

Using Oracle[®] Training Administration

Release 11i

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Using Oracle Training Administration Release 11i

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Using Oracle Training Administration, Release 11i

A73297-03

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Preface

Audience for This Guide

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

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

- The principles and customary practices of your business area.
- Oracle Human Resources Management Systems

If you have never used Oracle Human Resources Management Systems, Oracle suggests you attend one or more of the Oracle Human Resources Management Systems 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's 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.

- 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 OTA with Oracle Human Resources to support each stage of the cycle.
- Chapter 2 explains how to set up and categorize training activities and maintain price lists.
- Chapter 3 covers the creation and scheduling of training events and sessions. It describes when and how to change the status of events, create programs, and restrict events to one or more customers or to internal employees.
- Chapter 4 shows you how to manage the resourcing of events and sessions. It describes how to enter suppliers and customers as well as trainers and other resources. It also shows you how to book and view available resources.
- Chapter 5 explains how to use different types of finance headers and lines to cover your financial transactions with external or internal customers, including cross charging.

- Chapter 6 describes how you can use statuses to create the typical life cycle of an event, and control the type of student enrollments and resource bookings that you enter for the event.
- Chapter 7 explains how to enroll students in events. It describes how to enroll both employees and customers (non-employees) in the same event or session, waitlist students when events are full, and place students on waiting lists automatically. It shows you how to set up special discount or prepurchase agreements for selected customers and events.

It also describes how to set up and issue standard letters to students, triggered by changes in enrollment status.

- Chapter 8 explains how to set up OTA. It introduces flexfields and explains how you can configure and extend Oracle Applications. It describes how to set up and define your reference data, such as Lookups, your customers, suppliers, trainers, resources, and skills or competencies.

It also describes how to set up security and configure Oracle Training Administration so that users see only the windows and functions they need to perform their jobs.

- Appendix A lists the default menus that give you access to all the windows on the system.
- Appendix B addresses customers who have installed Oracle Order Management with OTA.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line;

however, JAWS may not always read a line of text that consists solely of a bracket or brace.

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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.

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF).

- **Online Help** – The new features section in the HTML help describes new features in 11*i*. This information is updated for each new release of Oracle Training Administration. The new features section also includes information about any features that were not yet available when this guide was printed. For example, if your administrator has installed software from a mini-pack as an upgrade, this document describes the new features. Online help patches are available on Metalink.
- **11*i* Features Matrix** – This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on Metalink.
- **Readme File**– Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

Related User's Guides

Using 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 OTA.

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

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

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle HRMS (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

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

Guides Related to This Product

Implementing Oracle Training Administration

This guide provides information about how to set up Oracle Training Administration to facilitate your training and certification business.

Using Oracle HRMS – The Fundamentals

Use this guide to learn about representing your enterprise on your application. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining a payroll, and also how to manage your costs.

Managing Your Workforce Using Oracle HRMS

Use this guide to learn about all aspects of managing your workforce. This includes how to represent your workforce on your application, recruiting new employees and developing their careers, and also defining and managing budgets.

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 Total Compensation Using Oracle HRMS

Use this guide to learn about setting up the application to store and process information on your total compensation package, including salary administration, other earnings, deductions, benefits, absence management and PTO accrual plans.

Configuring, Reporting and System Administration in Oracle HRMS

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

Implementing Oracle HRMS

This guide explains the setup procedures you need to carry out 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 information and career management functionality.

Using Oracle FastFormula

This guide provides information about writing, editing, and using formulas to configure 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 Training Administration (OTA)

This guide provides information about how to set up and use Oracle Training Administration to facilitate your training and certification business.

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

This guide provides information about using Application Data Exchange to view HRMS data with desktop tools, and upload revised data to your application.

Oracle Business Intelligence System Implementation Guide

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

BIS User Guide 11i

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.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

utilities. This guide also provides information on maintaining the applications file system and database.

Oracle Applications System Administrator's Guide

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

Other Implementation Documentation

Oracle Applications Product Update Notes

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

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle HRMS. This manual details additional steps and setup considerations for implementing Oracle HRMS with this feature.

Multiple Organizations in Oracle Applications

If you use the Oracle Applications Multiple Organization Support feature to use multiple sets of books for one Oracle HRMS installation, this guide describes all you need to know about setting up and using Oracle HRMS with this feature.

Oracle Workflow Guide

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

Oracle Applications Flexfields Guide

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

Oracle Technical Reference Manuals

The technical reference guides are now available in electronic format only. You can now access technical reference manuals for any Oracle Applications product you have licensed.

Oracle Manufacturing and Distribution Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes open interfaces found in Oracle Manufacturing.

Oracle Applications Message Reference Manual

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

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle HRMS and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network, Oracle University's online education utility. In addition, Oracle Training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep *Using 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 Oracle8i server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications

development, decision support and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing 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.

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CHAPTER

1

Introduction to Oracle Training Administration

Introduction to Oracle Training Administration

Oracle Training Administration (OTA) supports a wide range of business activities associated with training and development. OTA helps 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 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.

OTA enables you to do the following:

Set Up 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 Various Occasions

Oracle Training Administration enables you to create all types of event to meet your business needs. A *scheduled event* is a fixed date and time during which you teach an activity. Students sign on for an event, pay for it, and complete it. However, you might need to create other types of event. 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, assigning budgets both for the development of new activities and for the running costs of the event.

You can create several types of event:

- **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.

- **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 in 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, from hours to 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 attribute enables students to see which events they must attend, and to choose optional units or modules. You can also charge students for the whole program rather than the individual events

Track and Manage Event Enrollments

Using event statuses, you can control student enrollments in 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 \$10,000 for up to 10 students and \$15,000 for 11 to 20 students. You can create multiple price lists, 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

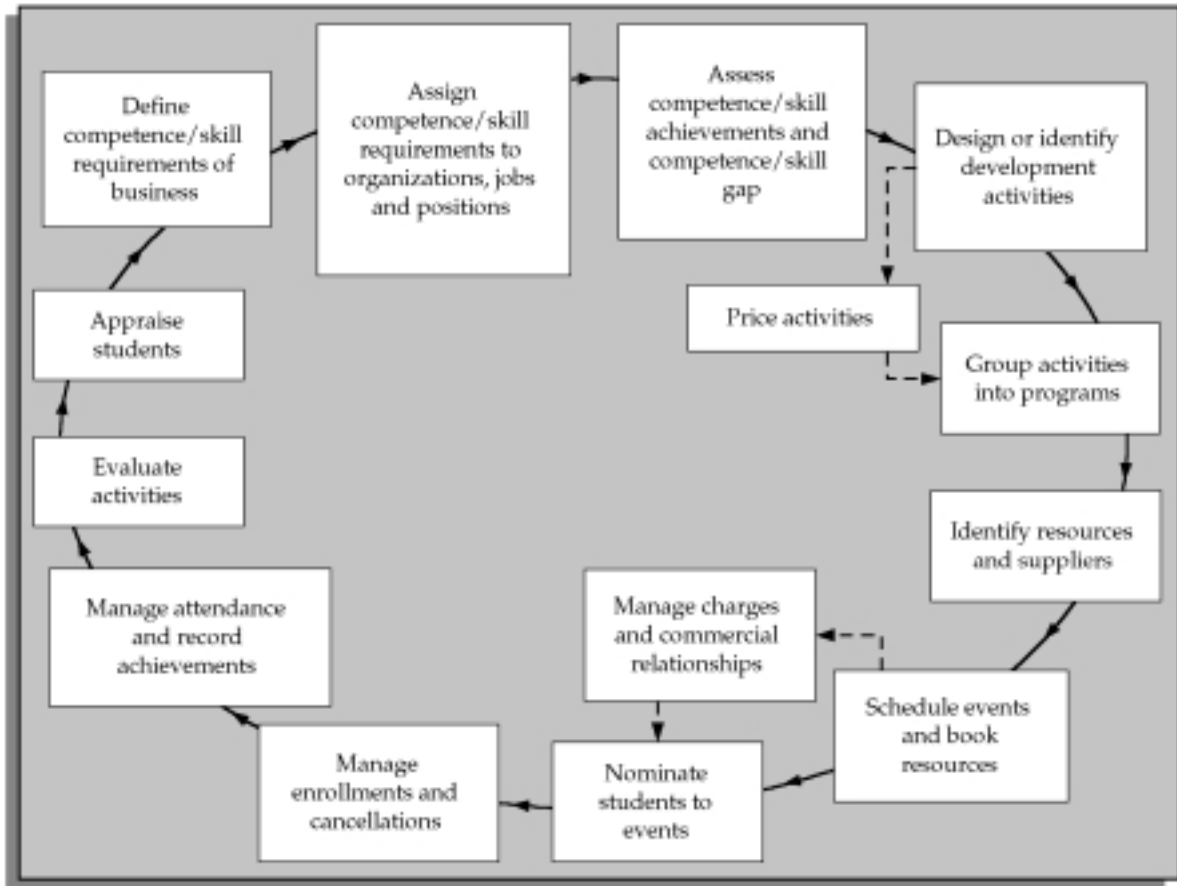
1. Define competence/skill requirements of business: define the competencies/skills (qualifications, knowledge and experience) your enterprise requires from its current staff and future applicants.
2. Assign competence/skill requirements to organizations, jobs, and positions: assign your overall business 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, we recommend 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 lie more clearly within the domain of the training department.

OTA 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. To support internal accounting practices, however, the application does enable cross-charging.

What Decisions Do You Need to Make?

To understand the decisions you have to make before you set up OTA, see *Implementing Oracle Training Administration*.

CHAPTER

2

Activities

Activities

You can use Oracle Training Administration to design any educational or training activities and events. These activities 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

How relevant are training events to your business?

Training activities enable employees to acquire or enhance competencies, qualifications, and experience. Trainees can then better fulfill job requirements and 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 utilize the potential of your employees more completely and effectively.

How versatile is event design using OTA?

OTA allows you wide flexibility in scheduling and grouping events.

- 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.

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.

Activities Overview

To enable you to design and build all your activities, 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
- Competencies
- Resources
- Event types you can create
- One-Time and Development Events

What Events Can You Build?

Combining these components 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 seminar or kick off meetings

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 an 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

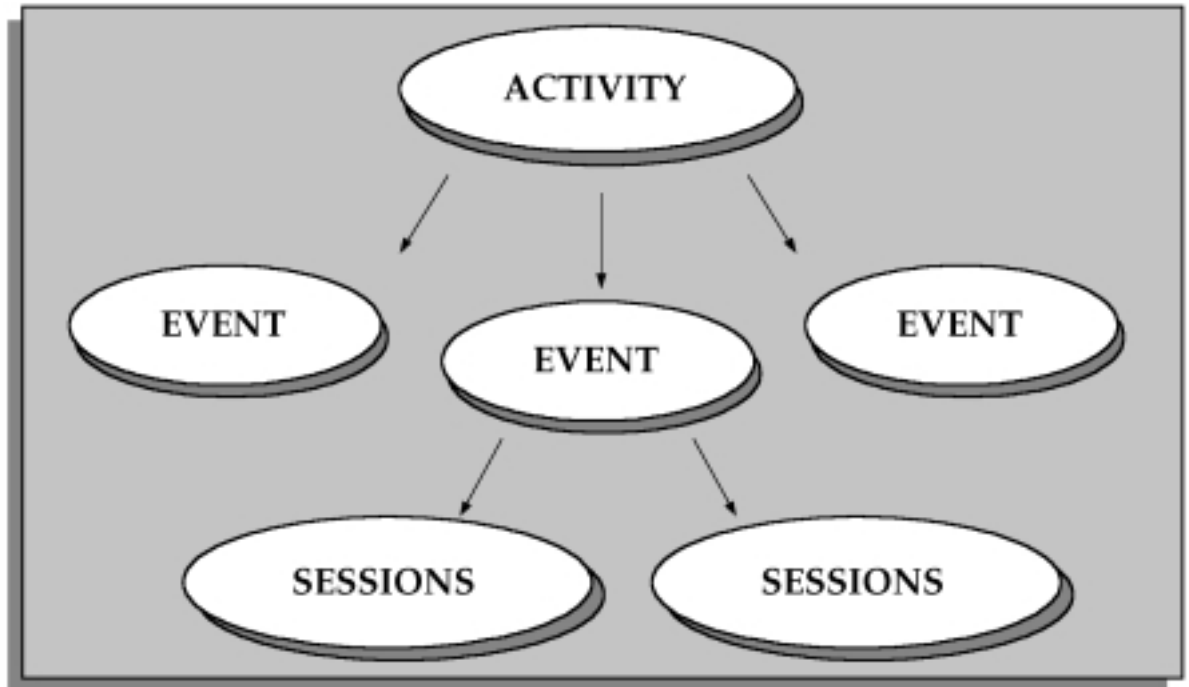
A program is a series of events that you schedule and administer as a group. Students can enroll in these events through the program. You create a program by scheduling some or all of the activities in a particular program category.

Session

An event can run for any period of time you choose. 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 2 – 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 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.

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.

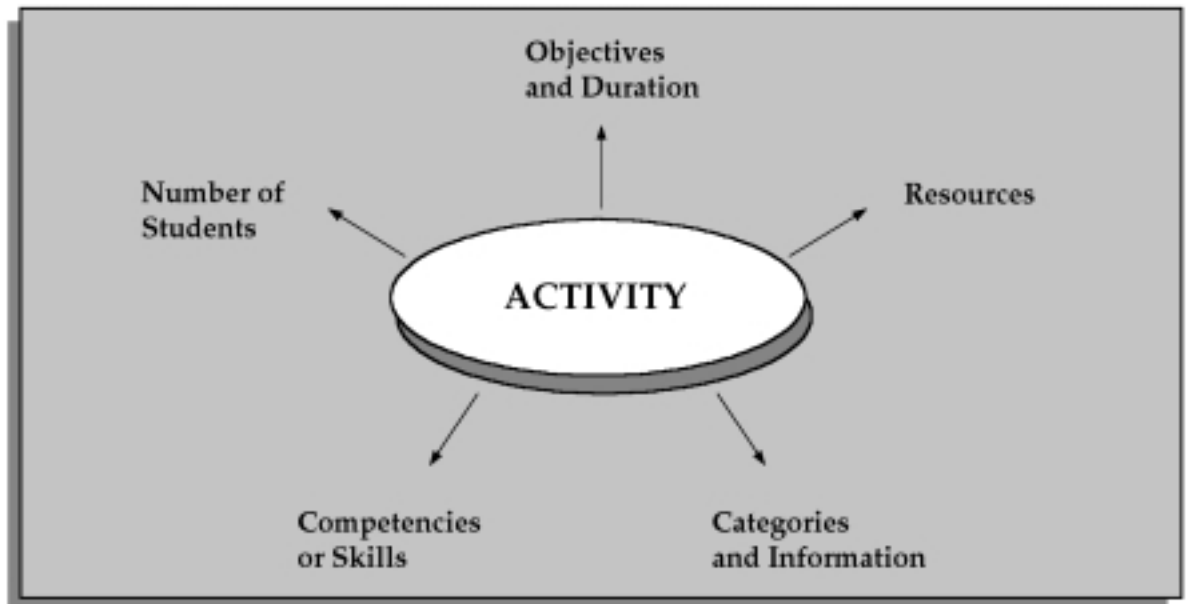
Activity Model

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, but 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 2 – 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.

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 box, you cannot create an activity with validity dates that overlap another activity of this type.
3. If you are using Oracle Order Management to manage external events, enter your inventory organization and the inventory item to which you want to link the activity. OTA automatically populates the activity name field with the item description you gave in the Oracle Inventory module.
4. If you have not set up the activity in Inventory, enter a name and description for this activity. It is this name (not the activity type name) that you see elsewhere in OTA.
5. Enter the 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.

6. Enter the target audience and the activity objectives.
7. Select the supplier of the activity.
8. Select the organization that sponsors (administers) the activity, and select the name of the person responsible for it.
9. 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 users can create events for the activity.
10. In the Success Criteria field, select the measure you use to determine successful completion of the activity (such as "Satisfactory Attendance", "Pass Examination", or "Positive Appraisal").
11. Check the Allow Expenses box if you want to allow internal students to claim expenses against events scheduled for this activity.

This box provides only information, and does not prevent students from claiming expenses.

12. Enter the minimum and maximum number of students required to run the activity, and the maximum number of internal students. These numbers provide a default when you create events for the activity.
13. 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.
14. Enter a default duration for events based on the activity.
15. Select the type and amount of professional credits that students can receive upon successful completion of this activity.
16. Save your work.

What to do Next?

- **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 2 – 16
- **Entering Special Information Types Delivered:** If you have set up special information types, you can enter information about them.
See: Entering Special Information Types Delivered by an Activity: page 2 – 18
- **Categorizing Activities:** You can categorize training activities into programs, classifications, packages, or delivery methods.
See: Categorizing Activities: page 2 – 13
- **Entering Required Resources:** You can specify resources that are required or useful to run events for a particular activity version.
See: Entering Resources Required for an Activity: page 2 – 19
- **Copying Objects:** You can copy objects from an existing activity into a new activity.
See: Copying an Activity: page 2 – 10

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 the 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.

Categories

If you want to group training events together, you can categorize activities. Categories help you search for appropriate events when enrolling students, while offering you greater latitude in reporting.

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

You can group training activities into four types of category:

- Classifications
- Delivery Methods
- Discount Packages
- Programs

Classifications are generic categories that can help you generate reports and inquiries. For example, you might set up classifications that define an audience, such as Management or Sales Staff. You might also set up classifications that define the type of training, such as Day Release, Full-Time Training, and Structured Work Experience.

Delivery Methods enable you to attach a method of delivery—classroom, computer, Web, or others you define—to activities and events.

Discount Packages are groups of activities that, together, are subject to a special enrollment agreement.

Programs are series of events that you schedule and administer as a group. Students can enroll in 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 3 – 13

Note: You can apply any or all of these category types to an activity.

Categorizing Activities

Use the Category Usages window to categorize training activities into programs, classifications, discount packages, or delivery methods. Once you have assigned categories to a category type, you can associate activities and categories from any of three windows: Activities, Scheduled Events, or Category Usages.

See Categories: page 2 – 12

► **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 8 – 7.

2. In the Category Usages window, select the category type you have defined. The current categories appear in the list. You can modify the current list by adding From and To dates. You can also add a category by choosing one from the Category poplist in an unused line.

► **To categorize an activity from the Activities or Scheduled Event window:**

1. Enter or query the activity (or event) in the Activities (or Scheduled Event) window.
2. Press the Categories button.
3. Select the category types and categories you want to associate with the activity. Fill the Primary check box for the category you want to designate as the default category for its category type.

Note: Designate only one Delivery Method as primary.

4. If you wish, you can add From or To dates to define the beginning and end points of each activity–category association. Note, however, that these dates provide only information, and do not validate entries.
5. Save your work.

► **To categorize an activity from the Category Usages window:**

1. In the Category Usages window, select a Category Type.
2. Select a category, then press the Activity button.
3. In the Define Activities by Category window, select the activity types and activities you want to associate with the selected category.

4. If you wish, you can add From or To dates to define the beginning and end points of each activity–category association.

Note: These dates provide only information, and do not validate entries.

5. Save your work.

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.

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.

Use the Delivered Competencies window to enter the competencies and proficiency levels that your training activities are expected to deliver. 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. From the Competence Types window, select Student Competence.
4. Select the competence delivered by the activity.
5. For each competence, select the proficiency level delivered by the activity.
6. Enter the dates between which the competence is valid. You must enter a From date but you can leave the To date blank.
7. Continue to enter competencies and proficiency levels for the activity, then save your changes.

Entering Competencies Required of a Trainer

From the Trainer Competencies window, you can require a trainer of each activity to exhibit competencies at specified proficiency levels.

To find trainers qualified to teach an activity, see Finding Specific Locales and Trainers: page 4 – 21.

► **To enter the competencies required of a trainer:**

1. Enter or query the activity in the Activities window.
2. Choose the Competencies button.
3. From the Competence Types window, select Trainer Competence.
4. Select a competence required to teach the activity.
5. Select the proficiency level you require of the trainer.
6. Enter the dates between which the competence is valid. You must enter a From date but you can leave the To date blank.
7. Continue to enter competencies and proficiency levels for the activity, then save your changes.

Entering Special Information Types Delivered by an Activity

If you are running Oracle HR and have not previously set up a skills-based evaluation system, ignore special information types and use competencies instead.

If you have set up special information 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 you have defined skill types.

- **To enter the special information types delivered by an activity:**
 1. Enter or query the activity in the Activities window.
 2. Choose the Other Information 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.

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 to require the resource or resource type and to enable automatic resource booking.

See Booking Resources: page 4 – 17

6. Select a reason why the resource is used, if required.
7. For the resource type of Trainer, select the role the trainer performs in delivering the activity.
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.
10. Save your work.

Price Lists

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

You can set up price lists in any currency or in training units, which have a meaning and value that you define. You can quote prices per student enrollment or arrange for establish volume discounts for customers. You can create multiple price lists to account 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 define any number of price lists for a variety of purposes:

- 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 a standard price when they create an event. You can also create discounts on price list entries using enrollment agreements.

An activity can appear on several price lists or more than once on a single price list. For example, an activity may have several entries on a price list if prices differ between dates or depend on the number of students attending the activity.

Overlapping Price List Entries

You cannot create overlapping entries for student-based price list entries for the same activity.

Price Basis

You can charge per student or per customer pays 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	4,000	01-JAN-2000	31-DEC-2000
PL*SQL Basics	10	19	7,000	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, 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 Prepurchase) 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.

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.

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 use only one default price list for each currency.

4. Enter a start and end date to define when the price list is effective.
5. 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 8 – 7

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 use only one default price list for each currency.

4. Enter a start and end date to define when the price list is effective.
5. 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 5 – 11

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

Step 4 – Create a Prepurchase Agreement: page 7 – 34.

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 OTA creates the new price list for you.

Changing Prices for Entries Within a Price List

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

OTA 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, the application enters an 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 increase 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. The application applies and saves your work.

Effective Price List Dates

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

Calculating Price List Entries

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

- The end dates of existing price list entries
- The end dates of the activity
- Any price list dates you enter
- Today's date

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

Example 1

Price List 1 is effective for the period 01-JAN-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 to which the price list entries apply is effective from 01-JAN-1999 onwards.

Price List or Entry	Start Date	End Date	Price
Price List 1	01-JAN-1999	31-DEC-1999	N/A
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 copies Price List 1 to create the new, extended Price List 2, with the following entry:

Price List or Entry	Start Date	End Date	Price
Price List 2	01-JAN-2000	31-DEC-2000	N/A
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). The application extended the only eligible entry 3 (it ended only because the price list ended), while the other two entries had already ended.

Example 2

Price List 1 is effective for the period 01-JAN-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 to which the price list entries apply is effective from 01-JAN-1999 to 31-JUL-1999.

Price List or Entry	Start Date	End Date	Price
Price List 1	01-JAN-1999	31-DEC-1999	N/A
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

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

Price List or Entry	Start Date	End Date	Price
Price List 3	01-JAN-2000	31-DEC-2000	N/A
Entry 3	01-JAN-2000	31-JUL-2000	172.50

Notice that Entry 3 appears on Price List 3 but ends on 31-JUL-2000, 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.

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.

Producing the Budgets and Costs Breakdown Report

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

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

- 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—OTA lists all events for the activity).
 - Activity Version (if you select an activity version you do not need to select an event title—OTA lists all events for the activity version).

- Event Title
- Program

Leave these fields 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 desired.

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.
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.
5. Select a currency if you want to restrict the report to student bookings for that particular currency. If you do not select a currency then the report includes 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 includes 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 report on events within that range.
11. Select Yes to include all student enrollments for which payment has been made, 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 desired. 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

3

Events

Events

OTA allows you to 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.

Once a student has completed a training event, you can record the student's successful attendance. If you are a user with the authority (and your enterprise uses the competence approach), you can update a student's Competence Profile automatically.

To streamline correspondence with students, you can generate several types of letters—course confirmations, cancellations, and notices of rescheduled events, for example—using the information you've already entered in OTA.

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

Event Schedule Overview

Oracle Training Administration's event schedule features enable you 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

Events to Create

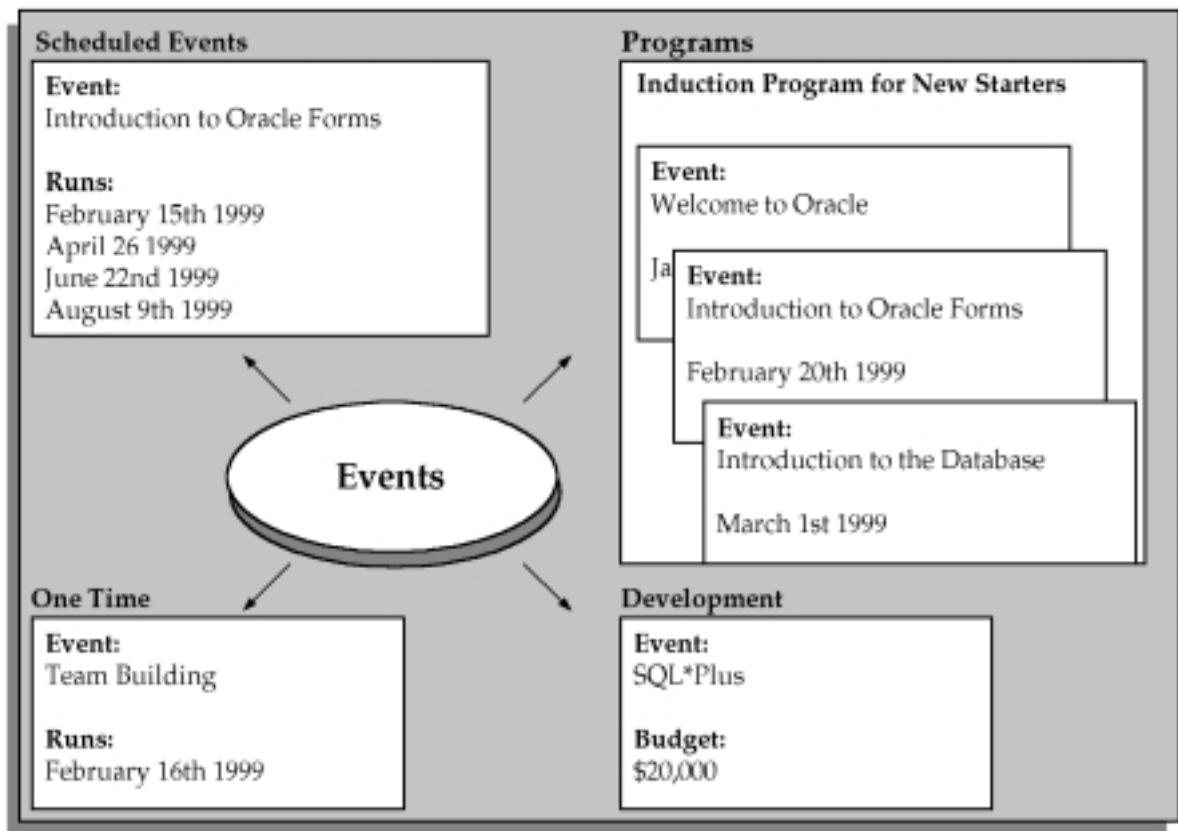
Events you can create include:

- 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 – 1 illustrates the different training events you can create and schedule.

Figure 3 – 1 Events



Scheduled Events

When you are ready to run an activity, you create a *scheduled event* for which you can book resources and enroll students.

While you are scheduling an event, you can:

- Break down an event into sessions
- Restrict an event to internal employees or customers
- Enter categories for the event, if required.

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.

Sessions

You can break down events into sessions. 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. You restrict an event in one of two ways:

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

Cost Analysis of Events

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

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 to its status or the maximum number of places available.

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

Alternatively, if 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 can also cancel any finance lines associated with these enrollments.

You might also wish to:

- Close an event
- Cancel an event
- Change 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 can then cancel any finance lines associated with these enrollments.

If the event is not full when you close it, you can opt to redefine 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, OTA automatically cancels all enrollments. You can choose which cancellation status to use for the enrollments (if you have defined more than one). You can also choose whether to cancel any finance lines associated with the enrollments.

Changing 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 can cancel any finance lines associated with these enrollments.

Enrolling Students Retrospectively or In Advance

You can enroll students 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 2002, with enrollment dates from 01 December 2001 to 31 December 2001 and you want to enroll a student today (30 October 2001), change the enrollment start date to 30 October 2001.

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

Scheduling an Event

Use the Scheduled Event window to create new events based on activities.

► **To schedule an event:**

1. Enter a title to identify the event, or leave the Title field blank if you want OTA 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) defaults from the activity, but you can override it.
3. In the Training Center field, select the training organization that controls the location of the event.
4. In the Location field, select the location where the event is to run.
5. In the Owner field, select a person who is to be responsible for the event administration.

Note: To enable OTA and Oracle Self-Service Human Resources to notify the correct persons of various system events, you must fill out the Owner and the Sponsor fields.

6. Enter the start (From) and end (To) dates. You 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 attain the status Normal and you cannot select an enrollment agreement when enrolling students in the event.

7. In the fields next to the From and To fields, enter the start and end times (in the format 14:00 for 2 pm), 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 must enter start and end times.

8. If Order Management has initiated the event, OTA automatically populates the Order Number and Line Number fields in the Order Details region. You cannot enter data into these fields.

If the order has come from OM, you cannot delete it, but you may cancel it.

Securing the Event

9. Select your own organization as the sponsoring (administering) organization.

10. Check the Secure check box.

Making the Event Part of a Program

11. If you wish to make the event part of a program, check the Program Only check box.

Restricting the Event to Customers or Employees

12. 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

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

The event status controls the type of enrollments you can enter for the event. If you are using OTA's predefined event and user statuses, a status of Full, for instance, limits student enrollments to Requested or Waitlisted.

See Event and Enrollment Statuses: page 6 – 5.

14. Enter enrollment dates to define the period in which you can create new enrollments for the event.
15. Enter the minimum and maximum number of students who can enroll in the event. OTA automatically sets the event status to Full when enrollment reaches the maximum.

You can also enter a maximum number of internal employees who can enroll in the event.

Entering Project Details

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

16. To enable you to analyze the cost of running the event, select either the project number or name to link the event with an open project.

Entering Price Details

17. 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 for each student enrollment.
 - No charge
18. Enter the price basis details for the event. Ensure that the finance line uses 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 event price, which appears in the Enrollment Details window. However, users with a qualifying responsibility can charge a different amount when they enter enrollments.
- Note:** You cannot change the price basis if finance lines for enrollments already exist for the event.
19. Save your work.

What to do Next?

- **Restrict an Internal Event:** You can restrict an internal event to selected employees. Press the Assignments button.
See: Restricting an Internal Event to Selected Employees: page 3 – 38.
- **Enroll Customers in Secure Customer-Based Events:** You can enroll customers in secure customer-based events.
See: Enrolling Customers for Restricted Events (Secure Customer-Based): page 3 – 39.
- **Create Event Sessions:** You can create sessions for the event. Press the Sessions button.
See: Creating Event Sessions: page 3 – 12.
- **View and Enter Activity Categories:** You can view and enter categories for the activity to which the event belongs. Press the Categories button.
See: Categorizing Activities: page 2 – 13.
- **Book Resources:** You can book resources for the event.
See Booking Resources: page 4 – 17

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 *Introducing 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.

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

Why Set Up Programs?

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

You can then 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 3 – 13.

How Do You Create a Program?

You create a program by selecting a category of activities, creating 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

Subgroups

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 of four groups'.

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. 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—to meet an individual customer's requirements, for example—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 include only 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 can neither update nor delete the event, nor enroll students in the event.

See: Organization Security: page 8 – 39

Scheduling a Program

Schedule programs of events in the Programs window.

Step 1 – Create an Activity Category: page 2 – 13

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 8 – 7

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 3 – 9.

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.

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 3 – 23

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 resources.

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 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 2 – 8

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

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 activity to be developed.
3. In the Training Center field, select the training organization that controls the location of the event.
4. Select the location where the event is to run.
5. Select the sponsoring (administering) organization.
6. Select the event type to classify development events for reporting purposes.
7. Enter the start date, end date, and duration of the event.

If you want to enroll students in this event later, you must enter the start and end dates for the event.

8. 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.

9. Save your work.

Booking Resources

You are now ready to book resources for the development work.
See: Booking Resources: page 4 – 17.

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

Checking Actual Versus Budgeted Costs

11. Query the development event in the Development Events window.
The Resource Bookings box is now checked as resources are booked for the event.
12. 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.
13. Save your work.

Creating a One-Time Event

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

Alternatives for creating events quickly

If you need to create and book resources for a one-time event, 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 and enroll attendees.

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

► **To create a one-time event:**

1. Enter a title for the event.
2. In the Training Center field, select the training organization that controls the location of the event.
3. Select the location where the event is to run.
4. Select the supplier of the event.
5. Enter the start and end dates and times (in the format 14:00 for 2pm).
6. Enter a duration.

Entering Project Details

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

7. Select either the project number or name to link the event with an open project to analyze the cost of running the event.
8. Save your work.

You can now enroll students in the event if you want to keep their course history and attainment details up to date.

Measuring Demand for Training

You can gauge demand for training before you schedule an event. 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 in 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.

1. Create a new event with the status Planned, and leave the event starting and ending dates blank.
See: Scheduling an Event: page 3 – 9.
2. Enroll students onto the event with the status Waitlist.
See: Entering an Enrollment: page 7 – 11.
3. Roll over the waitlisted students onto the next scheduled event for the activity.
See: Making Mass Updates to Enrollments: page 7 – 23.

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. OTA 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.

Searching for Events

In the Search for Events 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.

This window opens automatically when you choose Find from the Find Events window. It 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 search by category only when you open the Search for Event window from the Find Events window, and not from the Student Enrollments and Resources Bookings windows.

You can combine the following criteria to find the events that best match your students' requirements.

- **Date**
Events that are currently enrolling, or starting on or after a certain date
- **Competencies**
Events that are expected to deliver specific competencies
- **Resource**
Events taking place at a given venue, or using a particular trainer or other resource
- **Training center or location**
Events under the control of a given training center, or held at a specific location
- **Customer, supplier, or sponsor**
Events set up for a customer, provided by a particular supplier, or sponsored by a particular organization
- **Activity, category, or category type**
Events scheduled for a certain activity or for all activities in a selected category or category type

Choosing the Fields to View in the Search for Events Window

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

change the field prompts. The folder allows you to view a wide variety of information:

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

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 location where the event takes place

Note: OTA no longer uses this field (it remains to enable you to query past events). To search for events in a particular place, use the Location and Venue fields instead.

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 minutes, hours, days, weeks, or months the event is scheduled to run

Enrolling: this box is checked if today lies 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 in the event and with the specified status

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

Language: the language in which a scheduled event is delivered

Location: the location of an event; a *Venue* is a room or other area within a location

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

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

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

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

Placed: the number of students placed in the event

Price Basis: pricing information for scheduled events and programs

Primary Delivery Method: the principle method of delivery (instructor–led or computer–based training, for instance), if you have designated one

Program: the program category selected for a program

Prog Member: a check mark indicates that the event is part of the program displayed in the Program Title field

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

Public: a check mark indicates that 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 to attend the event.

Secure: a check mark indicates that a scheduled event or program is secure, and only users who belong to the appropriate sponsoring organization can enroll students in the event

Sponsor: the organization responsible for 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 locale booked for a scheduled event, session, or development event; a venue is a room or other area within a *Location*

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

Week No.: the week number from 1 to 52 calculated from the start date of the event

Suggestion: Since many of these fields do not apply to sessions, developments events, or one-time events, you might choose to create separate folders for listing such events. 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 Activity Categories in the Search for Event Window

A scheduled event may occur within many activity categories, which classify the event and show the programs and discount packages that can include it.

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

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

Finding Specific Events

You can choose the events to be listed in the Search for Event window using any of three methods:

- Choose Event Search from the OTA Navigator to open the Find Events window, which provides a convenient format for entering simple or complex query criteria
- Select an existing folder to view the events found by a predefined query
- Use Query-by-Example to enter your own query

► **To find events in the Find Events window:**

1. Choose Event Search from the OTA Navigator to open the Find Events window.

Alternatively, if you are already in the Search for Events window, choose Find from the Query menu or press the Find button on the toolbar to open the Find Events window.

You can customize your search by entering choices in any combination of the following fields.

2. Check one or more of the event type check boxes to restrict the search to events of these types only.
3. Check the Enrolling box to find events that are currently enrolling.
4. Enter an event title, activity, training center (the organization that controls a location), location (not the venue), event status, or sponsor.
5. 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.
6. 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.
7. Choose the language in which the event is taught.
8. Enter a supplier or customer.
9. Enter up to three rows of category types, categories, trainers, venues, or other 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, then select Full Matching.

Note: In the three rows you can select any Delivery Method as a category. If you want to find only primary delivery methods, use the Primary Delivery Method field.

10. Select an activity information type and enter activity information that denote an expected outcome from the events you want to find.
11. Choose the Find button. OTA opens the Search for Events window, which displays events that match your criteria.

Choosing the Fields to View in the Resources Booked Folder

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

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

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

Viewable Fields

You can view the following fields in the Resources Booked folder:

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 or the main trainer for the event

Quantity: the quantity of a given resource booked for the event

Resource Currency: the currency the resource is charged at

Resource Type: consumable (such as manuals and stationery) and non-consumable (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 for which the resource is booked

Start Time, End Time: the times for which 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 such 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

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., or
- An internal event on which you can enroll only 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 in an event to selected employees assigned to specific:

- Organizations
- Jobs
- Positions
- Any combination of the above

You restrict enrollments by identifying criteria that an employee must meet (or exceed) before they can enroll in 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 administrators assigned to the Sales, Marketing, and Training organizations to attend the event, but you want to prevent administrators from all other organizations from attending, you could set up the following event criteria:

Organization	Job	Position
Sales	Administrator	Junior Administrator
Marketing	Administrator	Junior Administrator
Training	Administrator	Junior Administrator

Now, only junior administrators 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 certain responsibilities to update and delete prices:

- Monetary
- Unitary
- Standard

If your enterprise does not use the application's financial security features, all users can update and delete prices.

Restricting an Internal Event to Selected Employees

After you create an event in the Scheduled Events window, you can restrict the event to members of certain organizations and holders of specific jobs and positions.

► **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 the latter case, you do not enter a price in the Scheduled Events window.

Note: Remember, if the Secure box is checked, you can restrict an internal event to selected employees only 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 who hold the position of Junior Secretary to attend the event, enter the following:
 - Sales in the Organization field.
 - Junior Secretary in the Position field.

To loosen the enrollment restrictions, you can leave any of the fields blank. Entering only an organization on a line leaves the event open to all members of that organization. Entering only a job or position on a line leaves the event open to all holders of that job or position, regardless of organization.

4. Optionally, enter further event criteria.
5. Save your work.

Enrolling Customers in Restricted Events (Secure Customer-Based)

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

If you use Order Management, you should handle customer enrollments and pricing for restricted events through OM.

► **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 3 – 9.
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 7 – 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 3 – 9.
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 5 – 11.
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 desired (this step may depend on your responsibility). This is the amount that the customer will be charged on a finance line.

Enrolling Students Automatically in Program Events

If you enrolled the student(s) in a program, OTA displays a message asking you whether you want to enroll the student(s) in all events (program members) automatically.

13. To enroll students in program events automatically, enter Y; otherwise enter N.

If you enter Y, the application 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 7 – 11.

CHAPTER

4

Resources

Resources

You can specify resources at either the activity or the event level.

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 4 – 17

Why Specify Resources as Required or Useful?

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

- Automatically

retrieves all the **required** resources you specify for the event. This short cut relieves you of the need to book the resources manually. You can delete any or all of the required resources you do not want to book.

- Individually

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.

Note: 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 appears only on the Resources Checklist. So, if you want to use the automatic method to book resources, specify that all resources are required (rather than useful) for the event—you 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 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 cannot book the required resources from the Required Resources button.

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.

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 its fields, including Classifications and Contact Roles.

► **To enter a new supplier:**

1. Enter the supplier name and a unique number (depending on your setup options, OTA may 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. OTA does not use the Site Uses fields.
6. Select the Contacts region. Enter the names, details, and telephone numbers of as many contacts as you require for this supplier.
7. Save your work.

Creating a Customer

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

System administrators can use function security to specify which tabbed regions of this form are displayed. When defining menus, they can specify parameters that control which tabbed region is visible when a user first opens 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.

See Customers, *Oracle Receivables User Guide*

► **To enter a new customer organization:**

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

Depending on your setup options, 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.

Setting Up Training Resources

You must set up 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.

► **To enter trainers:**

1. 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 in OTA before you can select them as resources. You can enter trainers as individuals with their own addresses. Alternatively, you can simply record that a certain supplier can provide a certain number of unnamed trainers.

- If you do *not* run Oracle Human Resources, use the OTA Enter Person window to enter trainers: page 4 – 9.
- If you *do* run Oracle Human Resources, use the HR People window 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 4 – 5 window.
- If you want to enter the trainer as a contact associated with the customer, use the Customers: page 4 – 6 window.

► **To enter resources:**

1. Enter your resources. See Entering Resources: page 4 – 10
2. Define usage reasons as values for the lookup type `RESOURCE_USAGE_REASON`.

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. In the Prefix field, enter a title such as Ms or Doctor.
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

Use the Resources window to enter and maintain resources, their suppliers, and their costs.

Before you enter resources in the Resources window, you may need to create or add to resource lookup types and values.

See Setting Up Training Resources: page 4 – 8

► **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. When you enter a resource type of Trainer, and you want to use the trainer's competencies to match the resource needs of an activity, you must enter the trainer as a person in Oracle Human Resources, then choose the person from the poplist in the Trainer Name field.
4. Enter a training center (an organization) to associate a resource with a particular training center.
5. Enter a location to associate a resource with a particular location.
6. Enter a start date when the resource becomes available for booking. You can also enter an end date.
7. Select the supplier. You can also enter a reference, such as a code used by the supplier to identify the resource.
8. Check the Consumable check box if the resource is not reusable. For example, pens and paper are typically consumable, whereas computers and venues are reusable.

Note: OTA assumes you have an unlimited supply of consumable resources, so it places 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.

9. Enter, in number of days, the normal lead time required for booking.
10. Enter the resource's address, such as the internal address within a training center.
11. Enter any special booking instructions, such as a delivery address or alternate supplier.

12. 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.
13. Save your work.

Resource Booking

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

- 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.

Primary Venue

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

This automatic designation doesn't prevent you from assigning multiple venues 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 appears. This message does not, however, prevent you from saving your changes.

Can You Double-Book Resources?

OTA prevents you from double-booking certain types of resource:

- Trainer
- Venue

By definition, you can use each named trainer or venue for only one scheduled event at a time, so the application prevents you from trying to do otherwise.

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

- Consumable resource types (such as manuals and stationery), which are not returned to stock after an event, and

- Non-consumable resource types (such as overhead projectors and computers), which are loaned for the duration of the event only

OTA does not prevent you from 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 from confirming the new booking. You can then flexibly define and manage these resources.

Note: OTA checks for double-bookings only when the status of the booking is Confirmed. You can thus 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 2 – 32.

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. 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 – 21.

Booking Resources

You enter resources using the Book Resources window.

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

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
- Use Query-by-Example to retrieve a list of events in the folder

Note: Enter dates in the Search for Event window using a two-digit year (01) rather than a four-digit year (2001).

► **To book resources for an event:**

Querying 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 display resources attached to the event's activity and to display the event information in the Event Details region.

Checking Use Event automatically populates the From Date, To Date, and Status fields of the first resource line.

Identifying Resources to Book

4. You can book resources using one of four options:
 - Automatically
 - Individually
 - Manually
 - Specifying Locales and Trainers

After you have identified resources using one of the four methods, proceed to Entering Essential Details: page 4 – 18.

Option 1: Book Resources Automatically

1. Choose the Book Required button to book the required resources automatically. OTA displays the resources in the Resource Bookings window.

Note: If you do not see the expected required resources when you choose the Book Required button, check that the start and end dates for the resource are appropriate for the event. See [Checking the Resource Dates: page 4 – 2](#)

2. Delete any of the resources you do not require by:

- Selecting the resource, then
- Selecting Delete Record

You then book other resources or enter essential details: [page 4 – 18](#) about the resource.

Option 2: Book Resources Individually

1. Choose the Activity Checklist button to view a list of the resources defined as required or useful for the activity.

Required resources display the value Y(es) in the Required column.

2. Select any of the resources from the list to book and display them in the Resource Bookings window.

To view a list of resources that are available on the date or dates of the booking, select a resource type then choose the Available Resources button. Select any of the resources from the list to book and display them in the Resource Bookings window.

You then book other resources or enter essential details: [page 4 – 18](#) about the resource.

Option 3: Book Resources Manually

1. Select the resource type, resource name, and the quantity required.
2. Choose the Available Resources button to view resources that are available on the date or dates of the booking. In the Resources window that appears, choose All Available Resources to book and display in the Resource Bookings window.

Choosing Specific Resources opens the Find Resources window, which enables you to find specific locales and trainers.

See [Finding Specific Locales and Trainers: page 4 – 21](#).

You then enter essential details: [page 4 – 18](#) about the resource.

Option 4: Find Specific Locales and Trainers

To identify trainers and locales that satisfy a set of criteria you specify, see [Finding Specific Locales and Trainers: page 4 – 21](#).

Entering Essential Details

1. Enter or confirm the Quantity and Dates you require of each resource.

2. Enter the status of the resource booking. If the status of the event is Normal or Full, you can select the status Confirmed.
3. Check the Primary Venue check box to indicate that designate the resource as the primary venue for the event. You can use this indicator to notify students and trainers where to attend the event. You can designate only 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 To change the Primary Venue: page 4 – 19.

Entering Other, Delivery, and Provider Details

Note: All Other, Delivery, and Provider Details are optional.

4. In the Other Details tab, enter the session times (in the format 14:00 for 2 pm) covered by the booking.
5. If the resource is a trainer, select the trainer role, such as primary trainer or onlooker.
6. In the Max Usage field, enter the maximum number of delegates that can use the resource—for example, the maximum number of people a venue can hold.
7. In the Delivery Details tab, enter a free text contact, telephone, and location if you need to record where to deliver the resource.
8. In the Provider Details tab, enter the supplier and the training center name and location.

Entering Finance Details

9. For each resource, select a finance header and enter an invoice amount in the Finance region. The application also displays the currency, cost, and cost per unit of each resource.

Note: You can view and select finance headers attached only to your own business group.

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

See: Creating a Finance Header: page 5 – 11.

10. 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.

Finding Specific Locales and Trainers

From the Resources Booking window, you can find specific locales and trainers according to their training center, location, or the competencies they provide.

► **To find specific locales and trainers:**

1. Open the Find Resources window by choosing the Available Resources button from the Resource Booking window. Then select Specific Resources from the Resources lookup.
2. To find locales or trainers attached to a particular Training Center or Location, select an item from either or both fields.
3. To find a trainer who speaks the language required by the activity, select a language from the Language lookup.
4. To find a trainer who can provide all of the competencies required by an activity, select the Match Competencies radio button.
5. To find a trainer who has taught the activity before, select the Taught Before radio button.
6. To find a trainer who can provide up to three specific competencies, select the Partial Match Competencies and fill in at least one of the three Competence fields.
Note: You can further specify your choices by supplying values both for locale and for competence fields.
7. Press Find. The qualifying resources display in the Resources Booking window.

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.
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 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 Booked button.
4. Query the venue, event, supplier, or other criteria for which you want to check resources.

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.

CHAPTER

5

Finance Headers and Lines

Finance Headers and Lines

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

You can create prepurchase agreements that allow a customer to pay for training in advance. The customer can then draw upon this prepaid balance during the agreement's period of validity to pay for any enrollments in 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 any number of customers.

What finance headers does OTA provide?

To facilitate invoicing, OTA provides you with four types of finance header:

- Payable, for supplier payments
- Receivable, for standard invoices and prepurchase items
- Cost transfer, for cross-charging
- Cancellation, for superseding previously transferred headers

Can you create your own headers?

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

Can you cross-charge training fees and resources?

Yes, you can use automated billing and payments to transfer the cost of training fees or resources between organizations, departments, or cost centers within your enterprise.

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

For internal training events, use OTA's standard financial functions as you normally would. If you are an independent training vendor who

has installed Order Management, however, you should use OM to handle your external training inventory, pricing, and invoicing.

Finance Headers and Lines 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.

See Price Lists: page 2 – 20

- 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.

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.

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.

Header Types

The four predefined types of finance header 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 – for superseding a previous header that has already been transferred to your financial system and therefore cannot be updated

Line Types

The three predefined types of finance line are:

- 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

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

See: Financial Security: page 8 – 36.

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.

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 transfers all headers with this status and updates them to the status Successful Transfer or Unsuccessful Transfer.

The other information the transfer process can return to Oracle Training Administration includes:

- External reference
- Date
- Message
- Paid flag

You can 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.

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 (corrections to journal entries for cost-transfers, for example).

To prevent transfer, change the status to Do Not Interface when you enter a new header. This prevents any further processing by any financial interfaces, such as accounts receivable, accounts payable, or general ledger applications. 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.

Creating a Finance Header

You can open the Finance Header window from the menu or by choosing the Finance Header button in 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

Window Control

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 do not appear. Within the context of entering an enrollment or resource booking, you can only select an existing header or enter a new header. The system automatically creates a finance line for this header.

► **To create a finance header:**

1. In the Raised By field, select the organization responsible for the header.
2. Select the header type: Payable, Receivable, Cost Transfer, or Cancellation.

Receivables and Payables

3. For a Receivable header, select one of the following:
 - **Standard:** to issue the invoice after the event
 - **Prepayment:** to issue the invoice before the event
 - **Prepurchase:** to deduct the cost of the enrollment from a prepurchase balance
 - **Prepurchase Payment:** to create the invoice for a prepurchase agreement
4. Select the customer or supplier if the correct information does not appear by default.
5. Select a contact and an address.
6. Select the appropriate payment method.

Cross-Charging

If you are transferring the cost of training fees or resources between organizations, departments, or cost centers within your enterprise, use the Cost Transfer header type, which automatically opens the Cost Transfer tabbed region.

7. Select a From Set of Books, then fill out the accounting flexfield segments to specify the Transfer From account.
8. Select a To Set of Books, then fill out the accounting flexfield segments to specify the Transfer To account.

Transfer

9. Select the appropriate status: Awaiting Transfer if you are ready to transfer this header to your financial system (you must check the Authorized box to assign this status), 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 in OTA (but not in SSHR), the application defaults generic financial information into the Finance Header window for you. You must complete all the information before you can save your work and generate the finance line and identity number.

10. Save your work.

What to do Next?

- **Entering an Enrollment:** If you are manually creating a finance header while you are entering an enrollment, go back to entering an enrollment: page 7 – 11.
- **Creating Finance Lines:** You can create the finance lines for this header manually.

See Creating a Finance Line Manually: page 5 – 13.

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 5 – 11.
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, the application 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.

OTA 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.

OTA 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 to 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 were transferred before cancellation, thereby creating 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.

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.

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.

CHAPTER

6

Event and Enrollment Tracking

Event and Enrollment Tracking

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, OTA 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.

Use Oracle Application Data Exchange (ADE).

See: Letter Generation: page 7 – 9

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 8 – 41.

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

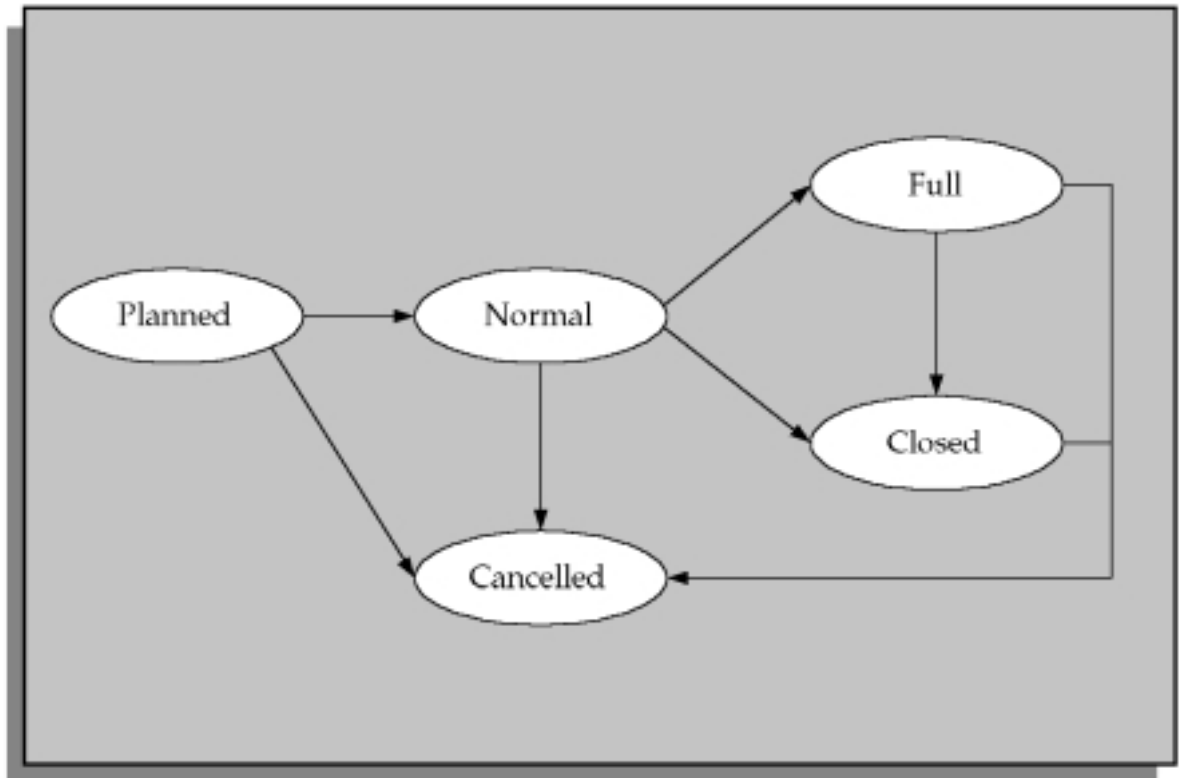
You can also create and issue the appropriate letters to students automatically when an enrollment is given a certain status, and to drive alerts.

See: Letter Generation: page 7 – 9

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 6 – 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

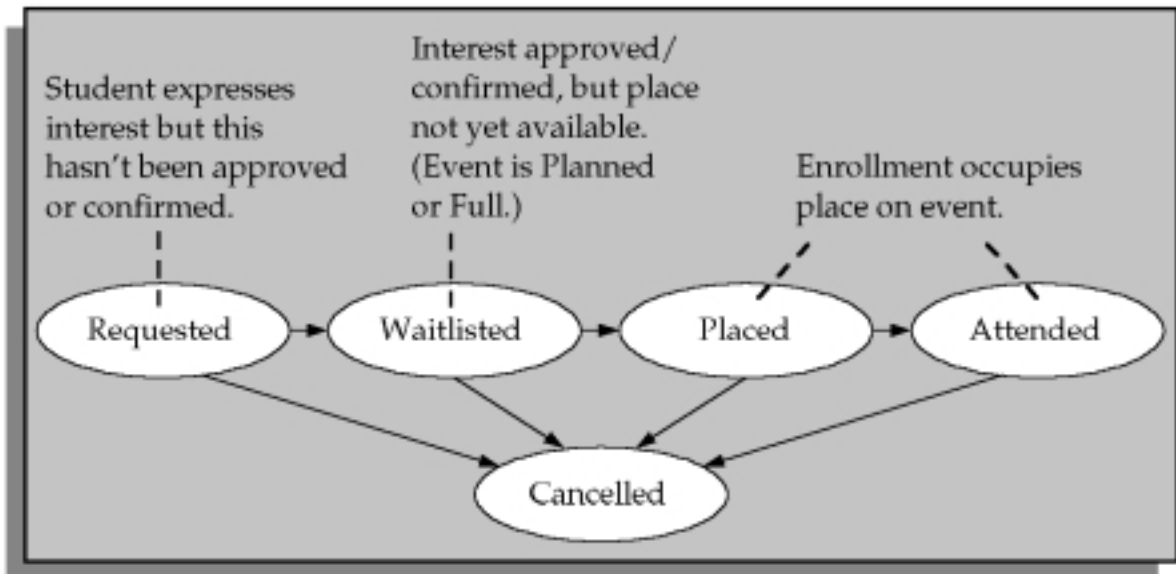
You are provided with five predefined statuses with Oracle Training Administration:

- 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 6 – 2 Enrollment Statuses



Although the application provides these five predefined status types, during setup you must name the status types yourself. 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.

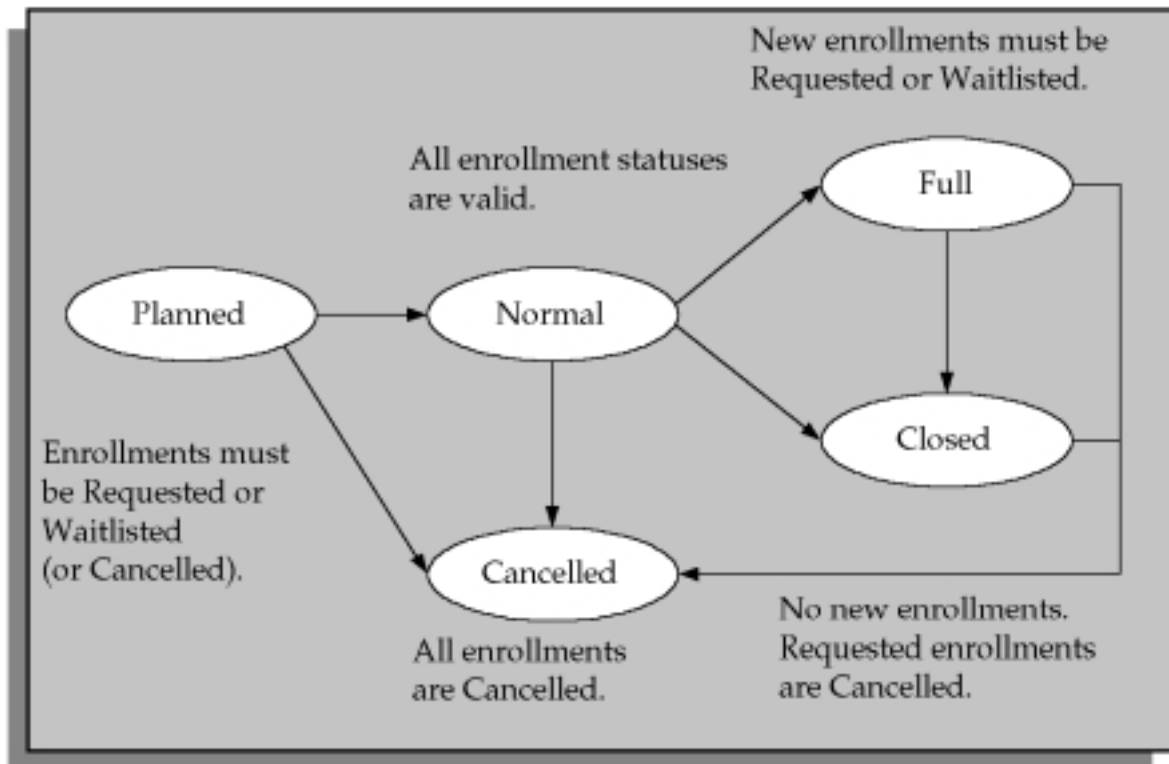
For example, you might want to distinguish between cancellations that incur a penalty fee and those for which there is no charge. You might also use different statuses to track management approval of a Requested enrollment.

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

This combination of event and enrollment statuses enables you to track and manage enrollments onto events.

Figure 6 – 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 **Waitlisted** when the students confirm their interest and/or their attendance is approved by management.
4. Update the event status to **Normal** when you have:
 - Sufficient Waitlisted enrollments to meet the minimum numbers required to run the event
 - 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 3 – 25.

Creating Enrollment Statuses

Use the Enrollment Statuses window to create enrollment statuses.

► **To create enrollment statuses:**

1. Enter a name for the first status.

Note: Self-Service OTA users must create a status of the type Requested.

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.

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.

Creating Event Statuses

- ▶ **To create event statuses:**
 - Create your own statuses as values for the Lookup type `EVENT_USER_STATUS`.

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

7

Enrollment

Enrollment

OTA allows you to enroll individuals and groups of students and internal employees and customers both from within and from outside your organization. OTA's integration with Order Management can enable you to use your organization's telesales representatives to enroll external customers in events.

Can you enroll employees and customers in the same event?

Yes, you can easily enroll both employees and customers (non-employees) in 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.

Can you make multiple enrollments?

You can make multiple enrollments in an event, 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?

To enable you to streamline all correspondence with students, OTA can generate several types of letters, including 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 help you to maintain a complete training history for your employees and customers (non-employees), OTA allows you to record information about training events they have attended outside your organization.

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

OTA 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.

OTA employs two types of enrollment:

- 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 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 enables you to enroll waitlisted students automatically, based on waitlist priority or enrollment dates. It also prevents double booking from occurring.

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.

Waiting List Management

Waiting list management enables 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, you can select another student from the waiting list.

Automatic Waitlist Enrollment

You can enroll waitlisted students automatically onto events, based on waitlist priority or enrollment dates. This automatic enrollment functionality also helps to prevent double booking from occurring.

To establish automatic waitlisting, you set several user profiles:

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

See User Profiles: page 8 – 41

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 an event's maximum number of attendees has increased.

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?

These statuses occupy places on events and prevent you from double-booking students onto events

However, Oracle Training Administration does not prevent you from double-booking students with the following statuses:

- 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 checks for double-bookings only 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 8 – 39.

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 8 – 51.

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 8 – 36.

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.

Letter Generation

Standard letters enable you to manage your enterprise's enrollment activities more easily. You can 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 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:

- Acknowledgement letters (for all requested enrollments)
- Confirmation letters (for placed enrollments, including event joining instructions based on the date, venue, and trainers)
- Reports for trainers (listing the students to attend an event)
- Follow-up letters (for non-response or non-payment)
- Acknowledgement letters (for cancellations)
- Certificates (of successful course completion)

How to Generate Letters

Generate letters online using Application Data Exchange (ADE). See *Application Data Exchange and Hierarchy Diagrammers User's Guide*.

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 compatible with Microsoft Word.

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.

Configuring Student Enrollments

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

- Create your own enrollment statuses: page 6 – 11 (from the system-defined enrollment statuses).
- Create standard letters: page 7 – 9 (that can be generated automatically when an enrollment is given a certain status).
- Enter the following lookup codes: page 8 – 7:
 - 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 8 – 41
- Customize Enrollments windows: page 8 – 47
- Define Functions: page 8 – 27. (to implement the competence approach)
- Set up Security to determine which users can:
 - Update and delete events: page 8 – 39
 - Enter, update, and delete enrollments for secure events: page 8 – 47
 - Override event price information: page 8 – 38

Entering an Enrollment

You enter student enrollments for customers and internal organizations using the Student Enrollments window. When you open the window, one or more 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 3 – 27.

- **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 enroll a student for the event only if you are assigned to the organization that is administering the event.
2. Enter the number of places to enroll. The default is 1.
3. Check the Internal check box if the enrollment is for an internal student, otherwise leave the box unchecked. OTA 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 or 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 or In Advance: page 3 – 8.

Entering Personal Details

8. Identify who is sponsoring the student:
 - For an external enrollment, select a customer (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 4 – 6.
 - For an internal enrollment, select an organization (if the student is an employee held in Oracle HR).
9. Select a student to enroll. If you are entering an internal enrollment, select an employee and assignment from the poplist. 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 poplist. 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 the following steps you complete depends upon how your enterprise has configured OTA.

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, the application 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, OTA 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 7 – 17

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

See: Entering Financial Details for an Enrollment: page 7 – 15.

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

See: Updating a Competence Profile: page 7 – 24

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 in 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 3 – 27.
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 7 – 11.
3. Copy and paste the enrolment for fast entry of multiple enrollments, if desired.

See Making Multiple Enrollments: page 7 – 17.

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 5 – 11 for this customer

Now go to Saving Your Changes: page 7 – 16 (Step 8).

- Select a Finance Header: page 7 – 15 (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. In the Enrollment Detail window, choose New Record from the Edit menu.
5. Choose the Paste button.
6. Add any additional information for this enrollment and save it.

Opening Regions and Changing Setup

The Enrollment Details window contains a number of tabbed regions:

- 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

Three setup options on this form 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.

Enrollment Updates

Oracle Training Administration enables you to update enrollments quickly. 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 installed Oracle Human Resources and OTA, 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. 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.

You can update the profile anytime.

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

If you delete an enrollment, you also delete the 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 7 – 26

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 to 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.

Warning: 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.

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.

OTA changes all the enrollment statuses, and rolls the enrollments forward onto a new event.

Updating a Competence Profile

You can update a student's competence profile as desired.

► **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 7 – 25
 - Make changes to the competencies first. See: Make Changes to Competencies: page 7 – 24

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, 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 desired

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.

Cancelling a Single Enrollment

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

If you cancel an enrollment when the event status is Full and a waiting list for the event exists, OTA displays a popup box that gives you two options:

- Continue to save the cancellation
- Select a student from the waiting list to fill the new place

You can also use the Mass Update feature to cancel multiple enrollments simultaneously.

See Making Mass Updates to Enrollments: page 7 – 23.

► To cancel a single enrollment:

1. Query the enrollment in the Enrollment Details window or by selecting the enrollment in the Enrollment Summary window.
Note: If the event is Secure (the Secure box is checked), you can cancel an enrollment for the event only if you belong 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. To change your security profile, contact your supervisor.
3. In the Change Reason field, you may select a reason for the status change.

Note: Once you have saved your changes, you cannot modify the Change Reason field without again changing the status and saving. This feature enables you to track the history of the enrollment by pressing the History button and selecting Enrollment Status History.

4. Save your changes.

If the event was previously Full and contains a waiting list, a box pops up to enable you to fill the freed space from the waiting list.

Selecting from the Waiting List

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

OTA displays the Waitlisted Enrollment window, from which you select students. The number of vacancies appears at the bottom of the window.

6. Select the student you want to enroll in the event by positioning the cursor in the Booking Status field and selecting Placed from the List.
You can now fill the place before someone else enters a new enrollment for the event.
7. Choose the OK button.

Saving the Cancellation 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.

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, most recent first. 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 a student's training history:**

1. In the Enrollment Details window, query an enrollment for the student.
2. Choose the History button and select Combined Training History. Choose OK.

OR

1. In the Additional Training window, query a student, then enter or query a course.

See Entering Additional Training: page 7 – 31

2. Choose the Training History button.

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 in 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.

Entering Additional Training

Use the Additional Training window to record the details of any non-OTA training courses attended by employees or customers (non-employees). If you wish to view all the training already entered for a student, press the Training History button.

See Viewing Training History: page 7 – 29

► **To enter additional training:**

1. Use the Type poplist to select whether the student comes from a customer or an internal organization, then enter the internal or customer organization's name.
2. Enter the student's name. The list of names available depends on the selections made in the Type and Company fields.
3. Enter the title of the training course, the date of its completion, and its supplier and location.
4. If the system contains one, select the OTA-based activity that most closely resembles the additional course. Select the training type from the poplist.
5. Enter the duration of the course and the status of the training, if desired (attended or incomplete, for example).
6. Enter any award or distinction granted. If the training is complete, enter the score achieved. Enter the contact name.
7. Save your changes.

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 4 – 6.
- 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 2 – 13.
- If the agreement is based on a price list, create the price list: page 2 – 24

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 4 – 6.

Step 2 – Create a Price List on which the agreement is based: page 2 – 24.

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, OTA 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. The application displays the Prepurchased Amount window.

If you have not yet created a finance header, see [Creating a Prepurchase Payment Finance Header](#): page 5 – 18.

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

For example, if you are entering training units and the unit was defined as Half an Hour (and a full day's training activity costs 16 training units), enter 16. The application 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.

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 first delete the finance lines 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 5 – 15 for more information.

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

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 title to include students who should have attended that one event. Only students with the status Attended appear in the report.
3. Select the event type. You can select an event type without selecting an event title if you want to include event types within the date range and center in the report.
4. Select the training center that controls the event.
5. Enter the start and end dates to include events or event types within the given range.
6. Choose the OK button.
7. Choose the Submit Request button.

Report Output

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

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

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.

Producing the Attendance and Signature Sheet Report

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

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

► **To run the Attendance and Signature Sheet report:**

1. In the Name field, enter or select Attendance and Signature Sheet Report.
2. Click in the Parameters field and select the parameters for the report. See the Report Parameters section for more information.
3. Enter the printer information and number of copies that you want to print. The report is entitled Attendance and Signature Sheet Report.
4. Submit the report.

Report Parameters

The parameters window includes eight optional fields:

– **Event Title**

Select an event from the list. If you leave this field empty the report will contain information for all valid classes, subject to the limits you set in the other parameters.

– **Training Center**

Select from the list of values to limit the report to a single training center. If you leave this field empty the report will contain information for all valid training centers.

– **Event Start Date**

Enter the beginning date of the event(s) you want to include in the report.

– **Event End Date**

Enter the ending date of the event(s) you want to include in the report.

– **Enrollment Number**

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

- **Optional Column Heading**

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

- **Display Payment Confirmation**

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

- **Display Trainer Signature**

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

Report Output

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

CHAPTER

8

Setup and Configuration

Setup and Configuration

Oracle Training Administration enables you to configure important parts of the system, and to define additional information you want to record.

What are the advantages of valid lists of values?

Some fields restrict data entry to items in lists of valid values, which

- ensures that all users use the same terminology, making it easier to enquire and report on the information, and
- speeds data entry because you can enter just enough to identify the value, and the application completes the entry.

Can you use more than one Business Group?

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

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

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 Configuration Overview

Setting up, configuring, and extending Oracle Training Administration requires an understanding of some basic constituents.

Key and Descriptive Flexfields

Key and descriptive flexfields enable you to configure and extend Oracle Applications. Each flexfield consists of separate fields known as *segments*.

There are two types of flexfield:

- *Key* flexfields are essential, so you must configure them before you can use OTA.
OTA includes one required key flexfield, the Training Resource flexfield. If you have installed other Oracle Applications, they may require you to configure other key flexfields. Oracle Human Resources users, for example, may need to configure the Personal Analysis key flexfield.
- *Descriptive* flexfields are optional and enable you to define additional information you want to record in most of the application's windows.

Lookups

Lookups 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. 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.

Function and Security Configuration

Function and security options can restrict user access to records, windows, and functions. Setting these options can secure your data and grant users access appropriate to their needs. Function security also regulates the display of the Competencies and Skills buttons in the Activities window.

Organization security can prevent users outside your HR organization from entering or modifying events, enrollments, or programs.

Enrollment Status security can prevent users with specific responsibilities from entering or modifying enrollments.

Financial security can prevent users with specific responsibilities from changing or deleting monetary or unitary amounts.

User Profiles

A *user profile* is a set of changeable options that govern a range of features, including waitlisting, Self-Service HR, and the automated creation and transfer of financial details. 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 windows using a user profile option and the parameter QUERY_ONLY=YES at form function level.

Lookups

Lookups provide lists of valid values on certain fields throughout the application. These lists:

- ensure that all users use the same terminology, which makes it easier to enquire and report on the information; and
- speed up data entry by enabling you to enter just enough to identify the value, letting the system complete the entry.

Each list of values, called a Lookup type, consists of a code and a meaning. For example, the lookup type YES_NO contains a Code Y, meaning Yes, and a Code N, meaning No. Users do not see the codes.

Each Lookup Type supports a maximum of 250 Lookups.

Predefined Lookup Types

Some Lookup types contain essential codes that you can never delete, though you can change their meaning. For some Lookup types, you can also disable the supplied codes. Your ability to disable and add codes depends on the *access level* of the Lookup type:

User	You can add codes and disable supplied codes.
Extensible	You can add 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 8 – 6 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.

User and Extensible Lookups

Field	Lookup
Category	ACTIVITY_CATEGORY
Success Criteria	ACTIVITY_SUCCESS_CRITERIA
Status	ACTIVITY_USER_STATUS
Type (of address)	ADDRESS_TYPE
Source (of enrollment)	BOOKING_SOURCE
Category Type	CATEGORY_TYPE
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

Adding Lookup Types and Values

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

Defining Lookup Types

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

► **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 see from within the application.
4. In the application field, select Oracle Training Administration.
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 from 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 from selecting this value with immediate effect from the current date.
 - Change the meaning and description to create a replacement Lookup.

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

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

Key Flexfields

You can set up an unlimited number of structures for key flexfields. Each separate structure can contain up to 30 segments.

You do not need to define structures for these flexfields before you begin using OTA. Define them only when you want to define training resources and additional activity information.

OTA provides two key flexfields:

- Training Resources: page 8 – 10
- Personal Analysis: page 8 – 22

The Training Resources key flexfield is an essential feature of OTA. The optional Personal Analysis key flexfield allows you to define and track information about the people in your system.

If you do not run Oracle Financials, you also need to define an accounting flexfield. If you already run Oracle Financials, the flexfield you require already exists.

Note: Avoid segments containing information that may change regularly. The application does not keep a history of changes to the combinations you create.

Training Resource Key Flexfield

For each resource type, you set up a structure of the Training Resource key flexfield. 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. Duplicating the Center segment in the structures for all resource types, for example, would enable you to report on all resources held at your training centers.

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

Descriptive Flexfields

Many windows include a user-definable descriptive flexfield. You decide the windows in which you want to record additional information. Each user-definable descriptive flexfield contains 20 segments. After you define a descriptive flexfield, OTA treats the segments as part of the window.

For each segment, you can define its prompt, the type of data it can contain, and the values a user can enter. You can provide a list or range of valid values. You also control the size and display characteristics of each segment and the order in which the segments appear.

You can define two types of descriptive flexfield segments:

- Global segments, which always appear in the window.
- Context-sensitive segments, which appear only when a defined context exists. You can prompt the user to provide the context, or you can provide the context automatically from a reference field in the same zone.

For example, a segment to hold a cost code might appear only for internal student enrollments.

Note: Some descriptive flexfields appear in more than one window. Check all of the windows that use a descriptive flexfield before you define any of the segments. This check is especially important if you intend to make the flexfield context-sensitive to another field. You must ensure that the reference field is present in all of the windows that use the flexfield.

The following table lists all the user-definable descriptive flexfields in OTA.

User-Definable Descriptive Flexfields in OTA

Descriptive Flexfield Title	Window Title
Additional Activity Information	Activities
Additional Activity Version Information	Activities
Additional Address Details (HR)	Address, Applicant Entry Contact
Additional Booking Deal Information	Enrollment Agreements
Additional Booking Status Information	Enrollment Statuses
Additional Category Inclusion Details	Category Usages
Additional Delegate Booking Information	Enrollments

Descriptive Flexfield Title	Window Title
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)	Organization
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 Training Details	Additional Training
Additional Vendor Supplies Information	Suppliers
Additional Finance Line Information	Finance Lines

The Org Developer Flexfield

Oracle HRMS supplies a predefined descriptive flexfield, the Org Developer flexfield. Your localization team defines this flexfield to meet the specific legislative and reporting needs of your country. When you use the Organization window in OTA, you see different additional organization information depending on the legislation code you selected for your Business Group. The legislation code controls which segments of the Org Developer DF are visible.

Descriptive Flexfields (with Startup Data)

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

- Personal Address Information
- Location Address

Address Styles in Oracle HRMS

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

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

Oracle HRMS also provides *context-sensitive* segments to hold each line of the address. The available address styles represent the contexts for these flexfields. The values used are the territory codes, which appear in the FND_TERRITORIES table. You can use only one Address Style for each Territory in the FND_TERRITORIES table.

These flexfields provide address styles as startup data. 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 don't want to use. Then define new segments to record your own information.

Warning: If you change the predefined styles, upgrading Oracle HRMS will overwrite your changes. If you add styles, any new startup data that contains address styles for these countries may overwrite your changes.

Organization 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 OTA's fundamental organizational unit. All the other information you enter belongs to one Business Group. You can set up several default options that apply across the Business Group. Unless you are implementing a global Business Group, you cannot view information online for more than one Business Group at a time.

Many enterprises decide to use just one Business Group to hold 'live' information so they can display, report, and manage all their information at the same time. However, you may want to set up multiple Business Groups in the same installation because:

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

Global or Local?

You can now implement a Global (single) business group, enabling you to define all your training structures only once, and allowing students from other business groups to enroll in training events in the global business group. If you are not running or planning to run a localized version of OTA, you use the OTA:Global Business Group profile to set your business group to global.

Running a globalized training organization can result in a more efficient use of resources, greater flexibility and control over events, and simplified enrollment and accounting procedures. For example, you could quickly identify a Spanish-speaking trainer from Spain who could teach a course in Argentina. If the event and trainer belonged to different HR Business Groups, you could not view them together at the same time, leading you to miss the appropriate match. However, if you wish to take advantage of the delivered extensions for French legislation, then you should not implement this global setup. You should implement OTA with a French Legislation for your business group.

Once you've set up a global Business Group, you will find it extremely difficult, if not impossible, to switch to a local Business Group should the need arise. So

if you believe you will require a localized (in other words, country-specific) version of OTA in the future, you should consider implementing a local OTA Business Group. Note, too, that any responsibility can view either global *or* local events, but not both.

For specific procedures, see: Creating a Business Group: page 8 – 18

Organizations

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

Note: *Do not use OTA organizations of the type Training Center in the role of HR Organization*—that is, do not assign people to these Training Centers in Oracle HR, though you must define these centers as HR Organizations in order to add them to Organization Hierarchies. Furthermore, *do not use Training Centers in HR Organization Hierarchies that you intend to use for HR reporting purposes such as head counts.*

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

Key Flexfields Associated with the Business Group

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.

Creating Business Groups and Organizations

You must create your enterprise's business groups and organizations in the following order..

► **To create Business Groups and Organizations:**

1. Create Locations: page 8 – 17
2. Create a Business Group: page 8 – 18
3. Create a Training Organization: page 8 – 20

Creating Locations

Create addresses in the Location window.

Note: Locations are shared across Business Groups in Oracle HR and with many other Oracle applications. Oracle HR uses only some of the fields in the Location window. The others are disabled for HR users.

► **To create a location and its address:**

1. Enter the name and description of the location.
2. Select a national address style from the list.
A window opens with the address format for the country you select.
3. Enter address information in this window and 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 run Oracle Human Resources, you will probably want to use your HR Business Group or Groups in OTA. This enables you to share data on people, organizations, locations, and skills across the applications.

If you are implementing Oracle Training Administration without Oracle HR, use the supplied setup Business Group, with all of its default definitions, as the starting point for your own. The default responsibility supplied with the application uses this Business Group.

Global or Local Business Groups

OTA gives you the option of using a global or local Business Group: page 8 – 18. Should you decide to implement a global Business Group, you must undertake several additional setup steps, specified below.

The OTA default navigation menus do not include access to an HR Organization Hierarchy window. Depending on your choice of local or global business group, you can manually add either the Global or the Local Organization Hierarchy window.

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

► To use an HR business group or the setup business group for OTA:

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. The currency selected here is the default currency for the business group, but you can enable and use other currencies.
4. Do not enter any other information in this window, which belongs to Oracle HR, not OTA.
5. Choose OK and save your work.

Note: If you are not implementing Oracle HR, you can ignore the other windows it provides for Business Groups, such as Work Day Information and Budget Value Defaults.

► To set up a global business group:

1. Create your business group in the Organization window, or follow the above procedure to use the setup business group.
2. Switch to the System Administrator responsibility, and open the System Profile window.

3. In the Find System Profile Values window, check the Responsibility checkbox and enter your responsibility. In the Profile field, enter OTA:Global Business Group and then press the Find button.
4. In the Responsibility column on the OTA:Global Business Group line, enter the name of your Business Group.
5. Back in the Find System Profile Values window, check the Site checkbox, uncheck the Responsibility checkbox (if it has remained checked), and enter HR:Cross Business Group in the Profile field.
6. In the Site column on the HR:Cross Business Group line, enter Yes.
7. Save your work.
8. To ensure that you can view and use competencies, verify that each competence is checked as Global. If you can access an HR responsibility, you can reach the Competencies window from Career Management on the HR Navigator. If you run Oracle HR but cannot access an HR responsibility, contact your System Administrator.
9. To ensure that you can view all available Training Centers, you must define them in your OTA global Business Group.

Note: *Do not use OTA organizations of the type Training Center in the role of HR Organization—that is, do not assign people to these Training Centers in Oracle HR, though you must define these centers as HR Organizations in order to add them to Organization Hierarchies. Furthermore, do not use Training Centers in HR Organization Hierarchies that you intend to use for HR reporting purposes such as head counts.*

Creating a Training Organization

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

All Oracle applications you install share the information entered in the Organization window. 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. Optionally select a location to record the site address. You can also enter an internal address to add more details such as a floor or office number.
4. Select Internal or External.

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

5. Save your work.

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

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 run only 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*.

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

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

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

Phasing in Delivered Competencies

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

- Continue to use skill types
- Switch immediately 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 8 – 27.

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 OTA. 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, and B.2)

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.

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

Other Uses of Special Information Types

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

The Competence Approach

If you have installed Oracle Human Resources and OTA, 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.

Enabling Competencies or Skills

Use the Form Functions window to enable functions such as competencies and skills.

► **To enable competencies and skills:**

1. Query the function to configure.

Use **OTA_OTAPDDAV** to enable the Competencies or Skills buttons on the Activities window, and **OTA_OTATAEDB** to add competencies to the students' competence profiles.

2. Enter the parameters in the Parameters field.

If you want selected users to add competencies to students' Competence Profiles, enter:

`COMPETENCIES="YES"`

3. Save your work.

Mapping Competencies to Languages

The Map Competencies to Languages window enables you to link language competencies set up in Oracle HR to the list of languages used in all Oracle applications. This mapping enables you to search for trainers who fulfill the language requirement of a specific event. You can also add a minimum proficiency level to each mapping, so that your search returns only those trainers who know the language well enough.

See: Finding Specific Locales and Trainers: page 4 – 21

► **To map competencies to languages:**

1. Open the Map Competencies to Languages window from the Navigator.
2. In the Competence field, select a language competence from the poplist.
3. Optionally, select a minimum proficiency level for the mapping.
4. In the Language field, select a language from the poplist.
5. Repeat steps 2–4 as needed.
6. 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.

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.

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.

Cross-Charging

OTA can charge a student's cost center when the student enrolls in a class on the Web using Oracle Self-Service Human Resources. Features include a window for setting up cross-charge accounting, which implementers must use to set up links between OTA and Oracle General Ledger. Several system profiles control automatic cross-charging.

Ensuring accurate cross-charging of SSHR enrollments takes five steps:

1. The student uses SSHR to enroll in a class.
2. The system automatically creates finance headers and lines, as long as the implementers have accurately mapped accounting fields between OTA/HR and General Ledger.

See Setting Up Cross-Charge Accounting: page 8 – 34

3. Once the course has finished, the training administrator marks the student's enrollment status as Attended.
4. The administrator runs the Create Cross Charging GL Lines for Transfer concurrent process.
5. To complete the cross-charge transfer, the administrator runs the Journal Import process in GL.

Note: For OTA to transfer the costs, the Oracle GL application must contain the Journal Import source Transfer.

Setting Up Cross-Charge Accounting

To enable cross-charging to occur when a user of SSHR attempts to enroll in a class, you must fill out the Cross-Charge Accounting form, accessible from the Setup menu in the OTA Navigator. The form maps all defined segments in Oracle General Ledger to a particular table in Oracle HR or to a constant value you specify.

See Cross-Charging: page 8 – 33

You must fill out this form twice for each business group/set of books combination, once to specify the account to transfer from (the debit account) and once to specify the account to transfer to (the credit account).

Note: To ensure that workflow notifies the appropriate person if the cross-charge processing fails, you must include a value in the Event Owner field of the Scheduled Event window in OTA.

► Setting Up Cross-Charge Accounting

1. From the lists of values, select an HR Business Group and a General Ledger Set of Books. The Cross Charge Type defaults to Enrollment when you click on the list of values icon.
2. Select From in the From/To field. Enter a starting date in the Date From field. If you choose, you may enter an ending date in the Date To field. Save your work.
3. In the Segment Mapping Details region, the GL Chart of Accounts column automatically fills with segments drawn from the GL Set of Books you have specified.

Note: *For each row, you must specify at least one value. The function works in sequence: if it fails to find a legitimate value in the HR Costing Data Source column, it moves on to the HR Costing Segment column; if it fails there, it looks for a Constant Value. Then if no constant exists, it generates an error message.*

4. If you choose to use the HR Costing Data Source, select from one of four choices: Assignment, Business Group, Organization from Assignment, or Sponsor Organization. If you select Sponsor Organization, then the Sponsor field in the Scheduled Event form must contain an organization with a cost center value.
5. If you choose to use the HR Costing Segment, select from the list of values taken from the Payroll Cost Allocation flexfield linked to the specified HR Business Group.
6. In the Constant Value field, select from the list (taken from the corresponding segment in GL) a default value that the function can use if it finds no legitimate value in the previous two columns.

7. Save your work, then repeat the above steps, using To in the From/To field.

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.

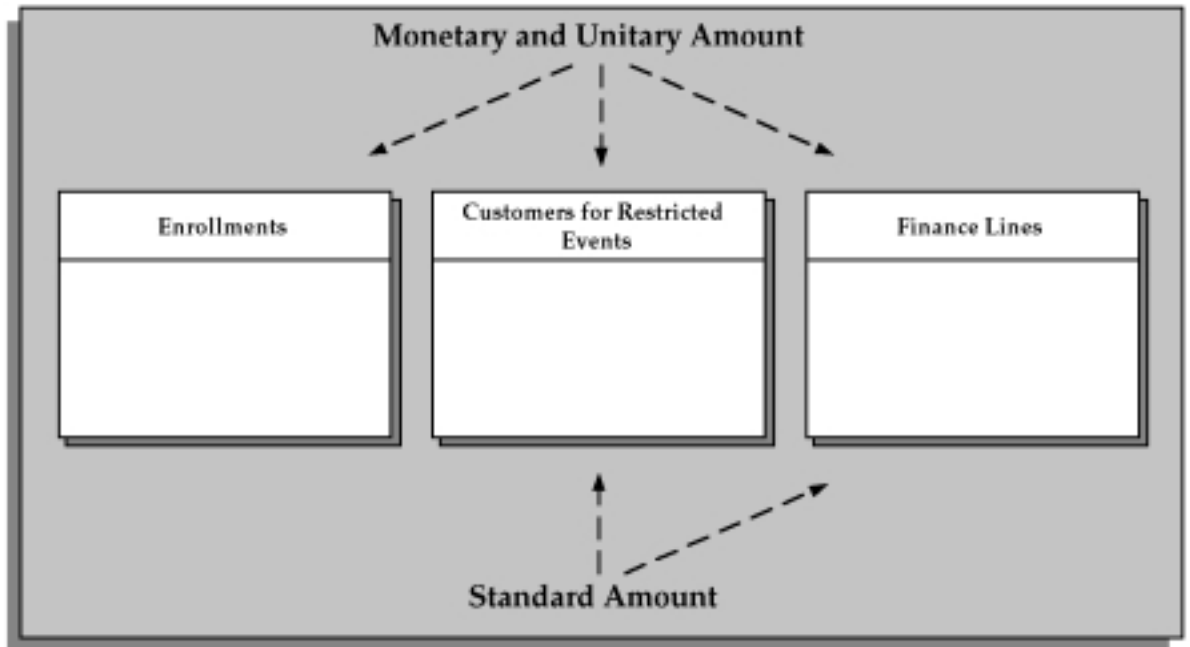
Which Windows Does Financial Security Affect?

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 8 – 1 illustrates which windows are affected: by money, unitary or standard amounts.

Figure 8 – 1 **Financial Security**



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.

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, enroll students, and update enrollments.

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 in those events**

This also includes enrolling and maintaining customers in customer-based events.

All other users who do not belong to the sponsoring organization can neither update nor delete events. They also cannot:

- 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 can remove security from an event, providing no enrollments exist for the event.

- **Update and delete programs, or enroll and maintain students (and customers for customer-based events) in events within the program**

All other users who do not belong to the sponsoring organization can neither update nor delete programs. Nor can they:

- 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.

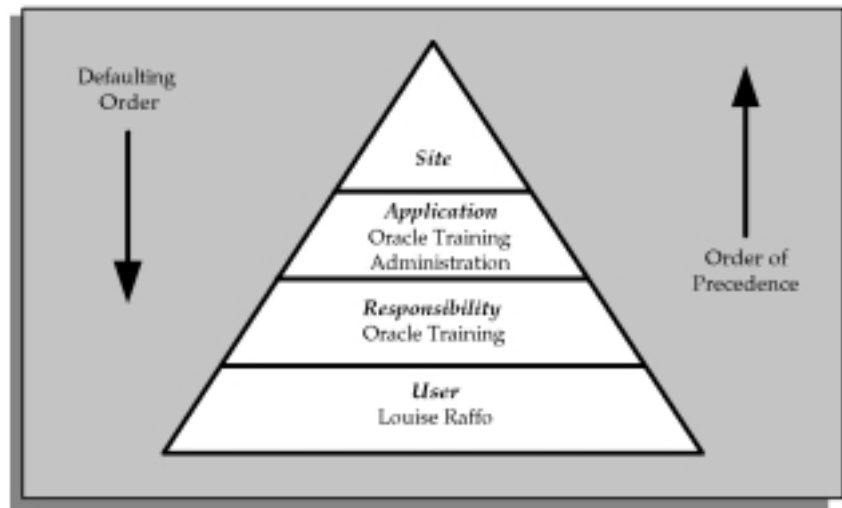
User Profiles

A user profile is a set of changeable options that determines how (or whether) a particular function 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 8 – 2 Levels For Setting User Profile Options



Note: Set site-level options first to ensure that all options contain a default. Any profile option without a default value might cause errors when you use windows, run reports, or run concurrent requests.

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

See System Profile Values Window, *Oracle Applications System Administrator's Guide*

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.

See Personal Profile Values Window, *Oracle Applications System Administrator's Guide*

Profile Options Summary

The table below indicates the levels at which you (the User) or the System Administrator can Update or only View the profile options.

A required profile option requires you to provide a value. Some profile options already provide a default value that you can change.

Profile Option	User	Resp	App	Site	Default Value required?
HR: Query-Only Mode	Update	Update	Update	Update	Yes (default is No)
OTA: Activate Automatic Waitlist Enrollments	Update	Update	Update	Update	Yes at Site level (default is No)
OTA: Automatic Creation of Finance Headers and Lines	View	View	View	Update	Yes (default is No)
OTA: Automatic Finance Header Approval	View	Update	View	Update	Yes (default is No)
OTA: Automatic Waitlist Enrollment Default Booking Status	Update	Update	Update	Update	No
OTA: Automatic Waitlist Enrollments: Hours Prior To Event	Update	Update	Update	Update	Yes at Site level (default is 0)
OTA PA Integration	Update	Update	Update	Update	No
OTA SS Default Training Administrator	View	Update	View	View	Yes (default is Null)
OTA: SSHR Automatic Transfer to GL	View	Update	View	Update	Yes (default is No)
OTA: Waitlist Sorting Criteria	Update	Update	Update	Update	Yes at Site level (default is booking priority then date placed)

Profile Options

HR: Query-Only Mode

You can restrict access to query-only for all OTA windows on a menu by setting HR: Query-Only Mode to Yes.

To grant query-only access to some forms and full access to other forms, set the HR: Query Only Mode profile to No and use the parameter QUERY_ONLY=YES at form function level to restrict access to individual forms.

OTA: Activate Automatic Waitlist Enrollments

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

OTA: Automatic Creation of Finance Headers and Lines

Indicates whether you are activating the automatic creation of finance headers and lines. Select Yes if you are enabling the Enroll in a Class function in Self-Service HR.

OTA: Automatic Finance Header Approval

Indicates whether automatically created finance headers also receive automatic approval. Select Yes if you are enabling the Enroll in a Class function in Self-Service HR.

OTA: Automatic Waitlist Enrollment Default Booking Status

Holds the default event enrollment status for automatic waitlist 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 cannot use that status to enroll students from the waitlist.

OTA: Automatic Waitlist Enrollments: Hours Prior To Event

Specifies, in number of hours prior to an event, when you want to stop automatic waitlist enrollments for any event. You must manually control any enrollments for the period specified. Enter a numeric value.

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 SS Default Training Administrator

Requires users of Self-Service OTA to set a default training administrator. Enter a person to receive workflow notifications automatically if no other approver is set.

OTA: SSHR Automatic Transfer to GL

Indicates whether the system transfers finance headers automatically created in SSHR to Oracle General Ledger. If you select Yes, the system automatically sets the transfer status to AT (Awaiting Transfer). If you select No, for each header and line you must manually set the transfer status to AT.

OTA: Waitlist Sorting Criteria

Identifies which criterion--booking priority or date placed--takes priority on the waitlist.

Function and Windows Configuration

You can configure 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.

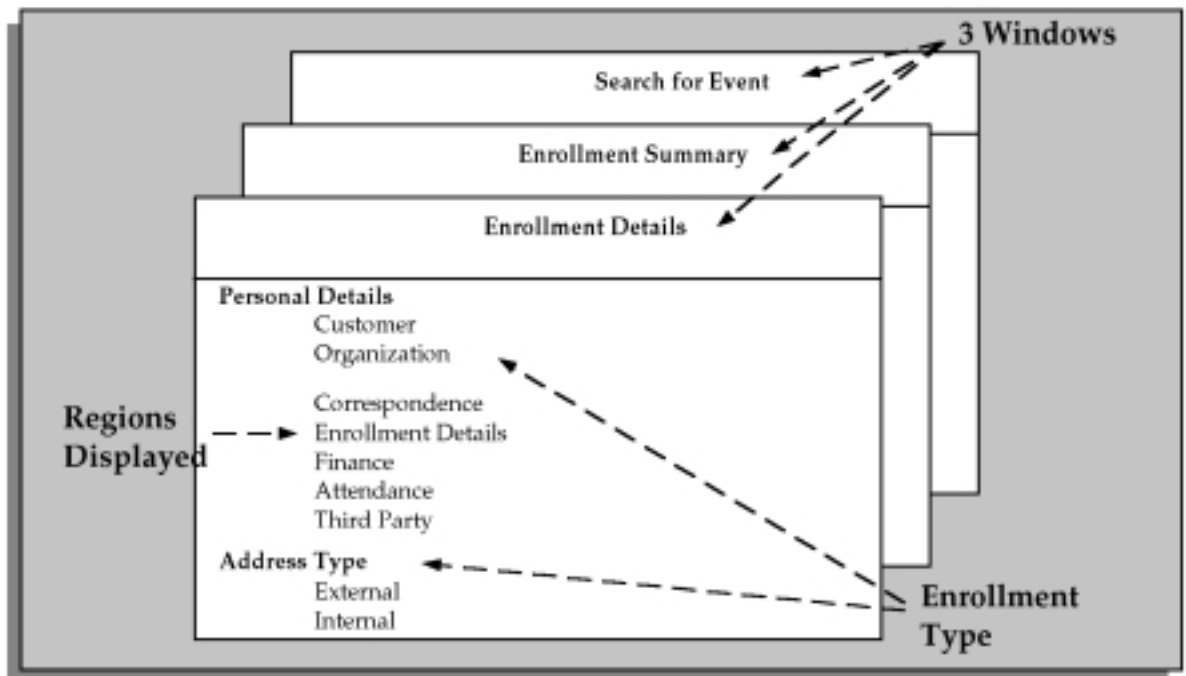
Enrollment Windows

You use parameters to configure 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 8 – 3 illustrates what users see when they enter an enrollment if you do not customize Oracle Training Administration.

Figure 8 – 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 do this only 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 Configuration

You can configure 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 Enrollment Windows Displayed: page 8 – 47

- 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 Enrollment 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 specify the number of Enrollment windows displayed, see Configuring Functions: page 8 – 50

Regions Displayed

The Enrollment Detail window by default contains five regions. 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. 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 Enrollment Detail window.

Suggestion: You can delete these three parameters instead of changing them to NO. However, we suggest that you change them to NO rather than deleting them in case you want to display the regions in future.

To configure the regions displayed, see Configuring Functions: page 8 – 50

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 Enrollment Details window displays the Customer region, but the user can change it to Organization.

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.

Configuring Enrollment Window Functions

Use the Form Functions window to configure the enrollment type and identify the enrollment windows to display.

► **To configure functions:**

1. Query the function to configure, for example, OTA_OTATAEDB.
2. Enter the parameters you require to configure the Enrollments windows in the Parameters field.

For example, if you want to display the Enrollment Detail window with only the Finance and Attendance regions 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.

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 cannot enter, update, nor delete enrollments of certain statuses.

Setting Up Enrollment Status Security

Use the Enrollment Status Exclusions window to define which enrollment statuses a particular 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 desired.
4. Save your changes.

Enroll in a Class Workflows (Training) (SSHR)

The predefined Enroll in a Class approvals process manages an applicant's enrollment into a class. Four predefined workflow attributes control a candidate's enrollment:

- **Managerial Approval Required**
A Manager has to approve a candidate for a course and the system will enroll the candidate.
- **No Managerial Approval Required**
A candidate can enroll directly in a course.
- **Training Administrator Approval Required**
A Training Administrator has to enroll a candidate in a course.
- **Managerial and Training Administrator Approval Required**
A Manager and a Training Administrator both must enroll a candidate in a course.

If you set the workflow attribute to Managerial Approval Required, the system saves the enrollment with the system status Requested Via the Web. Activating the workflow notifies the manager, who must approve or disapprove the employee's enrollment in the course.

If the manager approves the enrollment, a notification is sent to the Training Administrator to enroll the employee in the course. If the manager does not approve the nomination, a notification is sent to the employee informing them that the nomination was rejected. The manager may also include a reason why the course was not approved. The system status of the enrollment is then changed to Cancelled Via the Web.

If you set the workflow attribute to No Managerial Approval Required, the system saves the enrollment with a status of Placed or Waitlisted. Workflow notifies the manager and the training administrator of the enrollment. Workflow also informs them of any enrollment status changes.

If you set the workflow attribute to Training Administrator approval required, the system will save the enrollment with the status, Requested– via the web. The workflow is activated, and the manager is notified that the employee would like to enroll on a course. The training administrator is then notified by the workflow and can accept or reject the enrollment. If the training administrator rejects the enrollment they can change the enrollment status to Cancelled, Cancelled via the web or any other cancelled status. A notification will then be sent to the employee saying they have not been enrolled on a course; a reason for the rejection may also be included by training administrator.

If the training administrator receives a nomination, they must change the status to one of the following:

- PLANNED
- CANCELLED
- WAITLISTED
- PLACED
- FULL

If an event status is Planned or Full the enrollment status can only be changed to Requested via the Web or Waitlisted. A notification is then sent to the employee.

If you set the workflow attribute to Managerial and Training Administrator approval required, the system saves the enrollment with a status Requested via the web. Once the training administrator receives a nomination to enroll an employee on a course, you can assume that a manager’s approval was obtained or a manager’s approval wasn’t required.

Setting Up Enroll in a Class (SSHR)

► **To set up self-service class enrollments:**

1. Create web-based enrollment statuses in OTA so you can see which classes were created or approved through SSHR. Enter a status name of W:Requested and a type of Requested or Cancelled.
See *Creating Enrollment Statuses*: page 6 – 11
2. You can configure the range of dates a user sees by changing the values for the Lookup Type, OTA_ENROLL_CLASS_DATE.
See *Setting Up Searches (SSHR)*, *Implementing Oracle Self-Service Human Resources*
3. Review the user assistance components supplied and make any changes appropriate to your implementation.
See *Setting Up User Assistance Components (SSHR)*, *Implementing Oracle Self-Service Human Resources*
4. Review web page prompts and make any changes, in the Define Regions Window, to the fields in the OTA_ENROLL_CLASS_DATE region. See: *Web Applications Dictionary, Oracle Self-Service Web Applications Implementation Manual, Release 11*
5. If you have not implemented competence management you should set the HR:Display Skills/Competencies profile option to No. See: *User Profiles*: page 8 – 41. If you have set up a competence approach you should set the profile option to Yes and configure who has access to this option by Responsibility or Application.
See: *System Profile Values, Oracle Applications User's Guide*
6. Consider whether Enroll in a Class web pages need links or messages, and if so, set up reminders.
See *Configuring Reminders (SSHR)*, *Implementing Oracle Self-Service Human Resources*
7. Decide how users must enroll into a class:
See *Configuring the Enroll in a Class Enrollment Process (SSHR)*, *Implementing Oracle Self-Service Human Resources*
8. Configure the Enroll in a Class approvals process.
See *Configuring Approvals Processes (SSHR)*, *Implementing Oracle Self-Service Human Resources*
9. Set up Cross-Charge Accounting. Go to the Cross-Charge Accounting window, accessible from the Setup menu in the OTA Navigator.

See: Setting Up Cross-Charge Accounting: page 8 – 34

10. Set two user profiles--OTA: Automatic Creation of Finance Headers and Lines, and OTA: Automatic Finance Header Approval--to Yes. Optionally, you may set the profile OTA SSHR Automatic Transfer to GL to Yes.

See: User Profiles: page 8 – 41

11. Change the predefined training administrator settings by modifying the `set_training_admin_person` in the `hrcustwf.pkb` (`HR_OFFER_CUSTOM`) package. The value is set in the Set Training Administrator activity in the Enroll in a Class workflow.

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
	Enrollment Summary	View summary of student enrollment
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
	Resources Booked	View resources booked for an event
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
	Hierarchy	View and maintain local or global organization hierarchy
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
	Cross-Charge Accounting	Create and maintain cross-charge accounting information
	Mapping of Competencies and Languages	Map competencies to languages
Customer and Supplier		Alternate financial setup
	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

MENU ENTRY		DESCRIPTION
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. 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.

Cross-Charge Accounting

1. Choose Setup -> Cross-Charge Accounting in the Navigator.

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 -> Enrollment Summary 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.

Mapping Competencies to Languages

- Choose Setup -> Mapping of Competencies to Languages

One-Time Events

- Choose Events -> One-Time in the Navigator.

Organization

- Choose Organizations -> Training Organizations in the Navigator.

Organization Hierarchy

- Choose Organizations -> Hierarchy 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

- Choose Resources -> Resources Booked in the Navigator.

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

Integrating with Order
Management

Using Oracle Training Administration with Order Management

The linkage of Oracle Training Administration (OTA) with Oracle Order Management (OM) enables independent training vendors to manage the ordering and pricing of events through a standard interface. Your customers can contact your organization's call center and order an event or enroll a student just as they would order a chair or a software package. OM then generates invoices and bills the customers through its interface with Oracle Accounts Receivable.

Before you can order events and enrollments, you must add units of measure, place items in inventory, and link activities to inventory. Then you can add events and enrollments, and change the maximum number of attendees for an event.

Setting Up Order Management for OTA

For OM to recognize OTA activities, you must set up an OTA-specific Unit-of-Measure Class and two Units of Measure (UOMs).

► To add the Units Of Measure for OTA

1. From the OM responsibility, navigate to the UOM Classes window under Setup.
2. Create a new UOM class called "Training". Enter a description.
3. Enter a Base Unit of "Enrollment" and a UOM of "ENR". Save your work.

Note: Do not use other names for the UOMs.

4. Press the Units of Measure button. In the UOM window, go to the second line and create a new item with the name of "Event" and a UOM of "EVT". Make sure that the Base Unit check box remains set to Enrollment. Save your work.
5. Return to the UOM Classes window and press the Conversions button. Set the first line to Unit "Enrollment" and a Conversion of 1. Set the second line to Unit "Event" and a Conversion of 1. Save your work.

See Defining UOM Classes and Defining UOMs, *Oracle Order Management User's Guide*

Placing Items in Inventory

Once you have created the OTA Units of Measure, you can enter training as items in Oracle Inventory, which you can access directly through OM.

See Defining Inventory Items, *Oracle Inventory User's Guide*.

► To place an activity in inventory:

1. Under Items, navigate to the Master Items window.
2. Choose your inventory organization from the list of values.
3. To ensure that your system will recognize the links you create between inventory and OTA, you must make sure to set the HR: Security Profile (a System Profile under the System Administrator responsibility) to equal your HR Business Group in the "Responsibility" column.
4. Name the item. We suggest that you begin each item name with a fixed prefix, which will group all training items alphabetically on any long list of items.
5. Under the Main tab, select your primary UOM (Enrollment) from the list of values. User Item Type is optional, though you may wish to fill in a value to enhance reporting.
6. Under the Inventory tab, check two boxes: Inventory item and Reservable.
7. Under the Order Management tab, check the boxes Customer Ordered and Customer Orders Enabled.
8. Under the Invoicing tab, check Invoiceable Item and Invoice Enabled, if applicable. Save your work.

As a final step before linking OTA activities with OM, you must set up price lists and formulas.

Creating Price Lists for OTA Events

Oracle Advanced Pricing requires you to set up price lists and pricing formulas.

For step-by-step instructions, see Overview of Price Lists and Overview of Formulas, *Oracle Pricing User's Guide*

Linking Activities to Order Management

Once you have inventoried and priced training items in OM, you can link them to OTA.

► To link an inventoried activity to OTA:

1. Navigate to the Activities window in OTA. Create a new activity type or query an existing activity.
2. Enter or select your inventory organization from the list of values.
3. Enter or query an inventory item you have already entered in OM. The activity name populates automatically, but you can modify this field so you can link various activities with a single inventory item.
4. Save your work.

Changing the Maximum Number of Attendees

When you decide to raise or lower the maximum number of students who can attend an event initiated in OM, you must alert the system by changing the OTA Pricing Attribute from within OM.

► Changing the Maximum Number of Attendees in OM

1. In the Line Items tabbed region of the Sales Orders form, query or select the event you wish to change.
2. Confirm that the Quantity is 1 and the Unit of Measure is EVT.
3. Press the Actions button and select Promotion/Pricing Attribute from the List of Values.
4. In the Pricing Context field of the Pricing Attribute tabbed region, confirm or select OTA from the list of values.
5. In the Number of Students field of the Pricing Contexts window, enter the new maximum number of attendees for the event.

Note: If the Pricing Contexts window does not open automatically, click on the Pricing Attribute descriptive flexfield block just to the right of the Pricing Context field.

6. Save your work.

Ordering Events and Enrollments

In OM, you order events and enrollments by beginning to follow the standard OM Sales Order Form procedures, then pressing the Actions button to detail the enrollment or event request.

For step-by-step details on creating orders in OM, see Overview of Sales Orders, *Oracle Order Management User's Guide*

► To Order an Enrollment in OM:

1. Once you have entered or queried the order number and entered the standard OM ordering information, select a line item and press the Actions button.
2. Select Training from the list of values.
3. If the unit of measure of the selected line is ENR, choosing Training brings up the Event Availability form, which gives you a read-only list of the events scheduled for the activity you have chosen. Select the event.
4. Press the Select Enroll button, which brings up the Enter New Student Enrollment window. Fill out the form and save your work.

► To Order an Event in OM:

1. Once you have entered or queried the order number and entered the standard OM ordering information, select a line item and press the Actions button.

Note: Before you can enter a new event in OM, you must be sure that you have entered a value in the Number of Students field of the OTA Pricing Attribute.

See Changing Maximum Attendees in Order Management: page B -4.

2. Select Training from the list of values.
3. If the unit of measure of the selected line is EVT, choosing Training brings up the Enter New Restricted Event form. Fill out the form and save your work.

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 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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