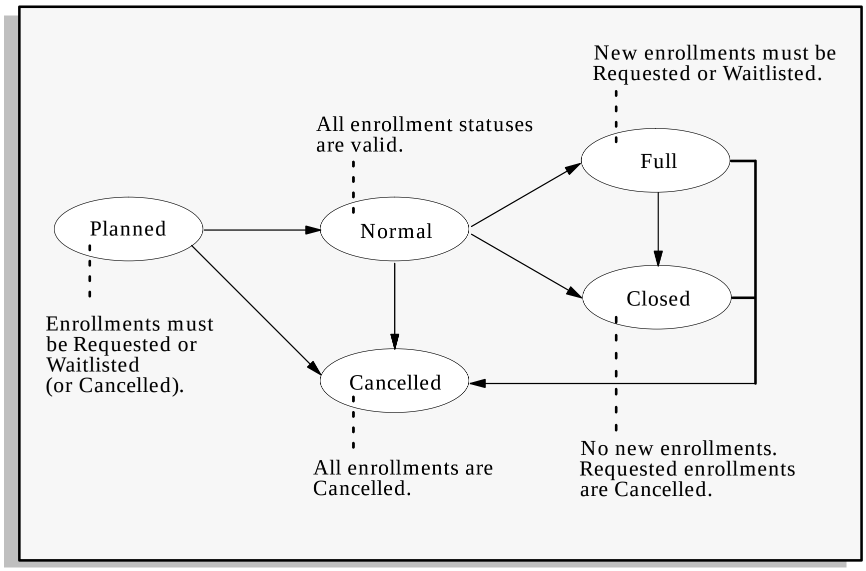
1. Create a new event with the status **Planned**.
2. Enter enrollments with the status Requested as students express an interest in the event.
3. Update the status of these enrollments to Waitlisted when the students confirm their interest and / or their attendance is approved by management.
4. Update the event status to **Normal** when you have:
    - sufficient Waitlisted enrollments to meet the minimum numbers required to run the event
    - when you have booked all the resources required
5. Update the status of the Waitlisted enrollments to Placed. When the number of Placed enrollments equals the maximum number of

places defined for the event, Oracle Training Administration is automatically sets the event status to **Full**.

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

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

Figure 7 – 1
Controlling enrollments using event statuses



Creating Your Own Statuses

You can also create your own user statuses for events. These might give further information about the life cycle of an event (such as Planned – Awaiting Confirmation, and Full – No Cancellations Allowed).

Create user statuses as values for the QuickCode Type EVENT_USER_STATUS.

Filling All Event Places

Oracle Training Administration changes the event status to Full when the number of students occupying places on the event reaches the maximum number of places defined for the event. Enrollments with the status Placed or Attended occupy places on an event; other enrollment statuses (Requested, Waitlisted, and Cancelled) do not.

Increasing the Maximum Number of Places on an Event

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

You record this change in Oracle Training Administration by increasing the maximum number of students defined for the event.

See: Changing the Event Status or Maximum Attendees: page 7 – 11.

Selecting From the Waiting List

If you increase the maximum when the event status is Full, and there is a waiting list for the event, you can take one of the following actions:

- continue to increase the maximum numbers without selecting from the waiting list
- select students from the waiting list to fill the new places

If you choose to select students, you can fill the places before someone else enters new enrollments for the event. If you choose not to do so, the event status returns to Normal.

See: Changing the Event Status or Maximum Attendees: page 7 – 11.

Changing the Status of an Event

Once you have scheduled an event, you might need to change the status of an event later on. The types of changes you might make include:

- closing an event
- cancelling an event
- changing the status to Planned

Closing an Event

When an event is Full, there are no places available, but you can continue entering Requested or Waitlisted enrollments. If you want to prevent *any* new enrollments, you can set the event status to Closed. This automatically cancels any enrollments with the status Requested (that is, enrollments where the student's interest has not been confirmed or approved). You are given the choice to cancel any finance lines associated with these enrollments.

If the event is not full when you close it, you are given the option of redefining the maximum number of places for the event to the current number of Placed and Attended enrollments. If you choose not to do so, you can continue updating enrollments from Waitlisted to Placed until the maximum number of places is reached.

Cancelling an Event

When you cancel an event, Oracle Training Administration automatically cancels all enrollments. You can choose which cancellation status to use for the enrollments (if more that one is defined at your site). You can also choose whether to also cancel any finance lines associated with the enrollments.

Changing an Event Status to Planned

Similarly, if you change an event status back to Planned, any enrollments with the status Placed or Attended are automatically changed to Waitlisted. You are given the choice to cancel any finance lines associated with these enrollments.

Enrolling Students Retrospectively/In Advance

You can enroll students onto events in advance or retrospectively by changing the enrollment date(s) in the Scheduled Events window. For example, if you have a scheduled event running from 05 to the 08 January 1997, with enrollment dates from 01 December 1996 to 31 December 1996 and you want to enroll a student today (30 October 1996), change the enrollment start date to 30 October 1996.

> **Note:** You cannot change the enrollment date in the Enrollments window.

See Also

Changing the Event Status or Maximum Attendees: page 7 – 11

Adding QuickCode Values: page 11 – 3

Setting Up Enrollment Statuses: page 8 – 5

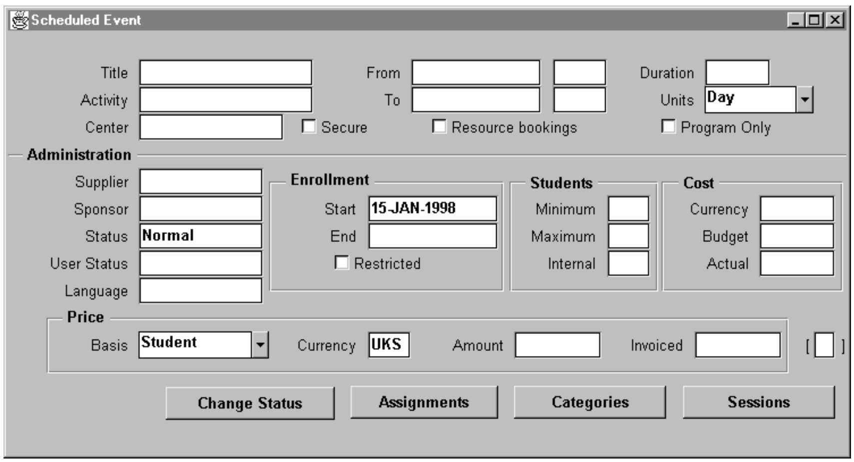
Scheduling a Single Event

Create new events based on activities in the Scheduled Events window.

Understanding Event Security

If your enterprise uses organization security for events and enrollments, only users who belong to the appropriate sponsoring organization can secure the event. If you belong to the sponsoring organization, you can update and delete the event and enroll students onto the event later. If you are not assigned to the organization that is administering the event, you cannot update or delete the event nor enroll students onto the event.

See: How Does Organization Security Work?: page 12 – 4



▶ **To create an event:**

1. Enter a title to identify the event, or leave the Title field blank if you want Oracle Training Administration to generate a number when you save the event.
2. Select the activity you want to run. Certain information (such as the status and the course duration) is defaulted from the activity, but you can override it.
3. Select the location where the event is run.
4. Enter the start and end dates of the event You can leave the dates blank only if you want to create an event with the status of Planned.

   If you do not enter dates, the event cannot have the status Normal and you are unable to select an enrollment agreement when enrolling students on the event.

5. Enter, the start and end times (in the format 14:00 for 2pm), if you want to create sessions for the event. Ensure that the times you enter start on (or before) and finish on (or after) the earliest and latest session times.

   If you are not creating sessions, you can leave the start and end times fields blank.

Securing the Event

6. Select your own organization as the sponsoring (administering) organization.
7. Check the Secure check box.

Making the Event Part of a Program

8. Check the Program Only check box to make the event part of a program, if required.

Restricting the Event to Customers or Employees

9. Check the Restricted check box only if you want to restrict enrollments to internal students with certain assignments, or to restrict enrollments to external students from selected customers. Otherwise, leave the box unchecked to open the event to any customer or external students.

Entering Administration Details

10. Select a status for the event. You can also select a user status.

    The event status controls the type of enrollments you can enter for the event.
11. Enter enrollment dates to define the period in which you can create new enrollments for the event.
12. Enter the minimum and maximum number of students that can enroll on the event. Oracle Training Administration automatically sets the event status to Full when the maximum is reached.

    You can also enter the maximum number of employees who can enroll on the event.

Entering Price Details

13. Select the price basis for the event:
    - Customer–based means that you plan to charge customers associated with the event a block price for a certain number of enrollments. If you select Customer, you must associate one or

more customers with the event and enter enrollments in the Customers for Restricted Event window.

- Student–based means that you plan to charge a price per student enrollment.
- No charge

14. Enter the price basis details for the event. Ensure that the currency of the finance line is the same currency as the price basis for the event:

    - If the price basis is Customer, select a currency, but do not enter a price. You enter the price for each customer associated with the event in the Customers for Restricted Event window.
    - If the price basis is Student, you can select a currency and a price. This price becomes the standard price for the event, which is displayed in the Enrollment Detail window. However, users with an appropriate responsibility can charge a different amount when they enter enrollments.

      Note: You cannot change the price basis if finance lines for enrollments exist for the event.

15. Save your work.

Performing the Next Steps:

- To restrict internal events to selected employees, see: Restricting Internal Events to Selected Employees: page 7 – 16.
- To restrict events to selected customers, see: Entering Customers for Restricted Events: page 8 – 30.
- To create event sessions, see Creating Event Sessions: page 7 – 14
- To view or enter categories for the event, see Viewing and Entering Event Categories: page 7 – 11.

See Also

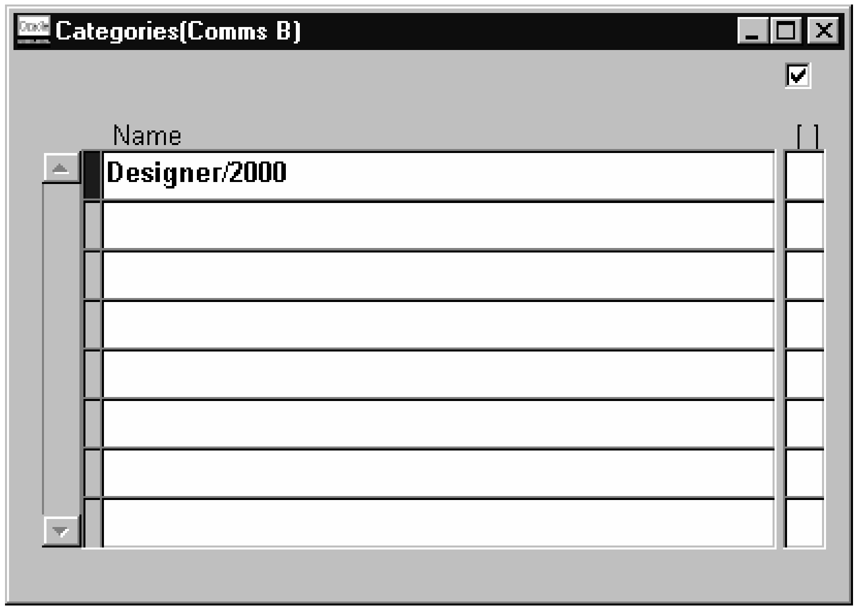
Changing the Event Status or Maximum Attendees: page 7 – 11.

Scheduling a Program: page 7 – 20.

Viewing and Entering Event Categories

You can view and enter categories for the event, if required. If you enter a category for an event, the category is added to the activity and applies to all events for that activity.

You can also see the category classifications entered for the activity on which this event is based.



▶ **To view and enter event categories:**

1. Query the event for which you want to enter or view categories.
2. Choose the Categories button. Oracle Training Administration displays the classifications entered for the activity on which this event is based.

Entering a New Category

3. Insert or move down to a new line and select a new category. If you need more information about entering categories, see: Entering Activity Categories: page 5 – 9
4. Save your work.

Changing the Event Status or Maximum Attendees

Once you have scheduled an event, you might need to make changes later on. The types of changes you might make include:

- the status
- the maximum number of places available

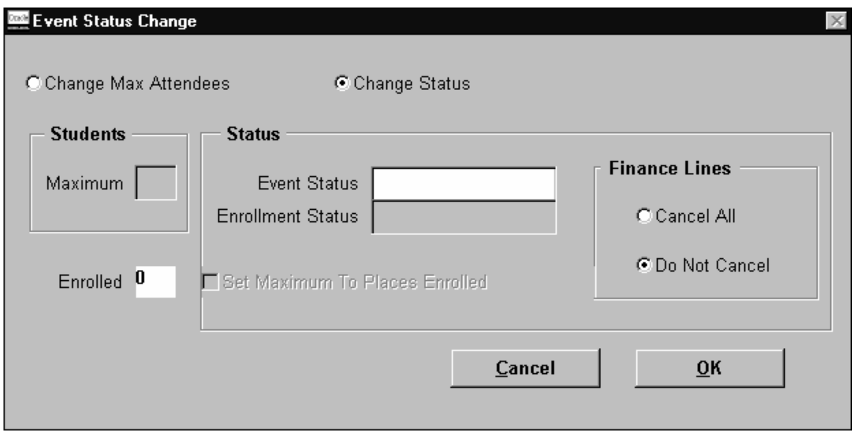
For example, you can increase the number of places available if an event proves to be popular by changing the venue, or rearranging the seating at the selected venue.

Alternatively, if an event is Full, you might want to prevent any new enrollments by changing the event status to Closed. This automatically cancels any enrollments with the status Requested (that is, enrollments where the student's interest has not been confirmed or approved). You are given the choice to cancel any finance lines associated with these enrollments.

See Also

Filling All Event Places: page 7 – 6

Changing the Status of an Event: page 7 – 6



▶ **To change the event status:**

1. Query the event for which you want to change the status.
2. Choose the Change Status button.

   Note: Remember, if the Secure box is checked, you can only update the event if you are assigned to the organization that is administering the event.

3. Ensure the Change Status radio button is on.
4. Select the new event and student booking status and select the OK button.

For example, change the event status to Cancelled or back to Planned. Oracle Training Administration changes all enrollments to the new status you enter.

5. Click the Cancel All radio button if you want to cancel all finance lines associated with these enrollments. Otherwise, leave the Do Not Cancel radio button switched on to retain the finance lines.

6. Save your work.

   If you want to check the changes you have just made, requery the event and check the Status field reflects the new status.

▶ **To change the maximum attendees:**

1. Query the event for which you want to change the maximum number of attendees.

2. Choose the Change Status button.

   > **Note:** Remember, if the Secure box is checked, you can only update the event if you are assigned to the organization that is administering the event.

3. Click the Change Max Attendees radio button.

   You can see the number of students enrolled on the event. Remember, you cannot reduce the maximum below the number of students currently enrolled with the status Placed or Attended.

4. Enter the new maximum number of attendees for the event and select the OK button.

   If you increase the maximum when the event status is Full and there is a waiting list for the event, Oracle Training Administration displays a pop up box to let you know there is a waiting list for the event. You can take one of the following actions:

   - continue and save the changes to the maximum number of attendees
   - select students from the waiting list to fill the new places

Selecting from the Waiting List

5. Choose Yes to select a student(s) from the waiting list.

   Oracle Training Administration displays the Waitlisted Enrollment window for you to select students from. The number of vacancies for the event appears at the bottom of the window.

6. Select the student you want to enroll on the event by positioning the cursor in the Booking Status field and selecting Placed from the List.

This enables you to fill the places before someone else enters new enrollments for the event.

7. Choose the OK button.

Saving the New Maximum Numbers Without Selecting from the Waiting List

8. Choose No if you do not want to select a student from the waiting list. The event status returns to Normal and you and other users can fill the places as normal.

   If you want to check the changes you have just made, requery the event and check the maximum number field reflects the new number.

Selected Fields

Resource Bookings: This box is display–only. It is checked if you have booked resources for an event. You book resources in the Resource Bookings window.

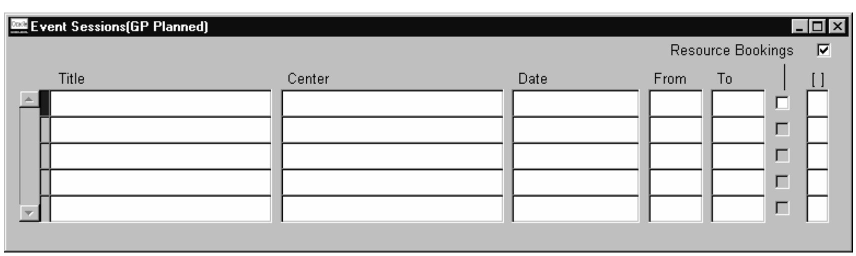
See: Booking Resources: page 7 – 27.

Maximum Students: The number of students who can enroll on the event. Oracle Training Administration automatically sets the event status to Full when the maximum is reached.

Invoiced: Displays the sum of finance lines of type Enrollment Charge created for this event.

Creating Event Sessions

You can create sessions for the event, if you want. You can enter the dates and times of each session, and you can specify that sessions take place in different training centers.



1. Choose the Sessions button.

Note: Remember, if the Secure box is checked, you can only create event sessions if you are assigned to the organization that is administering the event.

2. Enter the name of the session in the Title field.

   For example, if you run the event *Setting Up and Using Oracle Training Administration* over three days, you might enter I*ntroducing Oracle Training Administration* as the first session.

3. Select the training center where the event is run, if required.

4. Enter the dates and times of the session, if required.

5. Enter the next session, if required. For example, enter *Setting Up the Application* if this is the second session for the event.

6. Select the training center where the event is run, and the dates and times.

   Note: The sessions may or may not be held at the same venue.

7. Continue to enter sessions as described then save your work.

See Also

Scheduling a Program: page 7 – 20.

Creating a Development Event: page 5 – 16.

Entering Activity Categories: page 5 – 9.

Creating a Restricted Event

A restricted event is a scheduled event that is either:

- an event associated with one or more customers so that only these customers can enroll students onto the event
- an internal event on which you can only enroll employees who are assigned to certain organizations, jobs, or positions

You restrict an event by checking the Restricted check box.

See Also

Entering Customers for Restricted Events: page 8 – 30.

Restricting Internal Events to Selected Employees: page 7 – 16.

Restricting Internal Events to Selected Employees

You can restrict enrollments on an event to selected employees assigned to specific:

- organizations
- jobs
- positions
- any combination of the above

You do this by identifying criteria that an employee has to meet (or exceed) before they can enroll on an event.

> **Note:** Only events with a price basis of Student or No Charge can be restricted by assignment.

For example, if you want to enable junior secretaries assigned to the Sales, Marketing and Training organizations to attend the event, but you want to prevent secretaries from all other organizations from attending, you could set up the following event criteria:

Event		
Organization	**Job**	**Position**
Sales	Secretary	Junior Secretary
Marketing	Secretary	Junior Secretary
Training	Secretary	Junior Secretary

Now, only junior secretaries assigned to the Sales, Marketing and Training organizations meet the attendance criteria.

▶ **To restrict an internal event to selected employees:**

1. Create an event in the Scheduled Events window. You can enter a price per student for the event, or you can select the price basis of Customer–based. In this case, you do not enter a price in the Scheduled Events window.

   Note: Remember, if the Secure box is checked or you check the Secure box, you can only restrict an internal event to selected employees if you are assigned to the organization that is administering the event.

2. Choose the Assignments button.
3. Enter the organization, job or position you want to use as event criteria. For example, to enable employees in the Sales organization to attend the event who hold the position of Junior Secretary, enter the following:
   - Sales in the Organization field.
   - Junior Secretary in the Position field.
4. Enter further event criteria, if required, then save your work.

Programs

A program is a series of related events that you schedule together, such as an Induction program for new starters, or a Retirement Preparation program.

You might have a number of training activities that you regularly run as a program. If so, you can categorize these activities using a category with the usage 'program' that you have set up for this purpose. When you are ready to schedule this program, you select the category in the Programs window, and the system automatically creates an event for each activity in the category.

For example, you might run a New Manager program each year, comprising the activities 'Project Management', 'Budgeting', 'Team Building', and 'Appraisals and Interviews'.

Create Subgroups

You set up programs to manage enrollments on a sequence of events. You can specify that some of the events are required, and that other events are optional. This enables students to see which events they must attend, and to select their choice of optional units or modules.

You can create subgroups of events within the program to help those making enrollments choose the events on which to enroll. For example, the first two events in a conference program might be required. Then there might be a further 12 events, divided into three groups of four, with the instructions that students must 'Choose two from four'.

You must create the subgroups as lookups before you create the program.

Pricing Programs

You can charge students one price for the whole program rather than for individual events, if required. This is beneficial if, for example, students can select events of different prices from a program, or if some events within the program are charged in different currencies.

Customized Programs

Events within a program are not restricted to activities within the selected program category. If you need to create a special program, for example to meet an individual customer's requirements, you can remove events from the regular program and add any number of additional events.

Program categories are just a convenient way to group activities that you typically run together so that you can schedule the program quickly.

Program and Events Status

If you create a program with a status of Normal, you can only include events of the same status in the program (and that are not members of another program. If you create a program with a status of Planned, you can include events of the status Normal and Planned.

See Also

Entering Activity Categories: page 5 – 9.

Scheduling a Program

Schedule programs of events in the Programs window.

Understanding Program Security

If your enterprise uses organization security for programs and enrollments, only users who belong to the appropriate sponsoring organization can secure the program. If you belong to the sponsoring organization, you can update and delete the program and enroll students onto the events later. If you are not assigned to the organization that is administering the program, you cannot update or delete the event nor enroll students onto the event.

See: How Does Organization Security Work?: page 12 – 4

Prerequisites

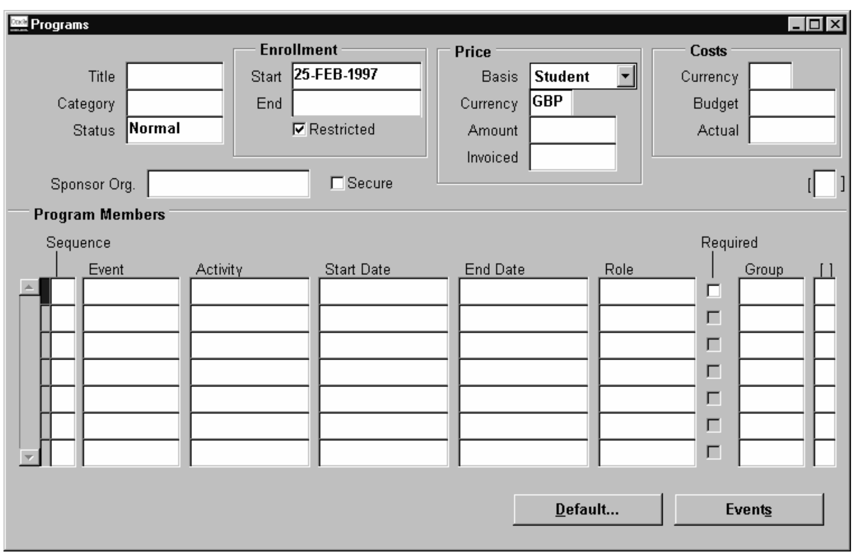
❑ Create a category to use as a program and assign to this category the activities you want to schedule together.

See: Entering Activity Categories: page 5 – 9.

❑ Create the names of subgroups within the program as values for the QuickCode Type PROGRAM_MEMBERSHIP_GROUP.

See: Adding QuickCode Values: page 11 – 3.

❑ Create descriptions of the role of an event within a program (such as Preparation, or Follow–up Test) as values for the QuickCode Type PROGRAM_MEMBERSHIP_ROLE.



▶ **To schedule a program:**

1. Enter a title to identify the program.
2. Select a category of activities.
3. Select a status.
4. Check the Restricted check box only if you want to restrict enrollments to internal students with certain assignments, or to restrict enrollments to external students from selected customers. Otherwise, leave the box unchecked to open the event to any customer or external students.

Securing the Event

5. Select your own organization as the sponsoring (administering) organization.
6. Check the Secure check box.

Entering Price Details

7. Select the price basis for the program:
   - Customer–based means that you plan to charge customers associated with the program a block price for a certain number of enrollments. If you select Customer, you must associate one or more customers with the program and enter enrollments in the Customers for Restricted Event window.
   - Student–based means that you plan to charge a price per student enrollment.
   - No charge
8. Enter the price basis details:
   - If the price basis is Customer, select a currency, but do not enter a price. You enter the price for each customer associated with the program in the Customers for Restricted Event window.
   - If the price basis is Student, you must select a currency and enter a price. This price becomes the standard price for the program, which is displayed in the Enrollment Detail window. However, users with an appropriate responsibility can charge a different amount when they enter enrollments.
9. Save your work.

Entering New Events for the Program

10. Enter the name of the event, and the dates the event runs.

11. Select the activity on which the event is based.
12. Assign events to groups and specify the role of each event within the program if you have set up roles and groups.
13. Check the Required box if the student must attend the event as part of the program.
14. Save your work.

    You can enter further details about the event, if required. To do this:

    - select the Events button and Oracle Training Administration displays the Scheduled Events window.
    - Query the event and enter further details.

    For more information about entering further details for the event, see Scheduling a Single Event: page 7 – 8.

Selecting Existing Events for the Program

15. Select the name of the event you want to include in the program. If you want to view the event before you include it, select the Events button. Oracle Training Administration displays the Scheduled Events window where you can query the event and view it before including it in the program.

    If you create a program with a status of Normal, you can only include events of the same status in the program (and that are not members of another program. If you create a program with a status of Planned, you can include events of the status Normal and Planned.
16. Assign events to groups and specify the role of each event within the program if you have set up roles and groups.
17. Check the Required box if the student must attend the event as part of the program.
18. Save your work.

Creating a Default Event for Each Activity

19. Choose the Defaults button if you want the system to create a default event for each activity in the selected category. You are prompted to enter the default start date for the events within the program.
20. Change the information that is defaulted for each member of the program in the Program Members block, and you can delete any member event if you do not want to schedule it as part of the program.

The system does not restrict the dates you enter for the events, so you can schedule several events to run simultaneously within the program. You can also create duplicate events for a single activity within the program.

21. Assign events to groups and specify the role of each event within the program if you have set up roles and groups. You can also specify which events are mandatory and which are optional within the program. This is for information only.
22. Save your work.
23. Select the event and choose the Events button to see and edit the full information for each event. The Scheduled Event window opens.

Selected Field

Invoiced: Displays the sum of finance lines of type Enrollment Charge created for this program.

Creating a One Time Event

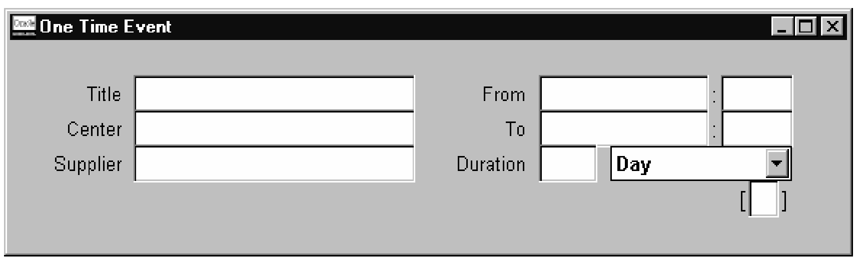
You would create a one time event when creating one of the other types of event, such as a scheduled event, is inappropriate. You would create a one time event when you do not want to record full activity details. Examples include:

- a unique or informal event
- conferences
- team ’away’ days

Alternatively, you would create a scheduled event if you want to teach it, at dates and times scheduled by your enterprise, many times.

One of the other reasons to create a one time event includes recording a course that an employee went on in the past (perhaps before joining your enterprise). You can then record enrollment on the event so that you can keep their training history and attainment details up–to–date.

The One Time Event window is designed for rapid entry of minimum event information to support student enrollments. It does not support the full features of the Scheduled Events window.



▶ **To create a one time event:**

1. Enter a title for the event, and if required, the training center where the event is to / or did take place.
2. Select the supplier of the event.
3. Enter the start and end dates and times (in the format 14:00 for 2pm).
4. Enter a duration, such as two days, if required.
5. Save your work.

   You can now enroll students onto the event if you want to keep their course history and attainment details up–to–date. See Entering an Enrollment: page 8 – 14..

Understanding Resource Booking

Resources are facilities, people or equipment that you need to book to run an event. You can book resources for the following:

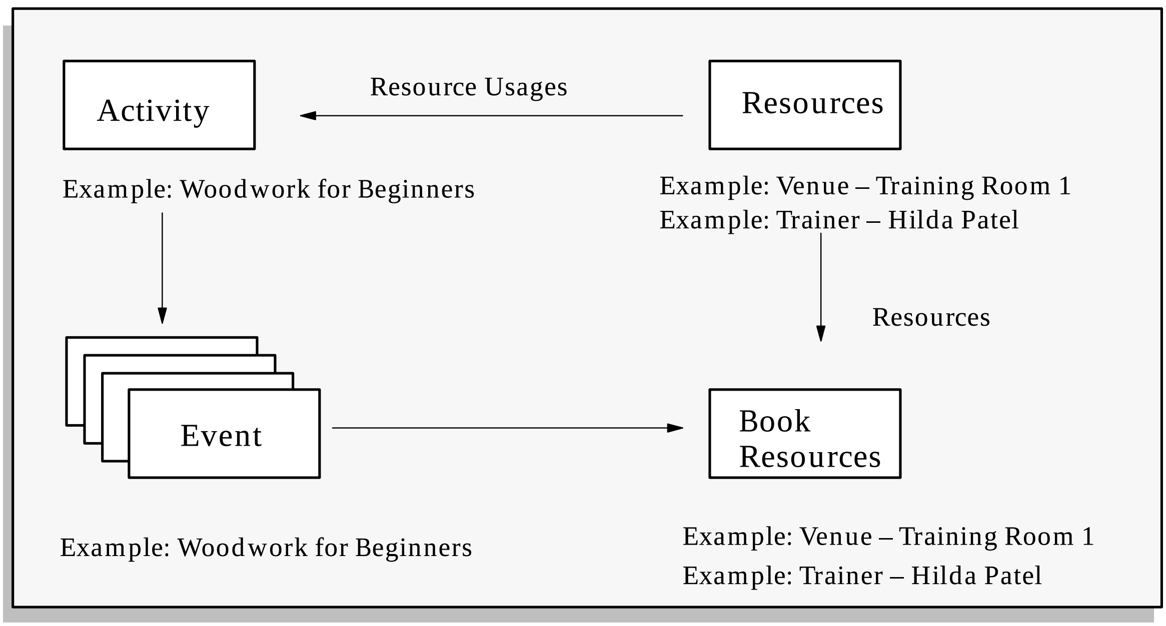
- a scheduled event
- a development event
- a session

Resources are divided into resource types. Two resource types are predefined:

- trainer
- venue

You, or your supervisor, can define generic resource types, such as overhead projectors, networked PCs and stationery.

Figure 7 – 2
Booking Resources



Resource Types and Double–booking

Oracle Training Administration prevents you from double–booking certain types of resource:

- trainer
- venue

By definition, you only have one of each named trainer or venue, so you cannot double–book resources of this type.

You can define as many other resource types as you require at your site. These are divided into consumable resource types (such as manuals and stationery), which are not returned to stock after an event, and non–consumable resource types (such as overhead projectors and computers), which are loaned for the duration of the event only.

Oracle Training Administration does not prevent you double–booking consumable resources. In effect, it assumes you have an unlimited stock of these resources. If you try to double–book a non–consumable resource, the system warns you that the resource is already booked, but does not prevent you confirming the new booking. This provides you with some flexibility in the way that you define and manage these resources.

☞ **Attention:** Oracle Training Administration only checks for double–bookings when the status of the booking is Confirmed. This enables you to double–book trainers and venues while you are planning an event and, perhaps, testing various event date and booking scenarios. If you want to check whether a booking with the status of Planned overlaps another booking, use the Resources Booked folder to view existing bookings.

Booking Resources Using Different Methods

You, or your supervisor, may have previously defined resources that are required or useful to run events for a particular activity version, and the quantity that you should book.

If resources have been defined as required or useful, you can book them by one of two methods:

- automatically
- individually

If a resources have not been defined previously as required or useful, you manually select the resources to book for the event.

When Should You Use the Automatic Method?

Use this short cut to see all the resources that have been specified as required for an event. You can then book them all together, saving you time.

You can of course delete any, or all of the required resources, if you do not want to book them.

When Should You Use the Individual Method?

Use this method to see the resources that are required or useful to run events before you book them. You can recognise required resources in the resource checklist as they have the value Y(es) in the Required column.

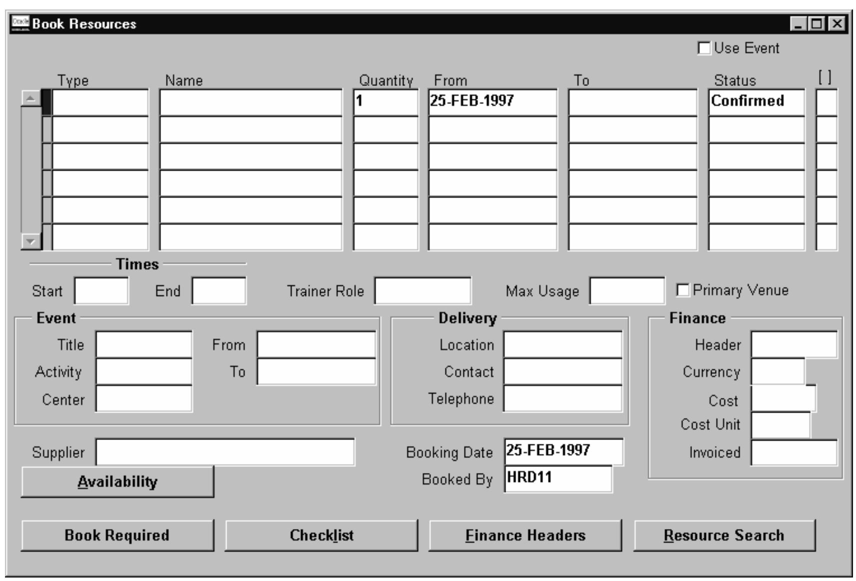
You can then select the resources you want to book from the list.

Booking Resources

You enter resources using the Book Resources window.

When you open the Resource Bookings window, the Search for Event window also opens so that you can select an event for viewing or entering bookings. In the Search for Event window, you can:

- select a folder to view the events found by a predefined query
- choose the Search button to open the Find Events window
- use Query–by–Example to retrieve a list of events in the folder



▶ **To book resources for an event:**

1. Query the event for which you want to book resources in the Search for Event window.
2. Select this event then switch to the Book Resources window.
3. Check the Use Event check box to book the resources for the event and to display the event information. You can also query any resources already booked for the event.
4. Take one of the following actions:
   - book resources automatically
   - book resources individually
   - book resources manually

Booking Resources Automatically

5. Choose the Book Required button to book the required resources automatically. Oracle Training Administration automatically displays the resources in the Resource Bookings window.

   Note: If you do not see required resources when you choose the Book Required button (and you expect to), check that the start and end dates for the resource are appropriate for the event. See Checking the Resource Dates: page 5 – 11..

6. Delete any of the resources you do not require by:
   – selecting the resource
   – selecting Delete Record

   You can then book other resources, or enter further details about the resource, if required.

Booking Resources Individually

7. Choose the Checklist button to view a list of the resources that have been defined as required or useful for the activity.

   You can recognise required resources in the checklist as they have the value Y(es) in the Required column.

8. Select any of the resources from the list to book them, and Oracle Training Administration display the resources in the Resource Bookings window.

   You can also select a resource type then choose the Availability button to view a further list of resources that are available on the date or dates of the booking, if required. Select any of the resources from the list to book them, and the resources are displayed in the Resource Bookings window.

You can enter further details about the resource, if required.

Booking Resources Manually

9. Select the resource type, resource name and the quantity required.
10. Choose the Availability button to view resources that are available on the date or dates of the booking, if required. Select any of the resources from the list to book them, and the resources are displayed in the Resource Bookings window.

Entering Further Details

11. Enter the status of the resource booking. By default the status of a new booking is Planned. If the status of the event is Normal or Full, you can select the status Confirmed.
12. Enter the dates and times (in the format 14:00 for 2pm) covered by the booking.
13. Select the trainer role, such as primary trainer or onlooker if the resource is a trainer.
14. Enter the maximum number of delegates that can use the resource, if required.

    For example, if the resource is a venue that holds a maximum of 30 delegates, enter 30.
15. Check the Primary Venue box (if the resource is a venue) to show that this is the main venue for the event, if relevant.
16. Enter a free text location and contact in the Delivery region if you need to record where the resource is to be delivered (such as a customer's address for an on–site event).
17. Select a finance header and enter an invoice amount in the Finance region.

    If you have not yet created the finance header, choose the Finance Headers button. Create a new Payable header, which must be for the same supplier and the same currency as the resource you are booking.

    See: Creating a Finance Header: page 9 – 5.

Calculating the Cost

18. Select each resource in turn to see the quantity and cost per unit of each resource.

This provides you with the relevant information to calculate the overall cost of the event.

19. Save your work.

Making Resources Unavailable and Making Provisional or Block Bookings

You can book resources for provisional and block bookings without associating them with an event. You can also make a resource unavailable for booking, if required. You might need to do this, for example, if a trainer is on holiday or is away sick, or if a training room is unavailable for any reason.

You make resources unavailable, and book resources for provisional and block bookings using the Book Resources window. Alternatively, you can also make resources unavailable by creating a development event of the type 'vacation', for example, and booking the resource against the development event. See: Creating a Development Event: page 5 – 16.

▶ **To make resources unavailable and make provisional or block bookings:**

1. Do not query the event in the Search for Event window but display the Book Resources window instead.
2. Do not check the Use Event check box.
3. Select the resource type, for example, trainer or venue.
4. Select the resource name and leave the default quantity required as 1.
5. Enter the dates the resource is unavailable, or for which you want to make provisional or block book.
6. If you are making a resource unavailable, enter the status of the resource booking as Confirmed. If you are making a provisional or block booking, you can enter enter the status as Planned or Confirmed.

   Note: Remember, only the status Confirmed prevents you from double–booking a trainer or venue.
7. Ensure that the name of the person responsible for these bookings is displayed in the Booked By field.
8. Save your work.

Viewing Resources

You can view resources that have been booked for all events, or selected events. You view resources using the Book Resources window.

▶ **Viewing previously booked resources for all events**

1. Do not query the event in the Search for Event window but display the Book Resources window instead.
2. Query the resources you want to view. For example, if you want to see all trainers booked for all events, enter Trainer and run the query.

Managing Resources

You can use the Resources Booked folder to help you manage your resources. It can help you to check on resource utilization and effectiveness. For example, you might want to see all the bookings for a specific trainer or venue, or you might want to see all resources for a supplier.

You can also produce the Budgets and Costs Breakdown report to enable you to see the profitability of events your enterprise runs.

See Budgets and Costs Breakdown Report: page 7 – 32.

This window uses folders so you can choose which events to list and which fields of information to view. Manage resources using the Resources Booked window.

▶ **To check resources:**

1. Query the event or session for which you want to check resources in the Search for Event window (if the event or session is not displayed already).
2. Select this event then switch to the Book Resources window.
3. Choose the Resource Search button to access the Resources Booked folder.
4. Query the venue, event, supplier and such for which you want to check resources.

Budgets and Costs Breakdown Report

This report enables you to see the profitability of events your enterprise runs. The information is split in two for each event; the total cost and the total revenue.

You can see the cost and revenue information for an individual event, or you can see the information for a group of events. If you want to group events you can do so by the following:

- activity type
- activity
- program

You can choose to see either summary or more detailed information. Detailed information includes the following:

- **cost:**
  - the resources used for each event
  - the resource booking statuses
  - currency codes
- **revenue:**
  - student names (internal and external)
  - transfer statuses
  - currency codes

Excluding Different Currencies

You should not include different currency values for resources used or for students charged in the report. If you do, you see several asterisks (****) in the Total Cost or Total Revenue information. Use the Resource Booking Currency and Delegate Booking Currency fields to include bookings and enrollments of that currency in the report.

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

▶ **To run the Budget and Costs Breakdown report:**

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

   The Parameters window opens.

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

   - Activity Type (if you select an activity type you do not need to select an event title—Oracle Training Administration lists all events for the activity).

- Activity Version (if you select an activity version you do not need to select an event title—Oracle Training Administration lists all events for the activity version).
- Event Title
- Program

Leave these field blank if you want to see all activities, events and programs in the report.

3. Select the status of any finance headers transferred to your accounting application, if required. For example, if you want to see all finance headers that are waiting to be transferred, enter Awaiting Transfer. Leave this field blank if you want to see finance headers of all statuses in the report.
4. Select the status of resource bookings you want to include in the report, for example, all Planned resource bookings. Leave this field blank if you want to see resource bookings of all statuses in the report.
5. Select the currency to include student (delegate) bookings of that currency in the report.
6. Select the currency to include resource bookings of that currency in the report.
7. Select Yes to include summary only information in the report in the Summary Display Mode field, or select No to include detailed information.
8. Enter start and end dates to include events within that range in the report.
9. Select Yes to include all student enrollments for which payment has been made in the report, or select No to include student enrollments that have not been paid.
10. Enter the standard price of the events you want to include in the report, if required. The report lists all events with standard amounts up to and including the price you enter. Leave this field blank if you want to see all prices included in the report.
11. Choose the Submit Request button.

Searching for Events

In the Search for Event window, you can view scheduled events, programs, one–time events, event sessions and development events. This window uses folders so you can choose which events to list and which fields of information to view.

You can combine the following sorts of search criteria to find the events that best match your students' requirements:

- search by date: events that are currently enrolling, or starting on or after a certain date
- search by skills: events that can be expected to provide a certain level of a skill
- search by resource: events at a given venue, or using a particular trainer or other resource
- search by training center: events scheduled at a given center
- search by customer, supplier, or administrator: events set up for a customer, or provided by a particular supplier, or administered by a particular organization
- search by activity or category: events scheduled for a certain activity or for all activities in a selected category

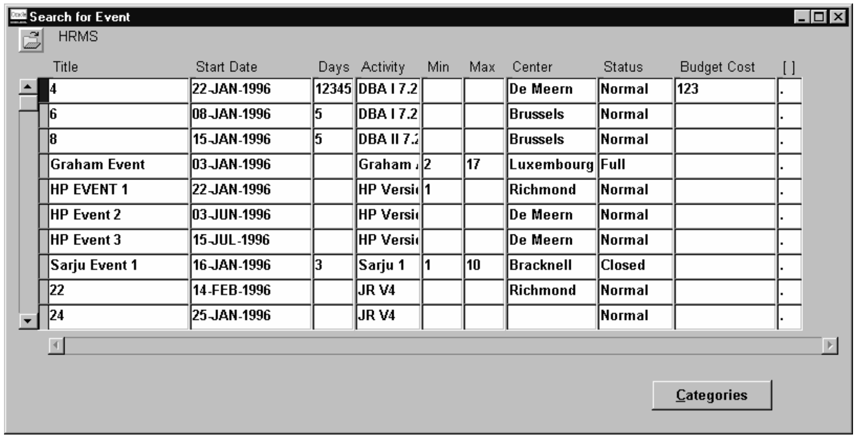
This window also opens when you open the Student Enrollments and Resources Bookings windows, to help you find the event for which you want to enter enrollments or bookings.

> **Note:** You can only search by category when you open the Search for Event window from the menu, and not from the Student Enrollments and Resources Bookings windows.

See Also

Entering an Enrollment: page 8 – 14.

Booking Resources: page 7 – 27.



Choosing the Fields to View in the Search for Events Window

If your responsibility provides access to the Folder menu, you can add or remove fields to and from the folder, resize and rearrange them, and change the field prompts. The full list of information you can view in this folder is as follows:

Actual Cost: the real cost of running the scheduled event, program or development event

Activity: the training activity on which a scheduled event is based or for which a development event is scheduled

Administrator: the organization responsible for the event

Attended: the number of students who have attended the event.

Budget Cost: the budgetted, or theoretical cost of running the scheduled event, program or development event

Center: the training center where the event takes place

Costing Currency: the currency in which the event was priced

Currency: the currency in which places on the event are sold

Development Event Type: a category that you can define as a QuickCode, for development events only

Duration, Duration Units: the number of hours, days, weeks, or months the event is scheduled to run

Enrolling: this box is checked if today is within the enrollment period for the event

Enrollment Start Date, Enrollment End Date: these dates define the period in which you can enroll students for a scheduled event or program

External Attended, External Placed, External Requested and External Waitlisted: the number of external students enrolled on the event and with the specified status

Internal Attended, Internal Placed, Internal Requested and Internal Waitlisted: the number of internal students enrolled on the event and with the specified status

Language: the language in which a scheduled event is delivered

Max Int Attendees: the maximum number of internal students allowed to be Placed on a scheduled event.

Maximum Attendees: the maximum number of students allowed to be Placed on a scheduled event.

Minimum Attendees: the minimum number of students allowed to be Placed on a scheduled event.

Parent Event: for sessions only, the scheduled event of which the session is a part

Placed: the number of students placed on the event by that enrollment.

Price Basis: pricing information for scheduled events and programs

Program: the program category selected for a program

Prog Member: if checked, this indicates that the event is part of the program displayed in the Program Title field

Program Title: the name of the program to which the event is part of

Public: this box is checked if a scheduled event or program is open to enrollments from any employee or customer

Remaining Internal Places: the Maximum Internal Students minus the number of internal enrollments with a status of Placed or Attended; for scheduled events only

Remaining Places: the Maximum Students minus the number of enrollments with a status of Placed or Attended; for scheduled events only

Requested: the number of students who have requested attendance on the event.

Secure: this box is checked if a scheduled event or program is secure, and only users who belong to the appropriate sponsoring organization can enroll students onto the event

Standard Price: the price of the event before any discounts or agreements

Start Date, End Date, Start Time, End Time: the dates and times bounding the period in which the event runs

Status: the status of the event (Planned, Normal, Full, Closed, or Cancelled) for scheduled events and programs only

Title: the name or number identifying the event

Type: scheduled, program, development, one–time, or session

User Status: the user–defined statuses for the event (held in the Quick Code EVENT_USER_STATUS)

Vendor: the organization supplying the event; for scheduled events and one time events only

Venue: the primary venue booked for a scheduled event, session, or development event

Waitlisted: the number of students on the waiting list for the event

Week No: the week number from 1 to 52 calculated from start date of the event, for example, week 1 starts the first week in January

Suggestion: Since many of these fields do not apply to sessions, developments events and one–time events, you might choose to create separate folders for listing these types of event. For example, you could define a Sessions folder by the query Type = Session and might include the following fields: Title, Parent Event, Start Date, Start and End Times and Center.

Viewing the List of Categories in the Search for Events Window

A scheduled event may be within many categories, which classify the event and show the programs and discount packages in which it can be included.

You can view the list of categories for an event in a separate window by choosing the Categories button.

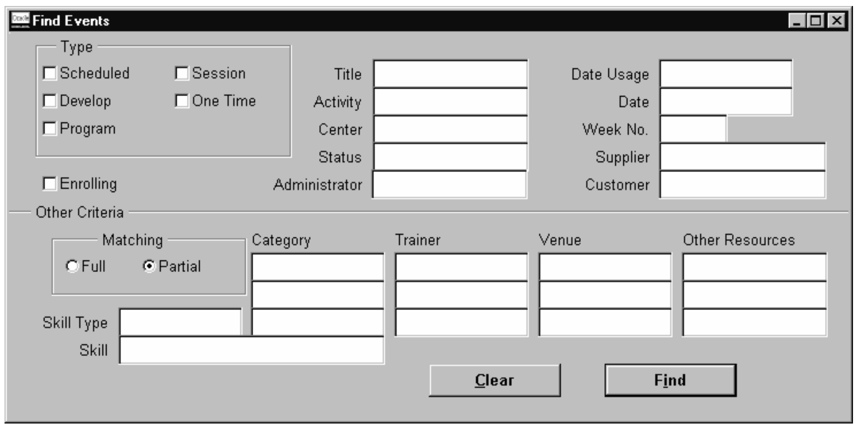
You can only search by category when you open the Search for Event window from the menu, and not from the Student Enrollments and Resources Bookings windows.

Suggestion: If you want to search for events by category, use the Find Events window. You can search for events within up to three categories at a time.

Choosing the Events to List in the Find Events Window

You can choose the events to be listed in the folder in one of the following ways:

- select an existing folder to view the events found by a predefined query
- use Query–by–Example to enter your own query
- choose Find from the Query menu to open the Find Events window, which provides a convenient format for entering simple or complex query criteria



▶ **Finding events:**

1. Choose Find from the Query menu (in Search for Events) to open the Find Events window.

   This window provides a convenient format for entering simple or complex query criteria.

2. Check one or more of the event type check boxes to restrict the search to events of these types only. For example, to find all schedule events, check the Scheduled check box.
3. Enter a date and select a value in the Date Usage field to define how the search should use the date you enter. For example, if you select Currently Running, the search retrieves events that are scheduled to run on the date you enter.
4. Check the Enrolling box if you want to find events that are currently enrolling.
5. Enter up to three rows of categories or resources as search criteria. Use the Matching option buttons to choose whether to retrieve

events that match all the rows you enter (Full Matching) or at least one of the rows (Partial Matching).

For example, suppose you want to find all the events in the categories Day Release AND First Aid. You must select Day Release in the Category field of the first row and First Aid in the Category field of the second row, and select Full Matching.

6. Select a skill type and level of skill that is an expected outcome from the events you want to find.
7. Enter a week number from 1 to 52 to find events that are running in that week of the year. Week 1 begins on the first Monday in January.
8. Choose the Find button and Oracle Training Administration displays events that match your criteria.

Using the Folder – Choosing the Fields to View

If your responsibility provides access to the Folder menu, you can add or remove fields to and from the folder, resize and rearrange them and change the field prompts.

If you are in any doubt about using folders, see the following information:

- Searching for Information (*Oracle Applications User's Guide*)
- Customizing the Presentation of Data in a Folder (*Oracle Applications User's Guide*)

Full List of Information

The full list of information you can view in this folder is as follows:

Booking Placed By: the name of the user who booked the resource

Consumable: these resource types (such as manuals and stationery) are not returned to stock after the event

Contact Name: the person to whom all correspondence goes

Contact Phone Number: the telephone number of the person to whom all correspondence goes

Date Booking Placed: the date the resource was booked

Delivery Address: the address where resources are delivered

Event Currency: the currency at which the event is charged

Event Title: the name of the event scheduled

Name: the name and / or location of the venue where the event occurs

No of Delegates: the number of delegates booked on the event

Normal Cost: the usual cost of the resource without any discounts or other agreements

Price: the price of the event

Primary: the main venue for the event or the main trainer

Quantity: the number of the resource booked for the event, for example, one trainer

Resource Currency: the currency the resource is charged at

Resource Type: these are divided into consumable resource types (such as manuals and stationery), and non–consumable resource types (such as overhead projectors and computers)

Role To Play: the trainer role, such as primary trainer, or onlooker

Status: the status of the event (Planned, Normal, Full, Closed, or Cancelled) for scheduled events and programs only

Start Date, End Date: the dates when the resource is booked

Start Time, End Time: the time when the resource is booked

Supplier: the organization supplying the event; for scheduled events and one–time events only

Suggestion: Since many of these fields do not apply to resource utilization, you might choose to create separate folders for listing these management issues. For example, you could define a Venue folder by the query Type = Venue and might include the following fields: Venue, Start Date and Start and End Times.

Choosing the Resources to List

You can choose the resources to be listed in the folder in one of the following ways:

- select an existing folder to view the resources found by a predefined query
- use Query–by–Example to enter your own query

CHAPTER

8

Setting Up Enrollments and Enrolling Students

This chapter explains how to set up and enter student enrollments for your events using statuses to track enrollments and to generate standard letters.

It also explains how to associate customers with restricted events, and to charge customers for events priced on a per customer basis.

Setup For Student Enrollments

You can customize the following to meet the needs of your enterprise:

- Define or create your own user statuses for the system–defined enrollment statuses.
- Create standard letters that can be generated automatically when an enrollment is given a certain status.

  See: Using Letters to Manage Recruitment and Enrollment: page 10 – 2
- Enter the following lookup codes:
  - the source of an enrollment, such as a brochure or agency (BOOKING_SOURCE)
  - the ranking of an enrollment, useful when an event is oversubscribed (PRIORITY_LEVEL)
  - the reasons a student can fail to complete an activity successfully (DELEGATE_FAILURE_REASON)

  See: Adding QuickCode Values: page 11 – 3.
- Use parameters to customize Enrollments windows:
  - whether users can enter employee enrollments, customer enrollments, or both in the Enrollment windows
  - which windows (Enrollment Summary, Enrollment Detail, and Search for Event) appear by default when users choose the Enrollments menu option
  - which regions of the Enrollment Detail window are displayed

  See: Customizing Functions, Enrollments and Activities Windows: page 12 – 9.
- Use parameters on form functions to control:
  - whether authorised users can add competencies gained through an activity to a student's Competence Profile

  See: Defining Functions to Implement the Competence Approach: page 12 – 12.
- Set up security to determine which users can:
  - update and delete events
  - enter, update and delete enrollments for secure events
  - override event price information

Benefits of Customizing Enrollments Set Up

When you have set up Oracle Training Administration to meet the needs of your enterprise, the main benefits to you and other users are that you can quickly and easily:

- Track and control enrollments through the life of an event.

  See: Using Statuses to Track and Control Enrollments: page 8 – 4.

- Issue the appropriate letters to students automatically and drive alerts.

  See: Using Letters to Manage Recruitment and Enrollment: page 10 – 2.

- Handle many students on multiple events efficiently.

  See: Making Multiple Enrollments: page 8 – 21.

- Manage priority enrollments by entering a priority level.

  See: Managing Enrollments Using Priority Levels: page 8 – 7.

- Find the best events for your students.

  See: Searching for Events: page 7 – 34.

Setting Up Enrollment Statuses

You are provided with five predefined statuses with Oracle Training Administration:

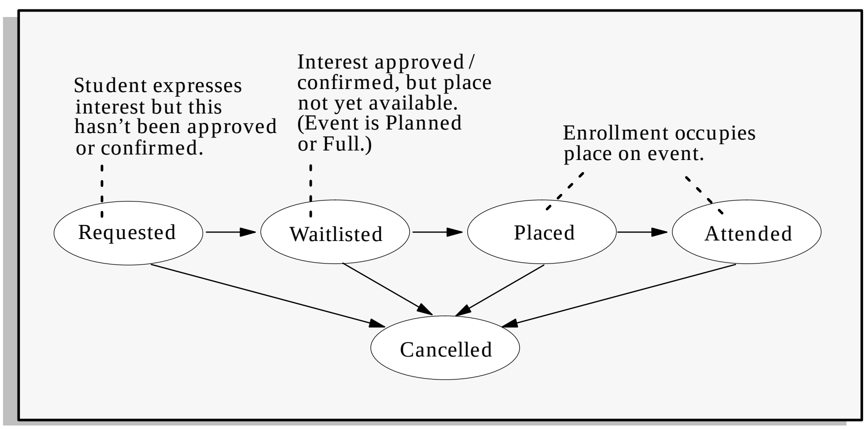
- Requested
- Placed
- Waitlisted
- Attended
- Cancelled

Although you are provided with these five predefined status types, you must name the status types yourself during setup. For example, enter the name Requested as the status that you want to appear for enrollments of the type 'Requested' and associate it with the predefined status type Requested. You must do this for the remaining four status types. Alternatively, enter the name Nominated as the status that you want to appear for enrollments of the type 'Requested' and associate it with the predefined status type Requested.

Using Statuses to Track and Control Enrollments

You can use these event statuses to track and control the progress of enrollments in your enterprise. Figure 8 – 1 illustrates the five predefined statuses provided with Oracle Training Administration.

Figure 8 – 1
Enrollment Statuses



Creating Additional Statuses

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

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

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

Controlling the Status of New and Existing Enrollments

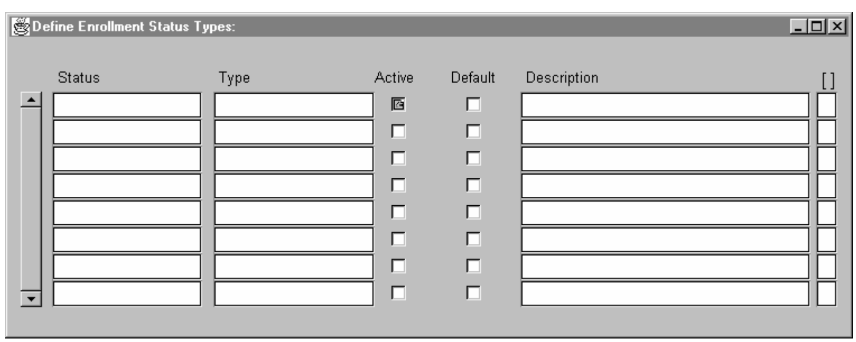
By changing the event status and setting a maximum number of places on an event, you can control the status of new and existing enrollments. For example:

- If the event status is Planned, all enrollments must be Requested or Waitlisted (or Cancelled).
- If the event is Full (that is, the number of Placed and Attended enrollments has reached the maximum), you can only enter new Requested or Waitlisted enrollments.
- If you close the event, or the enrollment period elapses, you cannot enter any new student enrollments.
- If you cancel the event, all enrollments change automatically to the status Cancelled, and you cannot enter any new enrollments.

See: Creating Enrollment Statuses: page 8 – 5.

Creating Enrollment Statuses

Use the Enrollment Statuses window to create enrollment statuses.



▶ **To create enrollment statuses:**

1. Enter your own name for the first status.
2. Select the status type to associate it with.
3. Check the Default check box if you want this status to be the default for the Type, otherwise, leave this box blank.

   Note: You must have one, and only one, default status for each Type.
4. Continue to enter your own status names and status types until you have entered them all, then save your work.

▶ **To change an existing status name:**

1. Query the event status you want to change.
2. Delete the contents of the Status field and enter your preferred status name.
3. Save your work.

▶ **To create additional enrollment statuses for a Type:**

1. Select New Record from the Edit menu.
2. Enter a unique Status and select the Type.
3. Check the Default check box if you want this status to be the default for the Type, otherwise, leave this box blank.

   Note: You must have one, and only one, default status for each Type.
4. Save your work.

Deactivating an Enrollment Status

You cannot delete a status that is used in any student enrollment records. However, you can deactivate a status to prevent it from being used in any new enrollments.

▶ **To deactivate an enrollment status:**

1. See if the status is the default for that Type, and if so, select another status as the default first.
2. Uncheck the Active check box to deactivate the enrollment status.
3. Save your work.

Managing Enrollments Using Priority Levels

If you have entered more requested enrollments than available places, you need to decide which enrollments to place and which to put on a waiting list in case of cancellations. To help you decide which enrollments to place, you can enter a priority level against each enrollment. You define priority levels as values for the QuickCode Type PRIORITY_LEVEL.

You can do a mass update of the priority requests to the status Placed, and issue a standard confirmation letter. You can do a mass update of the remaining requests to the status Waitlisted, and issue a standard waiting list letter.

If a placed student cancels, you can choose the highest priority waitlisted student to fill the place. You can do a mass update of all waitlisted students to roll them over to the next scheduled event for the activity.

Entering and Tracking Enrollments – Before You Start

Oracle Training Administration enables you to enter enrollments quickly and easily. Not only does it provide search features to help you to select the event, but it also defaults other information for you, such as the enrollment status and invoicing details. It leaves other information blank so that you can go back later and enter it when you have time.

Making Multiple Enrollments and Mass Updates

You might want to enter multiple enrollments, or select a group of enrollments and update them all in the same way. Oracle Training Administration provides you with a template and mass change facilities to enable you to enter multiple enrollments, and to update many enrollments at the same time.

See Also

Making Multiple Enrollments: page 8 – 21.

Making Mass Updates to Enrollments: page 8 – 25.

Which Statuses Occupy Places on an Event?

Only the following enrollment statuses occupy a place on an event:

- Placed
- Attended
- Any statuses your enterprise has created (based on Placed and Attended)

This means that when you set a maximum number of places on an event, only the definite bookings (Placed and Attended) take up those places.

Managing Waiting Lists

Oracle Training Administration also provides waiting list management to enable you to allocate places when places on an event become available. For example, if you cancel an enrollment when the event status is Full and there is a waiting list for the event, Oracle Training Administration lets you select another student from the waiting list.

See: Cancelling a Single Enrollment: page 8 – 22.

Can You Double–Book Students onto Events?

Oracle Training Administration prevents you from double–booking students with the following statuses onto events:

- Placed
- Attended
- Any statuses your enterprise has created (based on Placed and Attended)

However, Oracle Training Administration does not prevent you double–booking students with the following statuses onto events:

- Requested
- Waitlisted
- Cancelled
- Any statuses your enterprise has created (based on Requested, Waitlisted and Cancelled)

In effect, it assumes that until a student is Placed or has Attended an event, you can book them onto another, clashing event. This provides you with some flexibility in the way that you define and manage booking students onto events.

☞ **Attention:** Oracle Training Administration only checks for double–bookings when the status of the event is Confirmed. This enables you to double–book students while you are planning an event and, perhaps, testing various event date scenarios.

Making Enrollments for Customers and Employees

There are two types of enrollment in Oracle Training Administration:

- an enrollment for a customer, where the student is recorded on the system as a contact for the customer
- an enrollment for an internal organization, where the student is an employee held in Oracle Human Resources

If Oracle Human Resources is installed at your site, you can enter enrollments for employees. You may also be able to enter enrollments for external customers, depending on how your system administrator has set up the Enrollment form at your site.

If Oracle Human Resources is *not* installed at your site, you can only enter enrollments for customers.

See Entering Customers for Restricted Events: page 8 – 29.

Understanding How Enrollments Security Works

Your system administrator may have set up security to ensure that only those users who need to can perform certain enrollment tasks. These tasks are:

- enrolling students on secure events
- enrolling students onto an event of a specific status
- changing an enrollment price

Enrolling Students on Secure Events

If Oracle Human Resources is implemented at your site, some events may be secured. This means you can only enter and update enrollments on these events if you are assigned to the organization that is administering the event.

See: How Does Organization Security Work?: page 12 – 4.

Enrolling Students onto an Event of a Specific Status

If your enterprise uses enrollment status security, users with a specific responsibility are unable to enter, update or delete enrollments of a certain status(es).

See: How Does Enrollment Status Security Work?: page 12 – 4.

Changing an Enrollment Price

Your system administrator may have used financial security to enable users of a certain responsibility to update and delete the following prices:

- monetary
- unitary (invoice)
- standard

If there is no financial security in your enterprise, all users can update and delete prices.

See: How Does Financials Security Work?: page 12 – 6.

Procedure for Entering Enrollments

When you enter a new enrollment, the minimum information you need to enter is the name of the customer or organization that is 'sponsoring' the enrollment, and a student or contact. By default, the number of places enrolled for the customer or organization is one, and the status of the enrollment is Requested.

Additional information you can enter includes a correspondence address and telephone number, enrollment priority, and price and invoicing information.

You can enter new enrollments quickly. In Oracle Training Administration, there are just three steps:

1. Select the event. If you do not know the event name or code, you can search for appropriate events using a wide range of selection criteria.

   See Searching for Events: page 7 – 34.

2. Select the name of the customer or internal organization sponsoring the enrollment, and enter the student or contact name.

   See Entering an Enrollment: page 8 – 13.

3. Copy and paste the enrolment for fast entry of multiple enrollments, if required.

   See Making Multiple Enrollments: page 8 – 21.

Using the Enrollment Windows

When you open the Student Enrollments form, some or all of the following windows open (depending on how your system administrator has defined the menus at your site):

- Search for Event window: Use this window to select an event for viewing or entering enrollments. Depending on your setup options, the event you select in this window may automatically default to the other Enrollment windows.

  See: Searching For Events: page 7 – 34.

- Enrollment Summary window: Use this window to view multiple enrollments in a folder. For example, you can view all enrollments for a selected event, or with a particular status. Also use this window to make a mass update to multiple enrollments.
- Enrollment Detail window: Use this window to view or enter full information about an enrollment, including financial information, and a history of status changes.

Opening Regions and Changing Setup

There are a number of alternative regions on the Enrollment Details window:

- Correspondence
- Enrollment Details
- Finance
- Attendance
- Third Party Contact (for customer enrollments only)

These are all explained in the procedure below. However, some of these regions may not be displayed at your site, depending on how your system administrator has set up the Enrollment form.

▶ **To open a window that does not appear by default:**

1. Choose the Functions button on the Enrollment Summary or Enrollment Details window.
2. Select the window you want to open.

Changing the Setup Options

There are three setup options on this form that determine whether the event you select in the Search for Event window is automatically defaulted to the other windows. These options take effect immediately and apply only to your current use of the form. Your settings are not saved.

▶ **To view or change the enrollment setup options:**

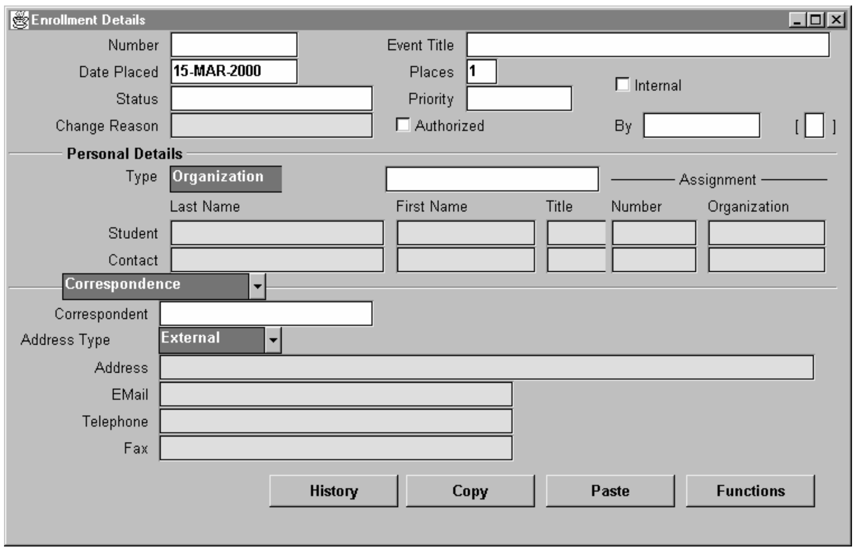
1. Choose the Functions button on the Enrollment Summary window or the Enrollment Detail window.
2. Select Setup Options.
3. Check the options you want to use:
   - Check Auto Query Enrollments for Selected Event if you want the Enrollment Summary folder to requery automatically each time you select a new event in the Search for Event window. System performance is improved if you uncheck this option.
   - Check Default Selected Event For Querying if you want to restrict every query you run in the Enrollment Summary folder to the event selected in the Search for Event window.

- Check Default Selected Event When Creating Enrollments if you want the event information on new enrollments to default to the event selected in the Search for Event window.

Entering an Enrollment

You enter student enrollments for customers and internal organizations using the Student Enrollments form. Depending on how your system administrator has defined your menus, you may see the Enrollment Summary window or the Enrollment Detail window, or both. The Search for Event form may also open automatically.

See: Using the Enrollment Windows: page 8 – 11.



▶ **To enter a new enrollment:**

1. Do one of the following:

   - If the Search for Event window opens, query an event, select it, then place your cursor in the Enrollment Details window. Provided that you haven't changed the Setup Options, the system automatically queries any enrollments already entered for the event. If an existing enrollment is displayed, choose New Record from the Edit menu.

   - If the Search for Event window does not open, select an event in the Event Title field of the Enrollment Details window.

Note: If the event is Secure, you can only enroll a student for the event if you are assigned to the organization that is administering the event.

2. Enter the number of places to enroll. By default, the number of places enrolled is one.

3. Check the Internal check box if the enrollment is for an internal student, otherwise leave the box unchecked. Oracle Training Administration warns you if this enrollment exceeds the maximum number of internal students who can attend the event.

4. Select the status of the enrollment if you do not want the one displayed. Your choice may be restricted by the status of the event and the number of enrollments already entered.

    Note: If your enterprise uses enrollment status security, you may be unable to enter an enrollment of a certain status. Contact your supervisor if you are in any doubt.

5. Select the priority level for the booking if you want information to help you decide which waitlisted enrollments to confirm if you receive cancellations. Add values using the QuickCode Type PRIORITY_LEVEL.

6. Check the Authorized box if you want. If you check the Authorized check box, your name is displayed in the By field.

Enrolling Students Retrospectively/In Advance

7. Leave the enrollment date placed as it is in this window. Instead, change the enrollment dates in the Scheduled Events window, as required. See Enrolling Students Retrospectively / In Advance: page 7 – 7.

Entering Personal Details

8. Identify who is sponsoring the student on the event:

    - Select a customer for an external enrollment (if the student is recorded as a contact for the customer).

      If the customer does not already exist, choose the Customer window from the menu and enter the customer details. See: Creating a Customer: page 2 – 15.

    - Select an organization for an internal enrollment (if the student is an employee held in Oracle Human Resources).

9. Select a student to enroll. If you are entering an internal enrollment, select an employee and assignment from the List. If you are entering an external enrollment, select or enter the student details.

Leave the Student field blank if you want to book one or more unnamed places.

10. Select a contact. If you are entering an internal enrollment, select an employee and assignment from the List. If you are entering an external enrollment, select or enter the contact details.

    Note: If you are entering an external enrollment and you have entered a new contact, you must save your changes before you select this person as a contact on a new finance header.

    Which of following steps you complete depends upon how Oracle Training Administration has been customized in your enterprise.

Entering Correspondence Details

11. Select the Correspondence region to identify to whom you want to send all correspondence (the correspondence defaults to contact, but you can change this):
    - Select Contact or Student for an internal enrollment. Also, select the Internal region if you want to send all correspondence to the address associated with the contact's assignment or select external to send correspondence to the contact's personal address.
    - Select Contact, Student or Third Party for an external enrollment. Choose the Third Party Contact region if the you are managing the enrollment through an agency and then select the contact.
12. Select the address details you require.

Entering Enrollment Details

13. Enter the enrollment details in the Enrollment Details region, such as where you get your enrollments from or any special dietary instructions.

    Use the Source field to help track the effectiveness of publicity or agency relationships. Add values using the QuickCode Type BOOKING_SOURCE.
14. Save your changes.

Performing the Next Step:

- Enter Financial Details for an Enrollment: page 8 – 18.
- Update a Competence Profile: page 8 – 16

See Also

Correcting Enrollment Details: page 8 – 20.

Updating a Competence Profile

If you have Oracle Human Resources and OTA installed in your enterprise, and you are implementing the competence approach, you can hold the qualifications, attributes and knowledge that students can expect to attain by attending training activities as competencies.

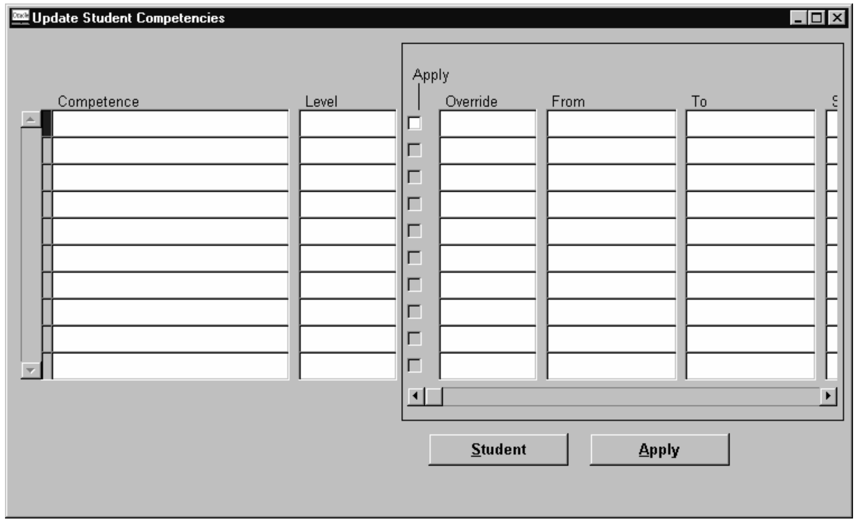
If you are a user with authority, you can automatically add these competencies delivered by the activity, along with the proficiency levels, to a student's Competence Profile.

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

You can, of course, override the start date and the proficiency levels, if required. For example, a student may not be proficient in a competence until mid way through an event. If the student is judged to be proficient in the delivered competencies, but not at the level identified by the activity, you can override the proficiency level and select the correct one. If the student is judged not to have gained some of the competencies identified for the activity, or if the event does not deliver identified competencies, you do not need apply them to the student's Competence Profile.

When Can You Update the Profile?

You can update the profile before a student attends the event, while they are attending the event, or afterwards.



▶ To update a competence profile:

1. Do one of the following:

   - If the student's details are displayed in the Enrollment Details window, choose the Functions button and select Update Student Competencies.

   - If the student's details are not displayed in the Enrollment Details window, first select the event and student, then choose the Functions button and select Update Student Competencies.

   The competencies this activity delivers are then displayed.

   Suggestion: We suggest that you select the Student button to see the competencies the student already possesses, and at which level, before you update the Competence Profile.

2. You can either apply the competencies: page 8 – 18 exactly as they are, or you can make changes: page 8 – 17 to them first.

Making Changes to Delivered Competencies

3. If you want to change the proficiency level at which the student demonstrates the competence, select the new proficiency level from the Override field.

4. The date from which the person acquires the competence at this level defaults from the event start date. You can change this date, if required, but you cannot enter a date that starts before the activity start date. You can also enter the end date, if required.

5. You can select the method by which the person gained the competence, such as training course or previous experience, in the Source field.
6. Enter the date when the person's proficiency in this competence should be reviewed.
7. Select the method of certifying that the person attained the competence at the recorded level, such as by examination.
8. Enter the date when the person's proficiency in this competence should be reviewed.
9. Enter any comments, if required

Applying the Competencies

10. Check the Apply box alongside each competence you want to add the student's Competence Profile.
11. Choose the Apply button, and OTA displays a message indicating that the competencies and proficiency levels have been added to the Competence Profile.

Entering Financial Details for an Enrollment

▶ **To enter finance details for an enrollment:**

1. Select the Finance region.

Creating a Finance Header

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

   See Creating a Finance Header: page 9 – 5.

   > **Note:** Oracle Training Administration generates the finance line and identity for you.

   Now go to S*aving Your Changes*.

Selecting a Finance Header

3. Select one of the following finance headers in the Header field:
   - An existing finance header if the event is priced Per Student.
   - A Standard or Prepayment header if you want to issue an invoice to the customer.

- A Prepurchase Use header if you want to deduct the cost of the enrollment from a prepurchased amount.

Note: The customer on the finance header does not need to be the same as the customer for whom the student works.

4. Check either Discount or Prepurchase if you want to apply an enrollment agreement to this enrollment, otherwise leave the default field None checked.

5. Select the name of the agreement.

   The amount displayed in the Invoiced field is automatically discounted. If the agreement is based on a price list, it is the price from this price list that is discounted, not the standard price for the event.

6. Select a price from a different price list if you do not want to use the one displayed (depending on your responsibility). See: **Selected Fields** (below). The Standard pricing field displays the price from the event record or a price list.

7. Override the price displayed in the Invoiced field only if you do not want to invoice the customer for the amount displayed. (You need the appropriate responsibility). This is the amount that the customer will be charged on a finance line.

Saving Your Changes

8. Save your changes.

Selected Fields

Standard: If you selected an enrollment agreement that is based on a price list, this field display the price of the activity on the price list. Otherwise this field displays the standard price for the event. You cannot update it.

Units: If you selected a prepurchase agreement defined in training units, this field displays the number of training units deducted from the balance of the prepurchase agreement for this enrollment.

Invoiced: Displays the standard price for the event, reduced by a discount if you selected an enrollment agreement that incorporates a discount. If you selected an agreement based on a price list, this field displays the price from the list reduced by a discount.

Depending on your responsibility, you may be able to enter a different amount. This is the amount that appears on the finance line for the enrollment.

Correcting Enrollment Details

You might need to correct enrollment details for a variety of reasons. For example, you might have entered an external student or contact name incorrectly (such as forgetting to enter the status or misspelling the last name), or you might have entered the wrong enrollment agreement. If so, you must cancel the enrollment and re–enter it. You cannot go back and correct the personal details or enter the correct enrollment agreement.

See Also

Cancelling a Single Enrollment: page 8 – 22.

Making Multiple Enrollments

You can enter enrollments for individual students, or enrollments for customers specifying a certain number of anonymous places. To speed up the entry of multiple enrollments, you can copy information from an enrollment into a template, edit the template, then use this as the basis for entering new enrollments.

If you are entering several enrollments that share common information, such as enrollments for one event or for one customer, you can copy information from one enrollment to the next.

▶ **To copy and paste enrollment information:**

1. Do one of the following:
   - query an existing enrollment that shares common information
   - enter and save the first enrollment you want to copy from
2. Choose the Copy button in the Enrollment Detail window.

Copying Selected Fields from the First Enrollment

3. Choose the Functions button and select Template to open the Copy Template window. Clear or change any field values that you don't want to apply to other enrollments.

   You can skip this step if you want to copy all the fields from the first enrollment.

Copying all the Fields from the First Enrollment

4. Choose New Record from the Edit menu in the Enrollment Detail window.
5. Choose the Paste button.
6. Add any additional information for this enrollment and save it.

Updating Enrollments

You need to update enrollments as and when required. For example, if you change an event status from normal to cancelled, you can change any enrollments for the event to cancelled. Alternatively, you might need to record the successful attendance of a student on the event.

You can also apply certain changes to multiple enrollments. For example, after changing an event status from planned to normal you can query all the waitlisted enrollments for the event and place them. After an event, you can query all the enrollments, change their status to Attended, and mark whether they successfully completed the event.

See Also

Making Mass Updates to Enrollments: page 8 – 25.

Recording Attendance and Results: page 8 – 24.

Correcting Enrollment Details: page 8 – 20.

Cancelling a Single Enrollment

When you cancel an enrollment, Oracle Training Administration prompts you to choose whether you also want to cancel any associated finance lines.

If you cancel an enrollment when the event status is Full and there is a waiting list for the event, Oracle Training Administration displays a pop up box to let you know there is a waiting list. You can take one of the following actions:

- continue to save the cancellation
- select students from the waiting list to fill the new place(es)

Notice that you can also cancel multiple enrollments at the same time using the Mass Update feature.

See Making Mass Updates to Enrollments: page 8 – 25.

▶ **To cancel a single enrollment:**

1. Query the enrollment in the Enrollment Detail window.

   Note: If the event is Secure (the Secure box is checked), you can only cancel an enrollment for the event if you are assigned to the organization that is administering the event.

2. Change the enrollment status to Cancelled (or your user status equivalent). If your enterprise uses enrollment status security, you may be unable to update the enrollment. Contact your supervisor if you are in any doubt.
3. Save your changes.

   If the event was previously Full and there is a waiting list, Oracle Training Administration displays a pop up box notifying you of this.

Selecting from the Waiting List

4. Choose Yes to select a student from the waiting list.

   Oracle Training Administration displays the Waitlisted Enrollment window for you to select students from. The number of vacancies for the event appears at the bottom of the window.
5. Select the student you want to enroll on the event by positioning the cursor in the Booking Status field and selecting Placed from the List.

   This enables you to fill the place before someone else enters new enrolment for the event.
6. Choose the OK button.

Saving the Cancellation Without Selecting from the Waiting List

7. Choose No if you do not want to select a student from the waiting list. The event status returns to Normal and you and other users can fill the places as normal.

Deleting a Student Enrollment

You can delete an enrollment, if required. For example, you may have enrolled the wrong student on an event, or enrolled the right student on an event but on the wrong date.

Before you delete an enrollment, you must check so see if any finance lines exist. If any do exist (with the status Not for transfer), you must delete them before you can delete an enrollment. You cannot delete a Transferred finance line.

Do not confuse deleting enrollments with cancelling enrollments. For example, you delete an enrollment if you have made a mistake but you cancel an enrollment if the event does not run (or if a student cancels attendance). See Cancelling a Single Enrollment: page 8 – 22

> **Note:** If you delete an enrollment, you also delete the student history, so be careful when using this facility. See Viewing and Reporting on Enrollment History: page 8 – 27.

▶ **To delete a single enrollment:**

1. Query the enrollment in the Enrollment Detail window.

   Note: If the event is Secure (the Secure box is checked), you can only delete an enrollment for the event if you are assigned to the organization that is administering the event.

2. Choose Delete Record from the Edit menu.
3. Save your changes.

Recording Attendance and Results

You can record the successful attendance or failure of a student and the results of the attendance. You can record this information for many students together using the Mass Update feature.

▶ **To record the results of a student's attendance:**

1. Query the enrollment in the Enrollment Detail window.

   Note: If the event is Secure (the Secure box is checked), you can only record attendance and results for the event if you are assigned to the organization that is administering the event.

2. Change the enrollment status to Attended.
3. Check the Successfully Attended check box if the student completed the event or program successfully.
4. Select a reason in the Failure field if the student did not succeed. You can add new reasons as values for the QuickCode Type DELEGATE_FAILURE_REASON.
5. Enter a result, such as a grade or a certificate, in the Result field.

Making Mass Updates to Enrollments

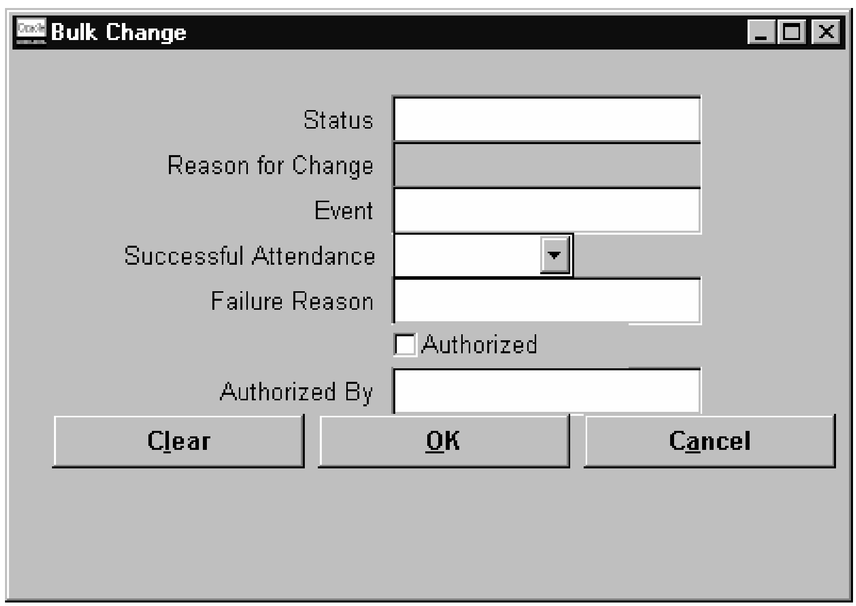
If you are updating several enrollments in the same way, such as changing their status, or rolling them forward onto a new event, you can make mass updates in the Enrollment Summary window.

Using Priority Levels

You can use make mass updates to enrollments using the priority levels you entered for the enrollment.

For example, if you previously entered more requested enrollments than available places, you can use the priority levels to help you decide which enrollments to place and which to put on a waiting list in case of cancellations. You could do a mass update of the priority requests to the status Placed, and issue a standard confirmation letter. You can do a mass update of the remaining requests to the status Waitlisted, and issue a standard waiting list letter.

If a placed student cancels, you can choose the highest priority waitlisted student to fill the place. You can do a mass update of all waitlisted students to roll them over to the next scheduled event for the activity.



▶ **To make mass updates to enrollments:**

1. Query the group of enrollments you want to update in the Enrollment Summary window.
2. Choose the Mass Update button and Oracle Training Administration displays the Bulk Change window.
3. Move the Bulk Change window so you can see the Enrollment Summary window (if it obscured) and choose the Select All button.
4. Uncheck the Change box for specific enrollments you do not want to update, or leave all enrollments checked if you want to update them all.

   You can choose the Deselect All button if you have made a mistake and you do not want to update any enrollments for this event.
5. Select the new values you want to apply in the Bulk Change window. Enter a new event only if want to roll forward the enrollments onto a new event.
6. Select OK.

   Oracle Training Administration changes all the enrollment statuses en masse for you (and rolls forward the enrollments onto a new event, if entered).

Viewing and Reporting on Enrollment History

You can view and report on the following in Oracle Training Administration:

- the history of enrollment statuses for any student enrollment
- a summary of all enrollments for a student
- all students (internal and external) who should have attended an event

Viewing the Status History of an Enrollment

You can view the history of enrollment statuses for any student enrollment.

▶ **To view status history for an enrollment:**

1. Query the enrollment in the Enrollment Detail window.
2. Choose the History button and select Enrolment Status History.

Viewing Event Attendance History

You can view a summary of all enrollments for a student, in reverse date order. The Student Enrollment History window shows the status of the enrollment, and whether the attendance was successful.

▶ **To view a summary of all enrollments for a student:**

1. Query an enrollment for this student in the Enrollment Detail window.
2. Choose the History button and select Student Enrollment History.

You can also use the Enrollment Summary window to query some or all enrollments for a particular student. For example, you could enter a query using the student's name and the status Attended. You could also restrict this query to events that the student completed successfully. Using the folder features of the Enrollment Summary window, you can choose what summary information to view about the enrollments found by the query.

Producing the Registration List Report

This report lists all students (internal and external) who should have attended an event. It provides student and contact names with relevant phone numbers.

Once you have checked the students listed on the report, you can chase up those students who should have attended an event, but who did not.

Limiting Output

You can limit the output to one of the following:

- one event
- all events of a selected type within a date range
- events within a date range and center
- all events of a selected type within a date range and center

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

▶ **To run the Registration List report:**

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

   The Parameters window opens.
2. Select the name of the event to include students who should have attended that one event in the report. Oracle Training Administration includes students with the status Attended in the report.
3. Select the event type to include in the report, for example, scheduled or development. You can select an event type without selecting an event (in the Event Title field) if you want to include event types within the date range and center in the report.
4. Select the center where the event ran, if required.
5. Enter the start and end dates to include events or event types within the range in the report.
6. Choose the OK button.
7. Choose the Submit Request button.

Entering Customers For Restricted Events

For events restricted to selected customers, use the Customers for Restricted Event window to select the valid customers.

You can price this type of restricted event per student or per customer:

- If the event is priced per student or has no charge, you select valid customers in the Customers for Restricted Events window, then you enter enrollments for these customers in the Enrollment Detail window.
- If the event is priced per customer, you select valid customers in the Customers for Restricted Events window and you also use this window to enter enrollment information (such as contacts and pricing).

  These enrollments are anonymous; that is, they do not mention student names. If you want to keep your student enrollment records up–to–date, you can also enter enrollments naming particular students in the Enrollment Detail window.

Maintaining Student Enrollments for Customer–Based Events

You block–book the number of places a customer requires for a customer–based event. These enrollments are anonymous; that is, they do not mention student names. If you want to maintain student enrollment records for the event, you later enter the individual enrollments using the Enrollment Detail window.

If the event's price basis is Customer–based, you must charge for the block–booking using the Customers for Restricted Event window—you cannot charge for these individual student enrollments in the Enrollment Detail window.

Changing an Enrollment Price

Your system administrator may have used financial security to enable users of a certain responsibility to update and delete the following prices:

- monetary
- unitary
- standard

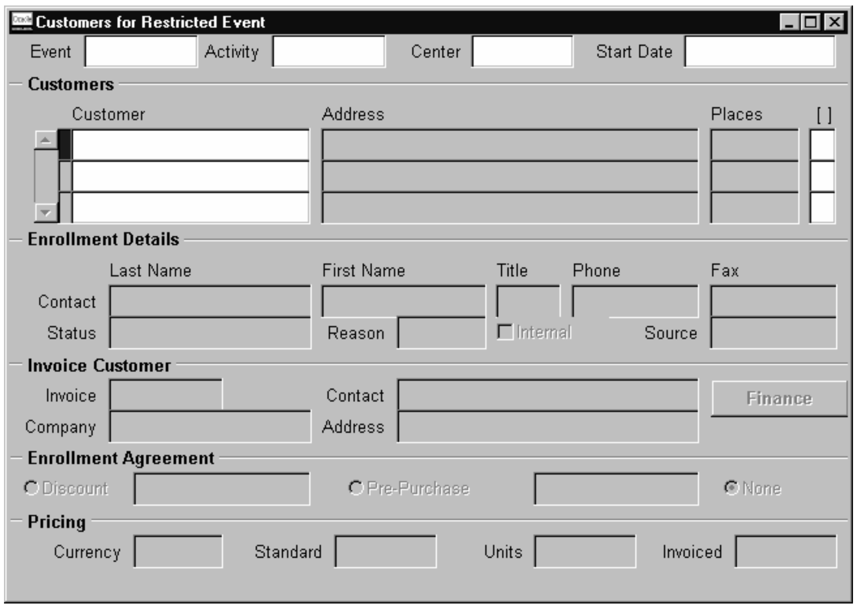
If there is no financial security in your enterprise, all users can update and delete prices.

See: How Does Financials Security Work: page 12 – 6.

Enrolling Customers on Secure Customer–Based Events

If Oracle Human Resources is implemented at your site, some customer–based events may be secured. This means you can only enter and update enrollments on these events if you are assigned to the organization that is administering the event.

See: How Does Organization Security Work?: page 12 – 4.



▶ **To enter customers for restricted events priced per student or no charge:**

1. Create an event in the Scheduled Events window if you have not already done so. See: Scheduling a Single Event: page 7 – 8.
2. Select the event in the Customers for Restricted Event window.
3. Select one or more customers for this event, and save your work.

Performing the Next Step:

- To enter enrollments for these customers using the Enrollment Detail window, see: Entering a New Enrollment: page 8 – 11.

▶ To enter customers and enrollments for restricted events priced per customer:

1. Create an event in the Scheduled Events window if you have not already done so. See: Scheduling a Single Event: page 7 – 8.
2. Select the event in the Customers for Restricted Event window.
3. Select one or more customers for this event.
4. Enter the number of places each customer requires.
5. Select a contact for the enrollments, and enter the enrollment status. You can also select the source of the enrollment.

Entering Financial Information

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

   Select a Standard or Prepayment header if you want to issue an invoice to the customer. Select a Prepurchase Use header if you want to deduct the cost of the enrollment from a prepurchased amount.

   Note: If you want to use a discount agreement, you must enter the same customer to invoice as the customer you entered in the Customer field.

Creating a Finance Header

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

   See: Creating a Finance Header: page 9 – 5.
9. Choose the Use Header button (in the Enrollment Detail window) to use your new header for this enrollment.

Using Discount or Prepurchase Agreements

10. Select either Discount or Prepurchase if you want to apply an enrollment agreement to this enrollment.
11. Select the name of the agreement. The amount displayed in the Invoiced field is automatically discounted.

    The Standard pricing field displays the price, from the default price list, appropriate to the number of places you entered. Depending on your responsibility, you may be able to select a price from a different price list, or enter a new price. See: **Selected Fields** (over the page).

12. Override the price displayed in the Invoiced field, if required. (This step may depend on your responsibility). This is the amount that the customer will be charged on a finance line.

Performing the Next Step:

- To enter enrollments for these customers using the Enrollment Detail window, see: Entering an Enrollment: page 8 – 13.

Selected Fields

Source: Use this field to help track the effectiveness of publicity or agency relationships. Add values using the QuickCode Type BOOKING_SOURCE.

Standard: This Pricing field displays one of two values:

- If you selected an enrollment agreement that is based on a price list, this field display the price of the activity on the price list, for the number of places entered. You cannot update it.
- Otherwise, the Standard field displays the price of the activity on the default price list, for the number of places entered. Depending on your responsibility, you may be able to select a price from a different price list, or enter a new price.

Units: If you selected a prepurchase agreement defined in training units, this field displays the number of training units deducted from the balance of the prepurchase agreement for this enrollment.

Invoiced: Displays the standard price, reduced by a discount if you selected an enrollment agreement that incorporates a discount. Depending on your responsibility, you may be able to enter a different amount. This is the amount that appears on the finance line for the enrollment.

CHAPTER

9

Creating Finance Headers and Lines

In Oracle Training Administration, you can enter payable and receivable financial information for transfer to your financial management system.

This chapter explains how to create finance lines and headers, and how to cancel them or move lines to a new header to reflect changes to payment arrangements.

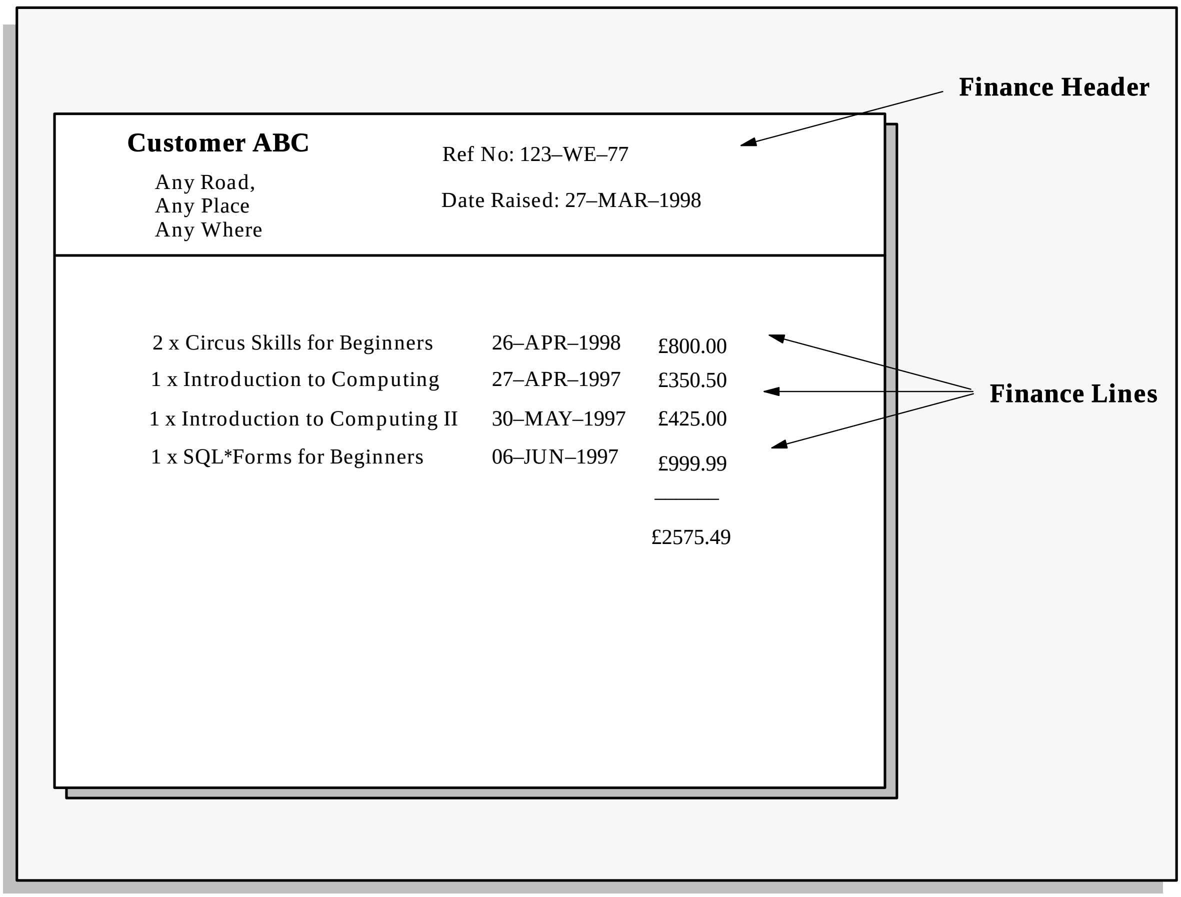
Introducing Finance Headers and Lines

A ***finance header*** holds generic financial information about the dealings you have with a particular customer or supplier. For example, the customer name, contact information, address and the payment currency. In Oracle Training Administration, you enter each individual transaction with a customer or supplier as a ***finance line***.

Figure 9 – 1 illustrates a finance header with finance lines for customer ABC.

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

Figure 9 – 1
A Finance Header and Lines



How Many Types of Finance Header Exist?

There are three types of finance header in Oracle Training Administration:

- Payable: a header for supplier payment finance lines
- Receivable: a header for enrollment and prepurchase charge finance lines. There are four subtypes:
  - Standard: for enrollment finance lines where an invoice should be issued after the event
  - Prepayment: for enrollment finance lines where an invoice should be issued before the event
  - Prepurchase Payment: for prepurchase charge finance lines where a customer is paying a sum in advance for unspecified enrollments
  - Prepurchase Use: for enrollment finance lines where the cost of the enrollment is to be deducted from a prepurchase balance and no invoice is to be issued
- Cancellation: a header that supersedes a previous header that has already been transferred to your financial system and therefore cannot be updated

You must create a finance header of the appropriate type for each supplier or customer your enterprise deals with.

Can You Set Up Different Types of Finance Lines?

There are three predefined types of finance line:

- Enrollment Charge: an amount receivable from a customer for attendance at an event
- Prepurchase Charge: an amount receivable from a customer as an advance payment for a certain amount of training, administered through a prepurchase enrollment agreement
- Supplier Payment: an amount payable to a supplier in exchange for resources

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

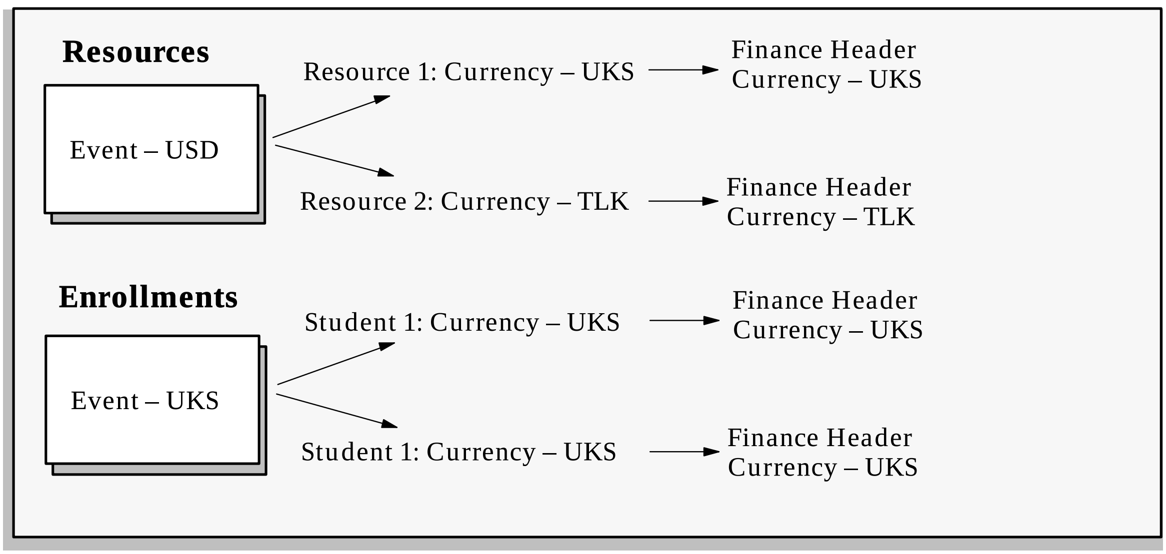
> **Note:** The only type of finance line that you can associate with an enrollment is an Enrollment Charge.

Finance Headers and Currency

Oracle Training Administration provides you with the flexibility to create finance headers for different currencies per customer or supplier. For example, you might need to schedule an event in United States Dollars, but create finance headers for specific suppliers in other currencies to pay for the resources (UK Sterling and Tasmanian Lire, for example).

You cannot create finance headers in other currencies to pay for student enrollments, however. If you schedule an event in UK Sterling, you must create finance headers for customers enrolling students onto the event in UK Sterling too.

Figure 9 – 2
A Finance Header and Currency



Transferring Headers and Lines to a Financial System

You can integrate Oracle Training Administration with Oracle Receivables and Oracle Payables, or another financial system. This means that your implementation team creates a process to transfer finance headers and lines to your financial system.

When you enter a new header, it has a default status of Not For Transfer. If you want the header to be transferred, change its status to Awaiting

Transfer. When you run the transfer process, it transfer all headers with this status and update them to the status Successful Transfer or Unsuccessful Transfer.

The other information the transfer process can return to Oracle Training Administration includes:

- external reference
- date
- message
- paid flag

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

Cancelling a Finance Header

When a header has been successfully transferred, you cannot make any changes to it or to the finance lines that belong to it. However, you have the option of cancelling a finance header or individual finance lines. This causes the system to create a new finance header of type Cancellation, which supersedes the original header. You can then create a new finance header and lines showing the correct information, if appropriate.

Creating a Finance Header

You can open the Finance Header window from the menu or by choosing the Finance header button on one of the following windows:

- Enrollment Detail: to create a receivable header for an enrollment
- Resource Booking: to create a payable header to the supplier of a resource
- Customer for Restricted Event: to create a receivable header for a customer associated with a restricted event that is priced on a Per Customer basis

If you open the window from the menu, it contains buttons that enable you to cancel headers, reinstate cancelled headers, and enter new finance lines for the header.

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

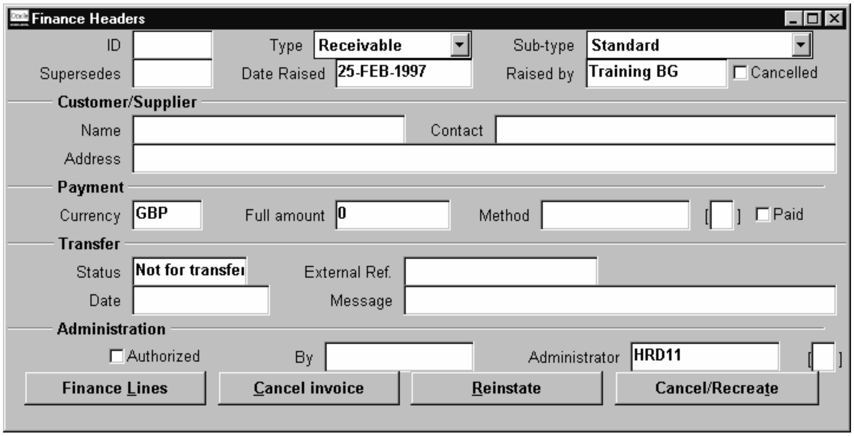
Prerequisites

- ❑ Create payment methods as values for the QuickCode Type PAYMENT_METHOD.

  See: Adding QuickCode Values: page 11 – 3.

- ❑ Create the customer, with site addresses and contacts.

  See: Creating a Customer: page 2 – 15.



▶ To create a finance header:

1. Select the header type and, for a Receivable header, a subtype of:
   - Standard if the invoice should be issued after the event.
   - Prepayment if the invoice should be issued before the event.
   - Prepurchase Use if the cost of the enrollment is to be deducted from a prepurchase balance.
   - Prepurchase Payment if you are creating the invoice for a prepurchase agreement.
2. Select the organization that is responsible for the header in the Raised By field.
3. Select the customer or supplier if the correct information does not appear by default.
4. Select a contact and an address.
5. Select the appropriate payment method.
6. Select the status Awaiting Transfer when you are ready for this header to be transferred to your financial system.

Oracle Training Administration updates the status of all finance lines that had the same status as the header.

> **Note:** If you are creating a finance header while you are entering an enrollment, Oracle Training Administration defaults generic financial information into the Finance Header window for you. You must complete all the information before you can save your work and generate the finance line and identity number.

7. Save your work.

Performing the Next Step:

- If you are creating a finance header while you are entering an enrollment, go back to entering an enrollment.
- To create the finance lines for this header, see Creating a Finance Line: page 9 – 7.

Selected Fields

Supersedes: If you cancel a header that has already been transferred, the system creates a new header of type Cancellation that supersedes the old header. The system uses this field to show the relationship between the headers.

Paid: If this box is checked, the interface to your financial system has returned the information that the header has been paid.

External Ref, Date, Message: Your financial system can return a value to these fields the header is transferred.

Creating a Finance Line

Oracle Training Administration automatically creates a finance line for you when you select a finance header when you are performing any of the following tasks:

- enrolling a student
- booking a resource
- enrolling a customer (customer–priced)
- using a prepurchase enrollment agreement

So, you do not need to create a finance line, Oracle Training Administration does it for you!

You can, however, create a finance line manually when you need to.

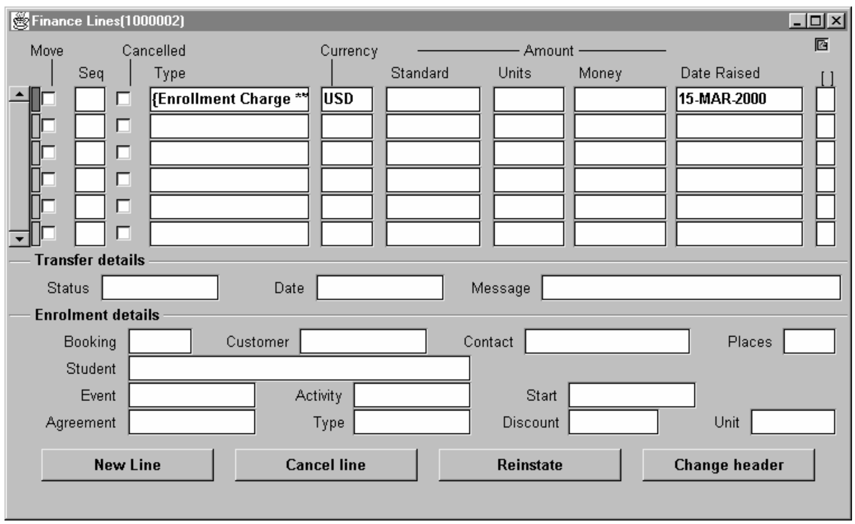
Changing Amounts

Your system administrator may have used financial security to enable users of a certain responsibility to update and delete the following prices:

- monetary
- unitary (invoice)
- standard

If there is no financial security in your enterprise, all users can update and delete prices.

See: How Does Financials Security Work: page 12 – 6.



▶ To create a finance line:

1. Enter or query the appropriate finance header in the Finance Header window.
2. Choose the Finance Lines button.
3. Select a blank line.
4. Select a line type
5. Choose the New Line button.

   Oracle Training Administration displays the

6. Select one of the following to associate with this line:
   - an enrollment
   - a resource booking
   - prepurchase agreement
7. Enter an amount in money or training units.
8. Save your work.

▶ **To create a finance line for user–defined finance line types**:

1. Enter or query the appropriate finance header in the Finance Header window.
2. Choose the Finance Lines button.
3. Select a blank line.
4. Select a line type
5. Choose the New Line button.

   Oracle Training Administration displays the
6. Select one of the following to associate with this line:
   - an enrollment
   - a resource booking
   - prepurchase agreement
7. Enter an amount in money or training units.
8. Save your work.

Changing the Transfer Status of a Line

You can update the status of an individual finance line by selecting the line and selecting another status in the Transfer field.

Moving Finance Lines To a New Header

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

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

▶ **To move finance lines to a new header:**

1. First create the header to which you want to move the lines. See Creating a Finance Header: page 9 – 5, for more information.
2. Query the header in the Finance Header window to which the lines currently belong.
3. Choose the Finance Lines button.
4. Choose the Change Header button in the Finance Lines window.
5. Select the header to which you want to move the lines.
6. Check the Move check box for each line you want to move to the new header.
7. Save your changes.

Cancelling Finance Headers and Lines

If you cancel a header or line that has not been transferred to your financial system, it is simply marked as cancelled.

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

If the header has been transferred, you can choose another option to cancel and recreate the header. In this case, the system creates a new header of type Cancellation and a new header based on the old header, which you can then edit.

You can also cancel individual finance lines.

▶ **To cancel a finance header:**

1. Query the header in the Finance Header window.
2. Choose the Cancel Invoice button.
3. Save your changes.

Oracle Training Administration cancels every finance line that belongs to this header.

▶ **To cancel a finance header and enter a new header to supersede it:**

1. Query a header in the Finance Header window that has the status Successful Transfer.
2. Choose the Cancel / Recreate button, and save.

   The system creates a Cancellation header and a new header, based on the old one. Both supersede the header you are cancelling.
3. Enter information for the new header, and save.

▶ **To cancel a finance line:**

1. Enter or query the appropriate finance header in the Finance Header window.
2. Choose the Finance Lines button.
3. Mark the line you want to cancel and choose the Cancel button.
4. Save your changes.

   Oracle Training Administration checks the Cancelled check box for this line.

Deleting Finance Headers and Lines

You can delete a finance header and lines, if required. For example, you may have enrolled the wrong student on an event and created a finance header or line that you now need to delete.

Deleting Headers

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

You cannot delete a Transferred finance line.

Deleting Lines

You can delete a finance line up until you have transferred it to your finance system. You cannot delete a finance line after that.

If any do exist, you must delete them before you can delete a header or line.

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

▶ **To delete a finance line:**

1. Enter or query the appropriate finance header in the Finance Header window.
2. Choose the Finance Lines button.
3. Choose the line you want to delete and choose Delete Record from the Edit menu.
4. Save your changes.

▶ **To delete a finance header:**

1. Query a header in the Finance Header window.
2. Choose Delete Record from the Edit menu.
3. Save your changes.

Restoring Cancelled Lines and Headers

You can restore a cancelled header or line by choosing the Reinstate button.

If the header had been transferred before cancellation, and therefore the system created a Cancellation header, choosing the Reinstate button deletes the Cancellation header. However, if the Cancellation header has also been transferred, you cannot restore the original header.

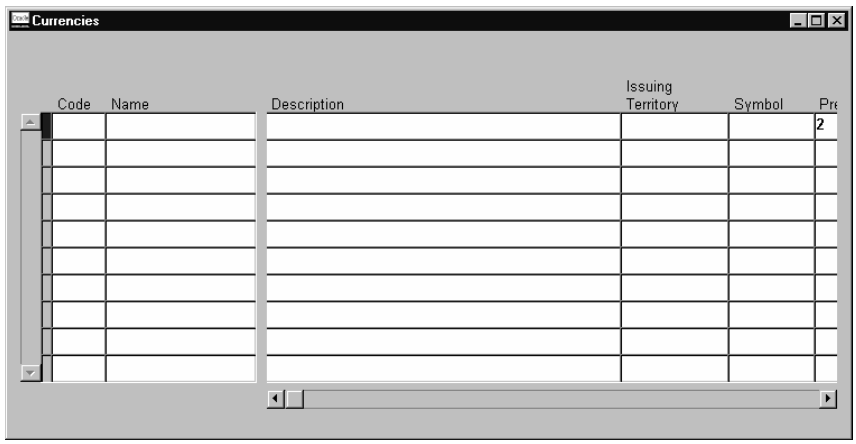
Enabling Currencies

You can use multiple currencies to hold price and cost information in Oracle Training Administration.

Your startup data includes the definitions of all world currencies. These definitions are shared by all Oracle Applications and are controlled by the system administrator responsibility. You enable those currencies you want to use in the Currencies window.

You can never delete a currency, but you can disable it.

> **Note:** You must enable at least one currency as the default currency for all information related to money in your system. This default is known as the *Base Currency* for your Business Group.



▶ To enable a currency:

1. Query the currency you want to enable.
2. Check the Enabled check box.
3. Save your choice to enable the currency.

▶ To disable a currency:

1. Query the currency you want to disable.
2. Uncheck the Enabled check box or enter an End Date for the currency.
3. Save your changes to disable the currency.

CHAPTER

10 Generating Letters

You can create standard letters to help manage event and enrollment administration. This chapter explains how to create standard letters, how to generate lists of recipients, and how to merge these lists with your word processed standard letters.

Using Letters to Manage Recruitment and Enrollment

You can use standard letters to help you to manage your enterprise's recruitment or enrollment activities. You do this by issuing standard letters to applicants (Oracle Human Resources) or to students (Oracle Training Administration), triggered by changes in assignment or enrollment status. For example, you can set up a standard enrollment confirmation letter that is triggered when a student's enrollment status is set to Placed or you can set up a rejection letter that is triggered when an applicant's assignment status is set to Rejected.

Here are a few examples of letters you can set up to help you to manage your enterprise's recruitment or enrollment activities:

Oracle Human Resources	Oracle Training Administration
Acknowledgement letters (for all active applications)	Acknowledgement letters (for all requested enrollments)
Confirmation letters (for interviews)	Confirmation letters (for placed enrollments, including event joining instructions based on the date, venue, and trainers)
Reports for interviewers and schedules	Reports for trainers (listing the students to attend an event)
Offer and Rejection letters (for applicants)	Chase–up letters (for non–response or non–payment)
	Acknowledgement letters (for cancellations)
	Certificates (of successful course completion)

Setting Up Standard Letters

Oracle HRMS provides you with two different methods to create standard letters:

- Concurrent Processing
- Online:
  - using Oracle Application Data Export (ADE)
  - using Object Linking and Embedding (OLE) to generate Microsoft Word letters only

Which Method Should You Use?

Use the online method, ADE or OLE, if you want to generate and review your letters immediately.

Alternatively, you can use the concurrent processing method to set up your standard letters. With concurrent processing, you can generate and review your letters without interfering with the other work you perform at your terminal. You can control when a concurrent process runs and schedule long–running processes to run at times when the system is lightly loaded. Another advantage of using concurrent processing is that you do not need Windows 95, Excel or Lotus 123 installed.

See: Concurrent Processing: page 10 – 5

Using ADE

You can use ADE to generate standard letters and reports. ADE retrieves data and exports it to a data file that is merged with a standard word processed document. The word processed document includes all the merge fields required to merge the data and the standard text for the letter. ADE is fully compatible with Microsoft Word 6.

You can use ADE to generate standard letters for recruitment or enrollment by performing a mail merge from the Request Letter window in your application.

If you want to use ADE to set up your standard letters instead of using the concurrent processing method, refer to the ADE documentation.

See: Application Data Export (ADE) Online Help

Using OLE

You can use Object Linking and Embedding (OLE) to generate Microsoft Word letters instead of using ADE, if required.

Attention: In future releases of Oracle HRMS, generating Microsoft Word letters using Object Linking and Embedding (OLE) will be replaced by ADE.

See: Flowchart for Setting Up Standard Letters Using Microsoft Word: page 10 – 17

Concurrent Processing

There are two methods of using concurrent processing to set up your standard letters:

- Using word processors
- Using Oracle reports

Using Word Processors

You can use any word processor to produce standard letters from Oracle HRMS. If you use a word processor, you can submit a concurrent request in the Letter Request window to generate the mail merge file. When the concurrent request is complete, you can use your word processor's mail merge facilities to create the merged letters.

See: Using a Word Processor: page 10 – 6

Using Oracle Reports

As an alternative to using a word processor to produce standard letters, you can use the Standard Letter and Label features of Oracle Reports. Use this method if you do not want to use word processors to print your letters (or if you do not have word processors).

See: Using Oracle Reports: page 10 – 22

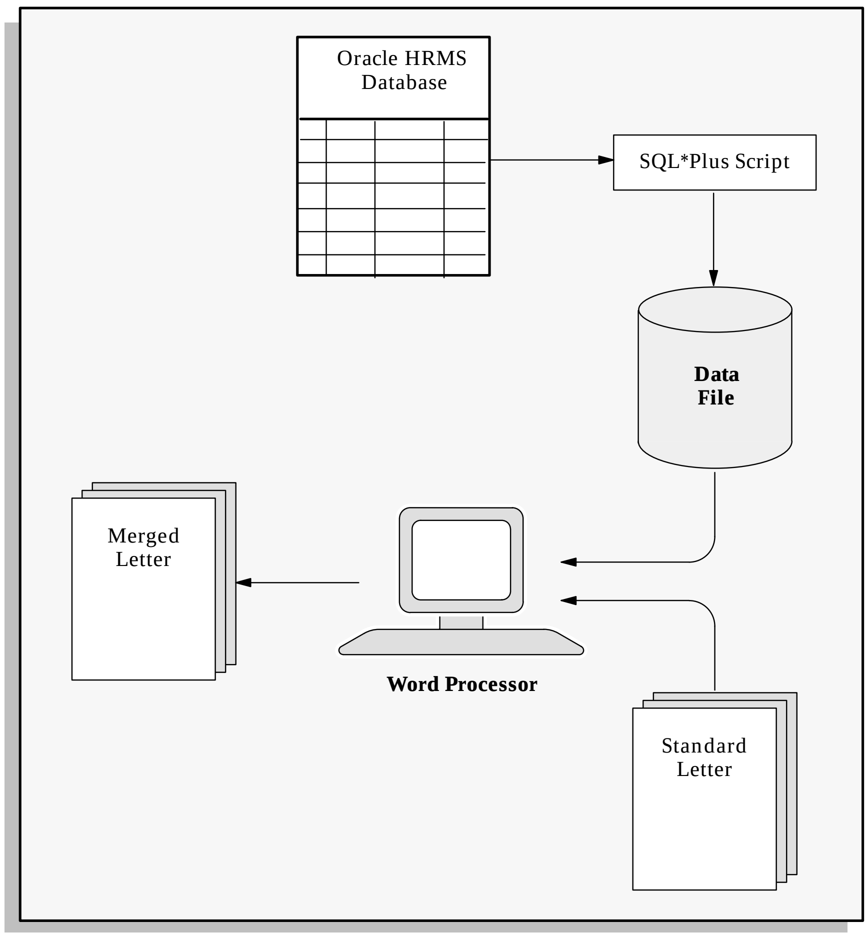
Using a Word Processor

To create standard letters using a word processor, you need to extract the data you want to include in the letters from the Oracle HRMS database. To do this, you create a program, such as a SQL*Plus script, to extract the data, which is then stored in a Data file. You also write skeleton standard letters using your word processor.

Each time you run your SQL*Plus script, it extracts data to the Data file. You then use the mail merge features of your word processor to merge this data with the skeleton standard letters you previously prepared. This merging process creates the actual letters that you send out to students and applicants.

An overview of creating standard letters using a word processor is illustrated in Figure 10 – 1.

Figure 10 – 1
Using a Word Processor



Which Word Processor?

Oracle HRMS supplies SQL*Plus script templates for use with MultiMate, WordPerfect and Microsoft Word. It also supplies two sample Microsoft Word documents containing merge codes for the SQL*Plus scripts. You can copy the SQL*Plus script templates (or Word documents) and modify them to create the standard letters you require.

If you use Microsoft Word as your word processor, not only can you use the concurrent processing method to produce your standard letters, but you can also generate letters online. You can generate Microsoft Word letters using OLE or Oracle Application Data Export (ADE). See: Setting Up Standard Letters: page 10 – 3.

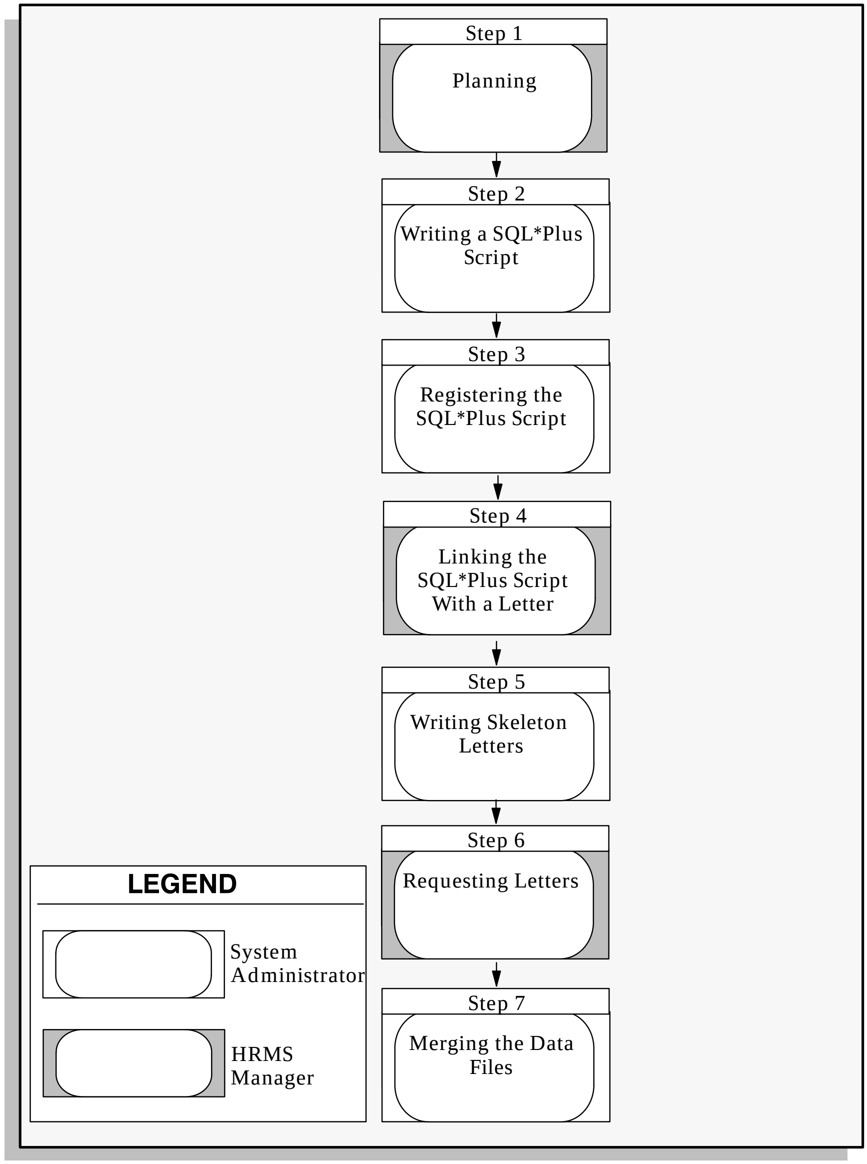
If you are setting up standard letters using the concurrent processing method with MultiMate or WordPerfect (or if you are using the concurrent processing method with Microsoft Word), see Flowchart for Setting Up Standard Letters Using MultiMate or WordPerfect: page 10 – 7

If you are setting up standard letters to be generated online for Microsoft Word, see Flowchart for Setting Up Standard Letters Using Microsoft Word: page 10 – 17

Flowchart for Setting Up Standard Letters Using MultiMate or WordPerfect

Figure 10 – 2 illustrates the sequence in which you set up standard letters using the concurrent processing method with MultiMate or WordPerfect (or if you are using the concurrent processing method with Microsoft Word).

Figure 10 – 2
Using MultiMate and WordPerfect



Planning

One of the first tasks you need to perform is to identify which data you want to extract from the database to include in your standard letters. You need to identify the select statements to use to provide you with the data as the *content* of your letters. Oracle HRMS supplies you with

SQL*Plus scripts as templates to help you do this. You also need to identify the text that you want to include as the *body* of your letters.

The next decision you need to make is whether to associate your standard letters with student enrollment or applicant assignment statuses.

If you do want to link your standard letters to student enrollment or applicant assignment statuses, your next decision is to identify which student enrollment or applicant assignment statuses you want to trigger your standard letters. For example, do you want to link your standard enrollment confirmation letter to the status Placed so that the letter is triggered when you set a student's enrollment status to Placed? Alternatively, do you want to link your standard rejection letter to the status Rejected so that it is triggered when an applicant's assignment status is set to Rejected?

Writing a SQL*Plus Script for MultiMate or WordPerfect

Now that you have identified whether you want to associate the standard letters with student enrollment or applicant assignment statuses, you are ready to write your program to extract the data from the database.

Oracle HRMS supplies you with SQL*Plus scripts as templates. You can copy the SQL*Plus script templates and modify them to create the standard letters you require. Copy the SQL*Plus scripts from the server side sql directory of the HR product tree (consult your installation guide for details). The following example applies to HR—Oracle Training Administration does not provide template scripts—but we provide an example of a Confirmation letter SQL mail merge file.

Once you have written your script, save the file with the name PERWP*** (or OTAWP*** for OTA). You must use this prefix for the system to recognise it as a type of letter. See your Oracle Applications installation server guides for details of where the concurrent manager places the files.

The template scripts Oracle HRMS provides are:

Scripts	Purpose	Used By
PERWPMUK.sql	Example UK SQL*Plus script for MultiMate	HR
PERWPMUS.sql	Example US SQL*Plus script for MultiMate	HR

PERWPWUK.sql	Example US SQL*Plus script for WordPerfect	HR
PERWPWUS.sql	Example US SQL*Plus script for WordPerfect	HR

One of the template SQL*Plus scripts (PERWPWUK.sql) is provided as a example, see Template SQL*Plus Script PERWPWUK: page C – 6. Oracle Training Administration does not provide template scripts, but we provide an example of a Confirmation letter SQL mail merge file, see OTA SQL*Plus Script: page C – 8

▶ **To write a SQL*Plus script for MultiMate or WordPerfect:**

1. Write a SQL*Plus script to select data from the database in a format your word processor can read and that is compatible with the standard letter.
2. Name the program PERWP*** (or OTAWP*** for OTA).
3. Save the program. (Consult your installation guide for details).

Registering the SQL*Plus Script for MultiMate or WordPerfect

You now need to register your SQL*Plus program with Oracle HRMS. You register your program so that you can run it as a concurrent program. Name the file PERWP*** (or OTAWP***). You must use this prefix for the system to recognise it as a type of letter.

You use the Concurrent Programs window to register your program (using a system administrator responsibility).

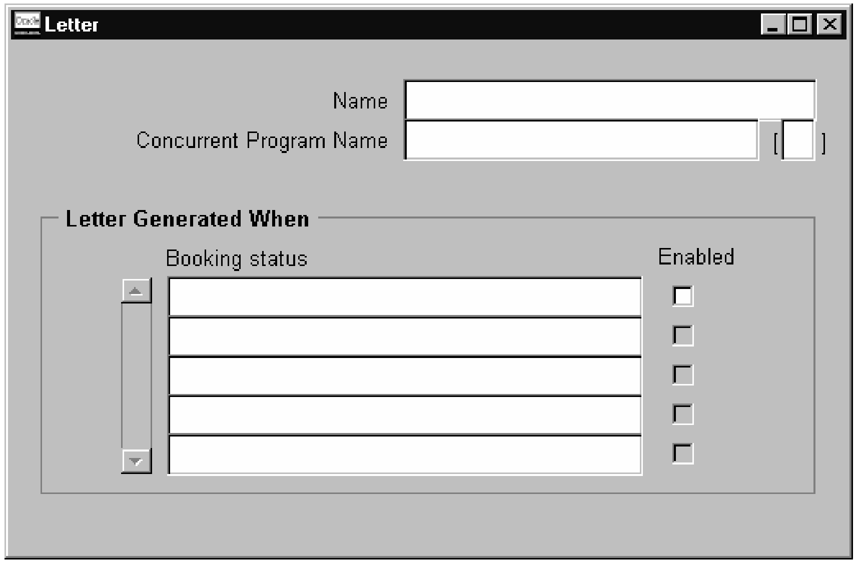
See: Concurrent Programs Window, *Oracle Applications System Administrator's Guide*

Linking the SQL*Plus Script With a Letter for MultiMate or WordPerfect

You need to link your SQL*Plus script with a letter and one or more statuses. In Oracle Human Resources, you can link one or more applicant assignment statuses with each recruitment letter. A request for the letter is then created automatically when an applicant is given an associated assignment status. For example, you can link your standard recruitment rejection letter to the status Rejected so that the letter is triggered when you set an applicant's assignment status to Rejected.

In Oracle Training Administration, you can link one or more enrollment statuses with each enrollment letter. A request for the letter is then created automatically when an enrollment is given an associated status.

Define your standard letter types in the Letter window.



▶ **To define a standard letter type:**

1. Enter a name for the letter in the Name field.
2. Select the Concurrent Program Name assigned by your System Administrator to the SQL*Plus script.

For Oracle Human Resources:

3. Select one or more applicant assignment statuses to create letter requests automatically for applicants, and check the Enabled box.

   When an applicant is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the applicant is added to the list of people to receive the letter when you submit the request.

For Oracle Training Administration:

4. Select one or more enrollment statuses to create letter requests automatically for enrollments, and check the Enabled box.

   When an enrollment is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the enrollment is added to the list of people to receive the letter when you submit the request.

Writing a Skeleton Letter

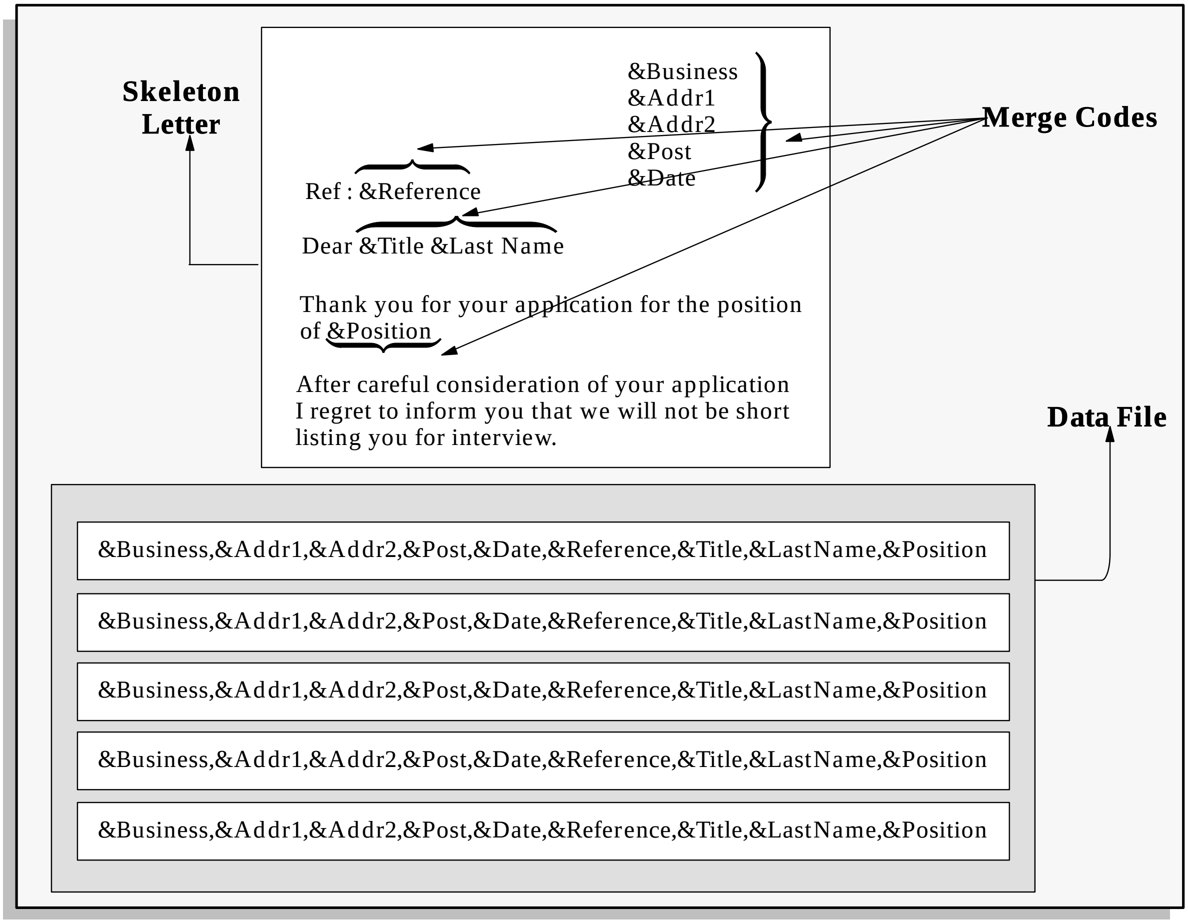
You now need to write a skeleton letter using your word processor. Include the appropriate merge codes from the data source for the word processor you are using.

The mail merge feature of any word processor enables you to merge text from the data file you create into a standard letter. Each line in the data file contains the text to merge into one standard letter for one recipient.

Within the program, you can format the data and include the characters that are recognized as separators by your word processor.

A standard letter comprises standard text with a number of embedded variables in it. When you print the letter, the variables are replaced with specific items of data, such as name and address details for different people.

Figure 10 – 3
Merging Data with Standard Letters



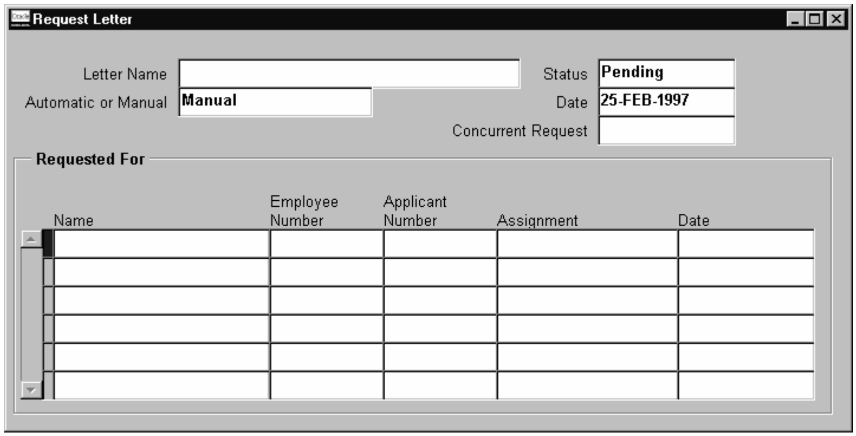
Requesting Letters for MultiMate or WordPerfect

When you, or other users, set the status for an applicant or enrollment that triggers your standard letters, Oracle HRMS creates a letter request automatically, with the status of Pending. It also adds the applicant's or student's name to the request. You can view the pending request and names through the Request Letter window.

Then, when you change the letter request from Pending to Requested, Oracle HRMS runs the SQL*Plus script that you previously wrote and creates the data file for mail merge. (Consult your installation guide for details of the location Concurrent Manager places the output file).

You can add further names to the list manually, if required. For example, you might have a last minute acknowledgement letter to send.

You can also create manual letter requests. If you do, enter the status of Pending yourself, then enter all the recipients of the letter before changing the status of the letter to Requested.



▶ **To submit an automatic letter request:**

1. Query the letter you require in the Letter Name field.
2. Ensure that the method is Automatic.
3. Move to the Requested for block to query the applicants, events or students which have been entered automatically on this request, according to their status. You can add further names manually.
4. Update the status from Pending to Requested.
5. Save your changes.

   A concurrent request ID number appears in the Concurrent Request field. When the Concurrent Manager has processed the request it changes the status to Completed.
6. You can query the request ID in the Concurrent Requests window and monitor its progress.

   > **Note:** Consult your installation guide for details of the location Concurrent Manager places the output file.

▶ **To create a manual letter request:**

1. Select the Letter Name for the letter type you want to request.

2. Ensure that the method is Manual.
3. Leave the status of the request as Pending.
4. Save the changes.

Adding the Names

- Select employees or applicants (for Oracle Human Resources) to receive the letter in the Requested For region.
- Select events or students or both (For Oracle Training Administration) in the Requested For region.

  This depends on how the letter has been set up on your system. For example, an enrollment confirmation letter might be defined so that it is sent to all students with the status Confirmed who are enrolled on the event selected in the Requested For region.

5. Save the changes.

Changing the Status

6. Update the status from Pending to Requested.
7. Save the changes.

   A concurrent request ID number appears in the Concurrent Request field. When the Concurrent Manager has processed the request it changes the status to Completed.

8. You can query the request ID in the Concurrent Requests window and monitor its progress.

   > **Note:** Consult your installation guide for details of the location Concurrent Manager places the output file.

Merging the Data File With the Standard Letter MultiMate or WordPerfect

The last step is to merge the data in the Data File with your skeleton letters to create your standard letters. The merging of text and data files is normally carried out using the mail merge features of your word processor.

If you do not have access to the directory where the Data File resides (consult your installation guide for details of the location Concurrent Manager places the file), you need to transfer the mail merge files created by the concurrent process to your word processor before you can merge the data file with the skeleton letters.

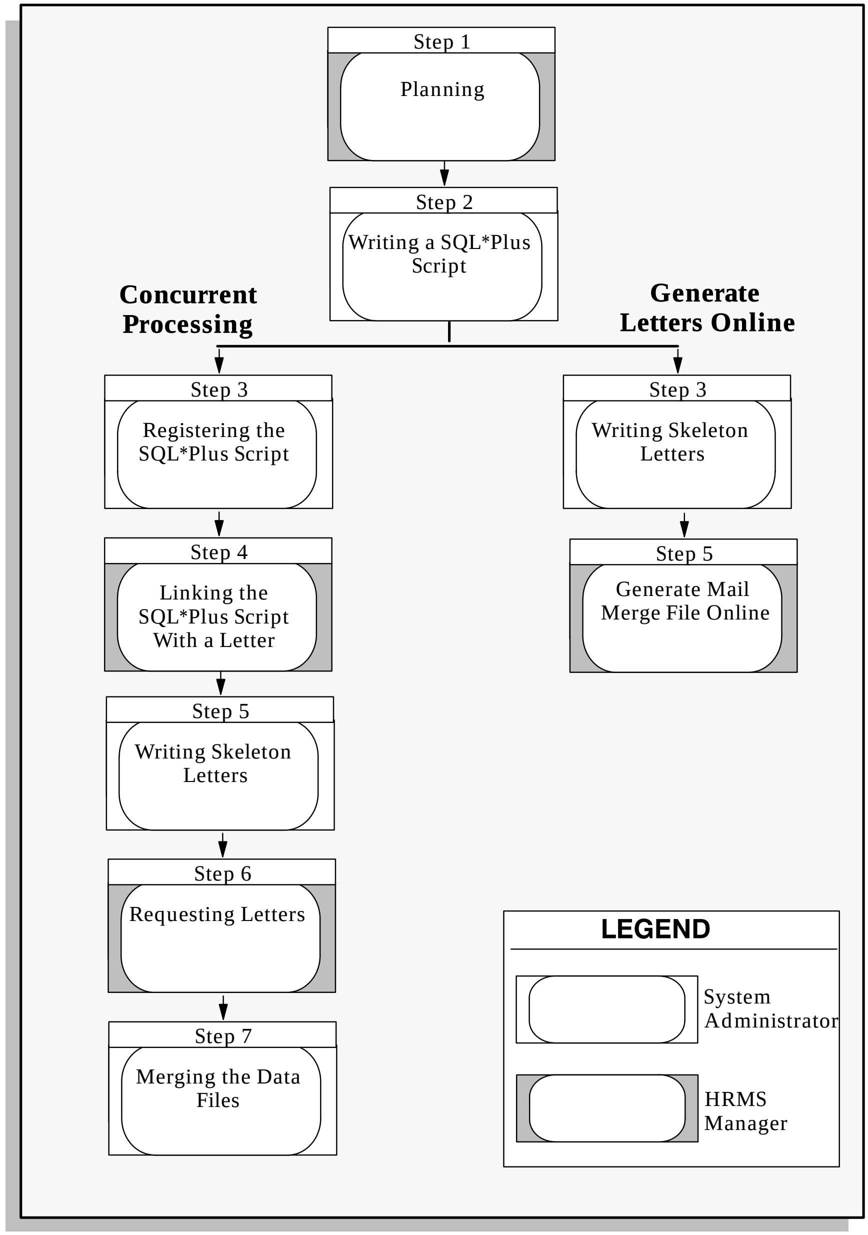
Saving the Letters You Generate

If you are using a word processor to merge the data file, you need to save the merged letters you generate. If you do not save the merged letters, when you exit the word processor you lose the letters. You do not lose the data file or the skeleton letter, however.

Flowchart for Setting Up Standard Letters Using Microsoft Word

Figure 10 – 4 illustrates the sequence in which you set up standard letters using Microsoft Word.

Figure 10 – 4
Using Microsoft Word



If you use Microsoft Word as your word processor, not only can you use the concurrent processing method to produce your standard letters, but you can also generate letters online.

You can use either one of two methods:

- Generate Microsoft Word letters using Object Linking and Embedding (OLE)
- Application Data Export (ADE)

☞ **Attention:** In future releases of Oracle HRMS, generating Microsoft Word letters using Object Linking and Embedding (OLE) will be replaced by ADE.

See: Application Data Export (ADE) Online Help

If you are setting up standard letters using the concurrent processing method, follow the same sequence as for MultiMate or WordPerfect. See: Flowchart for Setting Up Standard Letters Using MultiMate or WordPerfect: page 10 – 7

If you are generating Microsoft Word letters using Object Linking and Embedding (OLE), see Writing a SQL*Plus Script for Microsoft Word: page 10 – 18

Writing a SQL*Plus Script for Microsoft Word

Now that you have identified whether you want to associate the standard letters with student enrollment or applicant assignment statuses, you are ready to identify which data you want to extract from the database.

Oracle HRMS supplies SQL*Plus script templates. It also supplies two sample Microsoft Word documents containing merge codes for the SQL*Plus scripts. You can copy the SQL*Plus scripts from the server side sql directory of the HR or product tree. (Consult your installation guide for details).

Oracle Training Administration does not provide template scripts, but we provide an example of a Confirmation letter SQL mail merge file, see OTA SQL*Plus Script: page C – 8

You can copy the word documents from the client–side directory [APPL_TOP]\PER76\LETGEN.

You can run the scripts on the server side and make them accessible to other users across the network, or you must copy them to a directory which is accessible from the PC, such as a network drive. You must also make the Microsoft Word documents accessible to other users across the network, or you must copy them to each PC.

Templates Provided

The template scripts and Microsoft Word documents Oracle HRMS provides are:

Scripts and Documents	Purpose	Used By
PERWPOUS.sql	Example US Offer letter SQL mail merge file	HR
PERWPOUK.sql	Example UK Offer letter SQL mail merge file	HR
PERWPIUS.sql	Example US Interview letter SQL mail merge file	HR
PERWPIUK.sql	Example UK Interview letter SQL mail merge file	HR
PERWPOUS.doc	Example US Offer MS Word document	HR
PERWPOUK.doc	Example UK Offer MS Word document	HR
PERWPIUS.doc	Example US Interview MS Word document	HR
PERWPIUK.doc	Example UK Interview MS Word document	HR

One of the template SQL*Plus scripts is provided as an example, see Template SQL*Plus Script PERWPOUK: page C – 2

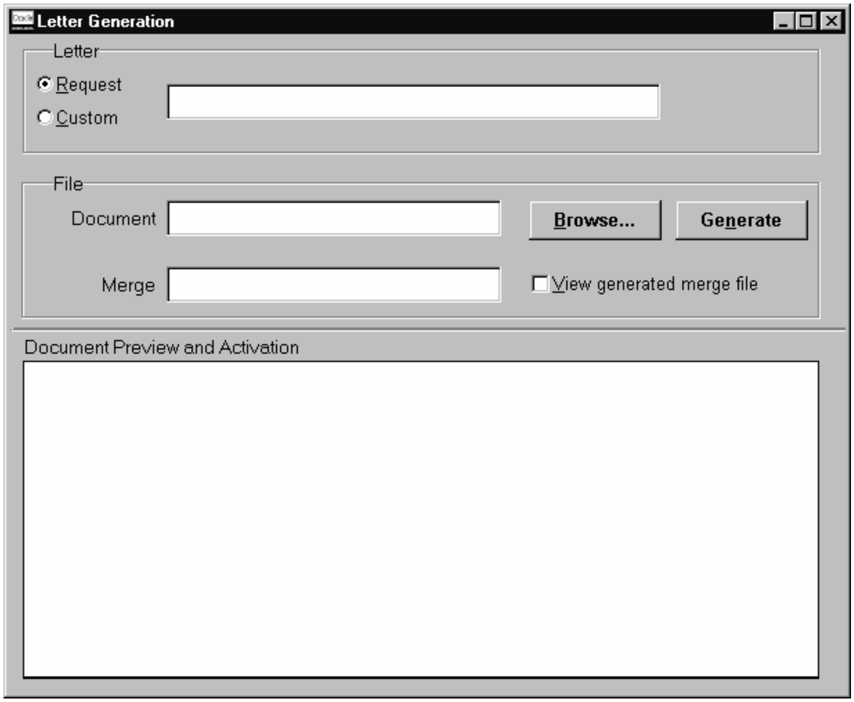
Oracle Training Administration does not provide template scripts, but we provide an example of a Confirmation letter SQL mail merge file, see OTA SQL*Plus Script: page C – 8

▶ **To write a SQL*Plus script for Microsoft Word:**

1. Write a SQL*Plus script to select data from the database in a format your word processor can read and is compatible with the standard letter.
2. Name the program PERWP*** (or OTAWP***).
3. Save the program. (Consult your installation guide for details).

Generating a Microsoft Word Letter

You can generate the Microsoft Word letter online using the Letter Generation window. This window uses Object Linking and Embedding (OLE) to display the Microsoft Word letter. When you start Microsoft Word from this window, your standard letter is automatically loaded and ready to be merged with the mail merge file.



▶ **To generate and merge a Microsoft Word document:**

1. Select one of the following in the Letter region:
   - *Request* if you want to process a pending letter request that the system has created automatically for applicants, or that you have created manually in the Request Letter window. Select the name of the letter request.
   - *Custom* if you want to process a custom program that is not associated with a letter type.
2. Position the cursor in the Document field and choose the Browse button.
3. Select the Microsoft Word document that is your skeleton letter.
4. Position the cursor in the Merge field and choose the Browse button.

5. Select the extract program (such as a SQL script) that extracts data from the database to create the mail merge file.

   You can run the scripts on the server side (consult your installation guide for details). Make them accessible to other users across the network, or copy them to each PC. You must also make the Microsoft Word documents accessible to other users across the network, or you must copy them to each PC.

6. Check View Generated Merge File if you want to examine the generated mail merge file before activating the Microsoft Word document then choose the Generate button to create the mail merge file.

   If the View Generated Merge File check box is checked, the file displays in the Windows Notepad application.

7. Double click on the document in the Document Preview and Activation block to open Microsoft Word with your standard letter displayed.

   The document displays in the Document Preview and Activation block.

8. Merge the data with the document.

   If the Microsoft Word document already contains mail merge fields, the mail merge file you have generated is automatically loaded in Microsoft Word.

9. You must open the merge file as the Data Source and insert the merge fields in your document if the document does not yet contain mail merge fields.

10. Save the document using the filename of your mail merge file, with a .doc extension.

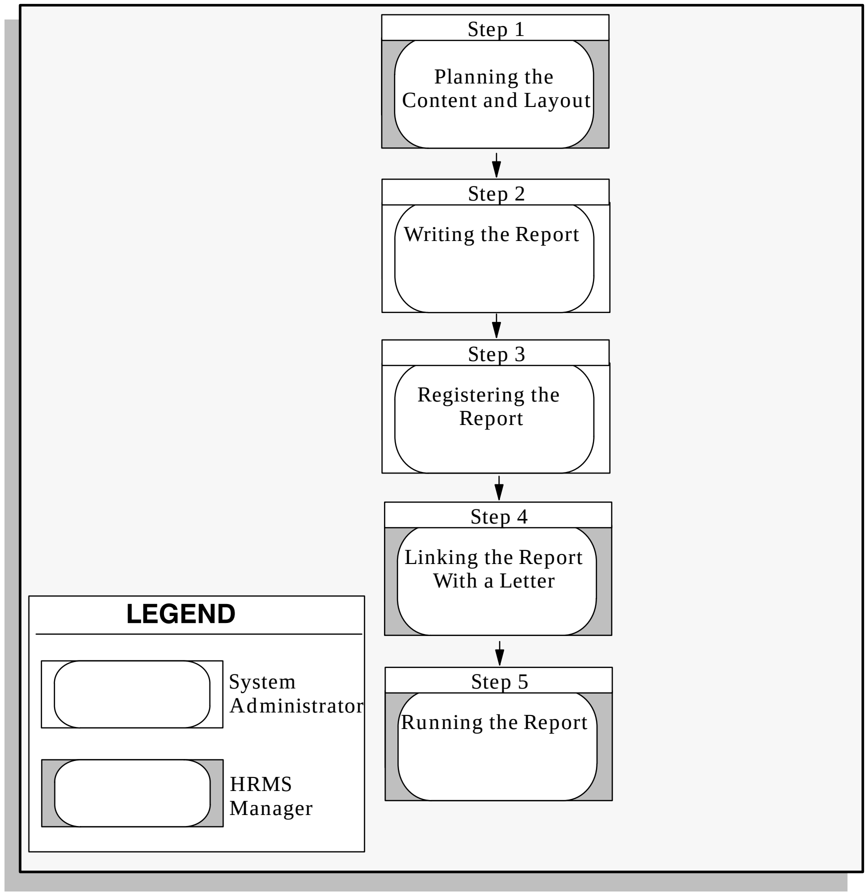
    Note: If you do not save the merged letters when you exit the word processor you lose them.

Using Oracle Reports

You can create a report for each letter using Oracle Reports, or another tool of your choice. The report contains the skeleton letter text and Select statements specifying the data to be extracted from the Oracle database.

Figure 10 – 5 illustrates the sequence in which you set up standard letters using Oracle Reports.

Figure 10 – 5
Using Oracle Reports



Planning the Content and Layout

One of the first tasks you need to perform is to identify which data you want to extract from the database to include in your standard letters. You need to identify the select statements to use to provide you with the data as the *content* of your letters. You also need to identify the text that you want to include as the *body* of your letters.

The next decision you need to make is whether you want to associate your standard letters with student enrollment or applicant assignment statuses.

If you do want to link your standard letters to student enrollment or applicant assignment statuses, your next decision is to identify which student enrollment or applicant assignment statuses you want to trigger your standard letters. For example, do you want to link your standard enrollment confirmation letter to the status Placed so that the letter is triggered when you set a student's enrollment status to Placed? Alternatively, do you want to link your standard rejection letter to the status Rejected so that it is triggered when an applicant's assignment status is set to Rejected?

Writing the Report

Now that you have identified whether you want to associate the standard letters with student enrollment or applicant assignment statuses, you are ready to identify which data you want to extract from the database.

Write your skeleton letter text and Select statements specifying the data to be extracted from the Oracle database

Registering the Report

You now need to register your report with Oracle HRMS. You register your report so that you can run it as a concurrent program. Name the file PERWP*** (or OTAWP*** for OTA). You must use this prefix for the system to recognise it.

You use the Concurrent Programs window to register your report (using a system administrator responsibility).

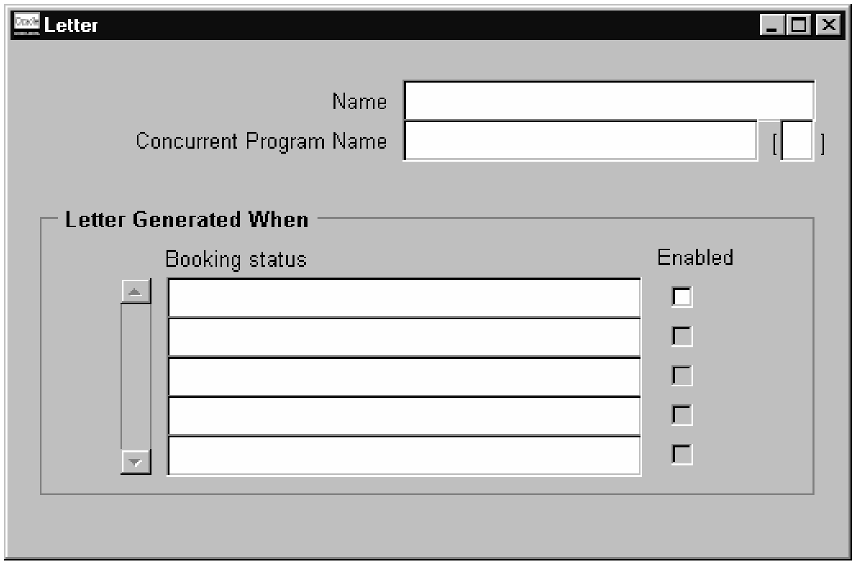
See: Concurrent Programs Window, *Oracle Applications System Administrator's Guide*

Linking the Report With a Letter

You need to link your report with a letter and one or more statuses. In Oracle Human Resources, you can link one or more applicant assignment statuses with each recruitment letter. A request for the letter is then created automatically when an applicant is given an associated assignment status. In Oracle Training Administration, you can link one or more enrollment statuses with each enrollment letter. A request for the letter is then created automatically when an enrollment is given an associated status.

For example, you can link your standard recruitment rejection letter to the status Rejected so that the letter is triggered when you set an applicant's assignment status to Rejected.

Define your standard letter types in the Letter window.



▶ **To define a standard letter type:**

1. Enter a name for the letter in the Name field.
2. Select the Concurrent Program Name assigned by your System Administrator to the report.
3. Select one or more enrollment statuses to create letter requests automatically for enrollments, and check the Enabled box.

   When an enrollment is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the enrollment is added to the list of people to receive the letter when you submit the request.

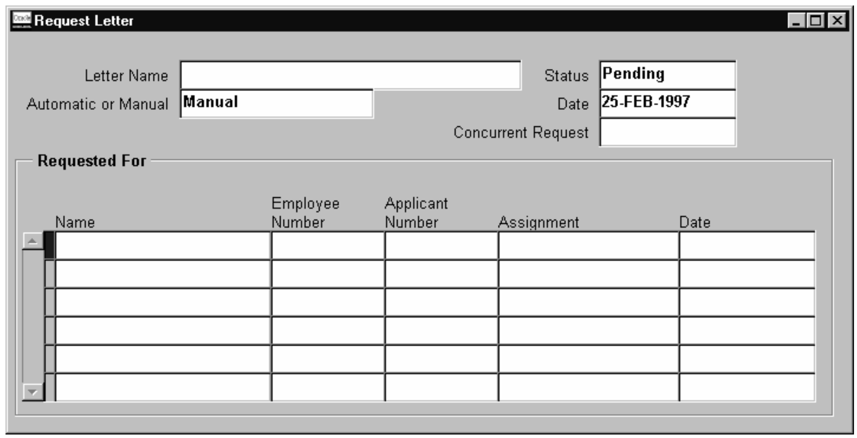
Running the Report

When you, or other users, set the status for an applicant or enrollment that triggers your standard letters. Oracle HRMS creates a letter request automatically, with the status of Pending. It also adds the applicant's or student's name to the request. You can view the pending request and names through the Request Letter window.

Then, when you change the letter request from Pending to Requested, Oracle HRMS runs the report that you created.

You can add further names to the list manually, if required. For example, you might have a last minute acknowledgement letter to send.

You can also create manual letter requests. If you do, enter the status of Pending yourself, then enter all the recipients of the letter before changing the status of the letter to Requested.



▶ **To submit an automatic letter request:**

1. Query the letter you require in the Letter Name field.
2. Ensure that the method is Automatic.
3. Move to the Requested for block to query the applicants, events or students which have been entered on this request automatically, according to their status. You can add further names manually.
4. Update the status from Pending to Requested.
5. Save your changes.

   A concurrent request ID number appears in the Concurrent Request field. When the Concurrent Manager has processed the request it changes the status to Completed.
6. You can query the request ID in the Concurrent Requests window and monitor its progress.

Note: Oracle HRMS saves the data file (consult your installation guide for details).

▶ **To create a manual letter request:**

1. Select the Letter Name for the letter type you want to request.
2. Ensure that the method is Manual.
3. Leave the status of the request as Pending.
4. Save the changes.

Adding the Names

- Select employees or applicants (for Oracle Human Resources) to receive the letter in the Requested For region.
- Select events or students or both (For Oracle Training Administration) in the Requested For region.

  This depends on how the letter has been set up on your system. For example, an enrollment confirmation letter might be defined so that it is sent to all students with the status Confirmed who are enrolled on the event selected in the Requested For region.

5. Save the changes.

Changing the Status

6. Update the status from Pending to Requested.
7. Save the changes.

   A concurrent request ID number appears in the Concurrent Request field. When the Concurrent Manager has processed the request it changes the status to Completed.

8. You can query the request ID in the Concurrent Requests window and monitor its progress.

   Note: Oracle HRMS saves the data file, consult your installation guide for details.

CHAPTER

11

Setting Up QuickCodes

QuickCodes provide lists of valid values on certain fields throughout the system. For many types of code you can add your own values and change the values that are predefined.

This chapter explains how to add values to predefined QuickCodes. It lists the predefined QuickCodes to which you can add values.

QuickCodes

Providing lists of valid values for certain items of information has two key advantages:

- It ensures that all users use the same terminology, which makes it easier to enquire and report on the information.
- It speeds up data entry because you can enter just enough to identify the value, and the system completes the entry.

In Oracle Applications, a list of values is called a QuickCode Type. Each value comprises a code and a meaning. For example:

QuickCode Type	Code	Meaning
YES_NO	Y	Yes
	N	No

The codes are used internally; users do not see them. There is a maximum of 250 QuickCodes for each QuickCode Type

Predefined QuickCode Types

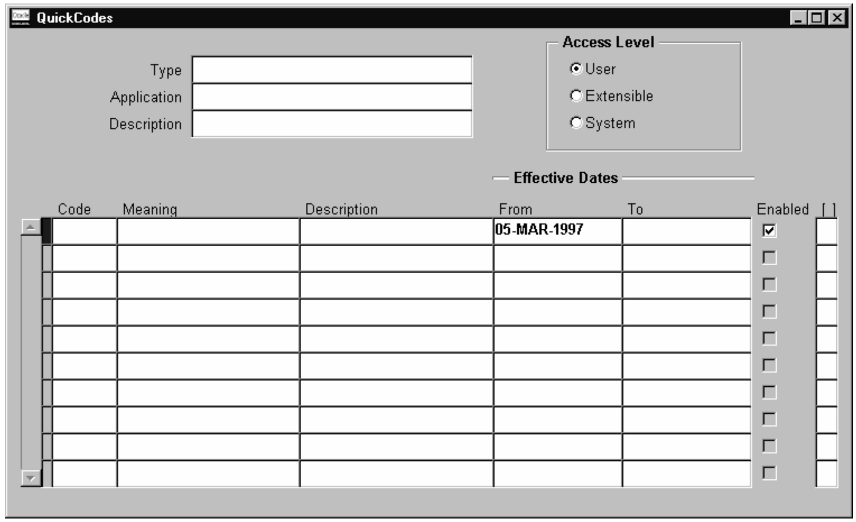
A number of QuickCode Types are included in Oracle Applications. Some contain codes as startup data. You can never delete these codes, but you can change their meaning. For some QuickCode Types, you can also disable the codes that are supplied. Your ability to disable codes and add new codes is determined by the *access level* of the QuickCode Type:

User	You can add codes and you can disable supplied codes.
Extensible	You can add new codes, but you cannot disable supplied codes because the system uses them.
System	You can neither add codes nor disable supplied codes. You can only change the meaning or description of supplied codes.

Table 11 – 1 lists the predefined QuickCode Types with an access level of User or Extensible.

Adding QuickCode Values

To add, disable, or change the meaning of a QuickCode, use the QuickCodes window.



▶ **To add QuickCodes:**

1. Query the QuickCode Type to which you want add a value.

   You cannot add values if the Access Level is System.

2. Enter a code and meaning. Optionally, enter a start and end date.

   If you do not enter a start date, the new QuickCode is valid immediately. If you do not enter an end date, the new QuickCode is valid indefinitely.

Removing QuickCode Values

You cannot delete QuickCodes after saving them, but you can stop them appearing in lists of values.

▶ **To remove a user defined QuickCode:**

■ In the QuickCodes window, do one of the following:

- Disable the code by unchecking the Enabled check box if you want to prevent users selecting this value on any date.
- Enter an end date if you want to prevent users selecting this value after a certain date.

- Change the meaning and description to create a replacement QuickCode.

If you disable the QuickCode or set an end date, users cannot select this value when they create new records. However, they can continue to see the value when they query records that contain it.

If you add, disable, or change the meaning of a QuickCode, users must log out and log back in again for your changes to take effect.

User and Extensible QuickCodes

You can add new QuickCodes to the following QuickCode Types in Oracle Training.

Field	QuickCodes
Category	ACTIVITY_CATEGORY
Success Criteria	ACTIVITY_SUCCESS_CRITERIA
Status	ACTIVITY_USER_STATUS
Source (of enrollment)	BOOKING_SOURCE
Failure	DELEGATE_FAILURE_REASON
Event Type	DEV_EVENT_TYPE
Reason For Change	ENROLMENT_STATUS_REASON
User Status	EVENT_USER_STATUS
Type (of Finance Line)	FINANCE_LINE_TYPE
Units (of time)	FREQUENCY
Priority	PRIORITY_LEVEL
Type (of Professional Credit)	PROFESSIONAL_CREDIT_TYPE
Group	PROGRAM_MEMBERSHIP_GROUP
Role	PROGRAM_MEMBERSHIP_ROLE
Type (of Resource)	RESOURCE_TYPE
Reason	RESOURCE_USAGE_REASON
Training Center	TRAINING_CENTRE
Trainer Role	TRAINER_PARTICIPATION
Unit	TRAINING_UNIT

Table 11 – 1 User and Extensible QuickCodes

CHAPTER

12 Customizing Functions and Setting Up Security

This chapter explains how you can set up security and customize Oracle Training Administration in your enterprise so that users see only the windows and functions they need to perform their jobs.

Oracle Training Administration gives you a flexible approach to controlling access to records, windows and functions. This means you can suit each employee's level of access to their work responsibilities.

Setting up security is usually part of the system administrator's role.

Customizing Functions and Setting Up Security

Once you have set up Oracle Training Administration, you can set up security and customize Oracle Training Administration so that users only see the windows and functions they need to perform their jobs. By doing this, you ensure that your data is secure, and that users have access appropriate to their needs.

Oracle Training Administration gives you a flexible approach to controlling access to records, windows and functions. This means you can suit each employee's level of access to their work responsibilities.

Find out why and how to set up security and customize Oracle Training Administration:

- Set Up Security: page 12 – 3
- Customize Functions, Enrollments and Activities Windows: page 12 – 9

Setting Up Security

Before you set up security, you should answer the following questions:

- Who are the users?
- What are the functional forms and areas these users should have access to?

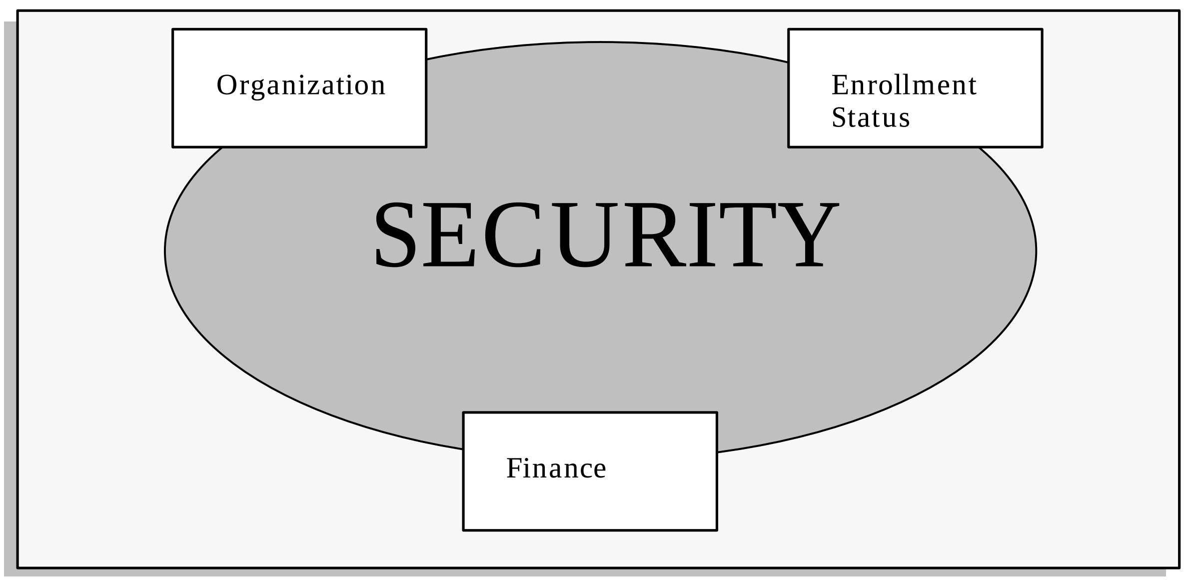
The best way to ensure that your data is secure is to give users access only to those windows and functions that they require to perform their jobs.

The best ways you can control and restrict access within Oracle Training Administration include setting up:

- organization security: page 12 – 3
- enrollment status security: page 12 – 5
- financial security: page 12 – 6

Setting up security is usually part of the system administrator's role.

Figure 12 – 1
Setting Up Security



Setting Up Organization Security

If you have Oracle HRMS at your enterprise, you can identify which employees belong to the organization sponsoring and managing an event.

Set up organization security if you want to enable only those users who belong to the sponsoring organization to update and delete events and to enroll students onto those events and update the enrollment.

How Does Organization Security Work?

A Secure check box exists on the Scheduled Event and Programs windows. If a user who belongs to the organization sponsoring (administering) the event or program checks this box, only users who belong to the same organization can do the following:

Events

Update and delete events, or enroll and maintain students onto those events. This also includes enrolling and maintaining customers on customer–based events.

All other users who do not belong to the sponsoring organization are unable to update and delete events. They are also unable to:

- enroll students onto those events (and customers for customer–based events)
- update an enrollment
- delete an enrollment

You also prevent users who do not belong to the sponsoring organization from creating, deleting or updating the following for the event:

- sessions
- internal assignments
- categories
- event associations

A user from the sponsoring organization is able to remove security from an event, providing no enrollments exist for the event, if required.

Programs

Update and delete programs, or enroll and maintain students (and customers for customer–based events) onto events within the program.

All other users who do not belong to the sponsoring organization are unable to update and delete programs. They are also unable to:

- enroll students or customers onto those events within the program

- update an enrollment within the program
- delete an enrollment within the program

What if You Do Not Set Up Organization Security?

If you do not set up organization security, all users can update and delete events and programs and enter, delete and update enrollments.

Setting Up Enrollment Status Security

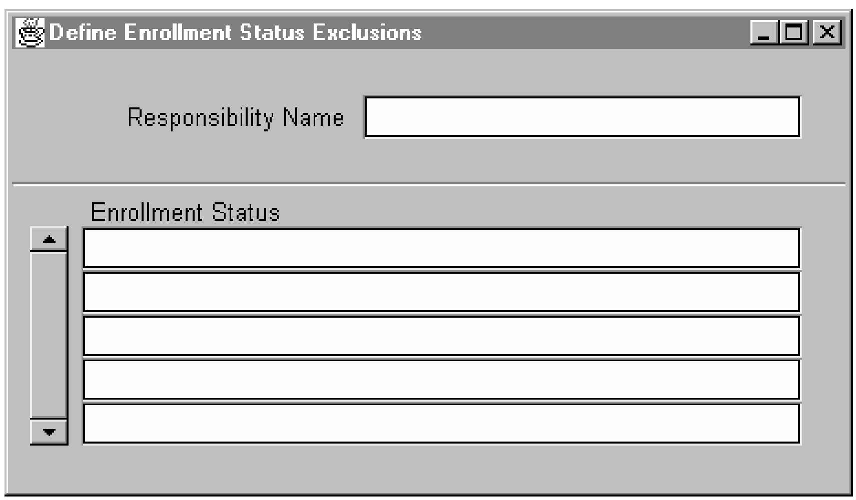
Set up enrollment status security if you want to prevent users with specific responsibilities from entering, updating or deleting enrollments of a certain status(es). For example, your enterprise might use responsibility to allow all users to request enrollments, but allow only the course administrator to place an enrollment.

How Does Enrollment Status Security Work?

Once you set up enrollment status security, users with a specific responsibility are unable to enter, update or delete enrollments of a certain status(es).

How to Set Up Enrollment Status Security

Use the Enrollment Status Exclusions window to select the responsibility and the enrollment statuses that users of this responsibility cannot select.



▶ **To set up enrollment status security:**

1. Query the responsibility for which you want to prevent users from entering and updating enrollments.
2. Select the enrollment status that you want to prevent this responsibility from entering and updating.
3. Continue to enter enrollment statuses that you want to prevent this responsibility from entering and updating, if required, then save your changes.

Setting Up Financial Security

Set up financial security if you want to restrict which users can enter, update and delete financial information, and which ones cannot. You can set up financial security to enable certain users to change financial values, while excluding others.

How Does Financial Security Work?

You can prevent users of a certain responsibility from being able to update and delete the following amounts:

- monetary
- unitary (invoice)
- standard

Monetary and Unitary (Invoice) Amounts

If you want to prevent users from updating and deleting the following:

- monetary amounts
- unitary (invoice) amounts

You need to enter the function OTA_FIN_ST_PRICE_NO_UPDATE on the menu for that responsibility.

Standard Amounts

If you want to prevent users from updating and deleting standard amounts, you need to enter the function OTA_FIN_MONEY_NO_UPDATE on the menu for that responsibility.

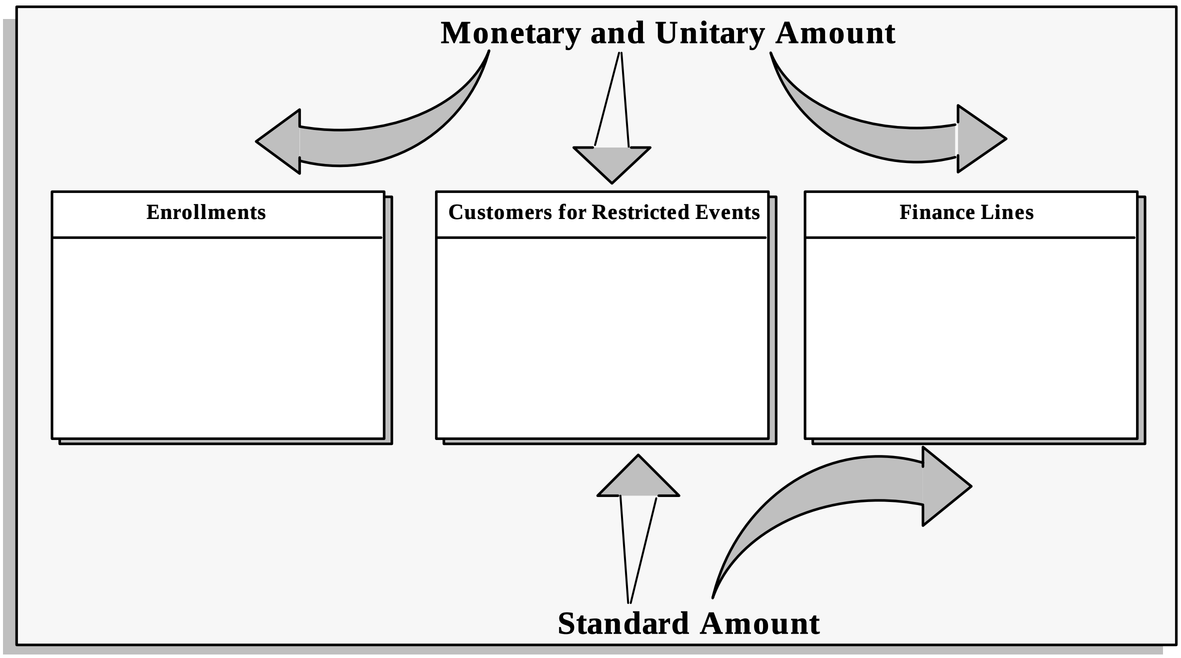
Which Windows Does Financial Security Affect?

Once financial security has been set up (depending upon whether you are preventing users from updating money, unitary or standard amounts), it affects the following windows:

- Enrollment Details
- Customers for Restricted Event
- Finance Lines

Figure 12 – 2 illustrates which windows are affected: by money, unitary or standard amounts.

Figure 12 – 2
Financial Security



How to Set Up Financial Security

Use the Menus window to set up financial security.

▶ **To set up financial security:**

1. Query the OTA_NAV menu.
2. Insert a new line and enter the sequence number.

   Note: Do not enter values in the Navigator Prompt, Submenu or Description fields.

3. Enter OTA_FIN_ST_PRICE_NO_UPDATE in the Function field to prevent users from updating and deleting monetary and unitary amounts.

4. Insert a new line and sequence number and enter OTA_FIN_MONEY_NO_UPDATE in the Function field to prevent users from updating and deleting standard amounts.

5. Save your changes.

Customizing Functions, Enrollments and Activities Windows

You can customize Oracle Training Administration in your enterprise so that users see only the windows and functions they need to perform their jobs. Function security enables you to define which functions users see when they enter a student enrollment, or whether they enter competencies or skills delivered by an activity.

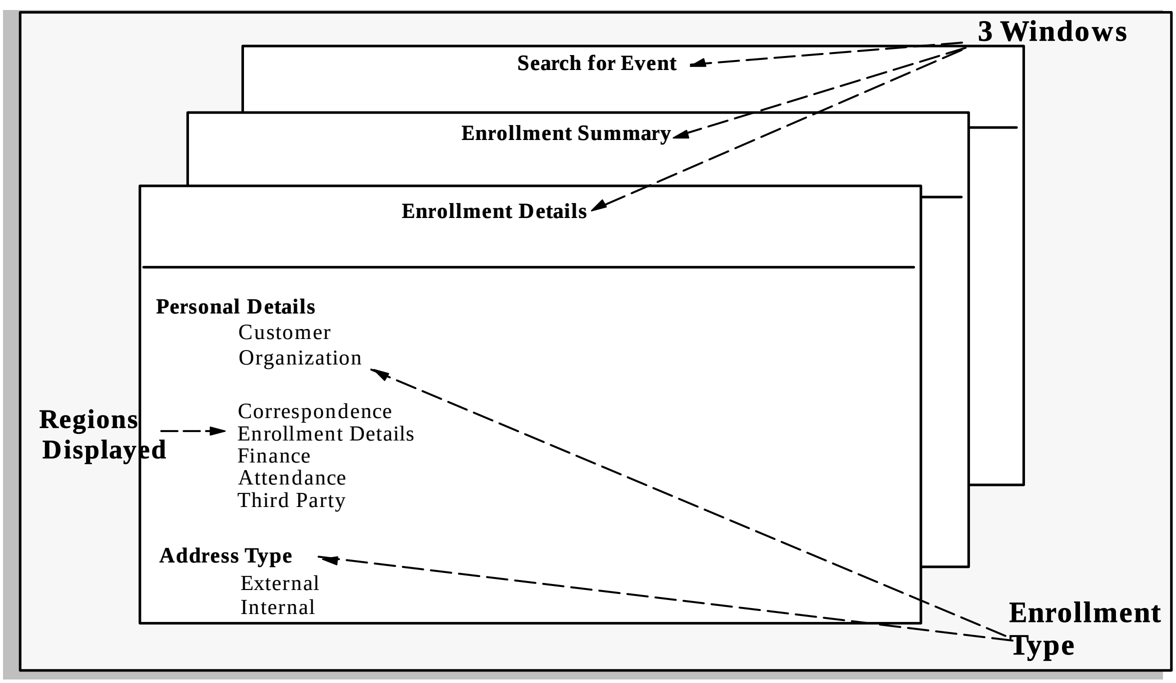
Enrollments Windows

You use parameters to customize the following functions:

- which windows (Enrollment Summary, Enrollment Detail, and Search for Event) appear by default when users choose the Enrollments menu option
- which regions of the Enrollment Detail window are displayed
- whether users can enter employee enrollments, customer enrollments, or both in the Enrollment windows

Figure 12 – 3 illustrates what users see when they enter an enrollment if you do not customize Oracle Training Administration.

Figure 12 – 3
Customizing Functions



Delivered Competencies Windows

You use parameters to enable users to enter and hold qualifications, attributes and knowledge that students can expect to attain by attending training activities as competencies, skills or a mixture of both (if you have Oracle Human Resources and OTA installed).

You also use parameters to enable selected users to add competencies gained through an activity directly to a student's Competence Profile.

Customizing Enrollments Windows

You can customize the Enrollments windows in the following ways:

- which windows (Enrollment Summary, Enrollment Detail, and Search for Event) appear by default when users choose the Enrollments menu option

  See: Number of Enrollments Windows Displayed: page 12 – 10

- which regions of the Enrollment Detail window are displayed
- whether users can enter employee enrollments, customer enrollments, or both in the Enrollment windows

Number of Enrollments Windows Displayed

When you first install the application, the three windows (Enrollment Summary, Enrollment Detail and Search for Event) appear by default when users choose the Enrollments menu option. If you do not want all three to appear, you need to enter up to two of the following parameter values:

- EVENT=NO

  This prevents the Search for Event window from displaying

- SUMMARY=NO

  This prevents the Enrollment Summary window from displaying

- DETAIL=NO

  This prevents the Enrollment Detail window from displaying

Suggestion: You cannot have just the Search for Event window open on its own. If you did, users could not enter event details. We suggest that you leave at least the Enrollment Detail window as the default.

To customize the number of Enrollments windows displayed, see Customizing Functions: page 12 – 12

Regions Displayed

You are provided with five regions (also known as canvasses) on the Enrollment Detail window by default. You cannot prevent two of the regions from being displayed. These are:

- CORRESPONDENCE – the Correspondence region
- ENROLLMENT_DETAILS – the Enrollment Details region

You can, however, prevent the other three regions from displaying, if required. For example, you can prevent the Third Party Contact region from displaying if your enterprise handles external enrollments only.

You prevent any of the three regions from displaying by changing the parameter values from YES to NO. For example:

- FINANCE=NO

  This prevents the Finance region from displaying
- ATTENDANCE=NO

  This prevents the Attendance region from displaying
- THIRD_PARTY=NO

  This prevents the Third Party Contact region from displaying

If you do not change the values for the three updatable parameters, users see all five regions in the Enrollments window.

Suggestion: You can delete these three parameters instead of changing them to NO, if required. However, we suggest that you change them to NO rather than deleting them in case you want to display the regions in future.

To customise the regions displayed, see Customizing Functions: page 12 – 12

Enrollment Types

You can also define whether users can enter the following types of enrollments in the Enrollment windows:

- internal organization (employee)
- customer
- both internal organization (employee) and customer

If you want users to enroll internal students only, you define INTERNAL in the parameters. If you want users to enroll customer students only, you define EXTERNAL. Then, when users select the

Enrollments window, they get the appropriate region (Customer or Organization) to meet your enterprise's needs.

If you want users to enroll organization and customer students, you can specify both in the parameters. You can even identify whether you want the window to default to either the Customer or Organization region. This is useful, for example, if your enterprise enrolls mainly external students but you occasionally enroll internal students. In this case, the Customer region is displayed on the Enrollment Details window, but the user can change it to Organization, when required.

You customize enrollment types by entering one of the following parameter values:

- ENROLLMENT_TYPE=INTERNAL

  The Organization region is displayed
- ENROLLMENT_TYPE=EXTERNAL

  The Customer region is displayed
- ENROLLMENT_TYPE=BOTH_INTERNAL

  The Organization region is the default
- ENROLLMENT_TYPE=BOTH_EXTERNAL

  The Customer region is the default

  Note: ENROLLMENT_TYPE=BOTH_INTERNAL is provided as the default.

▶ To customize functions:

Use the Form Functions window to customize the enrollment type.

1. Query the function to customize, for example, OTATAEDB.
2. Enter the parameters you require to customize the Enrollments windows in the Parameters field.

   For example, if you want to display only the Enrollment Detail window with the Finance and Attendance region for both organization and customer students (defaulting to customer), enter the following:

   ```
   EVENT=NO SUMMARY=NO THIRD_PARTY=NO
   ENROLLMENT_TYPE=BOTH_EXTERNAL
   ```
3. Save your work.

Defining Functions to Implement the Competence Approach

If you have Oracle Human Resources and OTA installed in your enterprise, and you are implementing the competence approach, you can hold the qualifications, attributes and knowledge that students can expect to attain by attending training activities as competencies, skills or a mixture of both (competencies and skills). You can also allow specific users to add the competencies delivered by the activity to a student's Competence Profile.

Remember, to use skills, you need to set up Special Information Types. See: Skills Information: page 4 – 4

To use competencies, you need to set up a framework of competencies. See: *Introducing Career Management Activities, (Oracle Human Resources User's Guide)*

Delivering Competencies or Skills Through Training Activities

You define functions to enable you to phase in the delivery of competencies through training activities. Functions enable you to indicate whether you want the Skills or the Competencies buttons to be available from the Activities window. When you first receive OTA, the Skills button already appears on the Activities window for users to enter skills. If you want users to enter competencies and not skills, you need to change the parameter values COMPETENCIES from NO to YES, and SKILLS from YES to NO.

You prevent either of the Competencies or Skills buttons from displaying by changing the parameter values from YES to NO. For example:

- COMPETENCIES=NO

  This prevents the Competencies button from displaying

- SKILLS=NO

  This prevents the Skills button from displaying

Updating a Student's Competence Profile Through Training Activities

You also define functions to enable selected users to add competencies gained through an activity directly to a student's Competence Profile. If you want selected users to add competencies to students Competence Profiles, enter the following:

- DISPLAY_MODE="BOTH" COMPETENCIES="YES"

  Note: Only the COMPETENCIES="YES" part of this string is required to add competencies to students Competence Profiles.

You use the Form Functions window to define functions to implement the competence approach.

▶ To define functions:

1. Query the function to customize.

   This is **OTA_OTAPDDAV** to define the Competencies or Skills buttons on the Activities window, and **OTA_OTATAEDB** to add competencies to the students Competence Profiles.

2. Enter the parameters you require in the Parameters field.

   For example, if you want selected users to add competencies to students Competence Profiles, enter the following:

   ```
   DISPLAY_MODE=”BOTH” COMPETENCIES=”YES”
   ```

3. Save your work.

APPENDIX

A Default Menus

This appendix shows you the default menu path for every window in Oracle Training Administration. Your system administrator can define new menus appropriate to the responsibilities at your site.

The first section shows the structure of the default menus for the default responsibility. The second section is arranged alphabetically by window title and shows how to find each window.

Default Navigation Menus for Oracle Training Administration

MENU ENTRY		DESCRIPTION
Enrollments		Enroll students and customers on events
	Student	Create and maintain student enrollments
	Customer	Create and maintain customer enrollments for restricted events
Activities		Create and maintain activities
Events		Create, maintain, and search for events
	Scheduled	Create and maintain scheduled events based on activities
	Programs	Create and maintain programs of multiple events
	Development	Create and maintain development events
	One–Time	Create and maintain one time events
	Event Search	Search for events
Resources		Define resources and administer bookings
	Definitions	Create and maintain resources
	Bookings	Administer resource bookings
Finance		Create and maintain finance details, price lists, and enrollment agreements
	Headers and Lines	Create and maintain finance headers and lines
	Price Lists	Create and maintain price lists for activities
	Enrollment Agreements	Create and maintain discounts and prepurchase agreements
Letters		Define and administer standard letters
	Definitions	Associate letter types with enrollment statuses
	Requests	Request a mailmerge file for standard letters
Personal Information		Create and maintain people and personal information
Organizations		Create and maintain customers, suppliers, and training organizations
	Customers	Create and maintain customers
	Suppliers	Create and maintain suppliers of activities and resources
	Training Organizations	Create and maintain organizations and Business Groups
	Locations	Create and maintain locations for organizations
Setup		Create and maintain reference information

	MENU ENTRY	DESCRIPTION
	Enrollment Status Exclusions	Prevent users from a responsibility from entering enrollments of a certain status
	Enrollment Statuses	Create and maintain enrollment statuses
	Category Usages	Specify use of activity categories for programs, packages, and reporting
	Skill Types	Enable skill types and specify their usage
	Lookup Codes	Create and maintain values and meanings for QuickCodes
	Personal Profile Options	Review your personal profile options
Customer and Supplier		Define and administer standard letters
	Calendar	Create a calendar to define an accounting year and periods
	Set of Books	Define the functional currency, account structure and accounting calendar for each company or group of companies
	Choose Set of Books	Define the accounting practices to follow for that set of books
	Financials Options	Define financials options
	System Options	Define system options
Reports		
	Submit Report	Submit and run reports
	View Report	View reports online

Windows and their Navigation Paths

This topic shows the default navigation paths for all the windows in Oracle Training Administration, as they are supplied. The responsibility that you use determines which of these windows you can use and how you access them. Your system administrator sets up navigation menus for your responsibility.

Activities

- Choose Activities in the Navigator.

Assignments for Restricted Event (Oracle HR users only)

1. Choose Events –> Scheduled in the Navigator.
2. Enter or query an event and check the Restricted box.
3. Choose the Assignments button.

Availability

1. Choose Resources –> Bookings in the Navigator.
2. Select a Resource Type and enter a date in the From field.
3. Choose the Availability button.

Book Required Resources

1. Choose Resources –> Bookings in the Navigator.
2. Check the Use Event check box.
3. Choose the Book Required button.

Book Resources

- Choose Resources –> Bookings in the Navigator.

Business Group Information

1. Choose Organizations –> Training Organizations in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button.

Calendar

- Choose Customer and Supplier –> Calendar in the Navigator.

Category Usages

- Choose Setup –> Category Usages in the Navigator.

Change Price List Dates

1. Choose Finance –> Price Lists in the Navigator.
2. Query the price list in the Price List window
3. Choose the Change Dates button.

Change Prices for Entries Within a Price List

1. Choose Finance –> Price Lists in the Navigator.
2. Query the price list on which you want to change prices.
3. Choose the Change Prices button.

Checklist

1. Choose Resources –> Bookings in the Navigator.
2. Query a scheduled event in the Search for Event window.
3. Check the Use Event check box in the Book Resources window.
4. Choose the Show Checklist button.

Choose Set of Books

- Choose Customer and Supplier –> Choose Set of Books in the Navigator.

Competencies

1. Choose Activities in the Navigator.
2. Enter or query an activity.
3. Choose the Competencies button.

Copy Activity

1. Choose Activities in the Navigator.
2. Enter or query an activity.
3. Choose the Copy Objects button.

Copy Template

1. Choose Enrollments –> Student in the Navigator.
2. Choose the Functions button and select Template.

Customer Addresses

1. Choose Organizations –> Customers in the Navigator.
2. Enter or query a customer.
3. Choose the Open button.

Customers

- Choose Organizations –> Customers in the Navigator.

Customers for Restricted Event

- Choose Enrollments –> Customer in the Navigator.

Development Events

- Choose Events –> Development in the Navigator.

Enrollment Agreements

- Choose Finance –> Enrollment Agreements in the Navigator.

Enrollment Detail

- Choose Enrollments –> Student in the Navigator.

Enrollment Mass Update

1. Choose Enrollments –> Student in the Navigator.
2. Query the enrollments to update.
3. Choose the Mass Update button in the Enrollment Summary window.

Enrollment Status Exclusions

- Choose Enrollment Status Exclusions –> Setup in the Navigator.

Enrollment Status History

1. Choose Enrollments –> Student in the Navigator.
2. Query the event for which to view enrollments.
3. Choose the History button in the Enrollment Detail window.
4. Select Enrollment Status History.

Enrollment Statuses

- Choose Setup –> Enrollment Statuses in the Navigator.

Enrollment Summary

- Choose Enrollments –> Student in the Navigator.

Enter Categories

1. Choose Activities in the Navigator.
2. Enter or query an activity.
3. Choose the Categories button.

Enter Person

- Choose Personal Information in the Navigator.

Extend a Price List

1. Choose Finance –> Price Lists in the Navigator.
2. Query the price list you want to extend.
3. Choose the Copy List button.

Event Categories

1. Choose Events –> Scheduled in the Navigator.
2. Enter or query an event.
3. Choose the Categories button.

Event Sessions

1. Choose Events –> Scheduled in the Navigator.
2. Enter or query an event.
3. Choose the Sessions button.

Event Status Change

1. Choose Events –> Scheduled in the Navigator.
2. Enter or query an event.
3. Choose the Change Status button.

Finance Lines

1. Choose Finance –> Finance Headers and Lines in the Navigator.
2. Enter or query a finance header.
3. Choose the Finance Lines button.

Financials Options

- Choose Customer and Supplier –> Financials Options in the Navigator.

Find Events

1. Choose Events –> Event Search in the Navigator.
2. Choose the Find button on the Toolbar.

Header (Finance)

- Choose Finance –> Headers and Lines in the Navigator.

Header Cancellation (Finance)

1. Choose Finance –> Headers and Lines in the Navigator.
2. Query the header in the Finance Header window.
3. Choose the Cancel Invoice button.

Header Re–creation (Finance)

1. Choose Finance –> Headers and Lines in the Navigator.
2. Query a header in the Finance Header window that has the status Successful Transfer.
3. Choose the Cancel / Recreate button.

Header Reinstatement (Finance)

1. Choose Finance –> Headers and Lines in the Navigator.
2. Query the header in the Finance Header window.
3. Choose the Reinstate button.

Letter Definitions

- Choose Letters –> Definitions in the Navigator.

Letter Requests

- Choose Letters –> Requests in the Navigator.

Location

- Choose Organizations –> Locations in the Navigator.

Lookup Codes

- Choose Setup –> Lookup Codes in the Navigator.

One–Time Events

- Choose Events –> One–Time in the Navigator.

Organization

- Choose Organizations –> Training Organizations in the Navigator.

Personal Information (Oracle HR users only)

1. Choose Personal Information in the Navigator.

Personal Profile Values

- Choose Setup –> Personal Profile Options in the Navigator.

Prepurchased Amount

1. Choose Finance –> Enrollment Agreements in the Navigator.
2. Enter or query a prepurchase agreement.
3. Choose the Finance button.

Price Lists

- Choose Finance –> Price Lists in the Navigator.

Programs

- Choose Events –> Programs in the Navigator.

Program Default Events

1. Choose Events –> Programs in the Navigator.
2. Enter a title to identify the program.
3. Select a category of activities.
4. Select a status.
5. Check the Restricted check box to restrict enrollments to internal students, otherwise, leave the box unchecked.
6. Select the price basis for the program:
7. Enter the price basis details.
8. Save your work.

9. Choose the Defaults button.

Program Default Event Edit

1. Choose Events –> Programs in the Navigator.
2. Query the event to edit.
3. Choose the Defaults button.

QuickCodes

- See Lookup Codes

Request Letter

- Choose Letters –> Requests in the Navigator.

Resource

- Choose Resources –> Definitions in the Navigator.

Resource Usages

1. Choose Activities in the Navigator.
2. Enter or query an activity.
3. Choose the Resources button.

Resources Booked

1. Choose Resources –> Bookings in the Navigator.
2. Choose the Book Required or Resource Search button in the Book Resources window.

Resources Search

1. Choose Resources –> Bookings in the Navigator.
2. Query a scheduled event in the Search for Event window.
3. Check the Use Event check box in the Book Resources window.
4. Choose the Resource Search button.

Scheduled Event

- Choose Events –> Scheduled in the Navigator.

Search for Event

- Choose Events –> Event Search in the Navigator.

Set of Books

- Choose Customer and Supplier –> Set of Books in the Navigator.

Setup Options

1. Choose Enrollments –> Student in the Navigator.
2. Choose the Functions button and select Setup Options.

Skill Provisions

1. Choose Activities in the Navigator.
2. Enter or query an activity.
3. Choose the Skills button.

Special Information Types

- Choose Setup –> Skill Types in the Navigator.

Student Enrollment History

1. Choose Enrollments –> Student in the Navigator.
2. Query the student for which to view enrollment history.
3. Choose the History button in the Enrollment Detail window.
4. Select Student Enrollment History.

Submit a New Request

1. Choose Processes and Reports –> Submit Processes and Reports in the Navigator.
2. Select Single Request or a Request Set.

Suppliers

1. Choose Organizations –> Suppliers in the Navigator.
2. Choose the Open button.

Suppliers Summary

- Choose Organizations –> Suppliers in the Navigator.

System Options

- Choose Customer and Supplier –> System Options in the Navigator.

APPENDIX

B Key and Descriptive Flexfields

A *flexfield* is a field that enables you to customize and extend Oracle Applications. Each flexfield has the characteristics of separate fields known as *segments.* There are two types of flexfield:

- Descriptive flexfields enables you to define additional information you want to record in the windows.
- Key flexfields are the mechanism by which you customize some important parts of the system.

This appendix lists the flexfields in Oracle Training Administration and summarizes what you need to set up.

User Definable Key Flexfields

In Oracle Training Administration there are two key flexfields:

- Training Resource
- Personal Analysis

You can set up an unlimited number of structures for these flexfields. Each separate structure can have up to 30 segments.

You do not need to define structures for these flexfields before you begin using Oracle Training Administration. Define them only when you want to define resources and skill types.

> **Note:** If you do not have Oracle Financials in your enterprise, you also need to define an accounting flexfield. If you already have Oracle Financials, the flexfield you require already exists.

Training Resource Key Flexfield

Every resource in Oracle Training Administration is of a certain type, such as trainer, venue, training guide, visual display equipment, or stationery. You define your own types, and for each type you define a structure of the Training Resource key flexfield. The name of the structure must be the same as the name of the resource type.

When users book resources, the resource names they see are made up of a combination of segment values. The segment values are displayed, not the meanings. The combination of segment values must be unique.

> **Suggestion:** Avoid segments containing information that may change regularly. There is no history of changes to the combinations you create.

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

Personal Analysis Key Flexfield

The Personal Analysis flexfield lets you add skills information to personal records in Oracle Human Resources and to training activities in Oracle Training Administration.

You can create any number of structures per Business Group for this flexfield. Each one represents a Special Information Type (which is a skill type in Oracle Training Administration). You link each structure to a Business Group in the Special Information Types window while you are logged on to that Business Group. In this window, check the Skill check box for the Special Information Types you plan to use to record skills in Oracle Training Administration.

Other Key Flexfields Associated with the Business Group

There are a number of other key flexfields, used in Oracle Human Resources, for which a structure name must exist so that you can associate it with your Business Group. These are:

- Job Name
- Position Name
- Grade Name
- People Group
- Cost Allocation

If you base your Business Group on the supplied setup Business Group, default structure names are already defined and associated with the Group. If you create a new Business Group, you must select the default structure names (or your own structures) in the Business Group Information window, which opens from the Organization window.

See Also

Oracle Human Resources User's Guide

Oracle Applications Flexfields Guide

User Definable Descriptive Flexfields

All window zones in which you can enter information contain a user definable descriptive flexfield. You decide in which zones you want to record additional information. Each user definable descriptive flexfield has 20 segments that you can define. After you define a descriptive flexfield, Oracle Applications treat the segments as part of the window.

For each segment, you can define its prompt, the type of data it can contain, and the values a user can enter. You can provide a list or range of valid values. You also control the size and display characteristics of each segment and the order in which the segments appear.

You can define two types of descriptive flexfield segments:

- Global segments, which always appear in the window.
- Context sensitive segments, that appear only when a defined context exists. You can prompt the user to provide the context, or you can provide the context automatically from a reference field in the same zone.

  For example, a segment to hold a cost code might appear only for internal student enrollments.

☞ **Attention:** Some descriptive flexfields appear in more than one window. Check all of the windows that use a descriptive flexfield before you define any of the segments. This is especially important if you intend to make the flexfield context sensitive to another field. You must ensure that the reference field is present in all of the windows that use the flexfield.

Refer to Table B – 1 for a full list of descriptive flexfields in Oracle Training Administration: page B – 5

Protected Descriptive Flexfields

Oracle HRMS supplies several descriptive flexfields that are predefined and protected. Your localization team defines these flexfields to meet the specific legislative and reporting needs of your country. When you use the Organization window in Oracle Training Administration, you will see different additional organization information depending on the legislation code you selected for your Business Group. The legislation code controls which segments of the protected flexfield called Org Developer DF are visible.

⚠ **Warning:** Do not attempt to alter the definitions of these protected flexfields. These definitions are a fundamental part of Oracle HRMS. Any change to them may lead to errors in the operating of the system.

It is possible that Oracle HRMS will use other segments of these flexfields in the future. Therefore, do not add segments to any protected flexfield. This can affect your ability to upgrade your system in the future.

List of Descriptive Flexfields

The following table lists all the descriptive flexfields in Oracle Training Administration.

Descriptive Flexfield Title	Window Title
Additional Activity Information	Activities
Additional Activity Version Information	Activities
Additional Address Details (HR)	
Additional Booking Deal Information	Enrollment Agreements
Additional Booking Status Information	Enrollment Statuses
Additional Category Inclusion Details	Category Usages
Additional Delegate Booking Information	Enrollments
Additional Event Association Information	Customers for Restricted Events
Additional Event Information	Scheduled Events, Programs, Development Events, One–time Events
Additional Finance Header Information	Finance Headers
Additional Letter Details (HR)	Letter
Additional Location Details (HR)	Location
Additional Organization Information (HR)	Organization
Additional Organization Unit Details (HR)	
Additional Price List Entry Information	Price Lists
Additional Price List Information	Price Lists
Additional Resource Bookings	Resource Bookings

Table B – 1 User Definable Descriptive Flexfields

Descriptive Flexfield Title	Window Title
Additional Resource Usage Information	Resource Usages
Additional Suppliable Resource Details	Resources
Additional Vendor Supplies Information	
Additional Budget Information	
Additional Finance Line Information	Finance Lines

Table B – 1 User Definable Descriptive Flexfields

Descriptive Flexfields with Startup Data

Oracle HRMS supplies two predefined descriptive flexfields to hold address information in different styles for different countries. These are the Personal Address Information descriptive flexfield and the Location Address descriptive flexfield.

You can use these descriptive flexfields to add new address styles or to change the styles included in Oracle HRMS.

☞ **Attention:** If you change the predefined styles, your changes will be overwritten when you upgrade Oracle HRMS. If you add new styles, your changes may be overwritten if new startup data contains address styles for these countries.

Changing Address Styles

Address styles vary between countries, so Oracle HRMS provides two descriptive flexfields that use *context sensitive* segments to hold each line of an address.

Title	Table Name	Window Title
Personal Address Information	PER_ADDRESSES	Address
Location Address	HR_LOCATIONS	Location

Table B – 2 Address Styles in Oracle HRMS

The available address styles are defined as the contexts for these flexfields. The values used are the territory codes. These codes can be found in the FND_TERRITORIES table. You can have only one Address Style for each Territory in the FND_TERRITORIES table.

Address styles are provided as startup data in these flexfields. If you require additional address styles, you need to define a new context and segments.

To change the address style for any country, disable those segments you do not want to use. Then define new segments to record your own information. However, these changes will be overwritten when you upgrade Oracle HRMS.

APPENDIX

C

Template SQL*Plus Scripts

This appendix provides template SQL*Plus scripts to extract data to include in standard letters.

Template SQL*Plus PERWPOUK

PERWPOUK.sql	Purpose

`WHENEVER SQLERROR EXIT FAILURE ROLLBACK`
`REM Define the MS Word mail merge record separator`
`DEFINE ch=”’%’”`
`REM Define the column width for returning query results`
`COLUMN L1 FORMAT A2000`
`SET PAUSE OFF`
`SET FEEDBACK OFF`
`SET RECSEP OFF`
`SET HEADING OFF`
`SET VERIFY OFF`
`SET TERMOUT OFF`
`SET PAGESIZE 0`
	This section defines the required SQL*Plus environment settings. You should produce this section exactly as you see it when you define your mail merge file.

`REM Insert session row`
`insert into fnd_sessions(session_id`
`,effective_date)`
`select  userenv(’SESSIONID’),`
`        to_date(’&2’,’DD–MON–YYYY’)`
`from    sys.dual`
	This section creates a row in the Application Object Library table (AOL) FND_SESSIONS. This enables the datetrack security views to be accessed for the session.
	The &2 argument contains the current SQL*Forms session date.
	You should produce this section exactly as you see it when you define your mail merge file.

<pre>/REM Set length of the header
SET LINESIZE 220
 	
REM Create the mail merge ’header’ record
for MS Word
REM Note: SPOOL command commented out for
concurrent manager.
REM   PC based solution required the
SPOOL command.
REM spool perwpouk.txt</pre>
	This section has two functions:
	1) To set the mail merge header linesize. This is dependant on the character length of all the mail merge items you want to use. In the example, the header linesize equates approximately to 220 characters.
	2) To enable the spooling of the SQL results.
	You must remove the REM keyword from the line that spools output to a file for the Microsoft Mailmerge. If you use concurrent processing to generate the data source file, Concurrent Manager creates the output file.

<pre>select ’address_line1’ ||&ch||
        ’address_line2’ ||&ch||
        ’address_line3’ ||&ch||
        ’town_or_city’ ||&ch||
        ’country’ ||&ch||
        ’postal_code’ ||&ch||
        ’applicant_title’ ||&ch||
        ’applicant_last_name’ ||&ch||
        ’position_name’ ||&ch||
        ’organization_name’ ||&ch||
        ’grade_name’ ||&ch||
        ’projected_hire_date’ ||&ch||
        ’recruiter_title’ ||&ch||
        ’recruiter_last_name’ ||&ch
from   sys.dual
/</pre>
	This section defines the mail merge header information. These are the mail merge fields you integrate with your word processed letter. Each mail merge field is delimited by the pre–defined &ch character. Ensure that the field size does not exceed 40 characters and that the field name does not include white spaces. Do not forget that the length in characters of this selected row from sys.dual is the LINESIZE value you specified above.

<pre>REM re–initialise the linesize to the
maximum 2000 varchar2 length
SET LINESIZE 2000</pre>
	After selecting your mail merge header information, you must re–set the LINESIZE to the maximum to VARCHAR2 size which is 2000.

<pre>REM Mail merge interview query
select rpad(
        nvl(pa.address_line1,' ')
                            ||&ch|
                nvl(pa.address_line2,' ')
                            ||&ch|
                nvl(pa.address_line3,' ')
                            ||&ch|
                nvl(pa.town_or_city,' ')
                            ||&ch|
 	
nvl(ft.territory_short_name, ' ')
            ||&ch|
                nvl(pa.postal_code,' ')
                            ||&ch|
                nvl(hl1.meaning, ' ')
                            ||&ch|
                nvl(pp1.last_name, ' ')
                            ||&ch|
                nvl(pos.name, ' ')
                            ||&ch|
                pou.name
                            ||&ch|
                nvl(pg.name, ' ')
                            ||&ch|
 	
nvl(to_char(pappl.projected_hire_date,
                          'fmDay fmddth
"of" fmMonth YYYY'), ' ') ||&ch|
                nvl(hl2.meaning, ' ')
                            ||&ch|
                nvl(pp2.last_name, ' ')
                            ||&ch,
                2000, '#') L1</pre>
	This section is the main SQL*Plus query that generates the mail merge field information. Note that the columns are merged together using the &ch character as the field delimiter.
	The RPAD function pads out the row of information with # for all white spaces. Without this function, mail merge cannot distinguish when a row / record has ended.
	The SQL*Plus query in this example is generated from letter requests. Therefore the &1 argument is used to identify which letter_request_id is being generated.

<pre>from   per_addresses
    pa,
                fnd_territories
    ft,
                hr_lookups
    hl1,
                hr_lookups
    hl2,
                hr_all_organization_units
    pou,
                per_positions
    pos,
                per_grades
    pg,
                per_applications
    pappl,
                per_all_people
    pp1,
                per_all_people
    pp2,
                per_all_assignments
    pasg1,
                per_letter_request_lines
    plr</pre>	

<table>
<tr><td><pre>where   plr.letter_request_id
    = &1
and   pp1.person_id
    = plr.person_id
and   pa.primary_flag
(+)   = ’Y’
and   pa.person_id
(+)   = pp1.person_id
and   ft.territory_code
(+)   = pa.country
and   hl1.lookup_code
(+)   = pp1.title
and   hl1.lookup_type
(+)   = ’TITLE’
and   pasg1.assignment_id
(+)   = plr.assignment_id
and   pos.position_id
(+)   = pasg1.position_id
and   pou.organization_id
(+)   = pasg1.organization_id
and   pg.grade_id
(+)   = pasg1.grade_id
and   pappl.application_id
(+)   = pasg1.application_id
and   pp2.person_id
(+)   = pasg1.recruiter_id
and   hl2.lookup_code
(+)   = pp2.title
and   hl2.lookup_type
(+)   = ’TITLE’
/
REM Note: SPOOL command commented out for
concurrent manager.
REM   PC based solution required the
SPOOL command.
REM spool off</pre></td><td></td></tr>
<tr><td><pre>REM update the letter request_status from
PENDING to COMPLETE
update per_letter_requests plr
set   plr.request_status = ’COMPLETE’
where plr.letter_request_id = &1
and   plr.request_status = ’PENDING’
/</pre></td><td>This section updates the the letter request from Pending to Complete (as the example is for letter requests).</td></tr>
<tr><td><pre>REM delete the session row created
delete from fnd_sessions fs
where fs.session_id = userenv(’sessionid’)
and   fs.effective_date =
to_date(’&2’,’DD–MON–YYYY’)</pre></td><td>This section deletes the row inserted into FND_SESSIONS.</td></tr>
<tr><td><pre>/

REM commit the changes
commit
/

exit</pre></td><td>This section commits the changes and exits the SQL*Plus session.</td></tr>
</table>

Template SQL*Plus Script PERWPWUK

PERWPWUK.sql	Purpose
REM DEFINE line_size=80 DEFINE field_size= &line_size–1 DEFINE ch=”’%’” SET PAGESIZE 0 SET LINESIZE &line_size BREAK ON L1 SKIP PAGE COLUMN L1 FORMAT A&line_size COLUMN L2 FORMAT A&line_size COLUMN L3 FORMAT A&line_size COLUMN L4 FORMAT A&line_size COLUMN L5 FORMAT A&line_size COLUMN L6 FORMAT A&line_size COLUMN L7 FORMAT A&line_size COLUMN L8 FORMAT A&line_size COLUMN L9 FORMAT A&line_size SET FEEDBACK OFF SET RECSEP OFF SET HEADING OFF SET VERIFY OFF SET TERMOUT OFF	This section defines the required SQL*Plus environment settings. You should produce this section exactly as you see it when you define your mail merge file.
insert into fnd_sessions (session_id ,effective_date) select userenv(’SESSIONID’) , to_date(’&2’,’DD–MON–YYYY’) from sys.dual	This section creates a row in the Application Object Library table (AOL) FND_SESSIONS. The &2 argument contains the current SQL*Forms session date. You should produce this section exactly as you see it when you define your mail merge file.
REM re–initialise the linesize to the maximum 2000 varchar2 length SET LINESIZE 2000	After selecting your mail merge header information, you must re–set the LINESIZE to the maximum to VARCHAR2 size which is 2000.

<table>
<tr><td><pre>/select nvl(t.meaning||' '||p.first_name||'
'||p.last_name, ' ')||&ch||
       nvl(a.address_line1,' ') ||&ch||
       nvl(a.address_line2,' ') ||&ch||
       nvl(a.address_line3,' ') ||&ch||
       nvl(a.town_or_city,' ') ||&ch||
       nvl(a.region_1, ' ') ||&ch||
       nvl(a.postal_code,' ') ||&ch||
       nvl(t.meaning||' '||p.last_name,'
')
from   per_addresses a,
       per_people p,
       per_letter_request_lines s,
       hr_lookups t
where a.person_id (+)
= p.person_id
and   p.person_id
= s.person_id
and   p.title
= t.lookup_code (+)
and   t.lookup_type (+)
= 'TITLE'
and   s.letter_request_id
= &1
/</pre></td><td>This section is the main SQL*Plus query that generates the mail merge field information. Note that the columns are merged together using the &ch character as the field delimiter.
The SQL*Plus query in this example is generated from letter requests. Therefore the &1 argument is used to identify which letter_request_id is being generated.</td></tr>
<tr><td><pre>update per_letter_requests r
set   r.letter_request_id = &1
where r.letter_request_id = &1
/update per_letter_request_lines rl
set   rl.letter_request_id = &1
where rl.letter_request_id = &1</pre></td><td>This section updates the the letter request from Pending to Complete (as the example is for letter requests).</td></tr>
<tr><td><pre>/commit
/exit
/</pre></td><td>This section commits the changes and exits the SQL*Plus session.</td></tr>
</table>

OTA SQL*Plus Script to Produce Confirmation Letters

OTA.sql	Purpose
WHENEVER SQLERROR EXIT FAILURE ROLLBACKREM Define the MS Word mail merge record separator DEFINE ch=”’%’”REM Define the column width for returning query results COLUMN L1 FORMAT A2000SET PAUSE OFF SET FEEDBACK OFF SET RECSEP OFF SET HEADING OFF SET VERIFY OFF SET TERMOUT OFF SET PAGESIZE 0	This section defines the required SQL*Plus environment settings. You should produce this section exactly as you see it when you define your mail merge file.
REM Insert session row insert into fnd_sessions(session_id ,effective_date) select userenv(’SESSIONID’), to_date(’&2’,’DD–MON–YYYY’) from sys.dual /	This section creates a row in the Application Object Library table (AOL) FND_SESSIONS. This enables the datetrack security views to be accessed for the session. The &2 argument contains the current SQL*Forms session date. You should produce this section exactly as you see it when you define your mail merge file.

REM Set length of the header SET LINESIZE 200REM Create the mail merge ’header’ record for MS Word REM Note: SPOOL command commented out for concurrent manager. REM PC based solution required the SPOOL command.spool xxxxx.txt	This section has two functions: 1) To set the mail merge header linesize. This is dependant on the character length of all the mail merge items you want to use. In the example, the header linesize equates approximately to 220 characters. 2) To enable the spooling of the SQL results. The spool file should match the name of the SQL file you are writing, but with a text file extension.
select ’student_title’ ||&ch|| ’student_first_name’ ||&ch|| ’student_last_name’ ||&ch|| ’event_name’ ||&ch|| ’event_code’ ||&ch|| ’event_end_date’ ||&ch from sys.dual /	This section defines the mail merge header information. These are the mail merge fields you integrate with your word processed letter. Each mail merge field is delimited by the pre–defined &ch character. Ensure that the field size does not exceed 40 characters and that the field name does not include white spaces. Do not forget that the length in characters of this selected row from sys.dual is the LINESIZE value you specified above.

REM re–initialise the linesize to the maximum 2000 varchar2 length SET LINESIZE 2000	After selecting your mail merge header information, you must re–set the LINESIZE to the maximum to VARCHAR2 size which is 2000.

REM Mail merge confirmation query
 select rpad(
       initcap(nvl(d.delegate_title_meaning,’ ’)) ||&ch||
        nvl(d.delegate_first_name,’ ’)
                      ||&ch||
        nvl(d.delegate_last_name,’ ’)
               ||&ch||
        nvl(v.description,’ ’)
                      ||&ch||
        nvl(d.event_activity_version_name,’ ’) ||&ch||
        to_char(d.course_end_date, ’DD fmMonth YYYY’) ||&ch,
        2000, ’#’)
L1
   from ota_delegate_bookings_v d,
       ota_activity_versions v,
        per_letter_request_lines plr
  where plr.letter_request_id
       = &1
  and   (plr.ota_booking_id
       = d.booking_id
  or   plr.ota_event_id
       = d.event_id)
  and   d.activity_version_id
    = v.activity_version_id
/
	This section is the main SQL*Plus query that generates the mail merge field information. Note that the columns are merged together using the &ch character as the field delimiter. The RPAD function pads out the row of information with # for all white spaces. Without this function, mail merge cannot distinguish when a row / record has ended.
	The SQL*Plus query in this example is generated from letter requests. Therefore the &1 argument is used to identify which letter_request_id is being generated.

REM Note: SPOOL command commented out for concurrent manager. REM PC based solution required the SPOOL command. spool off	

`REM Update the letter request_status from PENDING to COMPLETE`
`update  per_letter_requests`
`plr`
`set     plr.request_status`
`='COMPLETE'`
`where   plr.letter_request_id`
`=&1`
`and     plr.request_status`
`='PENDING'`
`/`
	This section updates the the letter request from Pending to Complete (as the example is for letter requests).

`REM delete the session row created`
`delete from fnd_sessions`
`fs`
`where  fs.session_id`
`= userenv('sessionid')`
`and    fs.effective_date`
`= to_date('&2','DD-MON-YYYY')`
`/`
	This section deletes the row inserted into FND_SESSIONS.

`REM commit the changes`
`commit`
`/`
`exit`
`/`
	This section commits the changes and exits the SQL*Plus session

APPENDIX

D

Implementation Checklist and Steps

This appendix contains a checklist to help you plan and manage your implementation of Oracle Training Administration. Each section of the checklist corresponds to the implementation of one area of the system. Some of these areas are required; others are optional. You can use this information to plan a phased implementation.

The second major section of this appendix expands the steps in the checklist. Each step summarizes what you can set up in each functional area, lists the forms or processes you should use for that step, and cross–references the topic that provides detailed task information.

Implementing Oracle Training Administration

Implementation takes place after a successful installation of the system, and describes the process you follow to customize Oracle Training Administration to meet your own specific business needs.

For information on installing Oracle Training Administration, consult the *Oracle Applications Installation Manual for Windows Client*s, release 11 or later.

Making Decisions

Before you set up Oracle Training Administration, you need to look at certain factors before you decide and plan how to implement the application in your enterprise.

There are two key implementation decisions to make:

- Do you plan to integrate Oracle Training Administration with Oracle Human Resources now or in the future? This has implications for the way in which you hold information about internal students and trainers. It also has implications if you are developing the competence approach, and you want to hold the qualifications, attributes and knowledge gained from training activities as competencies.
- Do you plan to hold financial information (about resource costs and enrollment charges) in Oracle Training Administration? What kind of arrangement do you need? Will you need an interface between Oracle Training Administration and your own financial system to trigger customer invoices if you run external courses, or cross-charge other departments if you run internal courses?

Other decisions you need to make includes:

- Is your enterprise planning to run
  - External training courses?
  - Both internal and external training courses?
  - Internal training courses?
- What information you need to record about students, trainers, customers and suppliers? For internal students you may already have a large amount of information, (especially if you run Oracle Training Administration within Oracle Human Resources). What further information do you need to record?

- What is your enrollment procedure? What are the stages each student goes through from enrollment to completion of the course? Do you want to link these stages (***statuses***) to standard letters?
- How do you want to organize your budgetting?
- Where do you teach? What is the maximum number of students you can have in each room (and therefore on each course in each room)? How do you describe the location of each one? Are some of these external to your organization and supplied by an external supplier? How are you going to organize locations, training centers, and resource revenues?
- What are the qualifications, skills and expertise your courses offer? In which way do you want to record these for each student, once they have completed a course?
- Do you have any special agreements with customers, if you run external courses? Do you want to give special discounts to customers who book many places on courses or groups of courses (packages)?
- Which of your users should access which parts of Oracle Training Administration? What are the roles within your training department? Which roles need full or restricted access?
- What kind of facilities and resources do events need? What skills do trainers require to teach this course? Where do your trainers come from—internal sources or an external supplier. At what point do you want to hold different versions of activities, either changing them over time, or offering alternative versions?
- How do you want to organize your resource categories? What information do you want to store for each resource type? Where and how do you want to hold trainer data?
- What type of development events do you want to record?

You can adopt a staged approach to implementation, by focussing only on the essential areas of the system. For example, you could begin by implementing event scheduling and enrollment management. Then later you could add resource management and skills management to the basic implementation. In a third stage, you could implement price lists, discounts, and other financial information to support invoicing and payments.

Working in partnership with Oracle you can call on skilled consultants to provide you with all of the training, and technical and professional expertise you need. Together you can successfully implement a training system that matches your specific business needs in the most efficient and cost–effective manner.

Implementation Checklist

Use the following checklist to record which parts of Oracle Training Administration you want to use. This helps you to complete the appropriate steps in the correct order for your implementation.

- ❑ **Basic Administration**
  - ❑ 1 Enable Currencies
  - ❑ 2 Define User for Implementation
  - ❑ 3 Define QuickCode Values
- ❑ **Training Resources and Skills Flexfield Setup**
  - ❑ 4 Specify Key Flexfield Structure
  - ❑ 5 Define Training Resource Key Flexfield Structure
  - ❑ 6 Define Resource Types
  - ❑ 7 Enter Trainers
  - ❑ 8 Enter Resources
  - ❑ 9 Define Personal Analysis Key Flexfield Structure
  - ❑ 10 Register Special Information Types for the Business Group
  - ❑ 11 Define Dummy Accounting Key Flexfield Structure
  - ❑ 12 Specify Descriptive Flexfield Contents for Additional Details
  - ❑ 13 Define Descriptive Flexfields
- ❑ **Organization Setup**
  - ❑ 14 Define Locations
  - ❑ 15 Define Business Group
  - ❑ 16 Link Responsibility to Business Group
  - ❑ 17 Define Organizations
- ❑ **Accounting Setup (If no Oracle Financials)**
  - ❑ 18 Create Calendar
  - ❑ 19 Define Set of Books

- ❑ 20 Uncheck Dynamic Inserts on OTA Accounting Key Flexfield
- ❑ 21 Choose Set of Books
- ❑ 22 Define Financials Options
- ❑ 23 Define System Options

❑ **Organization Setup contd.**

- ❑ 24 Define Suppliers
- ❑ 25 Define Customers

❑ **Enrollment Management Setup**

- ❑ 26 Define Enrollment Statuses
- ❑ 27 Enter Students and Training Managers

❑ **Activities Setup**

- ❑ 28 Define Activity Categories
- ❑ 29 Define Activities
- ❑ 30 Categorize Activities
- ❑ 31 Enter Resource Requirements

❑ **Finance Setup**

- ❑ 32 Define New Finance Line Types
- ❑ 33 Define Interface to Financials System
- ❑ 34 Define Price Lists
- ❑ 35 Create Finance Headers
- ❑ 36 Define Discount and Prepurchase Agreements

❑ **Application Data Export (ADE)**

- ❑ 37 Set Up ADE

- ❑ **Reporting and Standard Letter Generation Setup**
  - ❑ 38 Write New Reports
  - ❑ 39 Register Reports as Concurrent Programs
  - ❑ 40 Define Report Sets
  - ❑ 41 Concurrent Processing
  - ❑ 42 Online Using Application Data Export (ADE)
  - ❑ 43 Online Using Microsoft Word
  - ❑ 44 Define Standard Folders
  - ❑ 45 Enable or Disable User Folder Customization
- ❑ **Security Setup**
  - ❑ 46 Define Menu Functions
  - ❑ 47 Define Menus
  - ❑ 48 Customize Functions
  - ❑ 49 Define Report Security Groups
  - ❑ 50 Define Responsibilities
  - ❑ 51 Define Users
  - ❑ 52 Define HR User Profile Options
  - ❑ 53 Set Up Enrollment Status Security
- ❑ **Audit Setup**
  - ❑ 54 Estimate File Sizing and Management Needs
  - ❑ 55 Define Audit Installations
  - ❑ 56 Define Audit Tables and Columns
  - ❑ 57 Define Audit Groups
  - ❑ 58 Activate AuditTrail Update Tables Process
- ❑ **Help Customization**
  - ❑ 59 Create Custom Help Files

Implementation Steps

This section expands the implementation steps in the checklist and provides a summary of what you can set up in each functional area in the sequence that you should follow. Every step gives you the names of any forms or processes that you should use for that step.

Implementation Steps: Basic Administration

The administration steps are usually performed by the System Administrator. Sign on to the system using your System Administrator username and password. Contact your DBA if you do not know this information.

Step 1 Enable Currencies

All major currencies are predefined with Oracle Applications. The codes used are the ISO standard codes for currencies. However, you must enable the specific currencies you want to use for your base currency, or for any price or budget information.

The 'base currency' is the default currency used by your Business Group.

Currencies

See: Currencies Window, *Oracle Applications System Administrator's Guide*

Step 2 Define User for Implementation

Before you can access any of the Oracle Training Administration forms you must create a new Application User with access to the default responsibility (Oracle Training Administration GUI) supplied with the system.

Users

See: Users Window, *Oracle Applications System Administrator's Guide*

> **Note:** After you have completed this step you can sign on and use the new user to define QuickCodes, locations and your new Business Group.

Step 3 Define QuickCode Values

QuickCodes supply many of the lists of values in Oracle Training Administration.

See: User and Extensible QuickCodes: page 11 – 5

You can add new QuickCodes Values at any time. You can set the *Enable Flag* for a Value to No, so that it will no longer appear in the list of values, or you can use the Start and End Dates to control when a value will appear in a list.

When you add or change QuickCode Values you should sign on again to use the new value.

QuickCodes

See: Adding QuickCode Values: page 11 – 3.

Implementation Steps: Training Resources and Skills Flexfields Setup

The flexfield steps are usually performed by the System Administrator. Sign on to the system using your System Administrator username and password. Contact your DBA if you do not know this information.

Define Training Resources and Skills Key Flexfields

Step 4 Specify Key Flexfield Structures

Attention: If you have Oracle Human Resources and OTA installed in your enterprise, and you want to hold the qualifications, attributes and knowledge that students attain by attending training activities as competencies, you do not need to define the Personal Analysis flexfield. If you only have OTA, or if you want to hold the qualifications, attributes and knowledge as skills, you must define the Personal Analysis flexfield.

There are two Key Flexfield Structures you must define before you can use Oracle Training Administration. These are:

- Training Resource
- Personal Analysis

If you do not have Oracle Financials in your enterprise, you also need to define an accounting flexfield. If you already have Oracle Financials, the flexfield already exists.

Before you begin your implementation of these key flexfields you must clearly specify your requirements. This specification must include the following details for each key flexfield:

- The Structure Name and the number of Segments
- The Flexfield Segment Names, Order and Validation Options
- The Flexfield Value Sets to be used and any lists of values

The sequence which you follow to implement each Flexfield is:

- Define Flexfield Value Sets
- Define Key Flexfield Segments
- Define Flexfield Segment Values
- Freeze and Compile Key Flexfield Structure

Training Resources

Resources are any facilities, people, or equipment that you need to book to run an event.

See: Resources: page 3 – 2.

Step 5 Define Training Resource Key Flexfield Structure

The sub–steps that follow show you how to perform all these steps.

1. **Define Training Resource Flexfield Value Sets**

   If you want to validate the values which a user can enter for any segment you must define a specific Value Set.

   The attributes of the Value Set controls the type of values that can be entered, and how many characters each segment can hold. The attributes of the Value Set also controls how the values are to be validated.

   Value Sets can be shared by different segments of the same flexfield, or by segments of any other flexfield.

   Value Sets

   See: Defining Values and Values Sets, *Oracle Applications Flexfields Guide*

2. **Define Training Resource Flexfield Segments**

Define a structure for each resource type. The structure for the Venue resource type must be called Venue, the structure for the Trainer resource type must be called Trainer, and so on.

You must check the Allow Dynamic Inserts box. If you do not check the box, you are unable to create new resource name combinations in the Resources window.

Key Flexfield Segments

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide*

3. **Define Segment Values**

If you have chosen Independent or Dependent validation for a Value Set used by a Resource Flexfield Segment, you must define your list of valid values for the Value Set.

Segment Values

See: Defining Segment Values, *Oracle Applications Flexfields Guide*

4. **Freeze and Compile Your Resource Flexfield Structure**

You are now ready to freeze your Job Flexfield definition. Navigate to the Define Key Flexfield Segments window. Check the Freeze Flexfield Definition box and save your changes. Oracle Training Administration now freezes and compiles your Resource Flexfield definition. Compiling the flexfield definition enables the Resources Flexfield window with the defaults, values and rules that you have defined.

Key Flexfield Segments

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide*

Step 6 Define Resource Types

You define resource types as values for the QuickCode Type RESOURCE_TYPE. The type of a resource determines the information you can enter about the resource. Two types are seeded: Venue and Trainer.

QuickCodes

See: Adding QuickCode Values: page 11 – 3

Step 7 **Enter Trainers**

Depending on how you have set up the Training Resource key flexfield structure for the Trainer resource type, you may need to enter trainers on the system before you can select them as resources.

For example, if you are implementing Oracle Human Resources and most of your trainers are internal, you should enter them as employees using the HR Person form. Your Trainer flexfield structure is likely to contain a Name segment that uses a value set based on the HR People table (PER_PEOPLE_X).

If most of your trainers are external, you might prefer to enter them as contacts for a supplier. In this case, your Trainer flexfield structure should contain a Name segment that uses a value set based on the Supplier Contacts table (PO_VENDOR_CONTACTS).

Step 8 **Enter Resources**

Use the Resources form to enter specific trainers, venues, and stocks of equipment available from your suppliers.

Resources

See: Entering Resources: page 3 – 6

Skills

You can use skill types in Oracle Human Resources to record the skills held by employees and applicants and the skill requirements of jobs and positions if you are not using the competence approach. If you have Oracle Human Resources and OTA installed in your enterprise, and you are using the competence approach, you do not need to define the Personal Analysis flexfield.

You can, however, set up other structures of the Personal Analysis key flexfield to record other special personal information in Oracle Human Resources if you want.

See: Skills Information: page 4 – 4

Step 9 Define Personal Analysis Key Flexfield Structures

The Personal Analysis Key Flexfield is used to set up skills types to record the qualifications, competences and experience that students can expect to attain by attending training courses. Each type of information is defined as a separate *Structure* of the flexfield. Typical examples could be foreign language skills and professional qualifications.

This flexfield is used in the following areas:

- Skill Requirements

To take best advantage of the flexibility of Oracle Training Administration for recording and reporting special personal information in your enterprise the implementation sequence which you follow is:

- Design your Personal Analysis Flexfield Structures.
- Define Flexfield Value Sets.
- Define Personal Analysis Flexfield Segments.
- Define Personal Analysis Flexfield Segment Values.
- Freeze and Compile your Personal Analysis Flexfield Structures.

The sub–steps that follow show you how to perform all these steps.

1. **Design your Personal Analysis Flexfield Structures**

   You need to design a Personal Analysis Flexfield Structure for each Special Information Type you want to hold in Oracle Training Administration. For each structure you must include the following:

   - The Structure Name and the number of Segments.
   - The Flexfield Segment Names, Order and Validation Options.
   - The Flexfield Value Sets to be used and any lists of values.

2. **Define Personal Analysis Flexfield Value Sets**

   If you want to validate the values which a user can enter for any segment you must define a specific Value Set.

   The attributes of the Value Set controls the type of values that can be entered, and how many characters each segment can hold. The attributes of the Value Set also control how the values are to be validated.

Value Sets can be shared by different segments of the same flexfield, or by segments of any other flexfield.

Value Sets

See: Defining Values and Values Sets, *Oracle Applications Flexfields Guide*

3. **Define Personal Analysis Flexfield Segments**

   Define a structure for your Personal Analysis Flexfield which contains the segments you want to use. You use this structure to enter details in the Special Information Types window.

   You must check the Allow Dynamic Inserts box. If you do not check the box, you are unable to enter new details in the Skill Provisions window (or the Special Information window in Oracle Human Resources).

   Key Flexfield Segments

   See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide*

4. **Define Segment Values**

   If you have chosen Independent or Dependent validation for a Value Set used by a Personal Analysis Flexfield Segment, you must define your list of valid values for the Value Set.

   Segment Values

   See: Defining Segment Values, *Oracle Applications Flexfields Guide*

5. **Freeze and Compile Your Personal Analysis Flexfield Structure**

   You are now ready to freeze your flexfield definition. Navigate to the Define Key Flexfield Segments window. Check the Freeze Flexfield Definition box and save your changes. Training now freezes and compiles your Personal Analysis Flexfield definition. Compiling the flexfield definition enables the flexfield window with the defaults, values and rules that you have defined.

   Define Key Flexfield Segments

   See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide*

Step 10 Register Special Information Types for the Business Group

After you have defined your Personal Analysis Flexfield Structures you must link them to your Business Group.

For each information type, select one or more categories to control on which windows the information type is visible. The categories you see depend upon which products you have installed:

– *Job* for Job Skill Requirements (only if HR installed)

– *Position* for Position Skill Requirements (only if HR installed)

– *Skills* for use in Oracle Training Administration to record the skills provided by training activities

– *Other* for miscellaneous special information types in Oracle Human Resources (only if HR installed)

– *ADA* for use only in the US, for special information types set up to record information about employees with disabilities.

– *OSHA* for use only in the US, for a special information type set up to record information about employees' work–related injuries or illnesses.

Special Information Types

See: Enabling Special Information Types, *Oracle Human Resources User's Guide*

Accounting

Step 11 Define Dummy Accounting Key Flexfield Structure

Attention: You need to create a dummy Accounting Flexfield Structure if you do not have Oracle Financials in your enterprise. You need this dummy structure for Suppliers and Customers windows to operate.
If you already have Oracle Financials, the flexfield structure you require already exists.

1. **Define Dummy Accounting Flexfield Value Sets**

   If you want to validate the values which a user can enter for any segment you must define a specific Value Set.

The attributes of the Value Set control the type of values that can be entered, and how many characters each segment can hold. The attributes of the Value Set also control how the values are to be validated.

Value Sets can be shared by different segments of the same flexfield, or by segments of any other flexfield.

Create the following three value sets for your dummy accounting flexfield structure:

- Company
- Department
- Account

Note: You must create the value sets with the validation type Independent.

Value Set	Format Type	Maximum Size
COTA_COMPANY	Char	11
COTA_DEPT	Char	11
COTA_ACCOUNT	Char	11

Table 12 – 1 Value Sets

Value Sets

See: Defining Values and Values Sets, *Oracle Applications Flexfields Guide*

2. **Define Dummy Accounting Flexfield Segments**

Define a structure for your Accounting Flexfield which contains the segments you want to use. Name your structure something like OTA Accounting Flexfield. You can then distinguish this dummy structure from the Accounting Flexfield structure used by Oracle Financials. This may be useful if your enterprise later buys Oracle Financials and you want to set up full accounting functionality.

Note: You must check the Allow Dynamic Inserts box.

Segment Number	Segment Name	Column	Value Set
1	Company	SEGMENT1	COTA_COMPANY
2	Department	SEGMENT2	COTA_DEPT
3	Account	SEGMENT3	COTA_ACCOUNT

Table 12 – 2 Accounting Flexfield

You must enter flexfield qualifiers for each segment in turn.

Segment	Flexfield Qualifier	Check the Enable Box:
Company	Cost Center Segment	NO
	Natural Account Segment	NO
	Balancing Segment	YES
Department	Cost Center Segment	NO
	Natural Account Segment	NO
	Balancing Segment	NO
Account	Cost Center Segment	NO
	Natural Account Segment	YES
	Balancing Segment	NO

Table 12 – 3 Flexfield Qualifiers

Key Flexfield Segments

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide*

3. **Define Dummy Accounting Flexfield Segment Values**

As you have chosen Independent validation for the Value Sets used by a Accounting Flexfield Segment, you must define your list of valid values for the Value Sets.

Value Set	Code	Description	Qualifiers		
			Budgetting	**Posting**	**Account Type**
COTA_COMPANY	000	Company 000	Yes	Yes	N/A
COTA_DEPT	000	Dept 000	Yes	Yes	N/A
COTA_ACCOUNT	000	Account 000	Yes	Yes	Liability

Table 12 – 4 Accounting Flexfield Segment Values

Segment Values

See: Defining Segment Values, *Oracle Applications Flexfields Guide*

4. **Freeze and Compile Your Accounting Flexfield Structure**

You are now ready to freeze your Accounting Flexfield definition. Navigate to the Define Key Flexfield Segments window. Check the Freeze Flexfield Definition box and save your changes. Oracle Training Administration now freezes and compiles your Accounting Flexfield definition. Compiling the flexfield definition enables the Accounting Flexfield window with the defaults, values and rules that you have defined.

Define Key Flexfield Segments

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide*

Define Descriptive Flexfields

Step 12 Specify Descriptive Flexfield Contexts for Additional Details

Use descriptive flexfields in Oracle Training Administration to define your own additional fields to the standard windows. For example, if you want to record a *Cost Center* for any internal student enrollment, you can define a segment of the Additional Enrollment Details flexfield to record this information.

See: User Definable Descriptive Flexfields: page B – 4

Attention: The descriptive flexfield is defined at the level of the base–table. This means that any window which uses the base–table will display the same descriptive flexfield segments.

For each descriptive flexfield, specify your requirements, including the following details:

- The Context and the number of Segments for each Context
- The Flexfield Segment Names, Order and Validation Options
- The Flexfield Value Sets to be used and any lists of values

You can define two types of descriptive flexfield Segments:

- **Global Segments**

  Segments always appear in the flexfield window.

- **Context–Sensitive Segments**

  Segments appear only when a defined context exists. You can prompt a user to enter the context, or you can provide the context automatically from a reference field in the same block.

Suggestion: Often you can choose between using a code, a 'base–table' field, and a field which contains a meaning or description. You should always use base–table fields as reference fields for Context–Sensitive segments. These fields usually have the same name as the column in the base table.

Some of the Standard Reports supplied with the system include descriptive segment values. If you follow this suggestion, these reports will be able to use the prompts you define; otherwise they will apply a generic prompt to the data.

Step 13 Define Descriptive Flexfields

▶ **To implement each descriptive flexfield:**

1. **Register a Reference Field**

   If you want to use a reference field from the same block on the form to provide the context automatically for context–sensitive segments, you must register this field. Use the *Application*

Developer responsibility to update the definition of the descriptive flexfield.

Descriptive Flexfields

In the Descriptive Flexfields window, query the flexfield you want to update, choose the Reference Fields button, and enter the name of the Reference Field you want to use.

2. **Define Flexfield Value Sets**

   If you want to validate the values that a user can enter for any segment you must define a specific Value Set.

   - The attributes of the Value Set control the type of values that can be entered, and how many characters each segment can hold.
   - The attributes of the Value Set also control how the values are to be validated.

   Value Sets

   See: Defining Values and Values Sets, *Oracle Applications Flexfields Guide*

   > **Note:** Value Sets can be shared by different segments of the same flexfield, or by segments of any other flexfield.
   >
   > You do not need to use a Value Set to validate a segment. If you do not specify a Value Set then a user can enter any alphanumeric value up to a limit of 150 characters.

3. **Define Descriptive Flexfield Segments.**

   Define the segments of your descriptive flexfield for each Context.

   - Use Global Context to define any segments that always appear in the flexfield window.
   - Enter your own Context Name to define segments that appear only for that context.

   Uncheck the Override Allowed box, then freeze and compile your descriptive flexfield definitions.

   Descriptive Flexfield Segments

   See: Defining Descriptive Flexfield Structures, *Oracle Applications Flexfields Guide*

Attention: If you define a segment as 'Required', it will be required for every record on the system. There are two common problems you can encounter:

– If you define a 'Required' segment after you have entered records: Existing records will not have any value in this segment and the system will prompt you with an error when you query an existing record.

– Some descriptive flexfields are used in more than one block.

4. **Define Flexfield Segment Values**

If you have chosen Independent validation for a Value Set used by a descriptive flexfield Segment, you must define a list of valid values for the Value Set.

Segment Values

See: Defining Segment Values, *Oracle Applications Flexfields Guide*

Implementation Steps: Organizations

Step 14 Define Locations

Use this window to define each work location used by your enterprise. You define each location and address once only. This saves you time if you have several organizations with the same address.

This window contains information, such as Inventory Organization, that is used by other Oracle Applications.

Location

See: Setting Up Site Locations: page 2 – 4

Step 15 Define Business Group

The Business Group is the largest organizational unit on the system, and all other information you enter belongs to one Business Group.

If you are implementing Oracle Human Resources, use your HR Business Group in Oracle Training. Administration This allows you to share data on people, organizations, locations, and skills across the applications. Before you can define a Business Group for Oracle Human Resources, you must define five Key Flexfields.

See: Implementation Steps: Basic Administration, *Oracle HRMS Implementation Guide*

If you are implementing Oracle Training Administration without Oracle Human Resources, use the supplied setup Business Group, with all of its default definitions, as the starting point for your own Business Group. This Business Group is used by the default responsibility.

Organization

See: Creating a Business Group for Oracle Training Administration: page 2 – 5

Step 16 Link Responsibility to Business Group

If you are using the setup Business Group and default responsibility, you can omit this step.

If you use more than one Business Group you must set up a separate responsibility and user profile for each group.

This is a task for your System Administrator.

First create a new responsibility. Copy the supplied default responsibility if you want the new responsibility to use the predefined menus.

Responsibilities

See: Defining A Responsibility, *Oracle Applications System Administrator's Guide*

Then in the System Profile Values window, select this new responsibility, query the HR:Business Group option, and enter the name of your Business Group.

System Profile Values

See: Setting User Profile Options, *Oracle Applications System Administrator's Guide*

Step 17 Define Organizations

Organizations are the basic work structure of any enterprise. They usually represent the functional, management, or reporting groups that exist within a Business Group.

If you are implementing Oracle Human Resources, refer to your HR documentation for information about how organizations are used in that application.

If you are not implementing Oracle Human Resources, the only organizations you need to define are your internal training departments.

Suggestion: When you install Oracle Training Administration you will find a predefined list of Organization Classifications. These values are defined for the QuickCode Type ORG_CLASS, and provide options for all users of the Organization window.

You can disable the QuickCode values you will not use in your implementation in the QuickCodes window.

Organization

Creating a Training Organization: page 2 – 6

Implementation Steps: Accounting

Attention: You only need to complete the following five steps if you do not have Oracle Financials in your enterprise.
If you already have Oracle Financials, the data you require is already set up for you. Go to Implementation Steps: Organization contd: page D – 25

The Accounting key flexfield windows do not pop up automatically, unlike Oracle Training Administration flexfield windows that do.

Step 18 Create Calendar

Use this window to create an accounting calendar and period. You only need to create one period.

Calendar

See: Creating a Calendar for Oracle Training Administration: page 2 – 7

Step 19 Define Set of Books

Use this window to determine the currency, account structure and accounting calendar for each company.

Define Set of Books

See: Defining a Set of Books for Oracle Training Administration: page 2 – 9

Step 20 Uncheck Dynamic Inserts on OTA Accounting Key Flexfield

You must set the dynamic inserts to NO for the OTA Accounting flexfield.

1. Query the OTA Accounting key flexfield structure.
2. Uncheck the Dynamic Inserts box.

Key Flexfield Segments

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide*

Step 21 Choose Set of Books

Use this window to choose the set of books for your enterprise.

Choose Set of Books for Oracle Training Administration

See: Choosing a Set of Books: page 2 – 10

Step 22 Define Financials Options

Use this window to define your financials options.

Define Financials

See: Defining Financials Options for Oracle Training Administration: page 2 – 11

Step 23 Define System Options

Use this window to define your system options.

Define System Options

See: Defining System Options for Oracle Training Administration: page 2 – 12

Implementation Steps: Organizations contd.

Step 24 Define Suppliers

Suppliers are the internal or external agencies who provide training events or resources for training (such as venues and equipment).

You must define supplier names before you can enter resources in Oracle Training Administration. If you want to create finance headers for payments to suppliers, you must also enter supplier addresses and contacts.

Suppliers

See: Creating a Supplier: page 2 – 14

Step 25 Define Customers

If you are not implementing Oracle Human Resources, you must set up as customers all the organizations (internal and external) for which you run events and enroll students.

If you are implementing Oracle Human Resources, you need only set up customers for external organizations who enroll students on your events. If you want to hold price information for internal student enrollments, you must also create at least one internal customer.

For each customer, you must create at least one address and contact.

Customers

See: Creating a Customer: page 2 – 15

Implementation Steps: Enrollment Management

Step 26 Define Enrollment Statuses

There are five predefined enrollment status types:

- Requested
- Waitlisted
- Placed
- Attended
- Cancelled

Although you are provided with these five predefined status types, you must name the status types yourself during setup. You can also define more than one user status for each type.

Enrollment Statuses

See: Defining Enrollment Statuses: page 8 – 4

Entering Students and Training Managers

Step 27 Enter Students And Training Managers

If you are implementing Oracle Human Resources:

- You must enter your employees using the HR Person form before you can enroll them as students on events.
- If your events are also attended by external students, enter these students as customer contacts. You can either do this using the Customers form, or you can enter students directly from the Enrollments form as you enter enrollments.
- You can enter training managers as employees or external person types using the HR Person form. You can associate training managers with training activities.

If you are not implementing Oracle Human Resources:

- You can enter students as customer contacts. You can either do this using the Customers form, or you can enter students directly from the Enrollments form as you enter enrollments.
- You can enter Training Managers using the Enter Person form.

Implementation Steps: Activities

You define activity types and versions to represent the training courses and other developmental opportunities you make available to students. You can use versions to maintain a history of changes to an activity type over time, or to maintain multiple concurrent versions that differ, for example, in mode of delivery or language.

You can group activities into categories. You can record the resources required to run an activity and the skills it is expected to provide students.

See: What is a Training Activity?: page 5 – 2

Step 28 Define Activity Categories

You can use activity categories to group activities into programs (for scheduling), packages (for discounts), and classifications (for reporting purposes).

First you must define the categories as values for the QuickCode Type ACTIVITY_CATEGORY.

QuickCodes

Then select these categories in the Category Usages window and define how you will use each by selecting one or more usages (Classification, Program, Package).

Category Usages

Step 29 Define Activities

Define an activity for each training course or other development activity that you (or other suppliers) make available to students.

Activities

Step 30 Categorize Activities

You can select multiple activity categories for each activity version, to group it into programs, packages, and classifications. Enter or query the activity in the Activities window and choose the Categories button.

Enter Categories

Step 31 Enter Resource Requirements

You can create a resource checklist for each activity. This lists the resources that are required or useful to run the activity and the quantity that should be booked. Enter or query the activity in the Activities window and choose the Resources button.

Resource Usages

Note: You can copy the categories and resource requirements from one activity version to another.

Implementation Steps: Finance

In Oracle Training Administration, you enter each financial transaction with a customer or supplier as a finance line. Each finance line belongs to a finance header, which holds the name, address, and contact information for the customer or supplier, and the payment currency.

If you want to use these finance headers to trigger the creation of invoices and payments in your financial system, you must design an interface to transfer the information you require between Oracle Training Administration and your financial system.

See: Introducing Finance Headers and Lines: page 9 – 2

Step 32 Define New Finance Line Types

There are three predefined finance line types: enrollment charge, prepurchase charge, and supplier payment. You can define additional types (such as accommodation charges) as values for the QuickCode Type FINANCE_LINE_TYPE.

Step 33 Define Interface to Financials System

You can design an interface to transfer finance header and lines to you payable and receivables systems. This interface can check the following information, held in Oracle Training Administration, to decide whether to transfer a finance header or line, according to your own business rules:

- the status of the header (Not for Transfer or Awaiting Transfer)
- the status of individual finance lines on the header
- the type of finance header (Payable, Receivable, or Cancellation) and the subtype of a Receivable header:
  - Standard, meaning an invoice should be issued after the event
  - Prepayment, meaning an invoice should be issued before the event
  - Prepurchase Payment, meaning an invoice should be issued immediately for unspecified enrollments
  - Prepurchase Use, meaning no invoice should be issued because the enrollment cost is being deducted from a prepurchase payment
- the cancellation flag on a header or line
- the authorization flag on a header

- the header payment method
- any other information you have defined in the Additional Finance Information descriptive flexfield

Your interface can return the following information to Oracle Training Administration:

- the status of the header (Successful Transfer or Unsuccessful Transfer)
- an external reference, date, message, and a paid flag

When a header has the status Successful Transfer, it cannot be updated within Oracle Training Administration. However, you can cancel it (or individual finance lines) and issue a new header to supersede it.

Step 34 Define Price Lists

A price list is a catalog of activities and the prices at which they are available between certain dates. You can define any number of price lists, for example, for different seasons or for different categories of activity (targeted, perhaps, at different audiences). Users can select a standard price from a price list when they schedule events. They can also base enrollment agreements on a price list.

Price Lists

See: Price Lists: page 6 – 2

Step 35 Create Finance Headers

To record a monetary amount against a student enrollment or a resource booking, you must select a finance header. You can create the finance header when you enter the enrollment or booking.

However, you may be recording internal monetary transfer amounts for budgeting or costing purposes only. In this case, you might decide to create, during implementation, one default receivable finance header and one payable header for all your finance lines.

See: Creating a Finance Header: page 9 – 5

If you are creating prepurchase agreements for specific customers, you need to create a Prepurchase Payment receivable finance header for each customer.

Finance Headers

Step 36 Define Discount And Prepurchase Agreements

If you want to discount the standard price of events, or all prices on a price list, you can set up discount agreements for one customer or all customers. You can also set up prepurchase agreements, where a customer buys a certain amount or value of training in advance.

Enrollment Agreements

See: Enrollment Agreements and Training Packages: page 6 – 14

Implementation Steps: Application Data Export (ADE)

Application Data Export (ADE) enables you to export information from your database to other applications.

You can also use ADE to launch another application within Oracle HRMS or Oracle Training Administration. Applications are launched and run in another window on your desktop.

Step 37 Set Up ADE

You can launch ADE in three different ways:

- **Standalone mode**. ADE is launched from your PC desktop and run independently, without accessing your application.
- **Application mode**. ADE is launched from a button on your application toolbar and run within your application.
- **Leter request mode**. ADE is launched from the Merge button in the Request Letter window in Oracle HRMS or Oracle Training Administration.

ADE comes with its own set of documentation and online help.

See: Setup Overview,
Oracle Application Data Export User's Guide.

Implementation Steps: Reporting and Standard Letter Generation

Define Reports

Step 38 Write New Reports

A number of standard reports are supplied with Oracle Training Administration. These reports have been written using Oracle Reports V.2 and registered as concurrent programs within Oracle Applications.

You can use these standard reports or write your own reports

Step 39 Register Reports as Concurrent Programs

You must register each new report you have written as a concurrent program so that users can request the report from the Submit Requests window. You also register the parameters that can be submitted with the report. For example, you may have written a report to display personal details and you want to submit a student name to limit the output to include one person at a time.

Concurrent Programs

See: Concurrent Programs Window, *Oracle Applications System Administrator's Guide*

Step 40 Define Report Sets

You can define sets of reports:

- To restrict user access to specific reports.

  A set of reports can be linked to a responsibility.

- To simplify requesting a report

  You can run a report set in one request, rather than a request for each report.

Request Set

See: Organizing Programs Into Request Sets, *Oracle Applications System Administrator's Guide*

Standard Letter Generation

You can use standard letters in HRMS to help you to manage your enterprise's recruitment or enrollments. You do this by issuing standard letters to applicants (Oracle Human Resources) or students (Oracle Training Administration), triggered by changes in assignment or enrollment status.

Oracle HRMS provides you with two different methods to create standard letters:

- Online using Application Data Export (ADE)
- Concurrent Processing

Before you start to set up your standard letters, you need to establish which method best suits your needs.

See: Setting Up Standard Letters: page 10 – 3

Step 41 Concurrent Processing

There are two methods of using concurrent processing to set up your standard letters:

- Using word processors
- Using Oracle reports

You can use any word processor to produce standard letters from Oracle HRMS. If you use a word processor, you can submit a concurrent request in the Letter Request window to generate the mail merge file. When the concurrent request is complete, you can use your word processor's mail merge facilities to create the merged letters.

See: Using a Word Processor: page 10 – 6

As an alternative to using a word processor to produce standard letters, you can use the Standard Letter and Label features of Oracle Reports. Use this method if you do not want to use word processors to print your letters (or if you no not have a word processor).

See: Using Oracle Reports: page 10 – 22

Concurrent Processing – Using Word Processors

The sub–steps below describe how to set up standard letters using concurrent processing.

1. **Plan**

   One of the first tasks you need to perform is to identify which data you want to extract from the database to include in your standard letters. You need to identify the select statements to use to provide you with the data as the content of your letters. Oracle HRMS supplies you with SQL*Plus scripts as templates to enable you to do this. You also need to identify the text that you want to include as the body of your letters.

The next decision you need to make is to decide whether or not you want to associate your standard letters with student enrollment or applicant assignment statuses.

See: Planning (for Multimate or WordPerfect): page 10 – 8

2. **Write SQL*Plus script**

   The next step is to write the script that extracts the event and enrollment details from the system. This SQL*Plus file must use the correct delimiter for your word processor to recognise in the mail merge routine.

   See: Writing a SQL*Plus Script: page 10 – 9

   See: Template SQL*Plus Script PERWPWUK: page C – 6

3. **Register SQL*Plus script**

   After you have written the file to extract the data, you must register it so that it can be run as a concurrent program. Name the files PERWP***. You must use this prefix to define this program as a letter for the concurrent program to recognise it.

   Concurrent Programs

   See: Concurrent Programs Window, *Oracle Applications System Administrator's Guide*

4. **Linking the SQL*Plus script with a letter**

   The next step is to link your SQL*Plus script to one or more enrollment statuses.

   Letter

5. **Write skeleton letter**

   You now need to write a skeleton letter using your word processor.

6. **Request letter**

   You now run the SQL*Plus script to extract the data from the database. You activate the SQL*Plus script by creating a pending letter request in the Letter Request window.

7. **Merge data file with standard letter**

   You need to merge the data in the data file with your skeleton letters to create your standard letters.

Concurrent Processing – Using Oracle Reports

The sub–steps below describe how to set up standard letters using oracle reports.

1. **Plan content and layout**

   One of the first tasks you need to perform is to identify which data you want to extract from the database to include in your standard letters. You need to identify the select statements to use to provide you with the data as the content of your letters.

   The next decision you need to make is to decide whether or not you want to associate your standard letters with student enrollments or applicant assignment statuses.

2. **Write report**

   The next step is to write the report that extracts the event and enrollment details from the system. You also need to write your skeleton letter text and select statements.

3. **Register report**

   After you have written the report, you must register it so that it can be run as a concurrent program. Name it PERWP***. You must use this prefix to define this program as a letter for the concurrent program to recognise it.

   Concurrent Programs

   See: Concurrent Programs Window, *Oracle Applications System Administrator's Guide*

4. **Linking the report with a letter**

   The next step is to link your report to one or more enrollment statuses.

   Letter

5. **Running the report**

You now run the report to extract the data from the database. You run the report by creating a pending letter request in the Letter Request window.

Step 42 Online Using Application Data Export (ADE)

You can generate your standard letters online, using ADE. ADE comes with its own set of documentation and online help.

Note: We only provide online help for this version of ADE.

Step 43 Online Using Microsoft Word

If you use Microsoft Word as your word processor, not only can you use the concurrent processing method to produce your standard letters, but you can also generate letters online.

You can use one of two methods:

- Generate Microsoft Word letters using Object Linking and Embedding (OLE)
- Application Data Export (ADE)

☞ **Attention:** In future releases of Oracle HRMS, generating Microsoft Word letters using Object Linking and Embedding (OLE) will be replaced by ADE.

ADE comes with its own set of documentation and online help.

Note: We only provide online help for this version of ADE.

If you are setting up standard letters using the concurrent processing method, follow the same sequence as for Multimate or WordPerfect.

See: Flowchart for Setting Up Standard Letters Using MultiMate or WordPerfect: page 10 – 7

If you are generating Microsoft Word letters using Object Linking and Embedding (OLE), see: Writing a SQL*Plus Script for Microsoft Word: page 10 – 18

Define Folders

Oracle Training Administration includes five folder forms:

- Enrollment Summary
- Search for Event
- Resources Booked
- Customers Summary

- Suppliers Summary

You can define standard folders in each of these forms, and you can choose which users can create their own customized folders.

Step 44 Define Standard Folders

Each of the folder forms has a supplied default folder, which displays all records and a subset of the available fields. You can adapt these folders to create one or more folders in each form, with your choice of:

- fields and field labels
- records, defined by a query
- record sorting, using up to three sort fields
- field formatting, including column order and width

Each folder is either private to one user or available to all users who have access to the form. You must select one folder on each form to open as the default.

See: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

Step 45 Enable or Disable User Folder Customization

If you want users to be able to define their own customized folders, set the user profile option Flexview: Allow Customization to Yes.

System Profile Values

See: Setting User Profile Options, *Oracle Applications System Administrator's Guide*

Implementation Steps: Security

Defining new users and responsibilities is normally a task for your system administrator.

Each user accesses Oracle Training Administration through a responsibility, such as Training Manager, or Bookings Administrator. This controls:

- the forms the user can access
- whether the user can add and edit data, or only view it

- whether the user has access to all the regions and fields on a form
- the reports the user can run

Step 46 Define Menu Functions

This is a task for your System Administrator.

1. **Define Menu Functions**

   Menus are composed of submenus and form functions. All Oracle Applications are supplied with default functions and menus to give you access to all of the available forms.

   See: Implementing Function Security, *Oracle Applications System Administrator's Guide*

> **Attention:** You should not modify the default functions and menus supplied with the system. On upgrade, these defaults will be overwritten.

   Form Functions

Step 47 Define Menus

This is a task for your System Administrator.

1. **Define Menus**

   The default menu gives you access to *all* of the supplied submenus and functions. If you want to rearrange the menus and add submenus for new functions you have defined, you should create your own menu.

   Menus

2. **Set Up Financial Security**

   Set up financial security if you want to restrict which users can enter, update and delete financial information, and which ones cannot.

   Menus

Step 48 Customize Functions, Enrollments and Activities Windows

You can customize Oracle Training Administration in your enterprise so that users see only the windows and functions they need to perform their jobs. Function security enables you to define which functions users see when they enter a student enrollment, or whether they enter competencies or skills delivered by an activity.

1. **Customize Enrollments Windows**

You can customize the Enrollments windows in the following ways:

- which windows (Enrollment Summary, Enrollment Detail, and Search for Event) appear by default when users choose the Enrollments menu option
- which regions of the Enrollment Detail window are displayed
- whether users can enter employee enrollments, customer enrollments, or both in the Enrollment windows

Form Functions

See: Customizing Functions, Enrollments and Activities Windows: page 12 – 9

2. **Define Functions to Implement the Competence Approach**

If you have Oracle Human Resources and OTA installed in your enterprise, and you are implementing the competence approach, you can hold the qualifications, attributes and knowledge that students can expect to attain by attending training activities as competencies, skills or a mixture of both (competencies and skills). You can also allow specific users to add the competencies delivered by the activity to a student's Competence Profile after the student has completed the training event.

Form Functions

Attention: This software should not be used as the sole method of assessment for making judgements about hiring, performance or deployment. Your company may be held liable if you rely on incorrect computer data or computerized rules to make such judgements.

It is the customer's responsibility to take all appropriate measures to comply with the Data Protection and Privacy laws of the countries in which they operate.

All personal information that you store or use with this software must be up to date, accurate and relevant. You should confirm the details of the restrictions that apply to the computerized storage and use of personal information with your own legal department or representative.

Step 49 Define Report Security Groups

This is a task for your System Administrator.

You can define the groups of standard reports and processes that a user can run from the Submit Requests window. Every responsibility can have access to one report group.

Request Groups

See: Request Groups Window, *Oracle Applications System Administrator's Guide*

Step 50 Define Responsibilities

This is a task for your System Administrator.

1. **Define Responsibilities**

   Define responsibilities to bring together all of your security definitions: a data group, a main menu, and a report security group. You can exclude particular submenus or functions of the main menu to hide them from users of this responsibility.

   Responsibilities

   See: Responsibilities Window, *Oracle Applications System Administrator's Guide*

2. **Assign User Assignments to a Responsibility**

   Set up organization security if you want to enable only those users who belong to the sponsoring organisation to update and delete events and to enroll students onto those events and update the enrollment.

   See Setting Up Organization Security: page 12 – 3

Step 51 Define Users

This is a task for your System Administrator.

The sub–steps that follow show you how to perform all these steps.

1. **Define Every User of the Application**

You should define every user of the system with a unique username and password. You can give the same responsibility to many different users, but any data changes will be identified by the Application Username.

Users

See: Users Window, *Oracle Applications System Administrator's Guide*

2. **Set Up Organization Security and Associate Employees to Usernames**

   If you use Oracle Human Resources and want to restrict which users can update or delete certain events, Create one FND_USER for every employee who is using the Oracle Training Administration application. This means the user can only update or delete events that are administered by the organization to which he or she is assigned. This security applies both to the event itself and to all enrollments on the event.

   For more information about setting up organization security in Oracle Training Administration, see Setting Up Organization Security: page 12 – 3

   You must then associate employees with their usernames. You enter an employee's user name in the User Name field then select the employee from the List in the Employee field.

   Users

   See: Users Window, *Oracle Applications System Administrator's Guide*

Step 52 Define HR User Profile Options

This is a task for your System Administrator.

You must define the HR:Business Group profile option for every new responsibility. By default this option is set to the setup Business Group.

In addition, you may want to set other profile options for responsibilities or even for an individual user.

System Profile Values

See: Setting User Profile Options, *Oracle Applications System Administrator's Guide*

Step 53 Set Up Enrollment Status Security

You can prevent users of a responsibility from entering or updating enrollments with certain enrollment statuses. Use the Booking Status Exclusions window to select the responsibility and the enrollment statuses that users of this responsibility cannot select.

See Setting Up Enrollment Status Security: page 12 – 5

Implementation Steps: Audit

Step 54 Estimate File Sizing and Management Needs

Whenever you choose to audit the actions of users of the system you are deciding to keep the details of all the transactions that take place. This includes 'before' and 'after' details as well as the details of who made the change and when.

Turning Audit on has no noticeable effect on the performance of the system and users will not be aware of any extra delay in committing their transactions.

Attention: In normal use the auditing of data can soon generate large volumes of audit data, which even when stored in a compressed format will continue to grow in size until you reach the limits imposed by your environment. If you reach the limits during active use then users will be unable to use the system until you remedy the problem.

You are strongly advised to consider the scope of your audit activities and how you will use the data you accumulate. Also you should consider how often you will report on the audit data, and when you will archive and purge your audit data.

If you need more advice on this you should contact your Oracle Support representative.

The following tasks are the responsibility of your System Administrator.

Step 55 Define Audit Installations

If you have installed more than one Oracle Application you can audit across multiple installations. For Oracle Training Administration you should enable auditing for the OTA user and the APPLSYS user.

Audit Installations

See: Audit Installations Window, *Oracle Applications System Administrator's Guide*

Step 56 Define Audit Tables and Columns

With Oracle Applications you can define the level of detail you want to audit. You define the individual fields of each record that you want to audit.

Audit Tables

See: Audit Tables Window, *Oracle Applications System Administrator's Guide*

Step 57 Define Audit Groups

You can define one or more Audit Groups for your installation. You might find this useful if you have more than one Oracle Application installed.

Audit Groups

See: Audit Groups Window, *Oracle Applications System Administrator's Guide*

Step 58 Activate AuditTrail Update Tables Process

To start the AuditTrail activity you must submit the *Activate AuditTrail Update Tables Process.*

Submit Requests

See: Submitting a Request, *Oracle Applications System Administrator's Guide*

Implementation Steps: Help Customization

You can supplement the supplied help system by adding your own custom help files, for example to document specific procedures, statuses, or descriptive flexfields at your site.

☞ **Attention:** The Oracle Application CD contains the source files for the supplied help system. In principle, you can edit these files and recompile them to create a customized help system. However, your changes will be lost when you upgrade to a new release of Oracle Training Administration.

We therefore recommend that you put all your additional help text in the custom help files.

Step 59 Create Custom Help Files

On the Contents page (or "Home" page) of the Oracle Training Administration Help there is a hypertext link called "Custom Help".

To create your own help file you need a text edito that allows you to save files in HTML format. You also need a Windows PC.

See: Overview of Oracle Applications Help, *Oracle Applications System Administrator's Guide*

Glossary

A

Activity Any educational offering that is designed to improve a student's qualifications, competencies, or experience. Examples: a training course, on–the–job training, structured work experience. An activity defines what a supplier can offer, but it has no dates attached. An activity is a version of an activity type. See also: *Scheduled Event*.

Alternative Regions Parts of a window that appear in a stack so that only one is visible at any time. You click on the name of the region to pop up a list of the other regions in the stack. Select the name of a region to bring it to the top of the stack.

Appraisal A 'superset' of recording opinions and setting and achieving objectives, plans and so on. See also: *Assessment.*

Assessment An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job. See also: *Appraisal.*

B

Behavioral Indicators Characteristics that identify how a competence is exhibited in the work context. See also: *Proficiency Level*

Block The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next. See also: *Region*, *Field.*

Business Group The highest level organization in the Oracle HRMS system. A Business Group may correspond to the whole of your enterprise or to a major grouping such as a subsidiary or operating division. Each Business Group must correspond to a separate implementation of Oracle HRMS.

C

Category These enable you to group together activities that you want to schedule and administer as a program, or offer together as a discount package, or classify for reporting purposes. When you define a category, you can specify whether it can be used as a program, package, and / or classification. See also: *Program, Package.*

Competence Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competence can be a piece of knowledge, a skill, an attitude or an attribute.

Competence Profile Where you record applicant and employee accomplishments, for example, proficiency in a competence.

Competence Type A group of related competencies

D

Descriptive Flexfield A field that your organization can customize to capture additional information required by your business but not otherwise tracked by Oracle Applications. See also: *Key Flexfield.*

Development Event A mechanism for scheduling employee time and other resources required to develop new training activities or to enhance existing ones. You can attach a budget to a development event. See also: *Event*

Discount An agreement to supply student places on one or more events at a reduced price. The agreement may be restricted to one customer or open to all. It may be restricted to a maximum number of places. See also: *Enrollment Agreement*

E

Enrollment Agreement An agreement about the price or method of payment for one or more events. There are two types of agreement: discounts and prepurchase agreements. See also: *Discount, Prepurchase Agreement.*

Event When you are ready to take enrollments or make resource bookings, you create an event. An event is a specific instance of an activity, scheduled to run on given dates, or a one–time event, which is not related to an activity. See also: *Scheduled Event, One–time Event, Development Event.*

F

Field A view or entry area in a window where you enter, view, update, or delete information. See also: *Block, Region.*

Finance Header This records the status of a financial transaction with a particular customer or supplier. There are three types of finance header: payable, receivable, and cancellation. You can transfer it to your finance system to trigger the creation of an invoice or payment, or the cancellation of an existing invoice or payment. You can associate one or more finance lines with each header. See also: *Finance Line.*

Finance Line This records a sum of money to pay a supplier, or to charge a customer for an enrollment, or to deduct from the balance of a prepurchase agreement. See also: *Finance Header.*

Folder A special block or window whose field and record layout you can customize. You can identify a folder block by the Open Folder icon in the upper left corner. You can save your customized field and record layout as a new folder.

Form A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components. See also: *Block, Region, Field.*

K

Key Flexfield A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such a resource. See also: *Descriptive Flexfield.*

M

Menus You set up your own navigation menus, to suit the needs of different users.

O

One Time Event Any event for which you want to record basic information and enrollments, but which you do not need to define as an activity. Typically, this is an event that you do not expect to run more than once. See also: *Event*, *Activity.*

P

Package A group of activities that may be the subject of an enrollment agreement. See also: *Enrollment Agreement*

Personal Competence Profile See: *Competence Profile.*

Prepurchase Agreement A customer contracts to purchase a certain amount of training, measured in money or training units, on activities listed on a price list. This type of agreement may also incorporate a percentage discount. See also: *Training Unit*.

Price List A catalog of activities and the prices at which they are available between certain dates. A price list either details prices in monetary terms (in a certain currency) or in training units. See also: *Training Unit*.

Proficiency Level A system for expressing and measuring how a competence is exhibited in the work context. See also: *Behavioral Indicators*.

Program A group of events that you schedule together. Students enroll on the program and you can charge them for the program as a whole rather than individual events. See also: *Event*.

Q

QuickCode Types Categories of information, such as nationality, address type and enrollment status, that have a limited list of valid values. You can add values to some QuickCode Types.

R

Region A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window. See also: *Block, Field.*

Report Parameters Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

Report Security Group A list of reports and processes that can be submitted by holders of a particular responsibility. See also: *Responsibility*.

Report Set A group of reports and concurrent processes that you specify to run together.

Resource Any facility, person, or equipment that you need to book to run an event. Two special resource types in Oracle Training Administration are trainers and venues.

Responsibility A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities. See also: *User Profile Options, Report Security Group.*

Restricted Event A scheduled event on which only selected customers or selected employees can enroll. You select valid customers by name and valid employees by organization, job, or position. See also: *Scheduled Event*.

S

Scheduled Event A specific instance of an activity on which students can enroll and for which you can book resources. See also: *Event, Activity.*

Session A unit of time within an event for which you can independently book resources. For example, you might divide a one day event into four two hour sessions, and a five week evening course into five evening sessions.

Special Information Types Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

T

Third Party Contact An agency that places enrollments for students employed by other customers. You create a third party contact as a customer.

Training Unit Any user–defined expression of the cost of a training activity. For example, a customer might buy 100 hours of trainer time using a prepurchase agreement. This agreement must be based on a price list that expresses the cost of activities in trainer time. You might define the training unit as Half an Hour, so that a full day activity costs 16 training units. See also: *Prepurchase Agreement*

U

User Profile Options Features that enable system administrators and users to tailor Oracle Applications to their exact requirements. See also: *Responsibility*

Index

A

B

C

D

E

F

Q

R

S

T

U

V

W

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Oracle Training Administration User's Guide
A58282–01

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