Using Oracle® Training Administration

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Preface

Audience for This Guide

Welcome to Release 11*i* of the *Using Oracle Training Administration* user guide.

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 University.
- The Oracle Applications graphical user interface.

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

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

How To Use This Guide

This guide contains the information you need to understand and use Oracle Training Administration.

This preface explains how this user guide is organized and introduces other sources of information that can help you. This guide contains the following chapters:

- 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 and 3 explain how you can set up Oracle Training Administration to meet your enterprise's training needs. These chapters provide an introduction to flexfields and explain how you can customize and extend Oracle Applications. They also list the flexfields in Oracle Training Administration and summarize what you need to set up. They describe how to set up and define your reference data, such as Lookups, your customers, suppliers, trainers, resources and skills or competencies.

They also describe how you set up your training activities, such as your course events, on–the–job training events, work experience events, and so on.

- Chapter 4 explains how to maintain price lists for your training activities, and how to set up special discount or prepurchase agreements for selected customers and events. It also explains how to use different types of financial header to meet all your financial relationships with external, or internal customers, including cross charging.
- Chapter 5 describes how you can use statuses to create the typical life cycle of an event within your enterprise, and control the type of student enrollments and resource bookings that you enter for the event. It also describes waiting list management to enable you to allocate places on an event when they become available.
- Chapter 6 describes how to set up and issue standard letters to students, triggered by changes in 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.
- Chapter 7 covers scheduling and resourcing events and sessions. It describes when and how to change the status of events, create programs, restrict events to one or more customers or to internal employees, view and manage resources, and so on.
- Chapter 8 explains how to enroll students onto events. It describes how you can easily enroll both employees and customers (non–employees) onto the same event or session, waitlist students when events are full and enroll students on waiting lists automatically. Using statuses, OTA prevents you from double–booking students onto events.
- Chapter 9 answers questions about your training business. For example, you can run the Budgets and Costs Breakdown report to help you measure the profitability of events.
- Chapter 10 describes how 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
- Chapter 11 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.

- Appendix A lists the default menus that give you access to all the windows on the system.
- Appendix B provides a template SQL*Plus script for use with standard letters.

Finding Out What's New

From the HTML help window for Oracle Training Administration, choose the section that describes new features or what's new from the expandable menu. This section describes:

- New features in 11*i*. This information is updated for each new release of Oracle Training Administration.
- Information about any features that were not yet available when this user guide was printed. For example, if your system administrator has installed software from a mini pack as an upgrade, this document describes the new features.

Other Information Sources

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

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

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF). The technical reference guides are available in paper format only. Note that the HTML documentation is translated into over twenty languages.

The HTML version of this guide is optimized for onscreen reading, and you can use it to follow hypertext links for easy access to other HTML guides in the library. When you have an HTML window open, you can use the features on the left side of the window to navigate freely throughout all Oracle Applications documentation.

- You can use the Search feature to search by words or phrases.

- You can use the expandable menu to search for topics in the menu structure we provide. The Library option on the menu expands to show all Oracle Applications HTML documentation.

You can view HTML help in the following ways:

- From an application window, use the help icon or the help menu to open a new Web browser and display help about that window.
- Use the documentation CD.
- Use a URL provided by your system administrator.

Your HTML help may contain information that was not available when this guide was printed.

Related User Guides

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

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

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

User Guides Related to All Products

Oracle Applications User Guide

This guide explains how to navigate the system, enter data, and query information, and introduces other basic features of the GUI available with this release of Oracle Training Administration (and any other Oracle Applications product).

You can also access this user guide online by choosing "Getting Started and Using Oracle Applications" from the Oracle Applications help system.

Oracle Alert User Guide

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

Oracle Applications Implementation Wizard User 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 Oracle Developer forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards

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

User Guides Related to This Product

Using Oracle HRMS – The Fundamentals

This user guide explains how to setup and use enterprise modeling, organization management, and cost analysis. It also includes information about defining payrolls.

Managing People Using Oracle HRMS

Use this guide to find out about using employee management, recruitment activities, career management, and budgeting.

Running Your Payroll Using Oracle HRMS

This user guide provides information about wage attachments, taxes and social insurance, the payroll run, and other processes.

Managing Compensation and Benefits Using Oracle HRMS

Use this guide to learn about compensation setup, entry and analysis, setting up basic, standard and advanced benefits, salary administration, and absence management and PTO accruals.

Customizing, Reporting and System Administration in Oracle HRMS

This guide provides information about extending and customizing Oracle HRMS, managing security, auditing, information access, and letter generation.

Implementing Oracle HRMS

This user guide explains the setup procedures you need to do in order to successfully implement Oracle HRMS in your enterprise.

Implementing Oracle Self–Service Human Resources (SSHR)

This guide provides information about setting up the self–service human resources management functions for managers and employees. Managers and employees can then use an intranet and Web browser to have easy and intuitive access to personal and career management functionality.

Using Oracle FastFormula

This guide provides information about writing, editing, and using formulas to customize your system. Oracle FastFormula provides a simple way to write formulas using English words and basic mathematical functions. For example, Oracle FastFormula enables you to specify elements in payroll runs or create rules for PTO and accrual plans.

Using Oracle SSP/SMP

This guide provides information about setting up and using Oracle SSP / SMP to meet your statutory sick pay and statutory maternity pay obligations.

Using Application Data Exchange and Hierarchy Diagrammers

This guide provides information about using Application Data Exchange to view HRMS data with desktop tools, and upload revised data to your application. This guide also provides information about using Hierarchy Diagrammers to view hierarchy diagrams for organizations and positions.

Oracle Business Intelligence System Implementation Guide

This guide provides information about implementing Oracle Business Intelligence (BIS) in your environment.

BIS 11*i* User Guide Online Help

This guide is provided as online help only from the BIS application and includes information about intelligence reports, Discoverer workbooks, and the Performance Management Framework.

Using Oracle Time Management

This guide provides information about capturing work patterns such as shift hours so that this information can be used by other applications such as General Ledger.

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.

Installation and System Administration Guides

Oracle Applications Concepts

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

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle One–Hour Install, which minimizes the time it takes to install Oracle Applications and the Oracle 8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle One–Hour Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

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

Using the AD Utilities

Use this guide to help you run the various AD utilities, such as AutoInstall, AutoPatch, AD Administration, AD Controller, Relink, and others. It contains how–to steps, screenshots, and other information that you need to run the AD utilities.

Oracle Applications Product Update Notes

Use this guide as a reference if you are responsible for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11i. It includes new features and enhancements and changes made to database objects, profile options, and seed data for this 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 Training Administration Technical Reference Guide

This reference guide contains database diagrams and a detailed description of database tables, forms, reports, and programs for Oracle

Training Administration and related applications. 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 guide for any product you have licensed. Technical reference guides are available in paper format only.

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.

Training and Support

Training

We offer 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. We also offer Net classes, where training is delivered over the Internet, and many multimedia–based courses on CD. 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.

Do Not Use Database Tools to Modify Oracle Applications Data

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.

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

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications forms, you might 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.

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. Oracle Applications provides the E–Business Suite, a fully integrated suite of more than 70 software modules for financial management, internet procurement, business intelligence, 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 145 countries around the world.

Your Feedback

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

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

Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to **appsdoc@us.oracle.com**.

CHAPTER

1

Introduction to Oracle Training Administration

Introduction to Oracle Training Administration

Oracle Training Administration (OTA) is designed to support the full range of business activities associated with training and development. Its purpose is to ensure continuous improvement of your employees' abilities to meet current and future objectives in a cost–effective way.

What activities (courses) can you set up?

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 also have different versions of an activity, using dates to control when it can be scheduled.

Can you design curriculum for specific goals?

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

Can you schedule and track training events?

You schedule and track training events by classifying classes as open or restricted, grouping events into programs and identifying suitable training events based on combinations of criteria.

What about training histories?

You can manage all enrollments to events through nominations, confirmations, successful attendance and student training histories.

Can you update competencies?

You can optionally update competencies after successfully completing a training event.

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

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

- How many people, and which ones, have the required skills and competencies for the job?
- How quickly can I improve the skills of a group of people, and at what cost?
- How does a person compare with the skills and competencies needed for the job?
- Do my employees need more training?

Introduction to Oracle Training Administration Overview

Oracle Training Administration facilitates management of comprehensive training and certification business. Employee competencies are recorded and available for career planning as well as candidate placements, performance appraisals and other activities.

Tightly integrated with the career management functions within the Human Resources application, OTA is also integrated with Oracle Financials applications to administer the financial aspects of the training business.

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.

Cost Analysis of Events

If you have Project Accounting (PA) installed at your enterprise, you can link events created in Oracle Training Administration (OTA) with projects to analyze the actual cost of running an event. You track events, resources or resource bookings through Oracle Training Administration while you track and invoice the cost of preparing and delivering training through Project Accounting.

Additionally, if there are expenses that should be billed to a customer (such as restricted events), you can itemise the expenses in Project Accounting, and invoice them through the standard Project Accounting (PA) to Accounts Receivable (AR) interface.

Create Events for Every Occasion

Oracle Training Administration enables you to create all types of event to meet your business needs. A **s***cheduled 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 enroll 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 enroll 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 life cycle.

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

Automatic Waitlist Enrollment

Alternatively, you can enroll waitlisted students automatically onto events, based on waitlist priority or enrollment date. Oracle Training Administration not only provides automatic enrollment functionality, but it also prevents double booking from occurring.

Automatic enrollment for waitlisted students occurs when a student has cancelled an enrollment, or after the maximum number of attendees for an event has increased. OTA automatically moves the first eligible waitlisted person onto the event.

You can define the waitlist rules yourself, by priority, 'first come first served', and so on. You can also define the length of time before the event runs that this automated processing occurs. This provides you with significant flexibility to meet the needs of your enterprise.

Automatic Enrollment on All Events in a Program

If required, you can enroll students onto a program and choose whether or not to enroll them onto all events (program members) automatically. If you choose to enroll students onto program members automatically, Oracle Training Administration also creates all event associations for you, where appropriate.

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 $15 000 for up to 10 students and $10 000 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
- 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.

Cross Charge Training Fees and Resources

Automated billing and payments functionality exists for internal training, if required.

You can transfer the cost of training fees or resources between organizations, departments or cost centers within your enterprise. Cross charging for resources is of benefit if you operate a business in which resources are provided by other organizations or cost centers within your enterprise, rather than provided by outside suppliers.

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

The Training Cycle

The training function within an enterprise can be depicted as a cycle such as the one shown in the figure below.

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

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

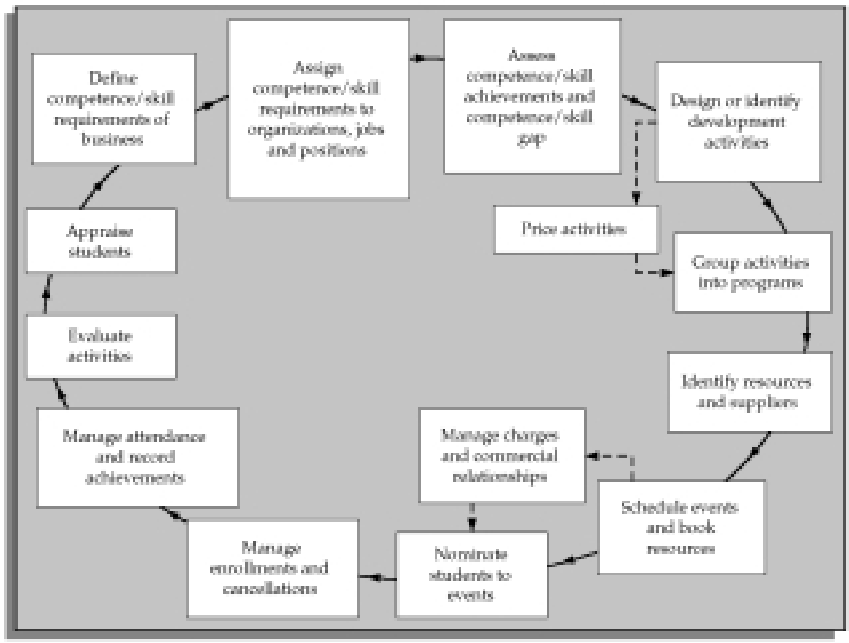
8. Schedule events and book resources: create events, with dates, for your training activities and book the resources required to run them. Manage payments to resource suppliers.
9. Manage charges and commercial relationships: set up special discount and bulk purchase agreements for customers, if appropriate.
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 The Training Cycle



Setup Decisions

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 Implementation Steps: page 11 – 8.

CHAPTER

2

Setup and Customization

Setup and Customization

One of the key features of Oracle Applications is the user's ability to customize some important parts of the system, and to define additional information you want to record in the windows.

What are the advantages of valid lists of values?

Another key feature of Oracle Applications is the provision of lists of valid values on certain fields throughout the system. Providing lists of values for certain items of information has several advantages:

- They ensure all users use the same terminology, making it easier to enquire and report on the information.
- They also speed up data entry because you can enter just enough to identify the value, and the system completes the entry.

Can you use more than one Business Group?

Yes, you can, though enterprises often use just one.

Many enterprises decide to use just one Business Group to hold 'live' information so they can display, report and manage all their information at the same time. However, you may want to set up multiple Business Groups in the same installation if you are a holding company or corporation with a number of subsidiary companies who manage their training quite separately.

How do you handle resources?

You can identify all resources you need to book to run events. These include facilities, people or equipment. You can enter trainers as people on the system, if required. Alternatively, you can simply record that a certain number of unnamed trainers can be provided by a certain supplier.

Can you update competencies after completion of a training event?

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.

You can automatically add these competencies to a student's competence profile after successful completion of a training event.

Once these competencies are added to the profile, they are available for career planning as well as candidate placements, performance appraisals and other activities.

Setup and Customization Overview

To enable you to set up, customize, extend and get the most out of Oracle Training Administration, you need to understand its constituents.

Key and Descriptive Flexfields

Oracle Applications provide you with key and descriptive flexfields to enable you to customize and extend Oracle Applications. Each flexfield has the characteristics of separate fields known as *segments*.

There are two types of flexfield:

- Key

  These are the mechanism by which you customize some important parts of the system.

- Descriptive

  These enable you to define additional information you want to record in the windows.

Lookups

Lookup 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. Lookups not only ensure that all users use the same terminology, but they also speed up data entry.

Structures and Data

Once you have identified whether to customize parts of the system, define additional information or to add your own Lookups, you are ready to set up other structures and data that all users share across the application. The structures and data include:

- Business Group and other Organizations

  Business Groups are the largest organizational unit on the system. You use just one Business Group, or use multiple Business Groups in the same installation. Organizations are your internal training departments and other departments.

- Customers and Suppliers

  These are the internal or external agencies with whom your enterprise provides or buys goods or services.

- Resources (including Trainers)

  These are facilities, people, or equipment that you need to book to run an event. You can enter trainers as people on the system, if required. Alternatively, you can simply record that a certain number of unnamed trainers can be provided by a certain supplier.

- Competencies or Skills

  You can hold the qualifications, attributes and knowledge that students can expect to attain by attending training activities as either competencies or skills.

- Financial Reference Data

  If you do not have Oracle General Ledger installed in your enterprise, you need to set up additional, financial information. You need to do this to enable the Customers and Suppliers windows to operate, and to enable integration with a general ledger or other accounting application to transfer costs.

  Note: If you do have Oracle General Ledger, some, or all of the data you require already exists.

Lookups

Lookups provide lists of valid values on certain fields throughout the system. 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 Lookup type. Each value comprises a code and a meaning. For example:

Lookup 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 Lookups for each Lookup Type

Predefined Lookup Types

A number of Lookup 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 Lookup 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 Lookup 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.

User and Extensible Lookups: page 2 – 7 lists the predefined Lookup types with an access level of User or Extensible.

User and Extensible Lookups

You can add new Lookups to the following Lookup types in Oracle Training Administration.

Field	Lookups
Category	ACTIVITY_CATEGORY
Success Criteria	ACTIVITY_SUCCESS_CRITERIA
Status	ACTIVITY_USER_STATUS
Type	ADDRESS_TYPE
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
Status of Training	OTA_TRAINING_STATUSES
Types of Training	OTA_TRAINING_TYPES
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

User and Extensible Lookups

Key Flexfields

You can set up an unlimited number of structures for key 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 training resources and skill types (if you are not using the competence approach).

In Oracle Training Administration there are two key flexfields:

- Training Resources: page 2 – 16
- Personal Analysis: page 2 – 19

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.

Suggestion: Avoid segments containing information that may change regularly. There is no history of changes to the combinations you create.

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.

Example – List of Descriptive Flexfields provides a full list of descriptive flexfields in Oracle Training Administration.

Example – 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 Additional Training	Additional Training
User Definable Descriptive Flexfields	

Descriptive Flexfield Title	Window Title
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
Additional Resource Usage Information	Resource Usages
Additional Suppliable Resource Details	Resources
Additional Vendor Supplies Information	
Additional Budget Information	
Additional Finance Line Information	Finance Lines
User Definable Descriptive Flexfields	

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.

Descriptive Flexfields (with Startup Data)

Oracle HRMS supplies two predefined descriptive flexfields to hold address information in different styles for different countries. These descriptive flexfields are:

- Personal Address Information
- Location Address

Title	Table Name	Window Title
Personal Address Information	PER_ADDRESSES	Address
Location Address	HR_LOCATIONS	Location

Table A – 1 Address Styles in Oracle HRMS

You can use these descriptive flexfields to add new address styles or to change the styles provided.

Oracle HRMS also provides *context sensitive* segments to hold each line of the address .The available address styles 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.

☞ **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.

Organization Definitions

Define a Business Group and internal training organizations so that you can select these organizations when you define training activities and schedule events. You can share your organization definitions with other Oracle Applications.

Business Groups

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.

Organizations

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.

Before you define organizations, enter their site addresses using the Location window. Several organizations can share one site address. Use the Organization window to define a Business Group and internal training organizations.

Key Flexfields Associated with the Business Group

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.

Suppliers and Customers

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 the *external* organizations for which you run events and enroll students. This includes internal or external agencies to whom you supply goods or services.

You set up as customers:

- The names and addresses of the organizations where external 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

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.

Shared Supplier and Customer Information

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

Training Resources

Training 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 Lookup 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. The name of the structure must be the same as the name of the resource type.

If you want users to select trainers already entered on the system as people or contacts (rather than letting them enter new trainer names when they define resources), 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.

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 could set up the following segments for the Trainer resource type:

- Full Name
- Main Expertise

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

- Name
- Center
- Capacity
- Seating Arrangements

• Main Purpose
• Fixed Equipment

You can define the same segment in multiple structures. This could be the Center segment in the structures for all resource types so that you can report on all resources held at your training centers.

If you define more than one Business Group, the Training Resource structures are shared across the Groups. However, you can 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.

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 only have Oracle Training Administration, you can hold the qualifications, attributes and knowledge as skills.

Competencies

If you are developing the competence approach, we suggest you hold the qualifications, attributes and knowledge gained from training activities as competencies.

For a full discussion of the competence approach, see Career and Succession Management, *Managing People Using Oracle HRMS.*

☞ **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: page 10 – 23.

Skills Information

If you are not developing the competence approach, 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.

Personal Analysis Key Flexfield

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 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.

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

These 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.

You select how you plan to use each type when you enable them for your Business Group.

In Oracle Human Resources, you can use them for:

- Job requirements
- Position requirements
- Personal information
- OSHA and ADA reporting

In Oracle Training Administration, you can use them 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 type appears.

Adding Lookup Types and Values

To create a new Lookup type, add values to an existing Lookup type, or prevent existing values from appearing in a Lookup type, use the Application Utilities Lookups window.

Defining Lookup Types

You can create your own Lookup Types to provide lists of values, for example to validate element entries.

▶ **To define a new Lookup type and the Lookup values:**

1. Choose the access level for the lookup type
2. Enter the lookup type.
3. Enter the user name of the lookup. This is the name that users will see from within the application
4. Select the application in which the lookup will be used
5. Optionally, add a description of the Lookup type
6. Enter the code, meaning and optionally a description for each value.

   If you do not enter a start date, the new Lookup is valid immediately. If you do not enter an end date, the new Lookup is valid indefinitely.
7. Save your work.
8. Optionally, choose the Usages button and select other Oracle Applications in which you want to use this new Lookup Type.

▶ **To add Lookup values to an existing Lookup type:**

1. Query the Lookup Type to which you want add a value.

   You cannot add values if the Access Level is System.
2. Enter the code, meaning and optionally a description for each value.

   If you do not enter a start date, the new Lookup is valid immediately. If you do not enter an end date, the new Lookup is valid indefinitely.
3. Save your work.
4. Optionally, choose the Usages button and select other Oracle Applications in which you want to use this new Lookup Type.

Removing Lookup Values

You cannot delete Lookup values after saving them, but you can stop them appearing in lists of values.

▶ **To remove a user defined Lookup:**

- In the Lookups window, do one of the following:
  - Enter an end date if you want to prevent users selecting this value after a certain date.
  - Disable the code by unchecking the Enabled check box if you want to prevent users selecting this value with immediate effect from the current date.
  - Change the meaning and description to create a replacement Lookup.

If you disable the Lookup or set an end date, users cannot select this value when they create new records. However, they can continue to see the value when they query records that contain it.

If you add, disable, or change the meaning of a Lookup, users must log out and log back in again for your changes to take effect.

Creating Locations

Create 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 create a 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 Locations

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

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

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

Creating a Business Group

If you 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. This Business Group is used by the default responsibility, supplied with the system.

▶ **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.
4. Do not enter any other information in this window as it is used by Oracle Human Resources, not by Oracle Training Administration.
5. 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.

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.

▶ **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.

   There is no additional information to enter for a training organization.
5. Save your work.

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

Creating Accounting Reference Data

If you do not have Oracle General Ledger installed in your enterprise, you need to set up a minimum Chart of Accounts structure to enable:

- The Customers and Suppliers windows to operate
- Integration with a general ledger or other accounting application to transfer costs

Accounting Data

1. Define Accounting Key Flexfield Structure: page 11 – 13
2. Create a Calendar: page 2 – 28
3. Define a Set of Books: page 2 – 30
4. Choose the Set of Books: page 2 – 32
5. Define Financials Options: page 2 – 33
6. Define System Options: page 2 – 35

Operating Information

If you have Oracle Financials installed in your site, you have the right multi–organization environment to enable the Customer window to operate correctly. If you haven't got Oracle Financials installed at your site, you need to create the right environment by setting up a GRE/Legal Entity and an operating unit, and set up the MO:Operating Unit profile for each of your OTA responsibilities.

If you have already created a GRE/Legal Entity, go straight to creating a operating unit.

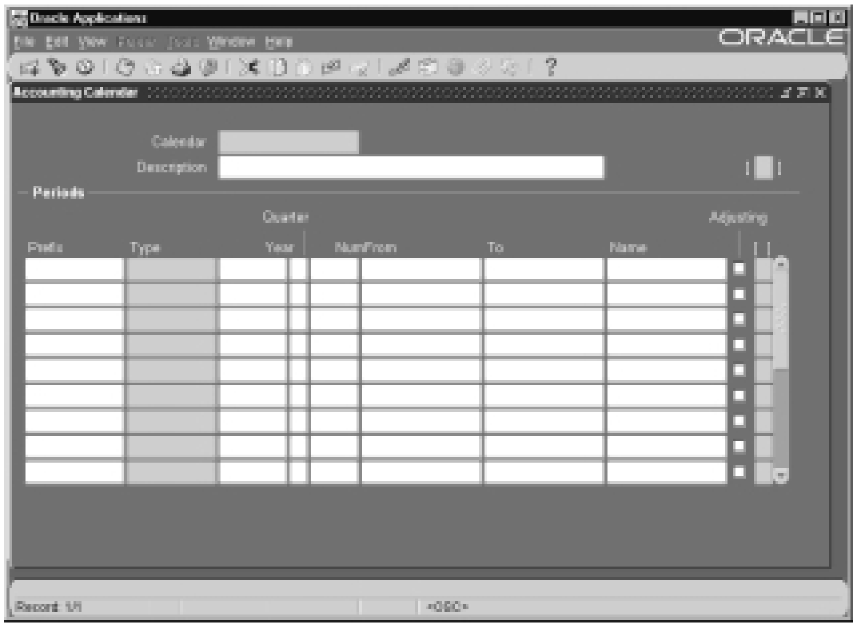
7. Create a GRE/Legal Entity: page 2 – 37
8. Create an Operating Unit: page 2 – 38
9. Create a MO:Operating Unit Profile: page 2 – 39

Creating a Calendar

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 General Ledger 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 for the calendar, for example, **`OTA Calendar`**.
2. Enter a description for the calendar, for example, **`Calendar for OTA`**.
3. Enter a period prefix, for example, **`OTA`**.
4. Enter the period type, for example, **`Year`**.
5. Enter the year, for example, **`2000`**.
6. 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.

7. Enter the number, for example, **1**.
8. Enter the start and end dates the period covers for example, **01–JAN–2000** to **31–DEC–2000**.

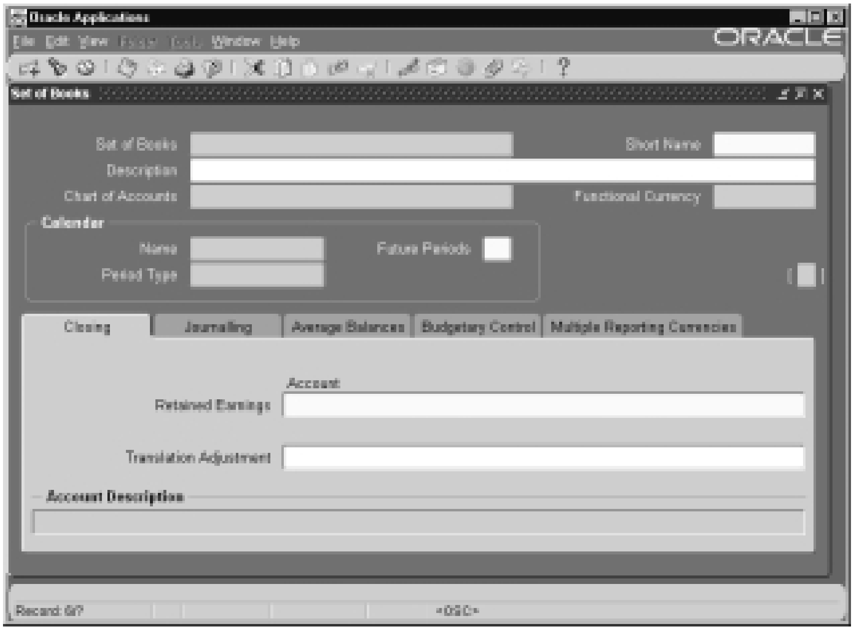
   Note: These dates are for reference only. They are not used by Oracle Training Administration.

9. Save your work.

Defining a Set of Books

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 General Ledger 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 for the set of books, for example, **`OTA set of Books`**.
2. Enter a short name for the set of books, for example, **`OTA`**.
3. Enter a description for the set of books, for example, **`Set of Books for OTA`**.
4. Select the name of the Chart of Accounts you are using, for example, **`OTA Accounting Flexfield`**.
5. Select the functional currency used by your enterprise in the Functional Currency field, for example, **`USD`**.
6. Select the accounting calendar you previously created, for example, **`OTA Calendar`**.

Entering Closing Information

7. Select the Closing tabbed region and enter zeros in all the segments as account information in the Retained Earnings field for Company, Department and Account.
8. Enter zeros in all the segments as account information in the Translation Adjustment field.

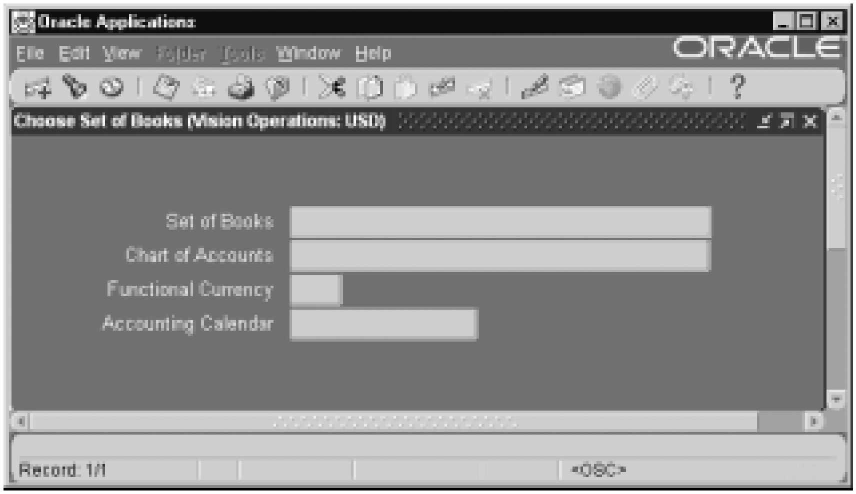
Entering Journalling Information

9. Ensure that the Balance Intercompany Journals and Suspense check boxes are checked.
10. Enter zeros in all the segments as account information in the (Suspense) Account field.
11. Save your work.

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

Choosing the Set of Books

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 General Ledger in your enterprise.



▶ **To choose a set of books:**

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

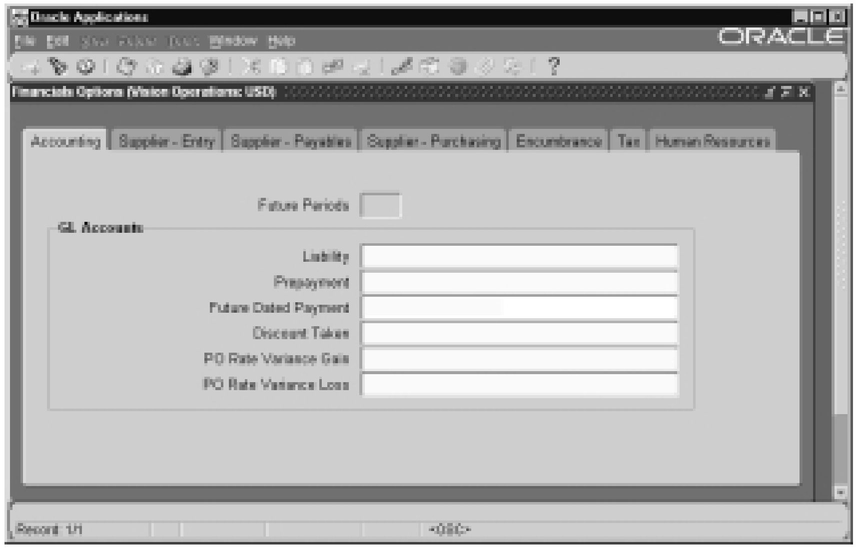
   Oracle Training Administration displays the Chart of Accounts, currency and calendar you previously created.

2. Save your work.

Defining Financials Options

Use the Financials Options window to set up your financials options. You only need to define financials options if you do not have Oracle General Ledger 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. Choose the Accounting tabbed region (if not already displayed).

Entering Accounting Information

2. Enter **1** in the Future Periods field.
3. Ensure that zeros (000.000.000) are displayed in the following fields:
   - Liability
   - Prepayment
   - Future Dated Payment
   - Discount Taken
   - PO Rate Rate Variance Gain
   - PO Rate Variance Loss

Entering Supplier–Entry Information

4. Select any invoice match option from the list.

5. Select the Supplier Numbers of Automatic as the entry and Numeric as the type from the lists.

Entering Supplier–Payables Information

6. Select 45 Net as the payment terms.
7. Select Check (cheque) as the payment method.

Entering Supplier–Purchasing Information

8. Select any Ship to Location from the list.
9. Select any Inventory Organization from the list.

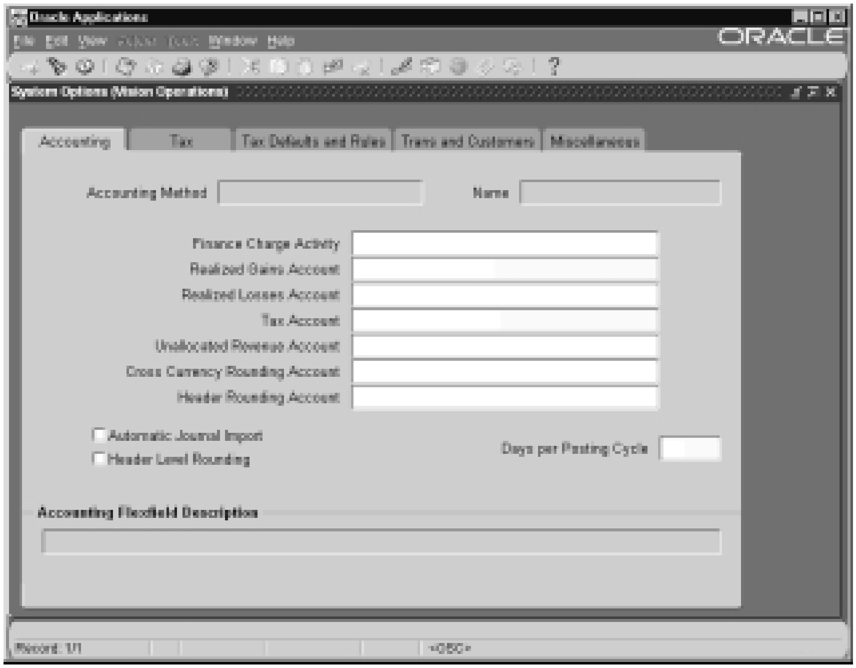
Entering Human Resources Information

10. Enter a business group, for example, **`OTA DEMO Business Group`**.
11. Select Home in the Expense Reimbursement Address region.
12. Select Automatic as the payment method.
13. Enter **`5`** in Next Automatic Number.
14. Save your work.

Defining System Options

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 tabbed region is displayed.

Accounting Information

2. Enter **`Cash Basis`** as the accounting method.
3. Enter **`OTA set of Books`** as the name.
4. Select zeros (000.000.000) in the following fields:
   - Finance Charge Activity
   - Realized Gains Accounts
   - Realized Losses Account

- Tax Account

5. Leave the default number of days per posting cycle as they are.

Tax Information

6. Select Sales Tax as the method of paying tax.
7. Select No Validation – Country as the location flexfield structure.
8. Leave 000000 to 99999–99999 as the default postal code range.
9. Select No Validation as the address validation.
10. Select Total Tax Only for printing invoices.
11. Leave the default tax cache size as it is.
12. Select Line as the calculation level.
13. Select Nearest as the rounding rule.

Transaction and Customer Information

14. Leave the maximum memory in bytes as 65535.
15. Leave the log file message level as 0.
16. Select DEFAULT as the grouping rule name.

Miscellaneous Information

17. Enter **`5000`** as the split amount.
18. Enter **`90`** as the number of days in the Days Sales Outstanding Calculation calculation.
19. Leave the Invoices per Commit as 1000.
20. Leave the Receipts per Commit as 1000.
21. Select Open Invoice Due Date as the charge back due date.
22. Select United States as the country.
23. Select None as the source of territory.
24. Select Line First–Tax After as the applications rule set.

Creating a GRE/Legal Entity

Use the Organization window to create a GRE / Legal Entity.

▶ **To create a GRE/Legal Entity:**

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.
4. Select Internal.
5. Save your work.
6. Select the classification of GRE / Legal Entity and click the Enabled check box.
7. Save your work.
8. If you are using a US Business Group, perform the following step, otherwise go to step 12.

If you are using a US Business Group

9. Click the Others button and select Employer Identification.
10. Enter the Employer's Identification Number (EIN).
11. Save your work.

Creating Legal Entity accounting information

12. Click the Others button and select Legal Entity Accounting.
13. Select the set of books you created earlier.
14. Leave the VAT Registration Number blank.
15. Save your work.

Creating an Operating Unit

Use the Organization window to create an operating unit.

▶ **To create an operating unit:**

1. Enter a name that is unique within the Business Group, for example, **OTA Operating Unit**.
2. Enter a start date early enough for any historical information you must enter.
3. Save your work.
4. Select the classification of Operating Unit and click the Enabled check box.
5. Click the Others button and select Legal Entity.
6. Select the legal entity you created earlier.
7. Save your work.

Creating a MO:Operating Unit Profile

Once you have created your GRE/Legal Entity and an operating unit, you need to create the MO:Operating Unit profile for each of your OTA responsibilities. Alternatively, you can set the profile at site level.

Use the System (Profile Values) window to attach the operating unit to an OTA responsibility

▶ To create an MO:Operating Unit Profile

1. Check the Responsibility check box and select the name of the OTA responsibility.
2. Enter MO% in the Profile field and click the Find button.

   The System Profile Values widow opens showing the MO:Operating unit value.
3. Select the operating unit you previously created, for example, select **OTA Operating Unit**.
4. Save your work.

Creating a Customer

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

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

▶ To enter a new customer:

1. Enter the customer name and a unique customer number, and save your work.

   Depending on your setup options, the customer number may be entered for you automatically.

2. Choose the New button.

   Oracle Training Administration opens the Customer Addresses window for your new customer.

3. Select a Country.

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

   The Business Purposes fields are not used by Oracle Training Administration.

   Oracle Training Administration enter a unique reference number for the customer at that address.

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

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

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

8. Save your work.

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 and Entering Training Resources

You need to create and enter your enterprise's training resources.

▶ **To create resources:**

1. Define resource types as values for the lookup type RESOURCE_TYPE.
2. Enter your centers as values for the lookup type TRAINING_CENTRE if your Training Resource Key Flexfield structure includes a segment for training center.

   See: Adding Lookup Types and Values: page 2 – 22

▶ **To enter trainers:**

3. Enter your 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 onto Oracle Training Administration before you can select them as resources. You can enter trainers as people on the system, with their own addresses. Alternatively, you can simply record that a certain number of unnamed trainers can be provided by a certain supplier.

   - If Oracle Training Administration is installed without Oracle Human Resources, use the OTA Enter Person window to enter trainers: page 2 – 43.
   - 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, *Managing People Using Oracle HRMS*.
   - If you want to enter the trainer as a contact associated with the supplier, use the Suppliers: page 2 – 41 window.
   - If you want to enter the trainer as a contact associated with the customer, use the Customers: page 2 – 40 window.

▶ **To enter resources:**

4. Enter Resources: page 2 – 44
5. Define usage reasons as values for the lookup type RESOURCE_USAGE_REASON.

   See: Adding Lookup Types and Values: page 2 – 22

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.

▶ **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 and save your work.:
   - Enter the date of birth in the Birth Date field
   - Select Home or Office to indicate the person's preferred mail destination in the Mail field
   - Select External or Contact to indicate the type of mail address in the Type field
   - Enter the person's work telephone number if the Work Telephone field displays. Otherwise, use the Phone Numbers window to enter this information.
   - Enter the person's email ID in the Email field
6. 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.

▶ **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.

Setting Up Special Information Types

▶ **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

3

Training Event Design

Training Event Design

You can use Oracle Training Administration to design any educational or training event. These events are not restricted to conventional training courses—you can design them for:

- On–the–job training
- Work experience
- Apprenticeships
- Tests or follow ups
- Computer–based training, and so on

How relevant are training events to your business?

Training events are one of the best ways for employees to acquire or enhance competencies, qualifications or experience. It also enables them to better fulfill job requirements and to achieve career objectives.

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

How versatile is event design using OTA?

OTA has many sophisticated features. These are some of them:

- You can have concurrent versions of the training events, using dates to control when they can be run.

  You can then use concurrent versions, for example, when you need to teach the training event in more than one language.

- You can run a training event for any period of time you require, such as several hours, days or weeks.

  To help you create a detailed agenda for a training 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.

Training Event Design Overview

To enable you to design and build all your training events, you need to understand the components provided by Oracle Training Administration. The components provided are:

- Activities
  - Events based on an activity
  - Programs (of events)
  - Sessions
- Activity Types, Concurrent Versions and Versions
- Generic Information for an Activity
- Categories
- Skills or Competencies
- Resources
- Event Types You Can Create
- One Time and Development Events

What Events Can You Build?

It is the combination of these components that enables you to build any of the following:

- Training courses run internally or bought from an external supplier
- Programs to manage enrollments on a sequence of events
- On–the–job training and apprenticeships
- Work experience and secondments (that is, temporary placements in other organizations to gain experience)
- Educational activities undertaken at the student's own initiative
- Revenue–raising training activities for external delegates
- Tests or any other sort of follow–up activities
- One time events (unique or informal), such as a seminar or kick off meeting

Activities

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.

Scheduled Event

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.

Program

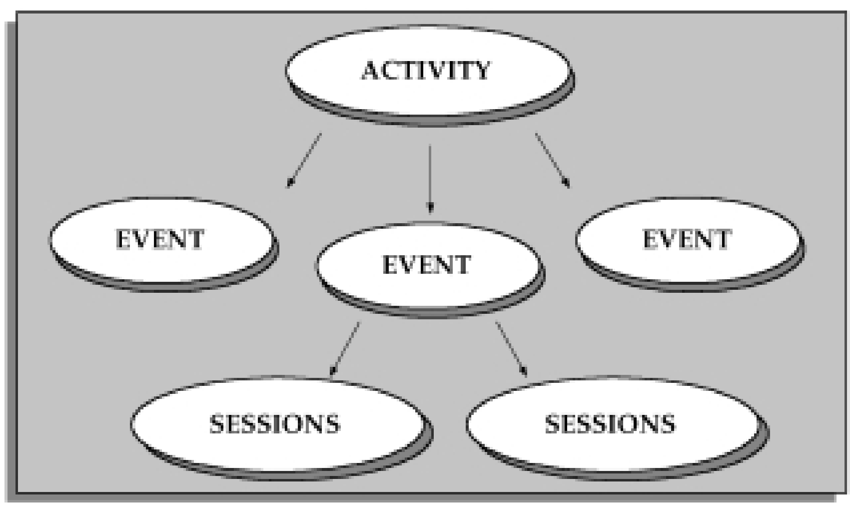
A program is a series of events that you schedule and administer as a group. Students can enroll on these events through the program. You create a program by scheduling some or all of the activities in a particular program category.

Session

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.

Figure 3 – 1 Training Event Building Blocks



Activity Types 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.

Copying and Ending Activities

Once you have created and used activities for a while you'll want to make changes. For example, you might want to create a similar activity or end an activity.

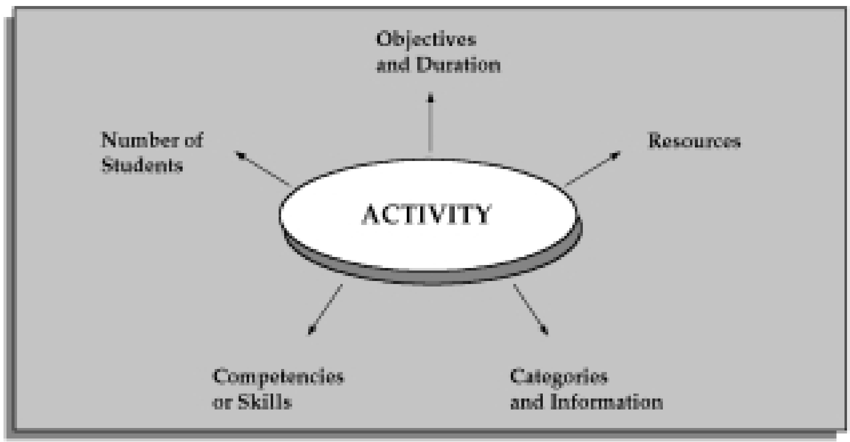
Activity Model

To save you from entering the same (or similar) information each time you schedule an event, you can hold generic information at activity level.

This not only ensures that all relevant information is there when you need it, bit it also saves you from making mistakes when you schedule an event!

The figure below illustrates the information you can hold at activity level.

Figure 3 – 2 Activities – Recording Information



Note: You can hold skills or competencies (or a mixture of both), depending upon how you or your system administrator has set up OTA.

Categories

If you want to group training events together to help you search for appropriate events later on when enrolling students, you can **categorize** activities.

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.

See: Programs of Events: page 7 – 8 for a further explanation.

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.

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

Skills or Competencies

You can identify which competencies (and at which proficiency level) an activity delivers. This can be an activity developed at your enterprise (or by an outside supplier).

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

> **Note:** You can hold skills or competencies (or a mixture of both), depending upon how your system administrator has set up OTA.

Resources

There are two ways to use resources in Oracle Training Administration.

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.

Alternatively, 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 – 33

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.

Events to Create

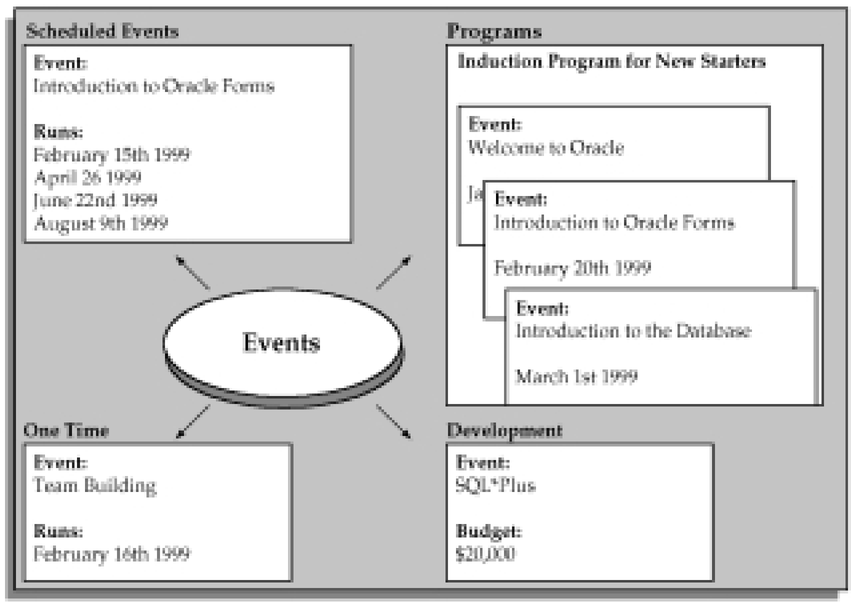
You can create the right kind of event for every occasion using Oracle Training Administration. For example, you can create:

- Scheduled events – training events that you schedule and onto which you enroll delegates
- Programs of related training events
- One Time events – unique or informal events
- Development events – to enable you to design and prototype new training activities

You can also restrict an event to internal employees or customers.

Figure 3 – 3 illustrates the different training events you can create and schedule.

Figure 3 – 3 Events



Scheduled Events and Sessions

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

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 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. For example, you might want to:

- run events as a series of evening classes or two mornings a week for three months
- run parts of events in different locations
- provide topic listings
- book resources at session level rather than at event level to use resources more effectively

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

Events – Restricted

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.

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.

Then, you can enroll students onto a program and choose whether or not to enroll them onto all events automatically.

You can also charge students for the whole program rather than the individual events.

See: Programs of Events: page 7 – 8.

How Do You Create a Program?

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

One Time and Development Events

You can also create one time and development events.

One Time (One Off) Events

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
- Seminar
- Kick off meeting

Alternatively, 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.

See: Creating a One Time Event: page 7 – 30

One Time (One Off) Events and Resources

If you need to create a one time event and book resources for the event, for example, a room and projection kit, we suggest an alternative solution. Create an activity, called 'Seminar' (or something similar), and create an event with minimal data. You can then book resources onto it and enrol attendees.

If you aren't going to enrol attendees, you can create a development event instead, and book resouces.

Development Events

If you want to use Oracle Training Administration to schedule and manage the development of new training activities, or to enhance existing activities, you can create a Development Event.

The main advantage of creating a development event is that you can plan for and control the costs 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.

Cost Analysis of Events

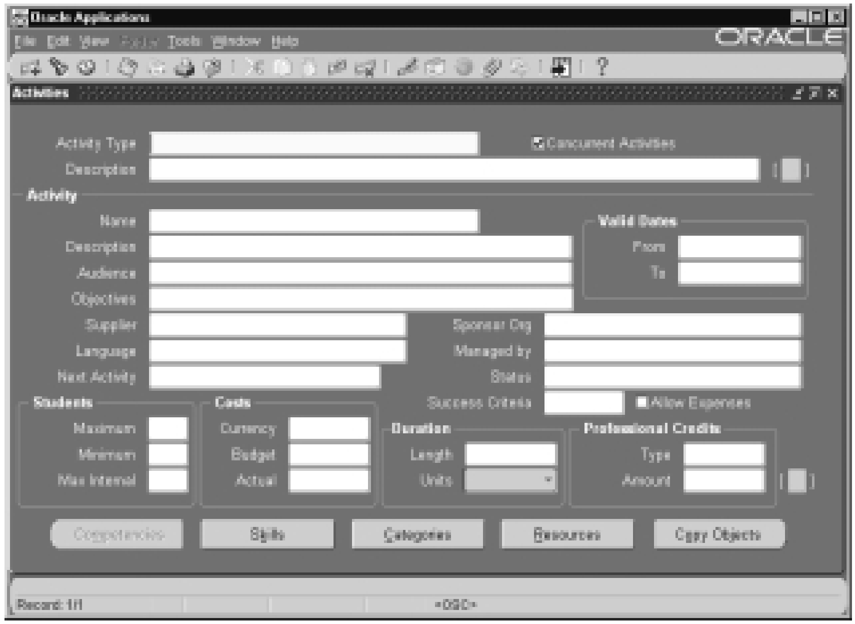
If you have Project Accounting (PA) installed at your enterprise, you have an alternative method of analyzing the actual cost of running a one time or development event.

You track events, resources or resource bookings through Oracle Training Administration while you track and invoice the cost of preparing and delivering training through Project Accounting.

Additionally, if there are expenses that should be billed to a customer (such as restricted events), you can itemise the expenses in Project Accounting, and invoice them through the standard Project Accounting (PA) to Accounts Receivable (AR) interface.

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 OTA.
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.

What to do Next?

- **Entering Skills Delivered:** If you have set up skill types, you can enter information about the skills that your activities provide.

  See: Entering Skills Delivered by an Activity: page 3 – 21.

- **Entering Competencies Delivered:** If you are using the competence approach, you can enter the competencies and proficiency levels that your training activities deliver.

  See: Entering Competencies Delivered by an Activity: page 3 – 19.

- **Categorising Activities:** You can categorise training activities into programs, classifications and packages, if required.

  See: Categorising Activities: page 3 – 20.

- **Entering Resource Required: Y**ou can specify resources that are required or useful to run events for a particular activity version.

  See: Entering Resource Required for an Activity: page 3 – 24.

Entering Competencies Delivered by an Activity

You can deliver competencies at a specific proficiency level through training activities your enterprise (or an outside supplier) provides.

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.

Categorising Activities

Use the Categories window to categorise training activities into programs, classifications and packages.

▶ **To set up categories:**

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

   See: Adding Lookup Types and Values: page 2 – 22.

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 categorise 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.

Entering Skills Delivered by 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.

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.

Entering Resources Required for an Activity

Use the Resource Usages window to specify resources that are required or useful to run events for a particular activity version.

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

Creating a Development Event

Use the Development Events window to create events to help you design and prototype new training activities, or to enhance existing ones.

Step 1 – Create the activity: page 3 – 17

This is the activity for which you want to schedule a development event

Step 2 – Create your Classifications as values: page 2 – 22

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

Step 3 – 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.

   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.

   > **Note:** If you have Project Accounting (PA) installed at your enterprise, you have an alternative method of analyzing the cost of running the event. Select either the project number or project name to link the event with the project. You do not need to complete steps 8 to 11.
7. Save your work.

Booking Resources

You are now ready to book resources for the development work. See: Booking Resources: page 7 – 33.

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 Budgeted 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 budgeted cost.

11. Save your work.

CHAPTER

4

Pricing and Financial Relationships

Pricing and Financial Relationships

Oracle Training Administration enables you to hold and manage price lists, offer discounts, offer prepurchase agreements and use up to three types of financial header to meet all your financial relationships with external, or internal customers. You can also use multiple currencies to hold price and cost information.

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 $20 000 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.

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

You can offer discounts to one customer or all customers.

Which finance headers are provided?

Oracle Training Administration provides you with four types of finance header to enable you to handle all your invoicing needs. For example, a Payable header for supplier payment finance line and prepurchase charge for finance lines.

Can you create your own headers?

Yes, you can. You have the flexibility to create finance headers for different currencies per customer or supplier, if required. For example, you might need to schedule an event in US Dollars, but create finance headers for specific suppliers in other currencies to pay for the resources (UK Sterling and Tasmanian Lire, for example).

Can you cross charge training fees and resources?

Yes. Automated billing and payments functionality exists for internal training, if required.

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

Pricing and Financial Relationship Overview

The key concepts that you need to understand to enable you to successfully manage your financial relationships with external or internal customers are:

- Price lists (in money and training units)

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

- Enrollment agreements

  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 a discount or prepurchase enrollment agreement to meet the needs of your customers.

- Finance headers and lines

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

- Currencies

  You can use multiple currencies to hold price and cost information in Oracle Training Administration.

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. These could be 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
- 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–2000	31–DEC–2000
PL*SQL Basics	10	19	7000	01–JAN–2000	31–DEC–2000
PL*SQL Basics	20	25	12 000	01–JAN–2000	31–DEC–2000

Money and 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 could 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 Lookup 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.

Next you 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.

Effective Price List Dates

You can extend the dates a price list is effective by copying an existing price list and entering the start and end dates for the new, extended list. You can also apply a percentage change across all the price list entries, 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–1999 to 31–DEC–1999, and today's date is 01–SEP–1999. Enterprise Z wants to extend Price List 1 to 31–DEC–2000, starting from 01–JAN–2000. 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–1999 onwards.

	Start Date	End Date	Price
Price List 1	01–JAN–1999	31–DEC–1999	
Entry 1	01–JAN–1999	30–JUN–1999	200.00
Entry 2	01–JUL–1999	31–AUG–1999	100.00
Entry 3	01–SEP–1999	31–DEC–1999	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–2000	31–DEC–2000	
Entry 3	01–JAN–2000	31–DEC–2000	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–1999 and 31–AUG–1999 respectively (and today's date is 01–SEP–1999). Price List 1 ran to 31–DEC–1999 (and is therefore still open). 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–1999 to 31–DEC–1999. Enterprise Z wants to extend Price List 1 to 31–DEC–2000, starting from 01–JAN–2000. 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–1999 to 31–JUL–1999.

	Start Date	**End Date**	**Price**
Price List 1	01–JAN–1999	31–DEC–1999	
Entry 1	01–JAN–1999	30–JUN–1999	200.00
Entry 2	01–JUL–1999	31–AUG–1999	100.00
Entry 3	01–SEP–1999	31–DEC–1999	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–2000	31–DEC–2000	
Entry 3	01–JAN–2000	31–JUL–2000	172.50

Notice that while entry 3 appears on Price List 3 it ends on 31–JUL–2000. This is because the activity on which the price list is based ends on 31–JUL–2000. Entries 1 and 2 still do not appear on the new price list.

Enrollment Agreements

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 a discount or prepurchase enrollment agreement to meet the needs of your customers.

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
- 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.

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

It can 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.

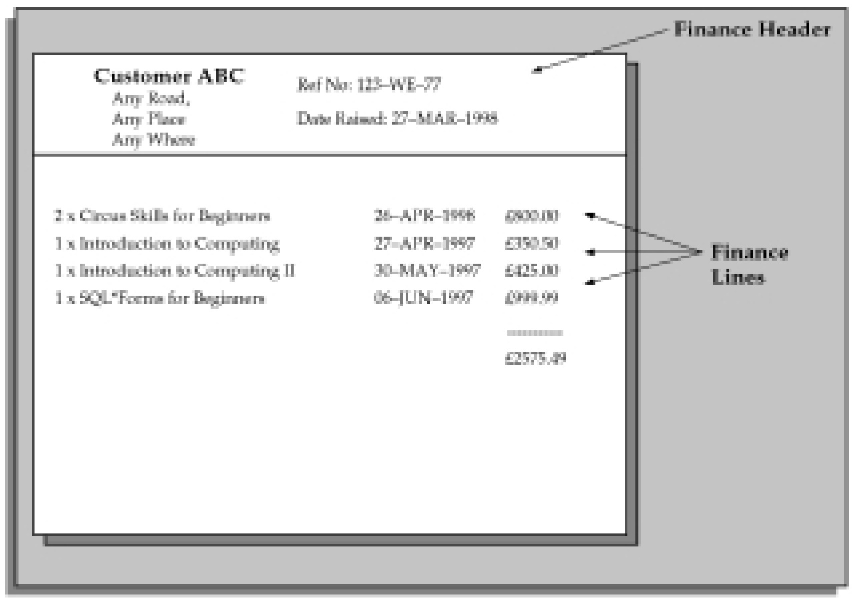
Finance Headers and Lines

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***.

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 4 – 1 illustrates a finance header with finance lines for customer ABC.

Figure 4 – 1 A Finance Header and Lines



Header and Line Types

You must create a finance header of the appropriate type for each supplier or customer your enterprise deals with. You are provided with four predefined types of finance line, but you can also create your own, if required.

Header Types

The four types of finance header in Oracle Training Administration are:

- Payable – for supplier payment finance lines
- Receivable – 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
- Cost Transfer – for transferring the cost of training fees or resources between organizations, departments or cost centers within your enterprise.

  Cross charging for resources is of benefit if you operate a business in which resources are provided by other organizations or cost centers within your enterprise, rather than provided by outside suppliers.
- Cancellation – that supersedes a previous header that has already been transferred to your financial system and therefore cannot be updated

Line Types

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 Lookup 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.

Automatic Finance Line Creation

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.

Update and Delete Prices

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.

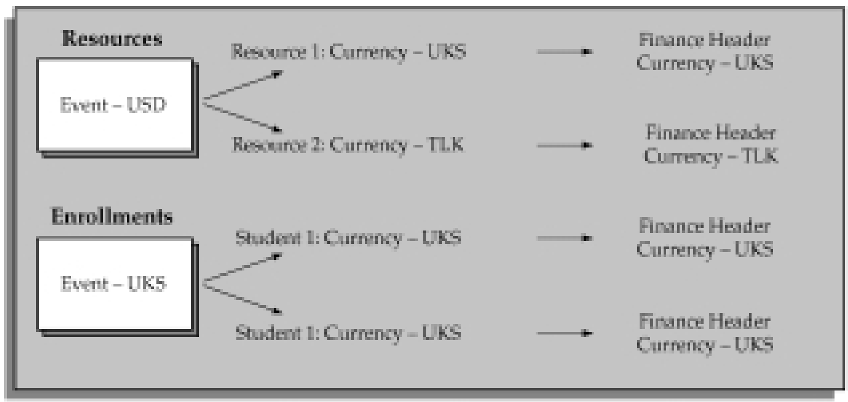
See: Financial Security: page 10 – 8.

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 US 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 4 – 2 A Finance Header and Currency



Finance Transfer Process

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 updates 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.

Preventing Processing of Finance Headers

Oracle Training Administration enables you to prevent further processing of finance headers, when required.

You might want to do this if you need to create financial records to 'correct' agreement balances, or if you want to record alternative financial transactions initiated in other systems. For example, corrections to journal entries for cost–transfers, and so on.

To prevent transfer, change the status to Do Not Interface. when you enter a new header. This prevents any further processing by any financial interfaces, such as accounts receivable, accounts payable or general ledger applications. All finance lines within a finance header with the status of do not interface, will not be processed irrespective of their individual status.

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.

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.

Creating a Price List in Money

Use the Price Lists window to create a price list in money 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.
5. Ensure that the Student tabbed region is displayed to make entries priced on a per student basis.
6. 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.
7. Display the Customer tabbed region to make entries priced on a per customer basis.
8. Select the activity, enter the price and the range of student numbers to which it applies. Enter a start date for the entry.
9. Save your work.

Creating a Price List in Training Units

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

Step 1 – Add Lookup Types and Values: page 2 – 22

To set up values for the Lookup type TRAINING_UNIT.

Step 2 – Create a Price List in Training Units:

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.
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.
8. Save your work.

Step 3 – Create a Finance Header: page 4 – 30

Create a finance header for that customer of the type Prepurchase Payment.

Step 4 – Create a Prepurchase Agreement: page 4 – 26.

Create an enrollment agreement of the type Prepurchase Use.

Extending a Price List

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

▶ **To extend a price list:**

1. Query the price list to extend and 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

Use the Change Price List Dates window to change the dates when a price list is effective. 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

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.

Changing Prices for Entries Within a Price List

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

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

1. Query the price list on which you want to change prices.
2. 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.

Creating a Discount Agreement

Create discount agreements in the Enrollment Agreements window.

Step 1 – Create one of the Following:

- If the agreement applies to a specific customer, enter the customer: page 2 – 40.
- If the agreement is based on a training package, create the package category and categorize the activities you want to include in the package: page 3 – 20.
- If the agreement is based on a price list, create the price list: page 4 – 18

Step 2 – Create 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.

Creating a Prepurchase Agreement

Create prepurchase agreements in the Enrollment Agreements window.

Step 1 – Create the Customer: page 2 – 40.

Step 2 – Create a Price List on which the agreement is based: page 4 – 18.

Step 3 – Create a Prepurchase Payment finance header.

Perform this step if you want to enter the value of the prepurchase agreement.

Step 4 – Create 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 4 – 28.

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.

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.

Deleting an Agreement (Prepurchase and Discount)

You can delete an enrollment agreement until you use the agreement for a customer and 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.

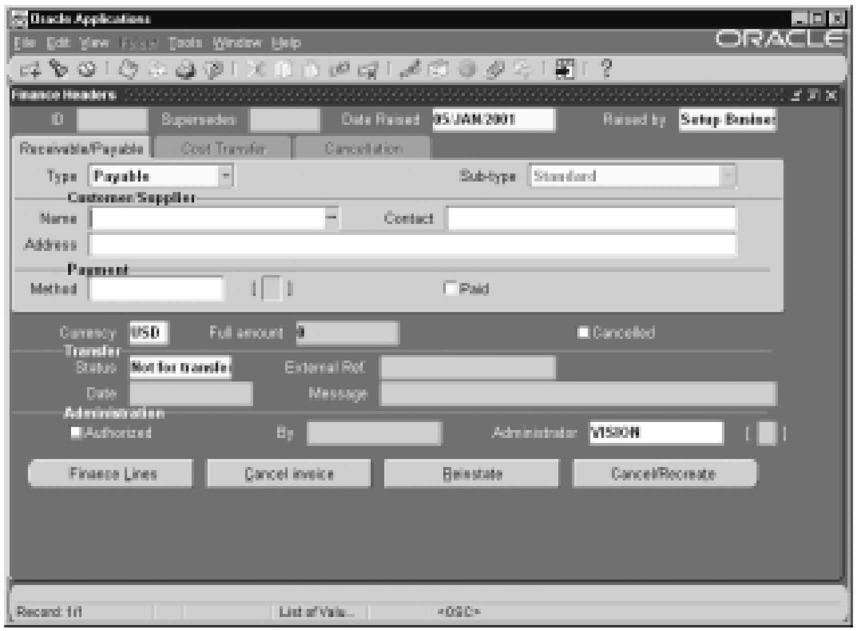
   See: Cancelling Finance Headers and Lines: page 4 – 36 for more information.

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

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



Additional Features

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.

Cross Charging

You can designate, at finance header level, a receiving cost center and a paying cost center, and summarize finance details for charges (or credits) for each combination of approved finance headers and lines.

▶ **To create a finance header:**

1. Select the header type, for example, Payable, Receivable, Cost Trnsfer or Cancellation.
2. Select one of the following for a Receivable header:
   - **Standard:** if the invoice should be issued after the event.
   - **Prepayment:** if the invoice should be issued before the event.
   - **Prepurchase:** 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.

Cross Charging

If you are transferring the cost of training fees or resources between organizations, departments or cost centers within your enterprise, two additional fields appear for you to enter information.

3. Select the department code or cost center number paying the charge in the Transfer From field.
4. Select the department code or cost center number receiving the charge in the Transfer To field.

Other Information

5. Select the organization that is responsible for the header in the Raised By field.
6. Select the customer or supplier if the correct information does not appear by default.
7. Select a contact and an address.
8. Select the appropriate payment method.
9. Select the appropriate status. For example, select Awaiting Transfer if you are ready for this header to be transferred to your financial system, or select Do Not Interface to prevent further processing of the finance header, and so on.

   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.

10. Save your work.

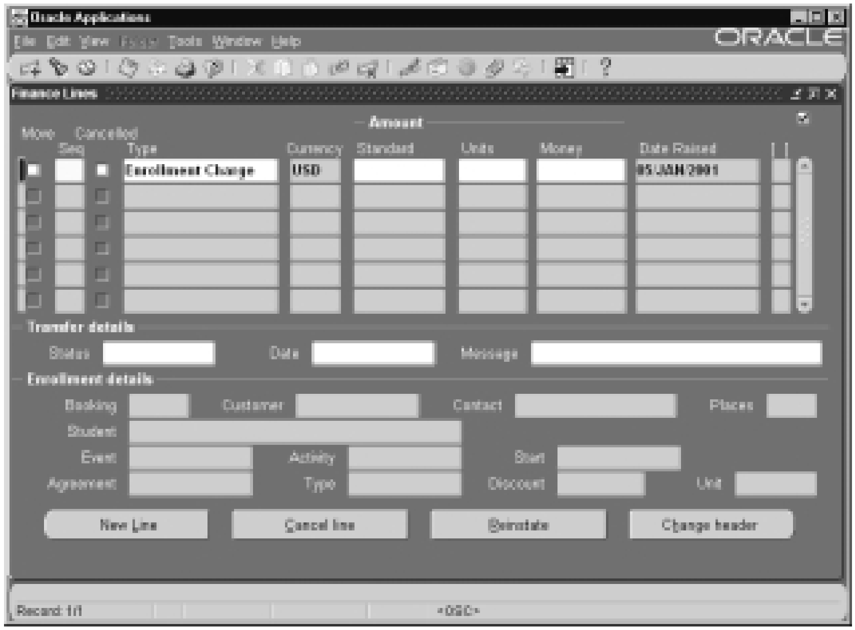
What to do Next?

- **Entering an Enrollment:** If you are creating a finance header while you are entering an enrollment, go back to entering an enrollment: page 8 – 17.
- **Creating Finance Lines:** You can create the finance lines for this header manually, if required.

  See Creating a Finance Line Manually: page 4 – 33.

Creating a Finance Line Manually

Oracle Training Administration automatically creates finance lines for you. You can, however, create a finance line manually when you need to.



▶ To create a finance line manually:

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.
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 change the transfer status of a line

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

Note: Finance lines within a finance header whose status is Do No Interface will not be processed irrespective of their individual status.

Moving Finance Lines To a New Header

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

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

▶ **To move finance lines to a new header:**

1. First create the header to which you want to move the lines. See Creating a Finance Header: page 4 – 30, 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 and replace a finance header:**

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., to replace it.
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 finance header or line. 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.

▶ **To restore cancelled lines and headers:**

1. Query a header in the Finance Header window.
2. Choose the Reinstate button.
3. Save your changes.

Enabling Currencies

Use the Currencies window to enable or disable currencies.

▶ **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

5

Event and Enrollment Tracking

Event and Enrollment Tracking

Using Oracle Training Administration you can use statuses to create the typical life cycle of an event within your enterprise, and control the type of student enrollments and resource bookings that you enter for the event.

How are waiting lists handled?

Oracle Training Administration also provides waiting list management to enable you to allocate places on an event when they 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 enrolls waitlisted students automatically onto events. Alternatively, you can select another student from the waiting list manually if you have not set up automatic waitlist enrollments in your enterprise.

How can you manage priority enrollments?

You can manage priority enrollments by entering a priority level against each enrollment.

You can do a mass update of the priority requests, for example, to the status Placed, and issue a standard confirmation letter.

Can you customize enrollments and events?

You can customize the enrollments windows so that users see only the fields and windows appropriate to them. You can also restrict update and deletion of events to super users.

How can you issue letters automatically?

You can create and issue the appropriate letters to students automatically when an enrollment is given a certain status. You will also be able to drive alerts.

See: Letter Generation: page 6 – 2

Event and Enrollment Tracking Overview

To enable you to set up event and enrollment tracking to best meet your enterprise's needs, you need to understand its constituents.

Event and Enrollment Statuses

Oracle Training Administration provides system statuses for scheduled events that reflect typical stages in the event's life cycle. You can use these scheduled event statuses as they are, or you can create your own. You are also provided with enrollments statuses. Again, you can use these as they are, or you can create your own based on the existing enrollments statuses. It is the combination of scheduled event and enrollment statuses that enables you to schedule and track training events and to manage enrollments onto events.

Priority Levels

You can also create and use priority levels to manage enrollments. For example, if you have entered more requested enrollments than available places, you can enter a priority level against each enrollment to help you decide which enrollments to place and which to put on a waiting list.

Automatic Waitlist Enrollments

You can set up automatic waitlist enrollments, if required. If you activate automatic waitlist enrollments, each time a student cancels an enrollment, or you increase the maximum number of attendees for an event, OTA moves the first eligible waitlisted person onto the event automatically.

To set up automatic waitlist enrollments, you use user profiles. See: User Profiles: page 10 – 17.

If you do not want to activate automatic waitlist enrollments in your enterprise, you can manually select students from the waiting list instead.

Source of an Enrollment

Using Lookups, you can also customize the source of an enrollment, such as a brochure or agency, or the reasons students fail to complete an event. This enables you to track the effectiveness of your event marketing, or to analyse the success rates of certain events, for example.

Letters to Students

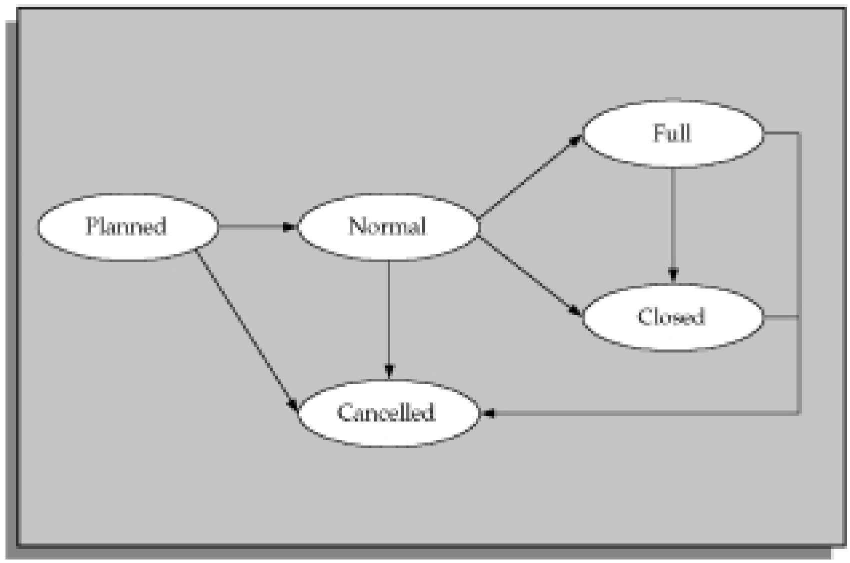
You can also create and issue the appropriate letters to students automatically when an enrollment is given a certain status, and to drive alerts.

See: Letter Generation: page 6 – 2

Event and Enrollment Statuses

Oracle Training Administration provides five predefined system statuses for scheduled events. These statuses reflect typical stages in the event's life cycle.

Figure 5 – 1 Event Life Cycle Management



These statuses would operate in a typical event life cycle as follows:

1. Create a new event with the status **Planned**.
2. Update the event status to **Normal** when you have sufficient interest to meet the minimum numbers required to run the event
3. Oracle Training Administration automatically sets the event status to **Full** when all the event places are filled.
4. When you are ready to 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.

Creating Your Own Statuses

This is just one possible sequence of event statuses. You can also create your own statuses for events, for example, to provide further information about the life cycle of an event (such as Planned – Awaiting Confirmation, or Full – No Cancellations Allowed).

Create your own statuses as values for the Lookup type EVENT_USER_STATUS.

Enrollment Statuses

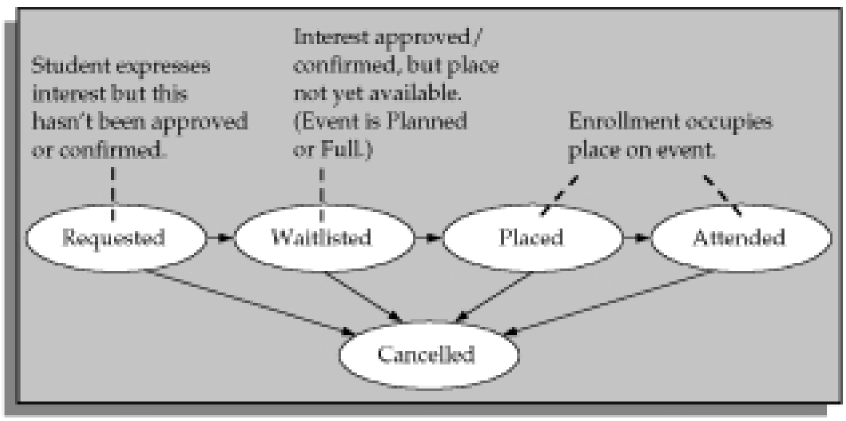
You are provided with five predefined statuses with Oracle Training Administration:

- Requested
- Placed
- Waitlisted
- Attended
- Cancelled

You can use these event statuses to track and control the progress of enrollments in your enterprise.

The figure below illustrates how the five predefined statuses provided with Oracle Training Administration operate.

Figure 5 – 2 Enrollment Statuses



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.

Additional Statuses

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

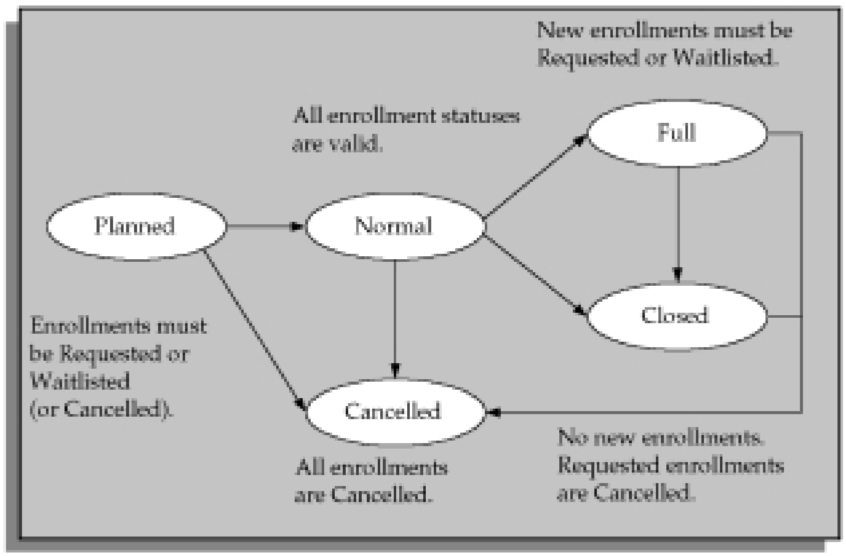
For example, you might want to distinguish between cancellations that incur a penalty fee and those for which there is no charge. You might also use different statuses to track management approval of a Requested enrollment.

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.

Combining Statuses to Track and Control Enrollments onto Events

It is this combination of event and enrollment statuses that enables you to track and manage enrollments onto events.

Figure 5 – 3 Controlling Enrollments Using Event Statuses



Typically, 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 W**aitlisted** 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

- 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.

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.

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 Lookup 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.

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 by increasing the maximum number of students defined for the event.

See: Changing the Event Status or Maximum Attendees: page 7 – 22.

Customise Student Enrollments

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

- Create your own enrollment statuses: page 5 – 12 (from the system–defined enrollment statuses).
- Create standard letters: page 6 – 2 (that can be generated automatically when an enrollment is given a certain status).
- Enter the following lookup codes: page 2 – 22:
  – 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)
- Activate automatic waitlist enrollments by defining profile options: page 10 – 17
- Customize Enrollments windows: page 10 – 12
- Define Functions: page 10 – 23. (to implement the competence approach)
- Set up Security: page 10 – 3 to determine which users can:
  – Update and delete events
  – Enter, update and delete enrollments for secure events
  – Override event price information

Creating Event Statuses

▶ **To create event statuses:**

- Create your own statuses as values for the Lookup type EVENT_USER_STATUS.

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.

CHAPTER

6

Letter Generation

Letter Generation

Standard letters enable you to manage your enterprise's recruitment or enrollment activities more easily. Using Oracle Human Resources or Oracle Training Administration, you can issue standard letters to applicants and students respectively, 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 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)

Letter Generation Overview

There are two different methods provided to create standard letters:

- Online using Application Data Exchange (ADE), *Application Data Exchange and Hierarchy Diagrammers User's Guide*.
- Concurrent processing: page 6 – 4

Which Method Should You Use?

Use the online method (ADE), if you want to generate and review your letters immediately.

ADE enables you to generate standard letters and reports by retrieving data and exporting 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.

Alternatively, you can use the concurrent processing method to set up your standard letters. With concurrent processing, you generate and review your letters without interrupting other work you perform at your computer. 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 to have Windows 95 or 98, Excel or Lotus 123 installed.

Concurrent Processing

There are two methods of using concurrent processing to set up your standard letters:

- Using Oracle Reports
- Using word processors

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 6 – 17 to set up your standard letters.

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.

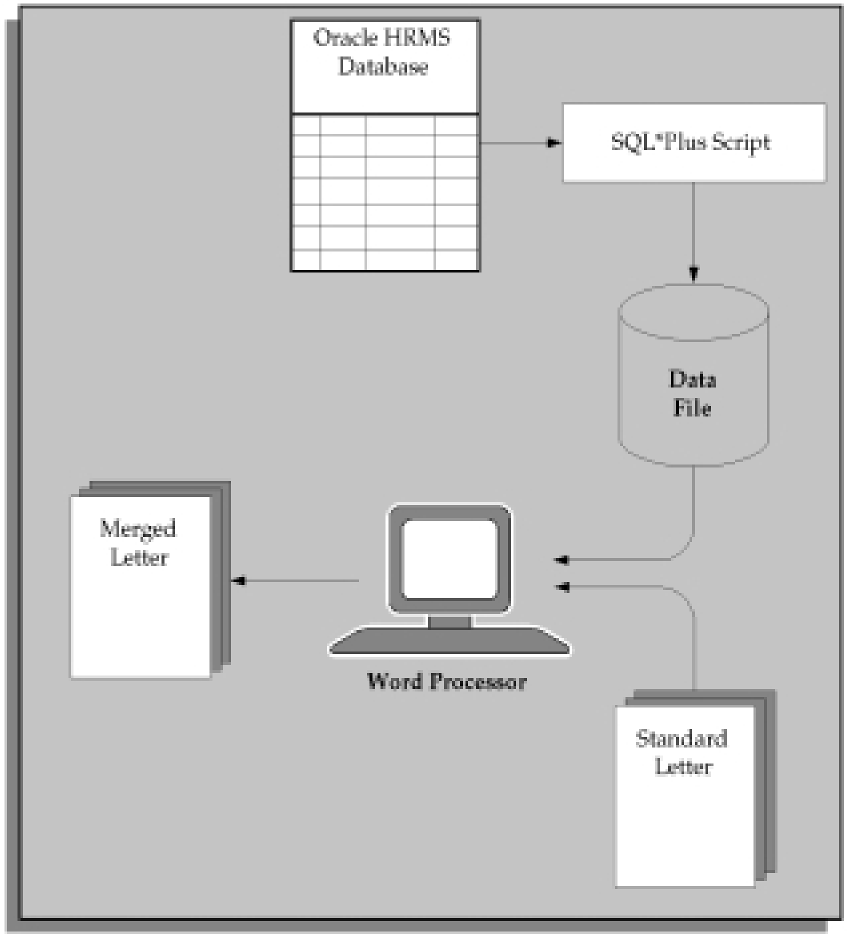
To create standard letters using a word processor, you need to extract the data you want to include in the letters from the Oracle HRMS database. To do this, create a program, such as a SQL*Plus script, to extract the data, which is then stored in a data file. You also write skeleton standard letters using your word processor.

> **Note:** 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.

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 shown in the following figure.

Figure 6 – 1 Using a Word Processor



If you want to set up standard letters using the concurrent processing method with MultiMate, WordPerfect Microsoft Word, see: Method 1 – Concurrent Processing: page 6 – 6

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 using Oracle Application Data Exchange (ADE).

See: Application Data Exchange (ADE) Overview, *Using Application Data Exchange and Hierarchy Diagrammers*.

Letters to Manage Recruitment and Enrollment

Oracle Training Administration provides you with two different methods to create standard letters:

- Method 1 – Concurrent Processing : page 6 – 6
- Method 2 – Online, Using Oracle Application Data Exchange (ADE)

  See: *Using Application Data Exchange and Hierarchy Diagrammers*

Method 1 – Concurrent Processing

There are two methods of using concurrent processing to set up your standard letters:

- Using word processors: page 6 – 6 (MultiMate, WordPerfect or Microsoft Word)
- Using Oracle Reports: page 6 – 17

Word Processors

If you are setting up standard letters using MultiMate, WordPerfect or Microsoft Word, follow these steps:

Task	**Performed By:**	
	System Administrator	**HRMS Manager (or HR Assistant)**
Planning Standard Letter Requirements: page 6 – 7		Yes
Writing a SQL*Plus Script for MultiMate or WordPerfect: page 6 – 8 or Writing a SQL*Plus Script for Microsoft Word: page 6 – 9	Yes	
Registering the SQL*Plus Script: page 6 – 11	Yes	
Linking the SQL*Plus Script to the Letter: page 6 – 12		Yes
Writing a Skeleton Letter: page 6 – 13	Yes	
Requesting Letters / Running the Report: page 6 – 14		Yes
Merging the Data Files: page 6 – 16		Yes

Planning Standard Letter Requirements

Before creating standard letters, you need to identify several things.

▶ **To plan standard letter requirements:**

1. Identify the database information to include in the letters.

   You need to identify the select statements 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.

2. Identify the text that you want to include as the *body* of your letters.

3. Decide whether to associate your standard letters with student enrollment or applicant assignment statuses.

4. Identify which statuses you want to trigger your standard letters (if you do want to link your standard letters to student enrollment or applicant assignment statuses).

   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? 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

Oracle HRMS supplies you with SQL*Plus scripts as templates for extracting database information for standard letters. You can copy the SQL*Plus script templates and modify them to create the standard letters you require.

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 PERWPWUK Template: page B – 5.

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 B – 7

▶ **To write a SQL*Plus script for MultiMate or WordPerfect:**

1. Copy the appropriate SQL*Plus script from the server side sql directory of the HR product tree (consult your installation guide for details).

2. Edit (or 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.

3. Save the file with the name PERWP*** (or OTAWP*** for OTA).

   You must use this prefix for the system to recognize it as a type of letter. See your Oracle Applications installation server guides for details of where the concurrent manager places the files.

Writing a SQL*Plus Script for Microsoft Word

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 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.

The template scripts and Microsoft Word documents Oracle HRMS provides are:

Scripts	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 B – 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 B – 7

▶ **To write a SQL*Plus script for Microsoft Word:**

1. Copy the SQL*Plus scripts from the server side sql directory of the HR product tree. (Consult your installation guide for details).

   You can copy the word documents from the client–side directory [APPL_TOP]\PER76\LETGEN.

2. Edit (or 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.
3. Save the file with the name PERWP*** (or OTAWP*** for OTA).

   You must use this prefix for the system to recognize it as a type of letter. See your Oracle Applications installation server guides for details of where the concurrent manager places the files.

Registering the SQL*Plus Script

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 recognize 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

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:

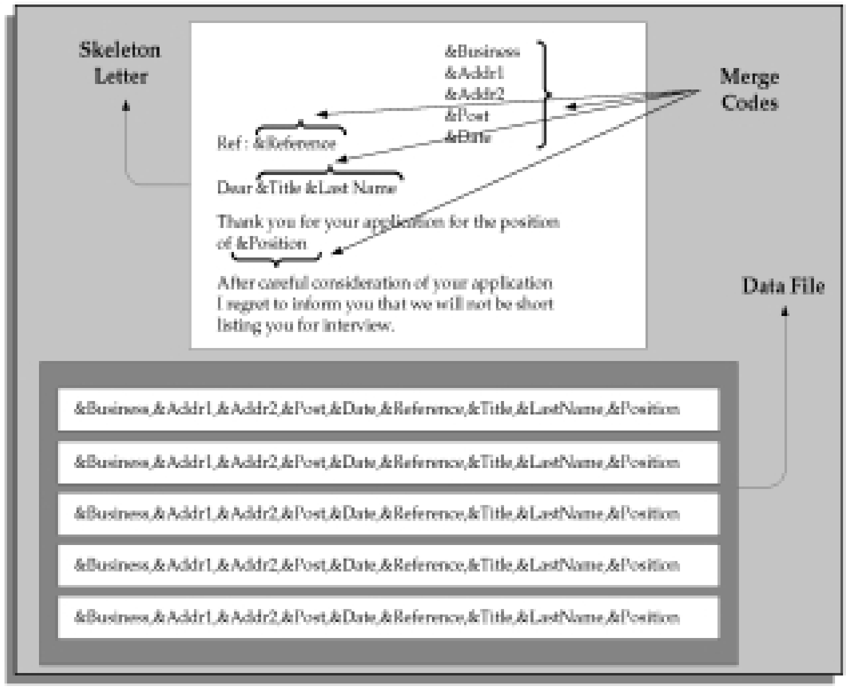
4. Select one or more enrollment statuses to create letter requests automatically for enrollments, and check the Enabled box.

   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

Write a skeleton letter using your word processor. Include the appropriate merge codes from the data source for the word processor you are using.

Figure 6 – 2 Merging Data with Standard Letters



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.

Requesting Letters/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 or SQL*Plus script for this type of letter.

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. You do this by entering the status of Pending yourself, then entering 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 that 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 or data 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

5. Select the names to add:

   - Select employees or applicants (for Oracle Human Resources) to receive the letter in the Requested For region.

     The Assignment field displays the organization to which the person is assigned. You can view the other components of the assignment by choosing List of Values from the Edit menu.

   - 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.

6. Save the changes.

Changing the Status

7. Update the status from Pending to Requested.

8. 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.

9. 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

When the concurrent manager has finished processing a letter request, you can merge the data in the Data File with your skeleton letters.

▶ **To merge the data file with the standard letter:**

1. 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.

2. 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.

Using Oracle Reports to Set Up Standard Letters

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.

The sequence in which you set up standard letters using Oracle Reports is identified below.

Task	**Performed By:**	
	System Administrator	**HRMS Manager**
Planning Standard Letter Requirements: page 6 – 7		Yes
Writing and Registering the Report: page 6 – 18	Yes	
Linking the Report With a Letter: page 6 – 19		Yes
Requesting Letters / Running the Report: page 6 – 14		Yes

Writing and Registering the Report

You need to write and register the report.

▶ **To write and register the report:**

1. 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
2. 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 recognize 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 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.
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.

CHAPTER

7

Event Schedule

Event Schedule

With Oracle Training Administration, you can easily schedule and track training events by classifying classes as open or restricted, group events into programs and identify suitable training events based on combinations of criteria.

One a student has completed a training event, you'll be able to record the successful attendance of a student on the event. If you are a user with authority (and your enterprise uses the competence approach), you'll be able to update a student's Competence Profile automatically.

To enable you to streamline all correspondence with students, you can generate several types of letters, for example, course confirmations, cancellations and any rescheduled events, using the information you've already entered in Oracle Training Administration.

Event Schedule Overview

With Oracle Training Administration’s Event Schedule features, you are able to:

- Schedule an event
- Change the status of an event
- Create sessions for the event
- Create programs of events
- Restrict events to one or more customers or to internal employees
- Book resources for events or sessions
- View and manage resources
- Run development or one–time events
- Make resources unavailable and make provisional or block bookings

Scheduled Events

Once you are ready run an event you can schedule it. You schedule an event using the Scheduled Events window, based on an activity.

You can do the following while you are scheduling an event:

- Enter categories for the event, if required.
- 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.

Remember, 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.

Cost Analysis of Events

If you have Project Accounting (PA) installed at your enterprise, you can link events created in Oracle Training Administration (OTA) with projects to analyze the actual cost of running an event. You track events, resources or resource bookings through Oracle Training Administration while you track and invoice the cost of preparing and delivering training through Project Accounting.

Additionally, if there are expenses that should be billed to a customer (such as those costs associated with delivering a restricted event), you can itemise the expenses in Project Accounting, and invoice them through the standard Project Accounting (PA) to Accounts Receivable (AR) interface.

Change the Status or Maximum Attendees of an Event

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.

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 2000, with enrollment dates from 01 December 1999 to 31 December 1999 and you want to enroll a student today (30 October 1999), change the enrollment start date to 30 October 1999.

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

Gauge Demand for Training

You can gauge demand for training before you schedule an event, if required. To do this, create an event for the activity you want to run, but leave the event dates blank. The event status must be Planned.

You can then enroll students onto the event to gauge interest, then do a mass update of all waitlisted students and roll them onto other events when you have enough interest.

See: Measuring Demand for Training: page 7 – 32.

Programs of Events

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’.

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.

Automatic Enrollment

When you later enroll students onto a program, you can choose whether or not to enroll students onto all events within the program automatically.

Program Pricing

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.

Program Customization

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.

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: Organization Security: page 10 – 5

Restricted Events

An event can be either public (students from any customer or internal organization can enroll) or restricted.

A restricted event is a scheduled event that is either:

- Associated with one or more customers so that only those customers can enroll students onto the event. For example, training held at a customer site.
- An internal event on which you can only enroll employees who are assigned to certain organizations, jobs, or positions (if you are using Oracle Human Resources). For example, you could restrict an event to personal assistants in the Sales and Finance departments.

You restrict an event by checking the Restricted check box in the Scheduled Event window.

Restricted Events (Internal)

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.

Restricted Events (Customer)

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.

Resource Booking

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

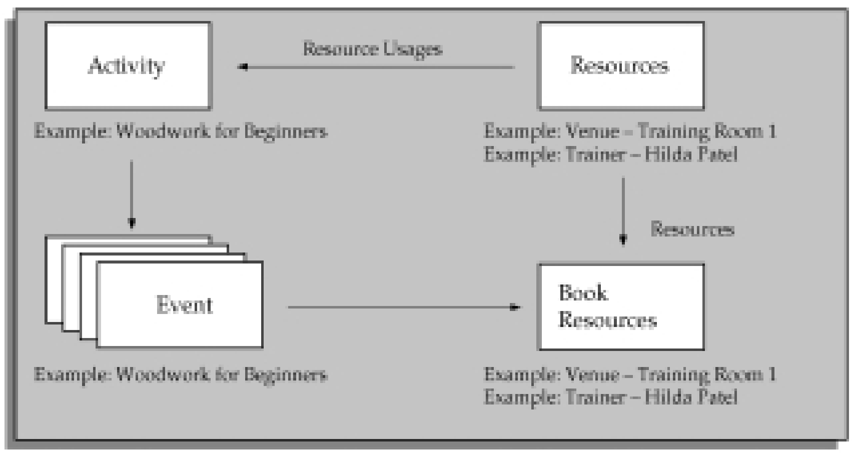
- Scheduled events
- Development events
- Sessions

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 – 1 Booking Resources



Primary Venue

When you book a resource of the type venue, Oracle Training Administration now automatically identifies the venue as the primary venue, provided a primary venue does not already exist. You can, of course, only have one primary venue for an event, but you can change primary venues, as required. Students and trainers can now be informed about where to go to attend the event.

This doesn't prevent you from having multiple venues assigned to an event, but it does reduce the chances that no venue is defined as the primary.

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

Can You Double–Book Resources?

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. For example, you cannot double–book book trainer Hina Patel at the same date or time, or room 101.

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.

Required or Useful Resources

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.

Resource Management

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 choose which events to list and which fields of information to view.

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

See: Producing the Budgets and Costs Breakdown Report: page 9 – 9.

Unavailable or Block Booked Resource

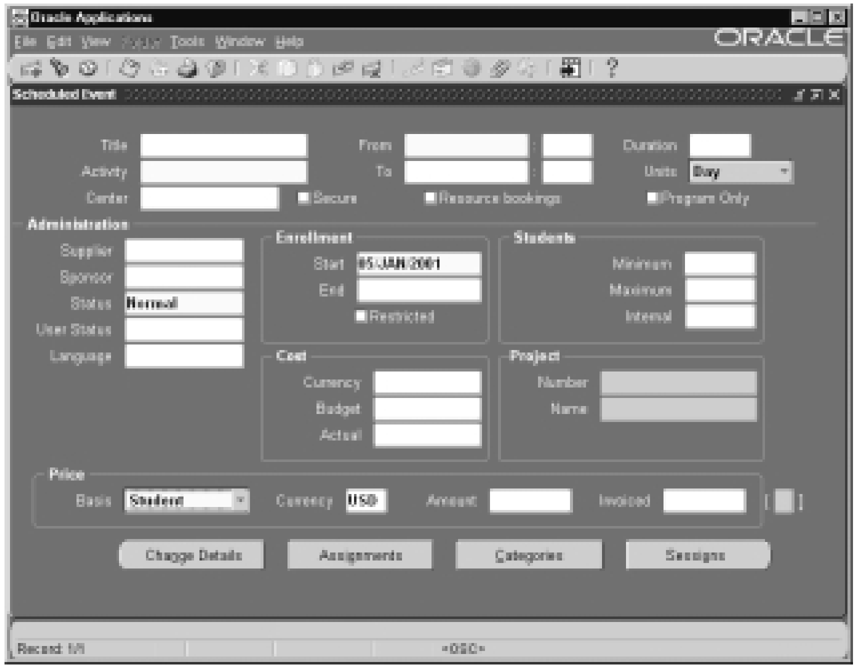
You can book resources for provisional and block bookings without associating them with an event. You can also make a resource unavailable for booking, if required. You might need to do this, for example, if a trainer is on holiday or is away sick, or if a training room is unavailable for any reason.

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 3 – 25.

Scheduling an Event

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



▶ **To schedule 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. You might want to do this if you are gauging demand for the event.

   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 creating sessions, you you must enter start and end times.

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 Project Details

If you have Project Accounting (PA) installed at your enterprise, you'll have additional fields available.

13. Select either the project number or name to link the event with an open project to analyze the cost of running the event.

Entering Price Details

14. 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

15. 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.
16. Save your work.

What to do Next?

- **Restricting an Internal Event:** You can restrict an internal event to selected employees, if required.

  See: Restricting an Internal Event to Selected Employees: page 7 – 31.
- **Enrolling Customers on Secure Customer–Based Events:** You can enroll customers on secure customer–based events, if required.

  See: Enrolling Customers for Restricted Events (Secure Customer–Based): page 8 – 12.
- **Creating Event Sessions:** You can create sessions for the event, if you want.

  See: Creating Event Sessions: page 7 – 25
- **Viewing and Entering Event Categories:** You can view and enter categories for the event, if required.

  See: Viewing and Entering Event Categories: page 7 – 21.

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.

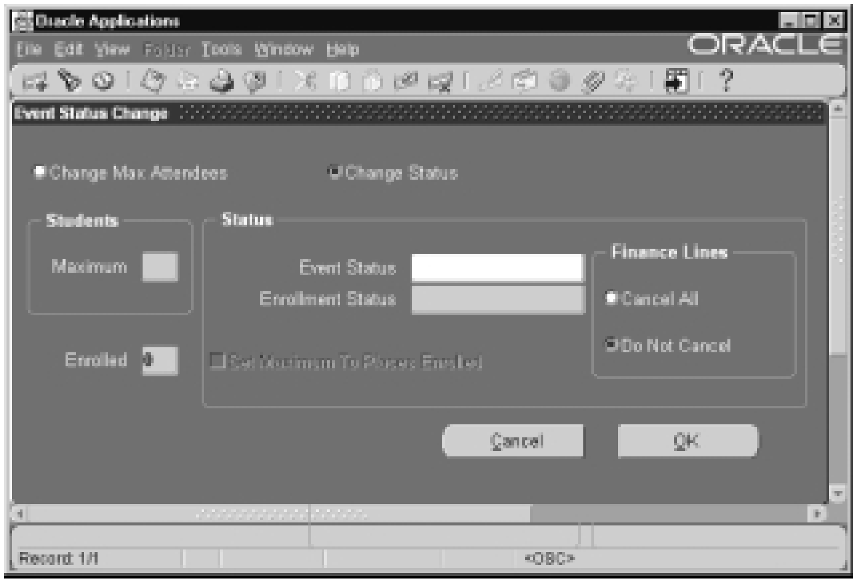
Entering a New Category

3. Insert or move down to a new line and select a new category.
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:

- Status
- Maximum number of places available



▶ **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.

Waitlist Enrollments

If you increase the maximum attendees when the event status is Full and your enterprise uses automatic waitlist processing, once you save your changes, OTA processes all eligible enrollments. You can then query the enrollments for the event to see which waitlisted students have been enrolled onto the event.

If you increase the maximum attendees and your enterprise does not use automatic waitlist enrollments (or the automatic enrollment date for the event has passed), OTA 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.

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.

Use the Event Sessions window, from Scheduled Events to create sessions.

1. Ensure that the event for which you want to create sessions is displayed in the Scheduled Events window.

   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. Choose the Sessions button.

3. 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.

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

5. Enter the date and duration of the session, if required.

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

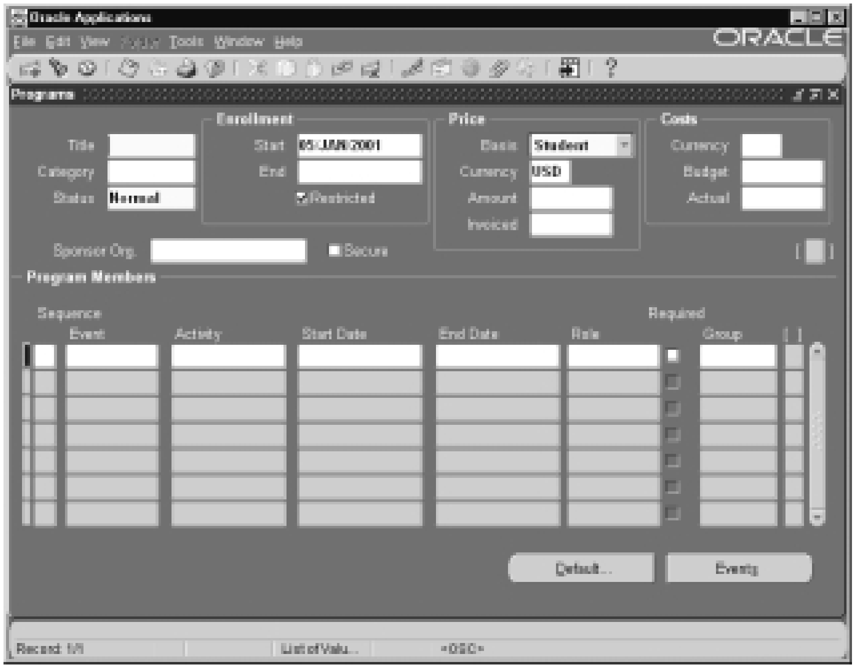
7. Select the training center where the event is run, and the date and duration.

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

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

Scheduling a Program

Schedule programs of events in the Programs window.



Step 1 – Create an Activity Category: page 3 – 20

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

Step 2 – Create the names of the SubGroups: page 2 – 22

1. Create the names of subgroups within the program as values for the Lookup Type PROGRAM_MEMBERSHIP_GROUP.
2. Create descriptions of the role of an event within a program (such as Preparation, or Follow–up Test) as values for the Lookup Type PROGRAM_MEMBERSHIP_ROLE.

Step 3 – 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 – 18.

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.

Creating a One Time Event

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.

Book Resources

If you need to create a one time event and book resources for the event, for example, a room and projection kit, we suggest an alternative solution. Create an activity, called 'Seminar' (or something similar), and create an event with minimal data. You can then book resources onto it and enrol attendees.

If you aren't going to enrol attendees, you can create a development event instead, and book resouces.

▶ **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.

Entering Project Details

If you have Project Accounting (PA) installed at your enterprise, you'll have additional fields available.

5. Select either the project number or name to link the event with an open project to analyze the cost of running the event.
6. 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.

Restricting an Internal Event to Selected Employees

Create an event in the Scheduled Events window.

▶ **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.
5. Save your work.

Measuring Demand for Training

You can gauge demand for training before you schedule an event, if required.

1. Create a new event with the status Planned, and leave the event start and end dates blank.

   See: Scheduling an Event: page 7 – 18.

2. Enroll students onto the event with the status waitlist.

   See: Entering an Enrollment: page 8 – 17.

3. Roll over the waitlisted students onto the next scheduled event for the activity.

   See: Making Mass Updates to Enrollments: page 8 – 30.

Booking Resources

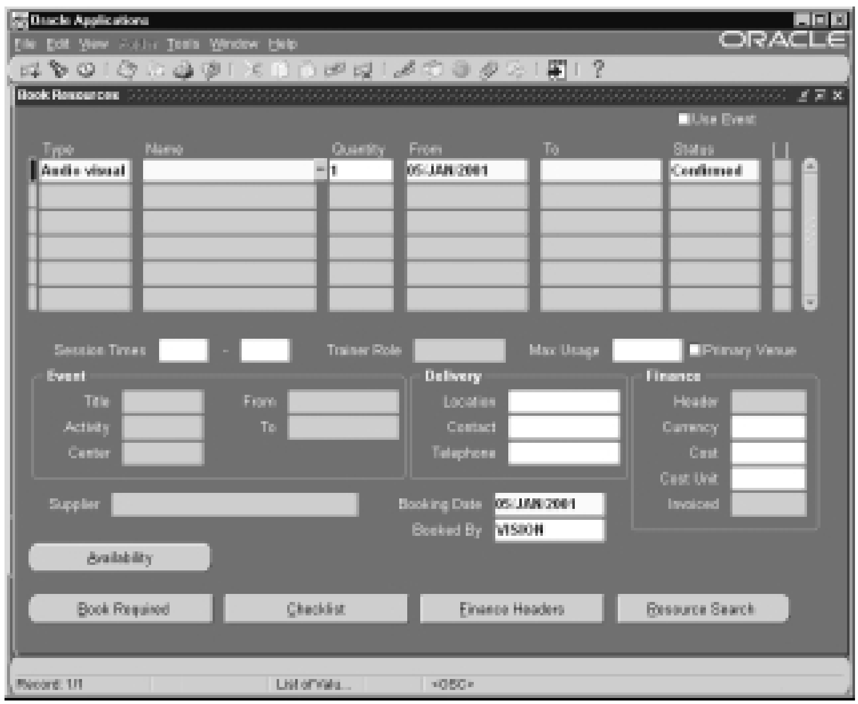
You enter resources using the Book Resources window.

When you book a resource of the type venue, Oracle Training Administration ensures that the event has one venue type identified as the primary venue (the main venue for the event). You can, of course, only have one primary venue for an event, but you can change primary venues, as required.

Search for Events 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. You can now book resources:
   - Automatically
   - Individually
   - 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 3 – 9..

6. Delete any of the resources you do not require by:
   - Selecting the resource
   - Selecting Delete Record

   > **Note:** When you book a resource using the Book Required button, it will have a status of Planned.

   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. 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 in the Max Usage field, if required.

    For example, if the resource is a venue that holds a maximum of 30 delegates, enter 30.
15. Check the Primary Venue check box to indicate that the resource booking is designated as the primary venue for the event. You can use this indicator to notify students and trainers where to attend the event. You can only designate one venue as the primary venue for a given event.

    > **Note:** OTA automatically checks the new venue as the primary venue if you have not already identified a primary venue when you save the changes..

    If you want to change the primary venue, see Changing the Primary Venue: page 7 – 36.
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 4 – 30.

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.

▶ To change the Primary Venue:

1. Query the event for which you want to change the primary venue.
2. Select the event and then switch to the Book Resources window.
3. Select the primary venue that you want to make non primary.
4. Uncheck the Primary Venue check box.
5. Select the venue that you want to make primary and check the Primary Venue check box.
6. Save your work.

Making Resources Unavailable and Making Provisional or Block Bookings

You make resources unavailable, and book resources for provisional and block bookings using the Book Resources window.

▶ **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.

Checking 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.

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.

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 criteria to find the events that best match your students' requirements. For example, you can search by:

- Date

  Events that are currently enrolling, or starting on or after a certain date

- Competencies or skills

  Events that are expected to deliver specific competencies or skills

- Resource

  Events at a given venue, or using a particular trainer or other resource

- Training center

  Events scheduled at a given center

- Customer, supplier or administrator

  Events set up for a customer, or provided by a particular supplier, or administered by a particular organization

- 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.

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, re–size 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 budgeted, 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 Lookup, 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 Lookup 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, re–size 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

Student Enrollment

Student Enrollment

Successful event scheduling and student enrollment are a priority for any training organization or enterprise administering in–house training.

Can you enroll employees and customers onto the same event?

Yes, you can easily enroll both employees and customers (non–employees) onto the same event or session, waitlist students when events are full and enroll students on waiting lists automatically. Using statuses, OTA prevents you from double–booking students onto events.

Can you make multiple enrollments?

You can make multiple enrollments on to events, or select a group of enrollments and update them all in the same way. This not only saves you time, but also ensures fewer data entry mistakes.

Can you quickly and easily correspond with students?

Yes. To enable you to streamline all correspondence with students, you can generate several types of letters. For example, course confirmations and cancellations, using the information you have already entered in OTA.

Can you enter information about training events not held in OTA?

To enable you to maintain a complete training history for your employees and customers (non–employees) you can record information about training events they have attended that have been delivered by other systems or providers.

Student Enrollment Overview

Using Oracle Training Administration's Student Enrollment functionality, you can manage all enrollments to events through nominations, confirmations, successful attendance and student training histories.

Once a student has completed a training event, you can record successful attendance.

If you are an authorised user (and your enterprise uses the competence approach), you can update a student's competence profile automatically.

Oracle Training Administration facilitates management of comprehensive training and certification business. Once you have recorded employee competencies, they are available for career planning as well as candidate placements, performance appraisals and other activities.

Customer and Employee Enrollments

Oracle Training Administration enables you to enter enrollments quickly and easily. Not only does it provide search features to help you 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.

There are two types of enrollment in Oracle Training Administration:

- For a customer, where the student is recorded on the system as a contact for the customer
- 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.

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.

Automatic Waitlist Enrollment

Oracle Training Administration also enables you to enroll waitlisted students automatically onto events, based on waitlist priority or enrollment dates. Not only are you provided with automatic enrollment functionality, but Oracle Training Administration also prevents double booking from occurring.

Automatic enrollment for waitlisted students occurs when a student has cancelled an enrollment, or after the maximum number of attendees for an event has increased. OTA automatically moves the first eligible waitlisted person onto the event.

This automatic waitlist functionality is optional. If you don’t want to use the automated waitlist processing, you can carry on using the existing functionality and select a student from the list of waitlisted students after a cancellation or course number increase has occurred.

Double–Booking Students

The following enrollment statuses occupy a place on an event:

- Placed
- Attended
- Any user defined statuses 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.

Can You Double–Book Students Onto Events?

It is these statuses that occupy places on events and that prevent you from double–booking students onto events

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

- Requested
- Waitlisted
- Cancelled
- Any user defined statuses 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.

Enrollment Security

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: Organization Security: page 10 – 5.

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 certain statuses.

See: Enrollment Status Security: page 10 – 7.

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: Financials Security: page 10 – 8.

Multiple Enrollments

To make it easier for you to enter and update multiple enrollments, OTA provides you with a template and mass change facilities.

You can update enrollments as and when required by changing their event status, for example, from Normal to Cancelled. This cancels any enrollments for the event. Alternatively, you might need to record the successful attendance of students on the event.

Enrollment Updates

Oracle Training Administration enables you to update enrollments quickly and easily. 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 want to record a student's successful attendance of an event, or update a student's competence profile.

Mass Updates

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.

Attendance and Results

You can record the successful attendance or non–attendance of a student, and the results of the attendance. You can record this information for many students together using the Mass Update feature.

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 proficiency 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 midway 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, during or after the event.

Correct, Cancel or Delete an Enrollment

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 enrolled the wrong student on an event. If so, you must delete the enrollment and re–enter it. You cannot go back and correct the personal details or enter the correct enrollment agreement.

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

If you delete an enrollment, you also delete the student history, so be careful when using this facility.

Cancel an enrollment, for example, if the event does not run (or if a student cancels attendance). See Cancelling a Single Enrollment: page 8 – 26

Additional Training

To enable you to record a complete picture of a person's training history, you can enter information about additional training. This is any training that a person has undertaken that is not defined as an enrollment on an event in OTA. For example:

- A person may have attended a course that is not supplied by your enterprise.
- You may have data stored on an alternate training system that you want include in OTA.

Once you have entered the data you can use it to analyse the types of training people are taking that is not offered by your enterprise.

Enrolling Customers for Restricted Events (Secure Customer–Based)

If Oracle Human Resources is implemented at your site, some customer–based events might 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.

▶ **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 an Event: page 7 – 18.
2. Select the event in the Customers for Restricted Event window.
3. Select one or more customers for this event, and save your work.

What to do Next?

- **Entering Enrollments Quickly:** You can enter enrollments for these customers using the Enrollment Detail window.

  See: Entering Enrollments Quickly: page 8 – 14.

▶ **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 an Event: page 7 – 18.
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 4 – 30.

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.

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.

Enrolling Students Automatically onto Program Members

If you enrolled the student(s) onto a program, Oracle Training Administration displays a message asking you whether you want to enroll the student(s) onto all events (program members) automatically.

13. To enroll students onto program members automatically, enter Y, otherwise enter N.

    If you enter Y, Oracle Training Administration also creates all event associations for you, where appropriate.

What to do Next?

- **Entering an Enrollment:** You can now enter enrollments for these customers using the Enrollment Detail window.

  See: Entering an Enrollment: page 8 – 17.

Entering Enrollments Quickly

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 – 39.

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 – 17.

3. Copy and paste the enrolment for fast entry of multiple enrollments, if required.

   See Making Multiple Enrollments: page 8 – 25.

Opening Regions and Changing Setup

There are a number of tabbed 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.

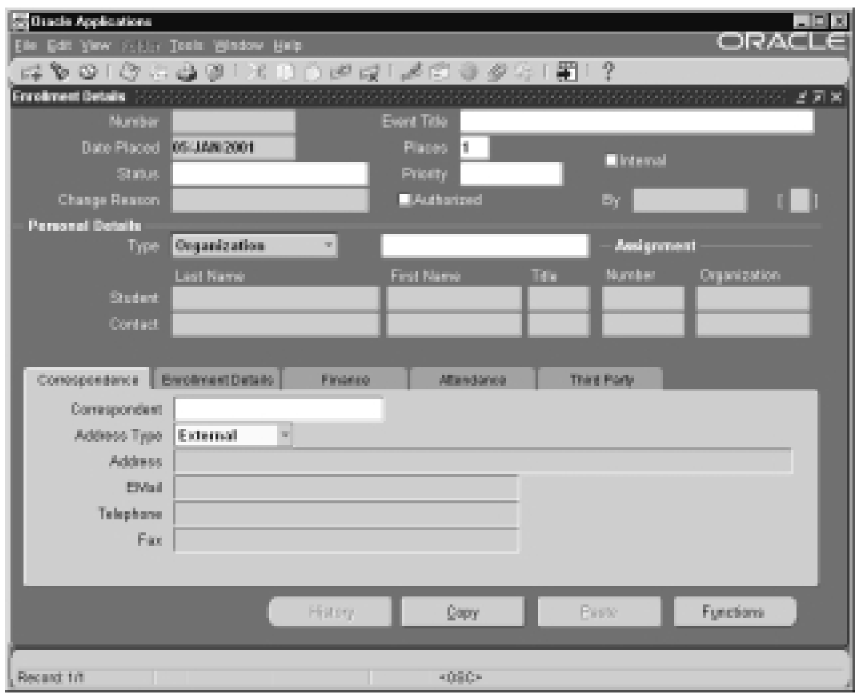
Entering an Enrollment

You enter student enrollments for customers and internal organizations using the Student Enrollments window. When you open the window, some or all of the following windows open (depending on how your system administrator has defined the menus at your site):

- Search for Event: Use this window to select an event for viewing or entering enrollments. Depending on your setup options, the event you select may automatically default to the other Enrollment windows.

  See: Searching For Events: page 7 – 39.

- Enrollment Summary: Use this window to make a mass update to multiple enrollments, or to view multiple enrollments in a folder. For example, you can view all enrollments for a selected event, or with a particular status.
- Enrollment Detail: Use this window to view or enter full information about an enrollment, including financial information, and a history of status changes.



▶ **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 you have not 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. The default 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 Lookup Type PRIORITY_LEVEL.
6. Check the Authorized box to display your name in the By field. Otherwise, leave this box blank.

Enrolling Students Retrospectively/In Advance

Note: Do not change the enrollment date in this window.

7. Change the enrollment dates in the Scheduled Events window instead. See Enrolling Students Retrospectively / In Advance: page 7 – 5.

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 – 40.

- 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 Lookup Type BOOKING_SOURCE.

14. Save your changes.

Enrolling Students Automatically onto Program Members

If you enrolled the student(s) onto a program, Oracle Training Administration displays a message asking you whether you want to enroll the student(s) onto all events (program members) automatically.

15. To enroll students onto program members automatically, enter Y, otherwise enter N.

    If you enter Y, Oracle Training Administration also creates all event associations for you, where appropriate.

What to do Next?

- **Copying Enrollments:** 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.

  See: Making Multiple Enrollments: page 8 – 25

- **Entering Financial Details**: You might need to enter financial details for an enrollment.

  See: Entering Financial Details for an Enrollment: page 8 – 23.

- **Updating a Competence Profile**: You can update a student's competence profile, if required.

  See: Updating a Competence Profile: page 8 – 21

Updating a Competence Profile

You can update a student's competence profile, as required.

▶ **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 exactly as they are, see: Apply the Competencies: page 8 – 22
   - Make changes to the competencies first, see: Make Changes to Competencies: page 8 – 21

Making Changes to 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

You need to enter financial details for an enrollment.

▶ **To enter financial details for an enrollment:**

1. Select the Finance region.

Creating a Finance Header

2. Perform one of the following steps:
   - Choose the Finance button to Create a Finance Header: page 4 – 30 for this customer

     Now go to Saving Your Changes: page 8 – 24
   - Select a Finance Header: page 8 – 23 (Step 3).

   Note: Oracle Training Administration generates the finance line and identity for you.

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 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). 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.

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 do not want to apply to other enrollments.

   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.

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 – 30.

▶ 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.

> **Note:** If you delete an enrollment, you also delete the student history, so be careful when using this facility.

▶ **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.
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 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 you want to roll forward the enrollments onto a new event.
6. Choose OK.

   Oracle Training Administration changes all the enrollment statuses for you, and rolls the enrollments forward onto a new event.

Entering Additional Training

Additional training is any training courses that are attended but not defined as an enrollment on an event in OTA. You can record details of training courses attended by employees and customers (non–employees) on your system in the Additional Training History window.

▶ **To enter additional training:**

1. Select whether the person is from a customer or an internal organization, and select the internal organization or customer name as appropriate.
2. Select the person for whom you want to enter additional training achievements, and select a contact if required. The list of names displayed is dependant on the selections made in the Type and Company fields.

Training Details

3. Enter the title of the training course, and details about the provider and location of the training course.
4. Enter the completion date and duration of the course, and the status of the training, if required, for example, attended, or incomplete.

Additional

5. Select the type of training and enter any award or distinction granted. If the training is complete enter the score achieved, for example, 90% or B.
6. Select the equivalent activity entered in OTA, if one has been entered.
7. Save your changes.

CHAPTER

9 Information Access

Information Access

Oracle Training Administration provides you with the business intelligence to answer questions about your training business. This leads to better decision making as well as to continuous improvement.

Can you measure an event's profitability?

Yes. You can run the Budgets and Costs Breakdown report to help you measure the profitability of events your enterprise runs.

Can you see training information?

You can see the history of enrollment statuses for any student enrollment. You can also see all enrollments for a student, in reverse date order. This can include additional training in courses outside of your enterprise. You can see the status of the enrollment or training, and whether the attendance was successful.

What event attendance details can you see?

You can see all students (internal and external) who should have attended an event. You are also provided with student and contact names, with relevant phone numbers.

What resource information can you see?

You can see all resources that have been booked for all events, or selected events.

Can I use HRMS Intelligence to answer business questions?

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

- How many people, and which ones, have the required skills and competencies for the job?
- How quickly can I improve the skills of a group of people, and at what cost?
- How does a person compare with the skills and competencies needed for the job?

- Do my employees need more training?
- What training are people taking that is not offered by my enterprise?

Information Access Overview

To enable you to answer questions about your training business, Oracle Training Administration provides you with the following information access:

- The Budgets and Costs Breakdown Report

  This identifies the profitability of events your enterprise runs. The information is split in two for each event; the total cost and the total revenue.

- The history of enrollment statuses for any student enrollment.

- Summaries of all training a student has attended, in reverse date order. The Training History window displays a combined set of records, including training planned for, or obtained by event–based training, and training obtained through other delivery methods or training providers.

  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.

- The Registration List report.

  This identifies all students (internal and external) who should have attended an event. It provides student and contact names with relevant phone numbers.

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

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 Enrollment Status History.

Viewing Training History

You can view a summary of all training a student has attended, in reverse date order. The Training History window shows the status of enrollments, and whether the attendance was successful. It can also show details of any training that the person has attended outside of your enterprise.

▶ **To view a summary of all student training history:**

1. Query an enrollment for this student in the Enrollment Detail window.
2. Choose the History button and select Student Training History.

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.

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.

Producing the 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

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

Different Currencies

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

▶ **To run the Budget and 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 a currency if you want to restrict the report to student (delegate) bookings for that particular currency. If you do not select a currency then the report will include bookings for all currencies.
6. Select the student display currency.
7. Select a currency if you want to restrict the report to resource bookings for that particular currency. If you do not select a currency then the report will include bookings for all currencies.
8. Select the resource display currency.
9. Select Yes to include summary only information in the report in the Summary Display Mode field, or select No to include detailed information.
10. Enter start and end dates to include events within that range in the report.
11. 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.
12. 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.
13. Choose the Submit Request button.

CHAPTER

10

Function and Security Customization

Function and Security Customization

Oracle Training Administration provides a flexible security and customization model to enable you to meet the needs of your enterprise.

How flexible is the approach?

Oracle Training Administration gives you a flexible approach to controlling access to:

- Records
- Windows
- Functions

This means you can suit each employee's level of access to their work responsibilities.

Function and Security Customization Overview

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.

To enable you to get the most out of Oracle Training Administration, you need to understand the components provided to set up security and perform customization.

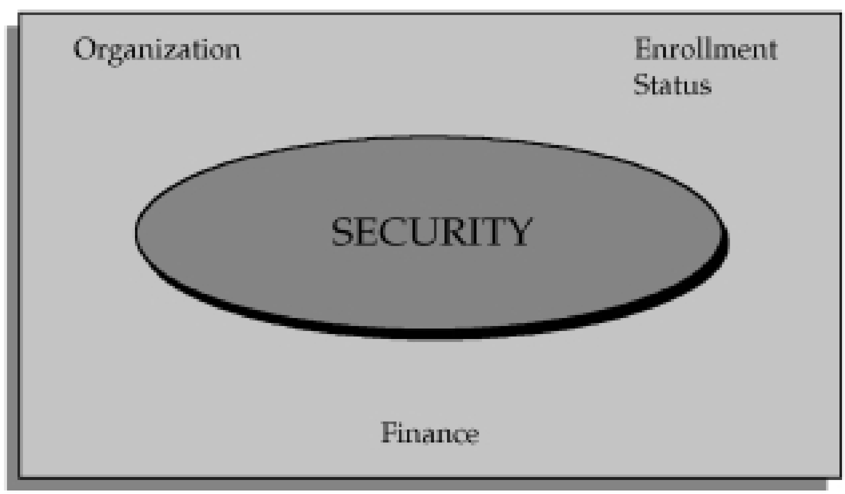
Security Setup

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. In Oracle Training Administration you can secure:

- Organizations
- Enrollment Statuses
- Finance

Setting up security is usually part of the system administrator's role.

Figure 10 – 1 Setting Up Security



Function, Enrollment and Activity Windows Customization

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.

User Profiles

A *user profile* is a set of changeable options that affects the way your application runs. You can set user profile options at site level, application level, responsibility level and user level.

You can restrict access to query–only for all or a selection of your Oracle Training Administration forms using a user profile option and the parameter QUERY_ONLY=YES at form function level.

Automatic Waitlist Enrollments

Use profile options to activate automatic waitlist enrollments. They enable you to define:

- Whether you activate automatic waitlist enrollments functionality
- The enrollment statuses assigned to events for automatic wailist enrollments (these are Placed or Attended)
- The number of days before an event starts automatic waitlist enrollments operates

  For example, if you want students on a waitlist to be enrolled automatically up to five days before the event starts, enter 5. After that, students are not enrolled automatically, giving you the chance to select students from the waiting list manually.
- Which criteria takes priority on the waitlist, booking priority or enrollment date.

  For example, if you want students to be automatically enrolled on a 'first come first served basis', enter Date Placed.

OTA and Project Accounting Integration

Use profile options to set up OTA and Project Accounting integration, if required.

Organization Security

If your enterprise uses Oracle HRMS with Oracle Training Administration, 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:

- **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.

- **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.

Enrollment Status Security

Set up enrollment status security to prevent users with specific responsibilities from entering, updating or deleting enrollments of a certain status(es). For example, your enterprise might 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).

Financial Security

Set up financial security if you want to restrict which users can enter, update and delete financial information, and which ones cannot.

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

To prevent users from updating and deleting monetary and unitary (invoice) amounts, enter the function OTA_FIN_ST_PRICE_NO_UPDATE on the menu for that responsibility.

Standard Amounts

To prevent users from updating and deleting standard amounts, enter the function OTA_FIN_MONEY_NO_UPDATE on the menu for that responsibility.

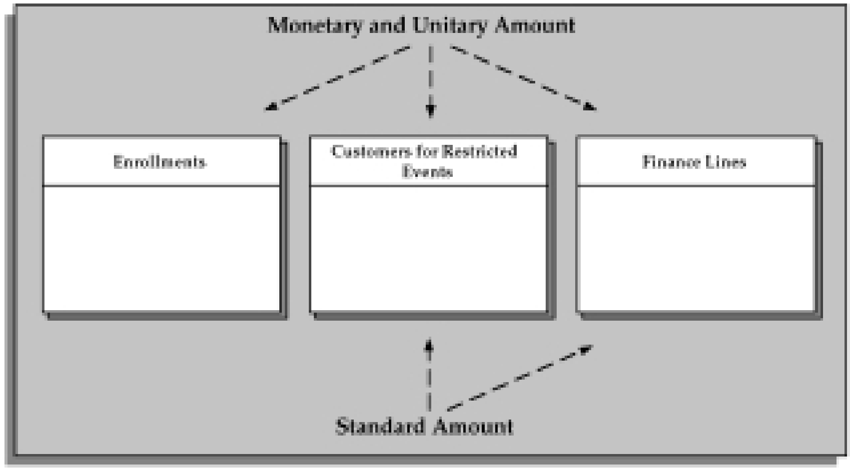
Which Windows Does Financial Security Affect?

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 10 – 2 illustrates which windows are affected: by money, unitary or standard amounts.

Figure 10 – 2 Financial Security



Function and Windows Customization

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.

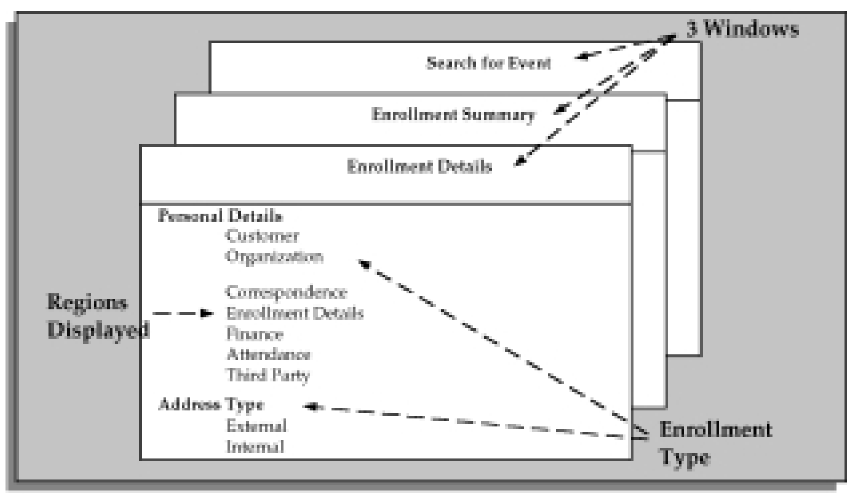
Enrollments Windows

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 10 – 3 illustrates what users see when they enter an enrollment if you do not customize Oracle Training Administration.

Figure 10 – 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
- A mixture of both

  Note: You can only do this if you have both Oracle Human Resources and OTA installed at your enterprise.

You also use parameters to enable selected users to add competencies gained through an activity directly to a student's Competence Profile.

Enrollments Windows Customization

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 10 – 12

- 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: Do not customize the windows so that only the Search for Event window displays. If you do, users cannot 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 10 – 22

Regions Displayed

You are provided with five regions 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 10 – 22

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.

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
- 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.

To use competencies, you need to set up a framework of competencies.

See: Career and Succession Management, *Managing People Using Oracle HRMS*.

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 the Competencies or the 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:

• COMPETENCIES=”YES”

You use the Form Functions window to define functions to implement the competence approach.

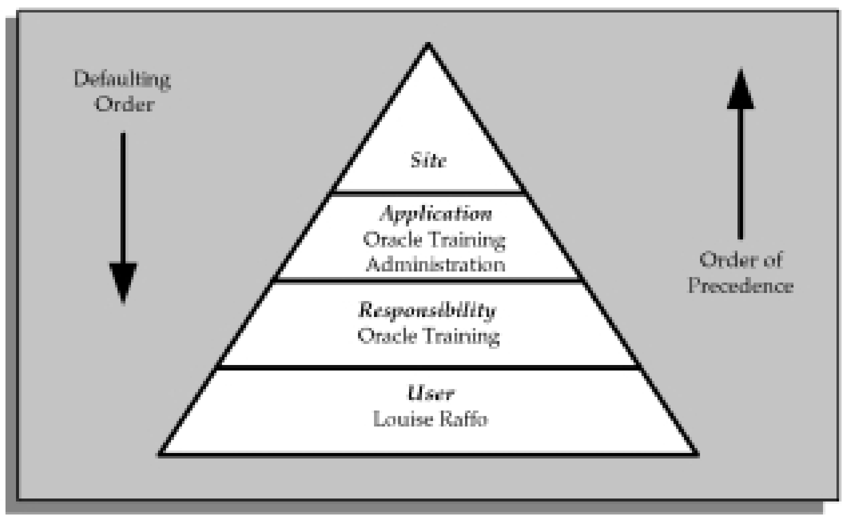
User Profiles

A user profile is a set of changeable options that affects the way your application runs. You can set user profiles at different levels:

Site level	These settings apply to all users at an installation site.
Application level	These settings apply to all users of any responsibility associated with the application.
Responsibility level	These settings apply to all users currently signed on under the responsibility.
User level	These settings apply to individual users, identified by their application usernames.

Values set at a higher level cascade as defaults to the lower levels. Values set at a lower level override any default from a higher level.

Figure 10 – 4 Levels For Setting User Profile Options



Suggestion: Set site–level options first to ensure that all options have a default. If a profile option does not have a default value, it might cause errors when you use windows, run reports, or run concurrent requests.

You use the System Profile Values window to set profile options at each level for your user community. If you change a user profile option value, your change takes effect as soon as your users log on again or change responsibilities.

Application users can use the Personal Profile Values window to set their own profile options at the user level. Not all profile options are visible to users, and some profile options, while visible, cannot be updated by end users. Any changes users make to their personal profile options take effect immediately.

Query–Only Access to Forms

You can restrict access to query–only for all Oracle Training Administration windows on a menu by setting the user profile option HR:Query Only Mode to Yes. You can set this profile for individual responsibilities or users, or at the site or application level.

If you want to give query–only access to some forms and full access to other forms, set the HR:Query Only Mode profile to No and use the parameter QUERY_ONLY=YES at form function level to restrict access to individual forms.

Profile Options Summary

The table below indicates whether you (the "User") can view or update the profile option and at which System Administrator levels the profile options can be updated: at the user, responsibility, application, or site levels.

A "Required" profile option requires you to provide a value. An "Optional" profile option already provides a default value, so you only need to change it if you do not want to accept the default.

Profile Option	User	System Administrator				Requirements	
	User	User	Resp	App	Site	Required?	Default Value
OTA:Activate Automatic Waitlist Enrollments	✓	✓	✓	✓	✓	Yes	Yes at Site level (the default is No)
OTA:Automatic Waitlist Enrollments: Days Prior To Event	✓	✓	✓	✓	✓	Yes	Yes at Site level (the default is 0)
OTA:Activate Automatic Waitlist Enrollment Default Booking Status	✓	✓	✓	✓	✓	Yes	No
OTA PA Integration	✓	✓	✓	✓	✓	Yes	No

Profile Option	User	System Administrator				Requirements	
	User	User	Resp	App	Site	Required?	Default Value
OTA:Waitlist Sorting Criteria	✓	✓	✓	✓	✓	Yes	Yes at Site level (the default is booking priority then date placed)

Key	
✓	You can update the profile option.
–	You can view the profile option value but you cannot change it.

Profile Options

OTA:Activate Automatic Waitlist Enrollments

Indicates whether you are activating automatic waitlist enrollments functionality. You can enter Yes or No.

OTA:Automatic Waitlist Enrollments:Days Prior To Event

Identifies the number of days before an event starts automatic waitlist enrollments operates. Enter a numeric value.

OTA:Automatic Waitlist Enrollment Default Booking Status

Holds the enrollment status assigned to events for automatic wailist enrollments. Enter either Placed or Attended.

Choose an enrollment status with the same Business Group that you intend to use for your OTA responsibility. If you do not, OTA is unable to use that status to enroll students from the waitlist.

OTA PA Integration

Identifies whether OTA is integrated with Project Accounting to enable cross charging to occur. It also identifies whether additional fields display on the Finance Header window. Enter Yes to integrate with Project Accounting and to display the additional fields.

OTA:Waitlist Sorting Criteria

Identifies which criteria takes priority on the waitlist, booking priority or date placed.

Setting Up Enrollment Status Security

Use the Enrollment Status Exclusions window to define which enrollment statuses are excluded for a particular responsibility. 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 for exclusion, as required.
4. Save your changes.

Setting Up Financial Security

Use the Menus window to set up financial security.

▶ **To set up financial security:**

1. Query the OTA_NAV menu.
2. Insert a new line and enter the sequence number.

   Note: Do not enter values in the Navigator Prompt, Submenu or Description fields.
3. 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

Use the Form Functions window to customize the enrollment type.

▶ **To customize functions:**

1. Query the function to customize, for example, OTA_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

Use the Form Functions window to define functions. For example, you can 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:

   `COMPETENCIES="YES"`

3. Save your work.

CHAPTER

11

Implementing Oracle Training Administration

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*i* 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 budgeting?
- 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 checklists to record which parts of Oracle Training Administration you want to use. Then refer to the implementation flowcharts to see the high level steps you must complete for each business function you have chosen to implement.

- ❑ Administration: page 11 – 8 (Required)

  Includes definition of currencies and lookups. It also includes definition of key and descriptive flexfields.

- ❑ Organizations: page 11 – 19

  Includes definition of Business Groups, responsibility linking and organization creation.

- ❑ Training Activities: page 11 – 24

  Includes definition of activity types and versions to represent the training courses and other developmental opportunities you make available to students.

- ❑ Event and Enrollment Management: page 11 – 25

  Includes definition of the predefined enrollment and event status types.

- ❑ Pricing and Financial Relationships: page 11 – 27

  Includes definition of finance headers and lines for each financial transaction you have with a customer or supplier.

- ❑ Control: page 11 – 30

  Includes definition of reports, letters, menus and function customization and security. It also includes audit definition and help customization.

Implementation Flowchart

Some of the steps outlined in this section are Required, and some are Optional. Required with Defaults means that the setup functionality comes with predefined, default values in the database; however, you should review those defaults and decide whether to change them to suit your business needs. If you want or need to change them, you should perform that setup step. You need to perform Optional steps only if you plan to use the related feature or complete certain business functions.

Figure 11 – 1 Implementation Flowchart for Oracle Training Administration 1

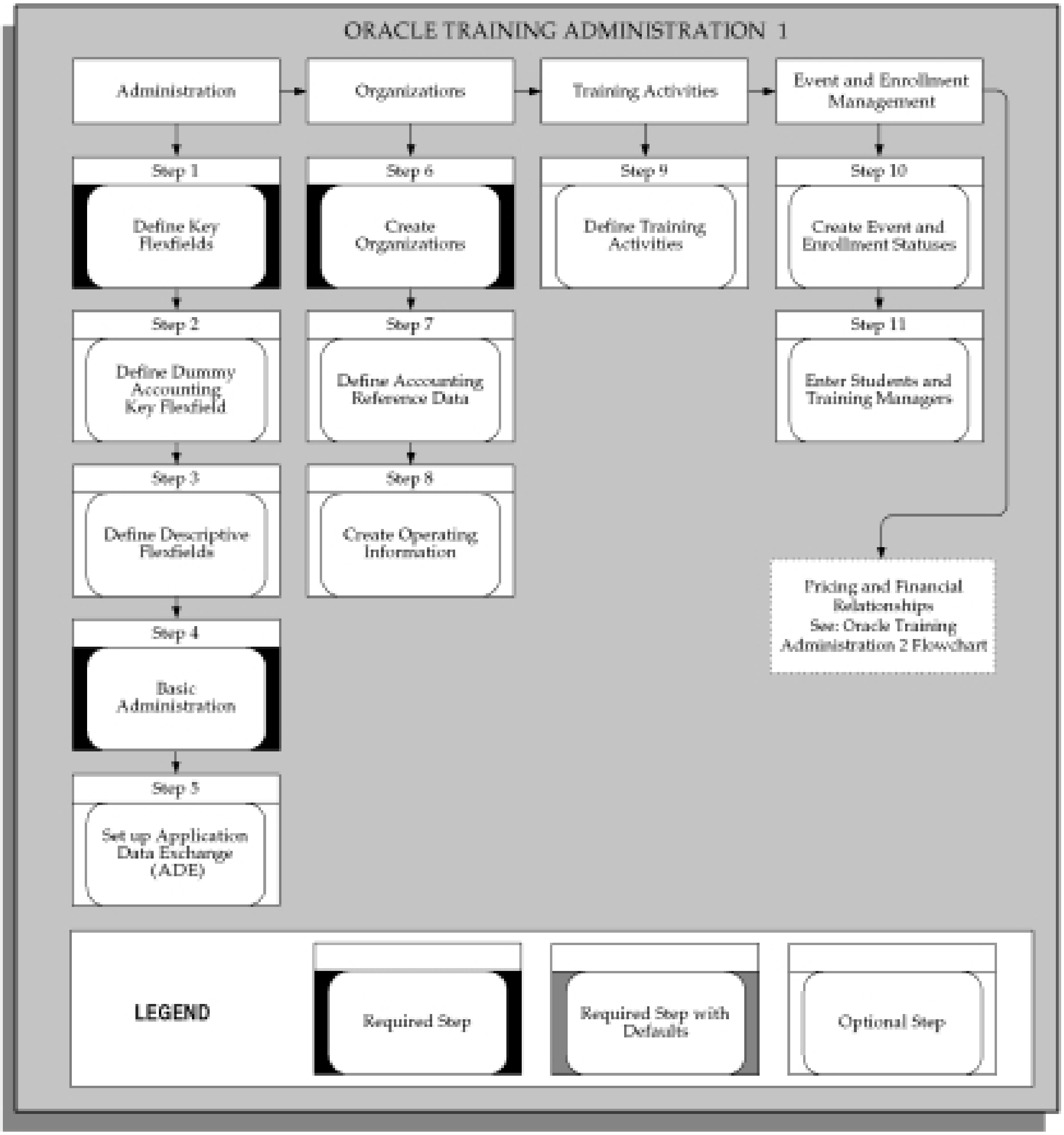
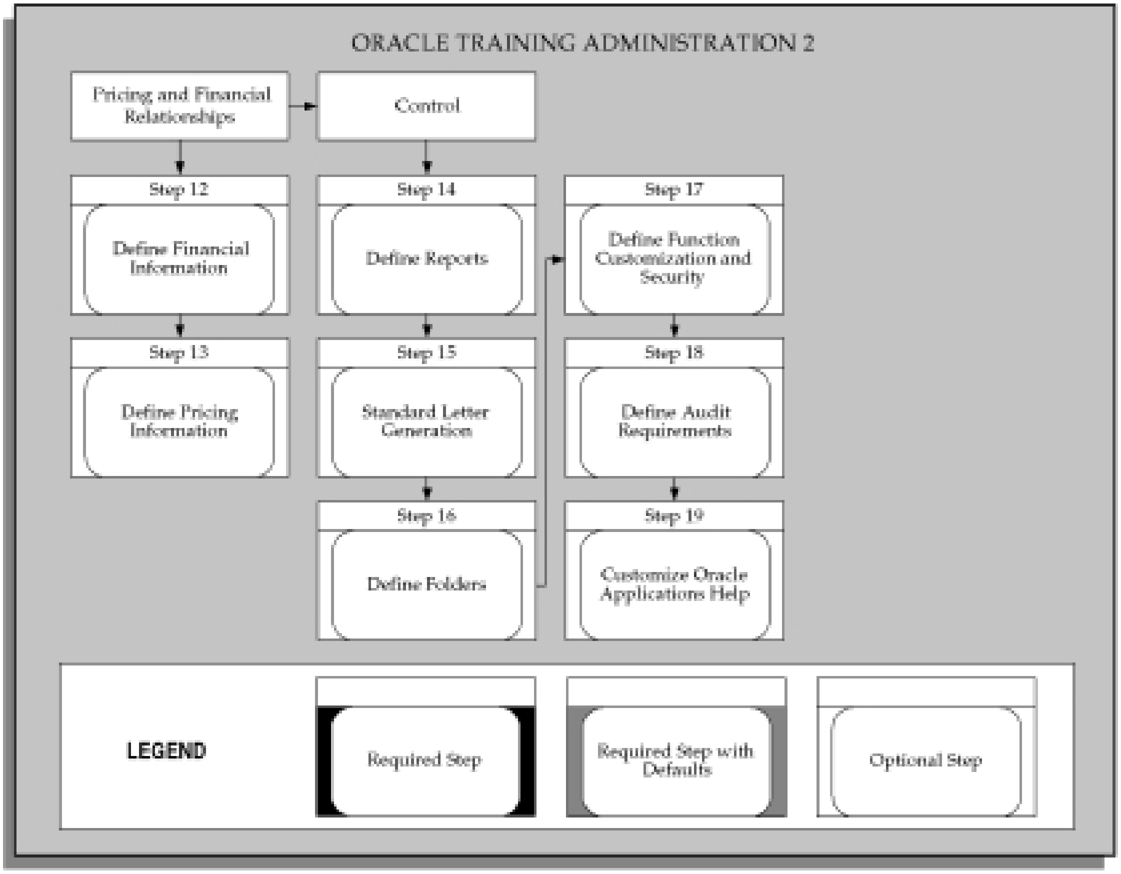


Figure 11 – 2 Implementation Flowchart for Oracle Training Administration 2



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.

You can review the detailed task information for each step using the hypertext links.

☞ **Attention:** If you try to implement functionality in Oracle Training Administration before you are familiar with it you may make mistakes. Before you do each step you should read any topic information that is referenced.

Oracle Self–Service Human Resources

If you are using Oracle Self–Service Human Resources to provide self–service human resource management for managers and employees, you also need to perform additional implementation steps.

See: Implementation Steps, *Implementing Oracle Self–Service Human Resources (SSHR).*

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.

Define Key Flexfields

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.

☞ **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.

Define Training Resources Flexfield

Training resources are any facilities, people, or equipment that you need to book to run an event.

Step 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.

Use the Value Set window.

See: Defining Value Sets, *Oracle Applications Flexfields Guide.*

Step 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.

Use the Key Flexfield Segments window.

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide.*

Step 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.

Use the Segment Values window.

See: Defining Segment Values, *Oracle Applications Flexfields Guide.*

Step 4 Freeze and Compile Your Resource Flexfield Structure

You are now ready to freeze your Job Flexfield definition. Navigate to the 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.

Use the Key Flexfield Segments window.

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide.*

Step 5 Define Resource Types

You define resource types as values for the Lookup Type RESOURCE_TYPE. The type of a resource determines the information you can enter about the resource. Two types are seeded: Venue and Trainer.

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values: page 2 – 22.

Step 6 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.

See: Creating and Entering Training Resources: page 2 – 42

Step 7 Enter Resources

Use the Resources form to enter specific trainers, venues, and stocks of equipment available from your suppliers.

Use the Resources window.

See: Entering Resources: page 2 – 44

Define Personal Analysis Key Flexfield

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.

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:

You need to design your personal analysis flexfield structures:

- 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.

Attention: 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.

Step 8 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.

Use the Value Sets window.

See: Defining Value Sets, *Oracle Applications Flexfields Guide.*

Step 9 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).

Use the Key Flexfield Segments window.

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide.*

Step 10 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.

Use the Segment Values window.

See: Defining Segment Values, *Oracle Applications Flexfields Guide.*

Step 11 Freeze and Compile Your Personal Analysis Flexfield Structure

You are now ready to freeze your flexfield definition. Navigate to the 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.

Use the Key Flexfield Segments window.

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide.*

Step 12 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.

Define Accounting Flexfield Structure

You need to create an Accounting Flexfield Structure (Chart of Accounts) if you do not have Oracle General Ledger in your enterprise.

You need this minimum Chart of Accounts structure:

- For Suppliers and Customers windows to operate
- To enable integration with a general ledger or other accounting application to transfer costs

If you intend to use Oracle Training Administration to transfer cross charges for internal students or resources, you should define a Chart of Accounts that reflects your real Chart of Accounts (plus cost centers and departments). This includes segment names, length, validation and selectable values.

> **Note:** If you already have Oracle General Ledger, the flexfield structure you require already exists, and you do not need to complete the following steps.

Step 13 Define 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.

For example, consider the following typical three value sets for your accounting flexfield structure:

- Company
- Account
- Cost Center

> **Note:** You must create the value sets with the validation type Independent.

Value Set	Format Type	Maximum Size
COTA_COMPANY	Char	11
COTA_ACCOUNT	Char	11

Table 11 – 1 Value Sets

Value Set	Format Type	Maximum Size
COTA_COST_CENTER	Char	11

Table 11 – 1 Value Sets

Use the Value Sets window.

See: Defining Value Sets, *Oracle Applications Flexfields Guide.*

Step 14 Define 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, for example. You can then distinguish this 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 not check the Allow Dynamic Inserts box. Oracle Training Administration requires the valid combinations to exist, and therefore cannot enter new values upon data entry in the OTA Finance windows.

Segment Number	Segment Name	Column	Value Set
1	Company	SEGMENT1	COTA_COMPANY
2	Account	SEGMENT2	COTA_ACCOUNT
3	Cost Center	SEGMENT3	COTA_COST_CENTER

Table 11 – 2 Accounting Flexfield

You must enter flexfield qualifiers for each segment in turn. This identifies which segment appears on each window.

Segment	Flexfield Qualifier	Check the Enable Box:
Company	Cost Center Transfer Segment	NO
	Natural Account Segment	NO
	Balancing Segment	YES
	Intercompany Segment	NO
Account	Cost Center Transfer Segment	NO

Segment	Flexfield Qualifier	Check the Enable Box:
	Natural Account Segment	YES
	Balancing Segment	NO
	Intercompany Segment	NO
Cost Center	Cost Center Transfer Segment	YES
	Natural Account Segment	NO
	Balancing Segment	No
	Intercompany Segment	NO

Use the Key Flexfield Segments window.

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide.*

Step 15 Define 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		
			Budgeting	**Posting**	**Account Type**
COTA_COMPANY	000	Company 000	Yes	Yes	N/A
COTA_ACCOUNT	000	Account 000	Yes	Yes	Liability
COTA_COST_CENTER	000	Account 000	Yes	Yes	Liability

Table 11 – 3 Accounting Flexfield Segment Values

Use the Segment Values window.

See: Defining Segment Values, *Oracle Applications Flexfields Guide.*

Step 16 Uncheck Dynamic Inserts on OTA Accounting Key Flexfield

You must set the dynamic inserts to NO for the OTA Accounting flexfield.

Navigate to the Define Key Flexfield Segments window, and query the OTA Accounting key flexfield structure.

Uncheck the Dynamic Inserts box.

Use the Key Flexfield Segments window.

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide.*

Step 17 Freeze and Compile Your Accounting Flexfield Structure

You are now ready to freeze your Accounting Flexfield definition. 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.

Use the Key Flexfield Segments window.

See: Defining Key Flexfield Structures, *Oracle Applications Flexfields Guide.*

Define Descriptive Flexfields

Use descriptive flexfields in Oracle Training Administration to define your own additional fields to the standard windows. For example, if you want to record details about any internal student enrollment, you can define a segment of the Additional Enrollment Details flexfield to record this information.

See: Descriptive Flexfields: page 2 – 9

☞ **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 18 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.

Query the flexfield you want to update, choose the Reference Fields button, and enter the name of the Reference Field you want to use.

Use the Descriptive Flexfields window.

Step 19 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.

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.

Use the Value Sets window.

See: Defining Value Sets, *Oracle Applications Flexfields Guide.*

Step 20 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.

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.

Use the Descriptive Flexfield Segments window.

See: Defining Descriptive Flexfield Structures, *Oracle Applications Flexfields Guide.*

Step 21 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.

Use the Segment Values window.

See: Defining Segment Values, *Oracle Applications Flexfields Guide.*

Basic Administration

Step 22 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.

Use the Currencies window.

See: Enabling Currencies: page 4 – 39

Step 23 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.

Note: After you have completed this step you can sign on and use the new user to define Lookups, locations and your new Business Group.

Use the Users window.

See: Users Window, *Oracle Applications System Administrator's Guide*

Step 24 Define Lookup Values

Lookups supply many of the lists of values in Oracle Training Administration.

Some Lookup Types have been predefined. You only need to define values for these types.

Lookup Values are the valid entries that appear in the list of values. They make choosing information quick and easy, and they ensure that users enter only valid data into Oracle Training Administration.

You can add new Lookup 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.

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values: page 2 – 22.

Set Up Application Data Exchange (ADE)

Application Data Exchange (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.

See: Application Data Exchange Overview, *Using Application Data Exchange and Hierarchy Diagrammers.*

Organizations

Create Organizations

Step 25 Create Locations

Use this window to create 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.

Use the Location window.

See: Creating Locations: page 2 – 24

Step 26 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 enables 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: 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.

Use the Organization window.

See: Creating a Business Group: page 2 – 25

Step 27 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.

Use the Responsibilities window.

See: Defining A Responsibility, *Oracle Applications System Administrator's Guide*

Step 28 Select a New Responsibility

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.

Use the System Profile Values window.

See: Setting User Profile Options, *Oracle Applications System Administrator's Guide*

Step 29 Create 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 Lookup Type ORG_CLASS, and provide options for all users of the Organization window.

You can disable the Lookup values you will not use in your implementation in the Application Utilities Lookups window.

Use the Organization window.

See: Creating a Training Organization: page 2 – 26

Define Accounting Reference Data

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 11 – 23

Note: The Accounting key flexfield windows do not pop up automatically, unlike Oracle Training Administration flexfield windows that do.

Step 30 Create Calendar

Use this window to create an accounting calendar and period. You only need to create one period.

Use the Calendar window.

See: Creating a Calendar: page 2 – 28

Step 31 Define Set of Books

Use this window to determine the currency, account structure and accounting calendar for each company.

Use the Define Set of Books window.

See: Defining a Set of Books: page 2 – 30

Step 32 Choose Set of Books

Use this window to choose the set of books for your enterprise.

Use the Choose Set of Books window.

See: Choosing the Set of Books: page 2 – 32

Step 33 Define Financials Options

Use this window to define your financials options.

Use the Define Financials window.

See: Defining Financials Options: page 2 – 33

Step 34 Define System Options

Use this window to define your system options.

Use the Define System Options window.

See: Defining System Options: page 2 – 35

Create Operating Information

If you have Oracle Financials installed in your site, you have the right multi–organization environment to enable the Customer window to operate correctly. If you haven't got Oracle Financials installed at your site, you need to create the right environment by setting up a GRE / Legal Entity and an operating unit, and set up the MO:Operating Unit profile for each of your OTA responsibilities.

Step 35 Create a GRE/Legal Entity

You need to create a GRE / Legal Entity to enable the Customer window to operate correctly.

Use the Organization window.

See: Creating a GRE / Legal Entity: page 2 – 37

Step 36 **Create an Operating Unit**

You need to create an operating unit to enable the Customer window to operate correctly.

Use the Organization window.

See: Creating an Operating Unit: page 2 – 38

Step 37 **Set up the MO:Operating Unit profile**

Once you have created your GRE/Legal Entity and an operating unit, you need to set up the MO:Operating Unit profile for each of your OTA responsibilities. Alternatively, you can set the profile at site level.

Use the System (Profile Values) window.

See: Creating a MO:Operating Unit Profile: page 2 – 39

Create Organizations Contd:

Step 38 **Create 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.

Use the Suppliers window.

See: Creating a Supplier: page 2 – 41

Step 39 **Create 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.

Use the Customers window.

See: Creating a Customer: page 2 – 40

Training Activities

Define Training 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.

Step 40 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 Lookup Type ACTIVITY_CATEGORY.

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values: page 2 – 22.

Step 41 Define Activity Category Usages

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).

> **Note:** If you want to assign the category to a program and an activity, you must check both the Program and Classification check boxes.

Use the Category Usages window.

Step 42 Create Activities

Define an activity for each training course or other development activity that you (or other suppliers) make available to students.

Use the Activities window.

See: Creating an Activity: page 3 – 17

Step 43 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.

Use the Enter Categories window.

See: Categorising Activities: page 3 – 20

Step 44 Enter Resources Required for an Activity

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.

Use the Resource Usages window.

See: Categorising Activities: page 3 – 20

Note: You can copy the categories and resource requirements from one activity version to another.

Event and Enrollment Management

Create Event and Enrollment Statuses

Step 45 Create Enrollment Statuses

You must name the five predefined enrollment status types during setup. These are: Requested, Waitlisted, Placed, Attended and Cancelled.

You can define more than one user status for each type, but you can only have one, and only one, default status for each Type.

Note: If you are using automatic waitlisting, ensure...

Use the Enrollment Statuses window.

See: Creating Enrollment Statuses: page 5 – 12

Step 46 Create Event Statuses

You create event statuses types as values for the Lookup Type EVENT_USER_STATUS.

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values: page 2 – 22.

Activate Automatic Waitlistlisting

Step 47 Create Booking Priorities

If you have not created your booking priorities already, define booking priorities as values for the Lookup Type PRIORITY_LEVEL. OTA uses the actual codes to define the booking priority, so you need to enter numbers as the lookup codes, rather than characters. The smaller the number, the higher the priority.

For example:

Booking Priority	Booking Priority Meaning
1	Very High
2	Moderate
3	Low
4	Very Low

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values: page 2 – 22.

Step 48 Define Automatic Waitlist Enrollments Profile Options

Define values for the profile options to activate automatic waitlisting. For example, identify the enrollment statuses assigned to events for automatic wailist enrollments, or which criteria takes priority on the waitlist.

Use the System Profile Options window.

See: Setting User Profile Options, *Oracle Applications System Administrator's Guide*

Enter Students and Training Managers

Step 49 Enter Students And Training Managers

If you are implementing Oracle Human Resources:

- Enter your employees using the HR Person form before you can enroll them as students on events.
- Enter students as customer contacts f your events are also attended by external students. You can either do this using the Customers form, or you can enter students directly from the Enrollments form as you enter enrollments.
- 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:

- 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.
- Enter Training Managers using the Enter Person form.

Pricing and Financial Relationships

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.

Define Financial Information

Step 50 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 Lookup Type FINANCE_LINE_TYPE.

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values: page 2 – 22.

Step 51 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 (for example, Awaiting Transfer)
- The status of individual finance lines on the header
- The type of finance header (Payable, Receivable, Cost Transfer or Cancellation) and the subtype for Receivable headers:
  - 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 52 Set up the Concurrent Process to Transfer Cross Charge Finance Details

Set up the Concurrent Process to transfer the finance header and line details to the Oracle General Ledger Open Interface tables.

The Create Journal Entries process creates journal entry lines for your chosen set of books. It also marks the finance headers and lines for transfer. If you do not use Oracle General Ledger, you can still set up a flexible Chart of Accounts and enter your transactions against it using the Finance Headers window. You transfer the finance headers and lines through the Open Interface tables, and import the data into the General Ledger of choice. You run the Journal Import Concurrent Program to import the data into Oracle General Ledger.

Use the Submit a New Request window

See: Submitting a Request, *Oracle Applications User's Guide.*

Step 53 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.

If you are creating prepurchase agreements for specific customers, you need to create a Prepurchase Payment receivable finance header for each customer.

Use the Finance Headers window.

See: Creating a Finance Header: page 4 – 30

See: Creating a Prepurchase Payment Finance Header: page 4 – 28

Define Pricing Information

Step 54 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.

You can create a price list in money or in training units.

Use the Price Lists window.

See: Creating a Price List in Money: page 4 – 18

See: Creating a Price List in Training Units: page 4 – 19

Step 55 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.

Use the Enrollment Agreements window.

See: Enrollment Agreements: page 4 – 9

Control

Define Reports

Step 56 Use Standard Reports or Write New Reports

A number of standard reports are supplied with Oracle HRMS. These reports have been written using Oracle Reports V.2 and registered as concurrent programs with the Standard Requests Submission (SRS) feature of Oracle Applications.

You can use these Standard Reports or write your own reports and register these as additional reports which users can request from the Submit a New Request window.

You can use these standard reports or write your own reports.

Step 57 Register Reports as Concurrent Programs

After you have written your new reports and saved them in the correct subdirectory, you must register the report as a concurrent program. You also register the parameters which can be submitted with the report. For example, you may have written a report to display personal details and you want to submit employee name to limit the output to include one person at a time.

Use the Concurrent Programs window.

See: Concurrent Programs Window, *Oracle Applications System Administrator's Guide*

Step 58 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.

Use the Request Set window.

See: Defining 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, for example. You do this by issuing standard letters to applicants or students, triggered by changes in assignment or enrollment status.

Oracle HRMS provides you with two different methods to create standard letters:

- Method 1 – Concurrent Processing : page 11 – 31
- Method 2 – Online, using Application Data Exchange (ADE), *Using Application Data Exchange and Hierarchy Diagrammers*.

Method 1 – Concurrent Processing

There are two methods of using concurrent processing to set up your standard letters:

- Using word processors
  - 1a – MultiMate or WordPerfect: page 11 – 31
  - 1b – Microsoft Word: page 11 – 32
- Using Oracle Reports: page 11 – 34

Using Word Processors Option 1a – MultiMate or WordPerfect

Step 59 Plan Standard Letter Requirements

You need to identify the database information to include in the letters.

See: Planning Standard Letter Requirements: page 6 – 7

Step 60 Write a SQL*Plus Script for MultiMate or WordPerfect

Oracle HRMS supplies you with SQL*Plus scripts as templates for extracting database information for standard letters. You can copy the SQL*Plus script templates and modify them to create the standard letters you require.

See: Writing a SQL*Plus Script for MultiMate or WordPerfect: page 6 – 8

Step 61 Register the SQL*Plus Script

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.

Use the Concurrent Programs form.

See: Registering the SQL*Plus Script: page 6 – 11

Step 62 Link the SQL*Plus Script to the Letter

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

Use the Letter form.

See: Linking the SQL*Plus Script to the Letter: page 6 – 12

Step 63 Writing a Skeleton Letter

Write a skeleton letter using your word processor. Include the appropriate merge codes from the data source for the word processor you are using.

See: Writing a Skeleton Letter: page 6 – 13

Step 64 Requesting Letters

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.

Use the Request Letter form.

See: Requesting Letters: page 6 – 14

Step 65 Merging the Data Files

You now need to merge the data in the Data File with your skeleton letters.

See: Merging the Data Files: page 6 – 16

Using Word Processors Option 1b – Microsoft Word

Step 66 Plan Standard Letter Requirements

You need to identify the database information to include in the letters.

See: Planning Standard Letter Requirements: page 6 – 7

Step 67 Write a SQL*Plus Script for Microsoft Word

Oracle HRMS supplies you with SQL*Plus scripts as templates for extracting database information for standard letters. You can copy the SQL*Plus script templates and modify them to create the standard letters you require.

See: Writing a SQL*Plus Script for Microsoft Word: page 6 – 9

Step 68 Register the SQL*Plus Script

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.

Use the Concurrent Programs form.

See: Registering the SQL*Plus Script: page 6 – 11

Step 69 Link the SQL*Plus Script to the Letter

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

Use the Letter form.

See: Linking the SQL*Plus Script to the Letter: page 6 – 12

Step 70 Writing a Skeleton Letter

Write a skeleton letter using your word processor. Include the appropriate merge codes from the data source for the word processor you are using.

See: Writing a Skeleton Letter: page 6 – 13

Step 71 Requesting Letters

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.

Use the Request Letter window.

See: Requesting Letters: page 6 – 14

Step 72 Merging the Data Files

You now need to merge the data in the Data File with your skeleton letters.

See: Merging the Data Files: page 6 – 16

Option 2 – 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.

Step 73 Plan Standard Letter Requirements

You need to identify the database information to include in the letters.

See: Planning Standard Letter Requirements: page 6 – 7

Step 74 Write and Register the Report

You now need to write and register the report.

See: Writing and Registering the Report: page 6 – 18

Step 75 Link 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.

Use the Letter form.

See: Linking the Report With a Letter: page 6 – 19

Step 76 Run 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.

Use the Request Letter form.

See: Running the Report: page 6 – 14

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 77 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 78 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.

Use the System Profile Values window.

See: Setting User Profile Options, *Oracle Applications System Administrator's Guide*

Define Function Customization and 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 79 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.

Attention: You should not modify the default functions and menus supplied with the system. On upgrade, these defaults will be overwritten.

Use the Form Functions window.

See: Defining Menu Functions, *Customizing, Reporting and System Administration in Oracle HRMS*.

Step 80 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.

Use the Menus window.

See: Defining Menus, *Customizing, Reporting and System Administration in Oracle HRMS*.

Step 81 Disable the Multiple Windows Feature

In most Oracle Applications, you can open multiple windows from the Navigator window without closing the window you already have open. HRMS, however, does not support Multiform functionality.

Attention: You must disable this feature on menu structures that access Oracle HRMS windows.

See: Disabling Multiple Windows, *Customizing, Reporting and System Administration in Oracle HRMS.*

Step 82 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.

Use the Menus window.

See: Setting Up Financial Security: page 10 – 21

Step 83 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.

Use the Enrollment Status Exclusions window.

See Setting Up Enrollment Status Security: page 10 – 20

Step 84 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

Use the Form Functions window.

See: Customizing Functions: page 10 – 22

Step 85 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). To do this, you need to identify whether the Competencies or Skills buttons should appear on the Activities window.

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.

Use the Form Functions window.

See: Defining Functions: page 10 – 23

Step 86 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.

Use the Request Groups window.

See: Request Groups Window, *Oracle Applications System Administrator's Guide*

Step 87 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.

Use the Responsibilities window.

See: Responsibilities Window, *Oracle Applications System Administrator's Guide*

Step 88 Assign User Assignments to a Responsibility

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.

Use the Scheduled Event and Programs windows.

See: Organization Security: page 10 – 5

Step 89 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.

Use the Users window.

See: Users Window, *Oracle Applications System Administrator's Guide*

Step 90 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.

You must 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.

Use the Users window.

See: Users Window, *Oracle Applications System Administrator's Guide*

Step 91 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.

Use the System Profile Values window.

See: Setting User Profile Options, *Oracle Applications System Administrator's Guide*

Step 92 Define OTA Project Accounting Integration

If you are integrating OTA with Project Accounting to enable cross charging to occur, for example, you need to enter Yes for the OTA PA Integration profile option.

Use the System Profile Options window.

See: Setting User Profile Options, *Oracle Applications System Administrator's Guide*

Define Audit Requirements

Step 93 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.

Step 94 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.

Use the Audit Installations window.

See: Audit Installations Window, *Oracle Applications System Administrator's Guide*

Step 95 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.

Use the Audit Tables window.

See: Audit Tables Window, *Oracle Applications System Administrator's Guide*

Step 96 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.

Use the Audit Groups window.

See: Audit Tables Window, *Oracle Applications System Administrator's Guide*

Step 97 Activate AuditTrail Update Tables Process

To start the AuditTrail activity you must submit the *Activate AuditTrail Update Tables Process.*

Use the Submit Requests window.

See: Submitting a Request, *Oracle Applications System Administrator's Guide*

Customize Oracle Applications Help

Step 98 Customize Oracle Applications Help

Oracle Applications Help for OTA defaults to Global help, but you can associate a responsibility with a set of help files for a localization, such as US or UK, or for a verticalization such as Oracle Federal HRMS. You do this by setting the user profile Help_Localization_Code.

See:User Profiles, *Customizing, Reporting and System Administration in Oracle HRMS.*

In addition to associating a responsibility with a localization or a verticalization you can also specify that a particular responsibility should have access to a customized subset of the localized or verticalized help files.

See: Customizing Oracle Applications Help *Oracle Applications User's Guide.*

APPENDIX

A

Default Menus

Default Navigation Menus for Oracle Training Administration

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.

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 an event
Training Record	**Additional Training**	Create, maintain and search for additional training
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 mail merge file for standard letters

MENU ENTRY		DESCRIPTION
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
	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
	Lookups	Create and maintain values and meanings for Lookups
	Personal Profile Options	Review your personal profile options
	Enrollment Status Exclusions	Prevent users from a responsibility from entering enrollments of a certain status
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

The following list 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.

Additional Training

- Choose Training Record –> Additional Training 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.

Lookups

- See Lookup Codes

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.

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.

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.

Training History

1. Choose Enrollments –> Student in the Navigator.
2. Query the student for which to view training history.

3. Choose the History button in the Enrollment Detail window.
4. Select Training History.

APPENDIX

B Template SQL*Plus Scripts

PERWPOUK Template

<table>
<tr><th>PERWPOUK.sql</th><th>Comment</th></tr>
<tr><td>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</td><td>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.</td></tr>
<tr><td>REM Insert session row
insert into fnd_sessions(session_id ,effective_date)
select userenv(’SESSIONID’),
        to_date(’&2’,’DD–MON–YYYY’)
from   sys.dual</td><td>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.</td></tr>
<tr><td>/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</td><td>This section has two functions:
1) To set the mail merge header linesize. This is dependent 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.</td></tr>
<tr><td>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
/</td><td>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.</td></tr>
</table>

PERWPOUK.sql	Comment
`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 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`
	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.

`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`	

PERWPOUK.sql	Comment
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	
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 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.

PERWPWUK Template

<table>
<tr><th>PERWPWUK.sql</th><th>Comment</th></tr>
<tr><td><pre>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</pre></td><td>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.</td></tr>
<tr><td><pre>insert into fnd_sessions
(session_id ,effective_date)
select userenv(’SESSIONID’)
,   to_date(’&2’,’DD–MON–YYYY’)
from   sys.dual</pre></td><td>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.</td></tr>
<tr><td><pre>REM re–initialise the linesize to the maximum 2000
varchar2 length
SET LINESIZE 2000</pre></td><td>After selecting your mail merge header information, you must re–set the LINESIZE to the maximum to VARCHAR2 size which is 2000.</td></tr>
</table>

PERWPWUK.sql	**Comment**
/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 /	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.
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	This section updates the letter request from Pending to Complete (as the example is for letter requests).
/commit /exit /	This section commits the changes and exits the SQL*Plus session.

OTA SQL*Plus Script

Produce Confirmation Letters

OTA.sql	Comment
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 line size. This is dependent on the character length of all the mail merge items you want to use. In the example, the header line size 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. 2.2

OTA.sql	Comment

`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 line size 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 line size to the maximum VARCHAR2 size, which is 2000.

OTA.sql	Comment

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.activ-
ity_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 man- ager. REM PC based solution required the SPOOL command. spool off	

<table>
<tr><th>OTA.sql</th><th>Comment</th></tr>
<tr><td><pre>REM Update the letter request_status from PENDING to COM-
PLETE
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 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>

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*.

Additional Training This is any training that a person has undertaken that is not defined as an enrollment on an event in OTA.

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.*

L

Lookup 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 Lookup Types.

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.*

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

Tabbed 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.

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*

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