Oracle® Learning Management

User Guide

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Oracle Learning Management User Guide, Release 11*i*

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Preface

Intended Audience

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

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

- The principles and customary practices of your business area.
- Oracle Self-Service Web Applications.

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

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

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

See Related Documents on page xviii for more Oracle Applications product information.

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Structure

Related Documents

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

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

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

Guides Related to This Product

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

OA Personalization Framework and OA Extensibility Framework

Learn about the capabilities of the 5.6 Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

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

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

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

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

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

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

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

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

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

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

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

Implementing Oracle Approvals Management

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

Oracle iRecruitment Implementation Guide

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

Oracle Time and Labor Implementation and User Guide

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

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Upgrading Oracle Applications

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

"About" Document

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

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, 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 Oracle applications file system and database.

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Product Update Notes

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

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Applications Message Manual

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

1

Introduction to Oracle Learning Management

Introduction to Oracle Learning Management

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

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

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

Manage All Learning With the Unified Catalog

The catalog supports a wide spectrum of education models by providing a single unified learning delivery system to the extended enterprise of employees, customers, and partners. The catalog provides an interface for administrators to manage the setup and delivery of learning. The catalog model relies on five catalog objects:

- Categories organize the catalog so that learners and administrators can find what they're looking for. A category can hold courses, learning paths, or other categories.
- Courses define subject matter and instructional objectives.
- Offerings define the delivery mode and language of a course. An offering might be an online course given in French, or an instructor-led course taught in Danish.
- Classes are enrollable instances of offerings. For example, an instructor-led offering might need delivery online, or in several different places at different times. A learner would enroll in a class held at a specific time and place.
- Learning Paths enable learners, managers, and administrators to group courses that satisfy multiple goals and deliver a range of competencies.

Administrators use the catalog to grant learners access, book resources, and assign competencies to learning. Learners and managers also view a version of the catalog to enroll in learning.

Group Courses Into Learning Paths

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

Learning path types come from three sources:

- Catalog learning paths, created by a learning administrator, appear in the learner catalog and enable multiple learners to follow a path.
- Manager learning paths enable managers to specify courses of study for their employees, either directly or as a result of another Human Resources activity such as a performance appraisal.
- Learner learning paths, created by learners to set their own goals, define a plan to achieve them, and measure their progress along the way.

Track and Manage Enrollments

Using class statuses, you can control enrollments in a class throughout its life cycle.

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

If you have to cancel a class, OLM cancels all learner enrollments and warns you if any of the learners have been invoiced.

Grant and Restrict Learner Access

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

Manage, Deliver, and Track Online Content

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

To deliver the online content to learners, you create a catalog offering, in which learners enroll and which they access through the online player.

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

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

Create and Manage Tests

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

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

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

Define Player Prerequisites

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

Import and Export Online Content

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

Enable Learners To Manage Their Learning

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

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

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

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

- Search for learning related to a subject matter, or by a set of keywords; learners can search by course name, description, location, competencies, and training dates
- Browse for learning by drilling down through categories to find the desired courses and learning paths
- View catalog information such as course objectives and descriptions, to help them find the desired learning
- Enroll directly in the learning they find

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

Offer Learning Access to External Learners

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

View Complete Learning History

The learning history functionality enables you to keep track of all learning activities that a learner has attended, passed, failed, completed, cancelled, or expired. This information appears in four sections:

- Courses presents detailed information for courses and offerings, such as status, score, and time taken.
- Learning Paths lists the learning paths that the learner has subscribed to and completed, or has unsubscribed from.
- External Learning shows learning taken externally, such as from an outside vendor, and entered manually.
- Expired Learning lists the courses a learner enrolled in, but never completed before the class end date had passed.

Manage Learner and Course Competencies

Like learning paths, competencies help to monitor performance and develop the careers of your workforce. This release extends to learning paths the existing ability to link HR competencies to courses. Administrators can configure the application to update, automatically or with approval, learners' personal competency profiles after they have completed classes successfully.

Enable Managers To Manage Their Workers' Learning

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

Automate Communication With Workflow Notifications

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

Develop and Budget for Courses

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

Create Sessions

An class can run for any period of time you choose. To help you create a detailed agenda for a class, you can break it down into shorter sessions, specifying the location and start and end times of each session.

Manage Waiting Lists

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

Automatic Waitlist Enrollment

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

Record Outcomes of Attendance

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

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

Cross Charge Class Fees and Resources

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

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

Oracle Learning Management Requirements

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

What courses can you set up?

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

Can you design curriculum for specific goals?

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

Can you update competencies?

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

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

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

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

Introduction

The Learning Cycle

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

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

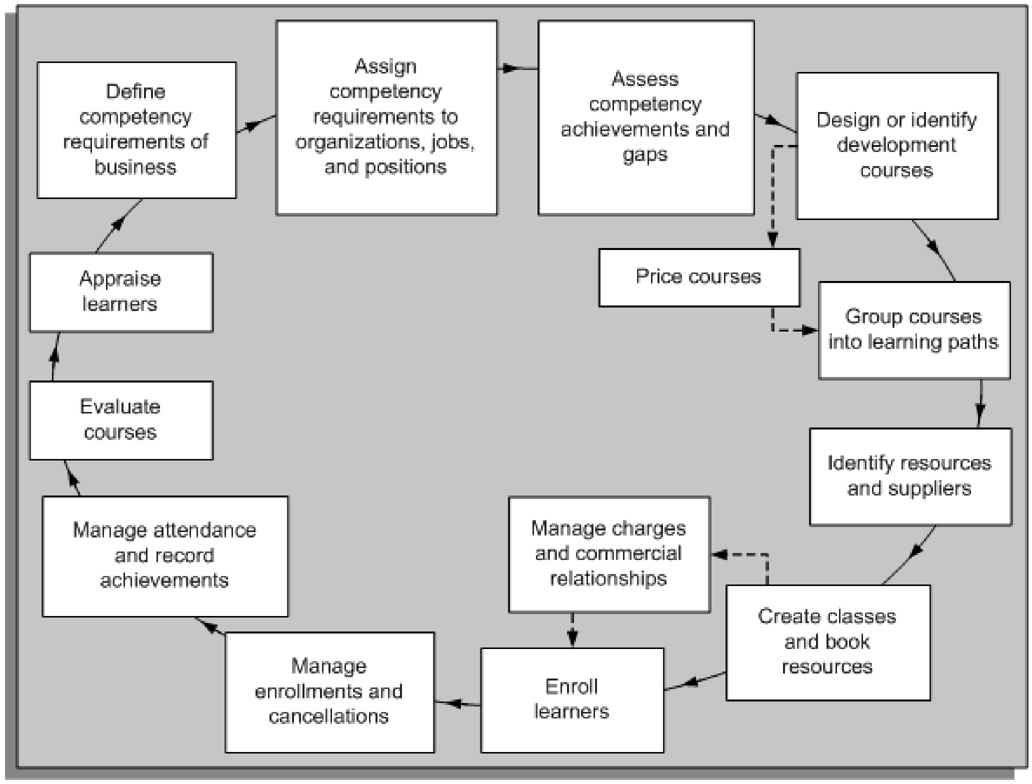
Setup Stages

1. Define the competency requirements of your business: define the competencies (qualifications, knowledge, and experience) your enterprise requires from its current staff and future applicants.
2. Assign competency requirements to organizations, jobs, and positions: assign your general and specific business requirements to particular structures within your enterprise.
3. Assess competency achievements and gaps: evaluate your current workers and applicants, then conduct a development needs analysis to identify the gaps.
4. Design or identify development courses: develop new internal courses or identify external activities that can supply the competencies required to close the gaps.
5. Price courses: create budgets and create price lists, if appropriate.
6. Group courses into learning paths and categories: design your catalog to accommodate the needs of organizations and individuals.
7. Identify resources and suppliers: identify the equipment, venues, instructors, and other resources required to run your courses, and build up a database of resources you can book.

User Stages

1. Create classes and book resources: create online and offline classes and book the resources required to run them. Manage payments to resource suppliers.
2. Manage charges and commercial relationships.
3. Enroll learners in classes.
4. Manage enrollments and cancellations: handle multiple enrollments using waiting lists and confirmations, issuing standard letters as required. Invoice paying customers.
5. Record attendance and achievements: after classes, record results including test scores, attendance levels, and competencies attained.
6. Evaluate courses: assess their effectiveness and compare actual revenues and spending with budgets.
7. Appraise learners: evaluate the longer term impact of learning management.

The OLM Learning Cycle



Setup Decisions

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

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

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

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

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

What Decisions Do You Need to Make?

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

2

Catalog

Catalog Overview

The catalog is the application's primary administrative structure, a nested hierarchy that enables you and your learners to browse all available learning, or to drill down to detailed class descriptions. From here you create and maintain all your catalog objects: categories, courses, offerings, classes, and learning paths.

Reporting on the Catalog

The Attendance and Signature Sheet Report, page 3-13 enables instructors to take and report class attendance.

Key Concepts

The catalog depends upon several key concepts:

- Catalog Objects, page 2-3--categories, courses, learning paths, offerings, and classes--are the building blocks of the catalog.
- Categories, page 2-3 are purely structural objects, like folders, that contain other catalog objects.
- Courses, page 2-3 define *what* a class teaches a learner.
- Offerings, page 2-4 determine *how* the learning is delivered.
- Classes, page 2-6 set *where* and *when* the learning takes place.
- Learner Access, page 2-11 determines *who* can enroll in a given class.
- Learning Paths, page 2-8 are virtual collections of courses that help learners achieve learning goals that a single course cannot address.
- Sessions, page 2-7 are subdivisions of classes, facilitating resourcing and scheduling.
- Delivery Modes, page 2-4 set whether a class is delivered online or offline, and scheduled or unscheduled.
- Restricted Classes, page 2-11, in tandem with learner access, determine enrollment availability for both customers and internal learners.

Catalog Requirements

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

How relevant are courses to your business?

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

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

How versatile is class design using OLM?

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

- You can use offerings and classes to run multiple versions of courses.
- You can group courses together into versatile learning paths.
- You can run classes for any period of time you require.
- To help you create a detailed agenda for a class, you can break it down into shorter sessions, specifying the location and start and end times of each session. You can book resources, such as venues and trainers, for the whole event or for individual sessions.

Catalog Administration

Catalog Objects

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

- Categories, page 2-3 are containers that hold other learning objects
- Courses, page 2-3 define subject matter and other generic information
- Offerings, page 2-4 are specific instances of courses, and hold the delivery mode and language of instruction
- Classes, page 2-6 are specific instances of offerings, holding enrollment, scheduling, and location information

Learning Paths, page 2-8, the fifth type of catalog object, contain virtual groups of courses that help learners achieve learning goals that a single course cannot address.

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

You can use learner access, page 2-11 at every level of the hierarchy, each object inheriting (and optionally adding to) the learner access designated for its parent object.

Categories

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

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

Courses

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

- topics and description
- objectives
- competencies delivered
- professional credits delivered
- intended audience
- administrative details

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

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

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

See Learner Access, page 2-11

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

Learner Competencies

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

See Competencies, page 2-12

Order Management and OLM

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

See Using Oracle Learning Management With Order Management, page 12-61

Course Information Types

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

Offerings

Third in the learning object hierarchy, offerings are specific instances of courses. You can enter various kinds of data at this level, but the primary purposes of offerings is to set the delivery mode and the language of delivery of each class under it and, for online offerings, to establish the link to the online content. In other words, offerings largely determine *how* a course is delivered.

Delivery Modes

OLM predefines delivery modes based on two concepts.

- Learners take *online* classes using the OLM Player; the application considers other classes to be *offline*.
- *Synchronous* classes are scheduled; learners can take *asynchronous* classes at any time within the window of opportunity you define.

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

- Online synchronous ("virtual classroom" with live instructor)

- Online asynchronous (online self-study)
- Offline synchronous (traditional instructor-led class)
- Offline asynchronous (reading a book)

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

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

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

Resources and Offerings

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

Caution: Requiring and specifying (by name) any resource in the Resource Checklist automatically books the resource for all classes based on the offering. You must manually book any resources not marked as Required. You can also manually remove resources from the class Resource Bookings.

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

Player Preferences

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

- *Show Toolbar* displays the Player navigation toolbar.
- *New Window* opens the Player in a separate, new window.
- *Next* includes the Next icon in the Player toolbar. Checking this box displays the next content object.
- *Previous* includes the Previous icon in the Player toolbar. Checking this box displays the previous content object.
- *Outline* includes the Outline icon in the Player toolbar. Checking this box displays the outline of the offering.
- *Exit* includes the Exit (Home) icon in the Player toolbar. When learners launch an offering from within OLM, Exit returns them to their Home page. If the Player has opened in a new window, Exit simply closes the window, which leaves the Home page or referring URL available to the learner in the previous window.

Instructor Competencies

Use the Instructor Competencies tab to specify the competencies required of an instructor of this offering and of the classes based upon it.

See Competencies, page 2-12

Settings Passed to Classes

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

- Price Basis: Customer, Learner, or No Charge
- Budgeted and Actual Cost
- Maximum Attendees, Minimum Attendees, and Maximum Internal Attendees

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

Classes

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

- schedule dates, times, and locations
- enable, disable, or update learner access
- view and change existing enrollments and enrollment parameters
- view and change resource bookings
- subdivide the class into sessions
- provide administrative details
- restrict enrollments to specific customers

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

See Learner Access, page 2-11

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

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

Scheduling and Resourcing

For each class you can specify dates, times, durations. Class dates must fall within the valid dates of its parent offering.

You can also designate the beginning and the end of the enrollment period, enabling you to plan and resource classes without making them available to learners, and to close enrollment for a class about to begin or for a class that might be cancelled (setting the class status to Closed, page 6-6 also prevents new enrollments). You can also enroll learners in advance or retrospectively by changing the enrollment dates.

For offline classes you can specify a location hierarchy:

- Training Center
- Location
- Venue

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

Use the Resource Bookings page to select an instructor or other resources.

See Resource Booking, page 4-8

Enrollment

You must enter new learner enrollments into the Enrollment Details window. Once you have done so, however, you can update and delete learner enrollments from the List of Enrollments link on the Class page.

Once a learner has completed a class, you can record the learner's successful (or unsuccessful) attendance. You may also be granted the authority to update a learner's Competency Profile automatically.

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

Sessions

To help you create a detailed agenda for a synchronous class, you can break it down into shorter sessions, specifying the location and start and end times of each session.

You can book resources, such as venues and trainers, for the whole class or for individual sessions, enabling a more efficient allocation of resources.

Class Pricing

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

Customer means that you plan to charge customers associated with the class a block price for a certain number of enrollments. If you select Customer, you must associate one or more customers with the class and enter enrollments in the Customers for Restricted Class window.

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

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

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

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

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

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

Internal Learners

If you run Oracle Human Resources, you can set a maximum on the number of employees who can enroll in a class. This operates in addition to a maximum total number of learners who can enroll in a class.

Cost Analysis of Classes

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

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

Change the Status or Maximum Attendees of an Class

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

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

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

Learning Paths

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

Learning paths can also come from other sources:

- Learners and managers can create individual learning paths within OLM.
- Appraisers and managers can create learning paths from Talent Management.

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

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

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

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

Many aspects of catalog learning paths are similar to courses. You can set learner competencies for a learning path, in addition to competencies that already exist at the individual course level. See Competencies, page 2-12

As with courses and other catalog objects, you can establish learner access for a learning path. See Learner Access, page 2-11

Learner and Manager Learning Paths in OLM

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

Learning Paths from Talent Management

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

Target Completion Period

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

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

Learning Path Sections

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

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

The section types available are:

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

- *All Components Optional* means all courses in the section are optional. The learner may elect to enroll in one or more, or in none of the courses.
- *One or More Components Mandatory* means the learner must complete a given number of courses in the section. You specify the number of courses the learner must complete, but the learner selects which courses to take.

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

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

Learning Path Components

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

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

Subscription and Enrollment

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

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

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

Notifications

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

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

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

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

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

Learner Access

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

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

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

Tight or Loose? Your Access Model

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

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

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

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

Restricted Classes

A class can be either public (learners from any customer or internal organization can enroll) or restricted.

A restricted class is either:

- An internal class in which you can enroll learners according to learner access, or
- Associated with one or more customers so that only those customers can enroll learners in the class

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

If you restrict classes to selected customers, use the Customers for Restricted Class window to select the valid customers.

Learner Access Options

You can add access by assignment by specifying any combination of organization, job, and position. You can thus grant access to all members of an organization, or to all senior programmers in the business group. Selecting Include child organizations grants access not only to members of the selected organization, but to all members of all organizations sitting under it in the organization hierarchy.

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

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

Competencies

You can deliver course competencies at a specific proficiency level through classes your enterprise (or an outside supplier) provides. You can then update a learner's personal competency profile after they have successfully gained the competency.

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

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

To find instructors qualified to teach a course, see Finding Specific Locales and Instructors, page 4-10.

3
Enrollment

Enrollment Overview

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

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

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

Enrollment and HRMS Talent Management

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

Reporting on Enrollment

OLM reports relating to enrollments include:

- Attendance and Signature Sheet Report, page 3-13
- Registration List Report, page 3-12
- Student Sign-in Sheet Report, page 3-15

Key Concepts

Enrollment relies upon several key concepts:

- Enrollment Statuses, page 6-4

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

- Customer and Worker Enrollments, page 3-3

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

- Waiting Lists, page 3-3

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

- Double-Booking, page 3-4

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

- External Learning, page 3-23

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

Enrollment Requirements

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

Can you enroll workers and customers in the same class?

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

Can you make multiple enrollments?

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

Can you correspond with learners?

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

Can you enter information about classes not held in OLM?

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

Enrollment

Customer and Worker Enrollment

OLM employs two types of enrollment:

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

If your enterprise has licensed Oracle HRMS or HRMS Foundation, you can enter enrollments for employees, contingent workers, and applicants. You may also be able to enter enrollments for customers, depending on how your system administrator has set up the Enrollment form at your site.

If Oracle HRMS is not licensed, you can enter enrollments only for customers.

Multiple Enrollments

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

You can update enrollments by changing their class status, for example, from Normal to Cancelled. This change cancels selected enrollments for the class. You can also record the successful attendance of multiple learners.

Waiting List Management

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

Automatic Waitlist Enrollment

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

Automatic enrollment for waitlisted learners occurs when a learner has cancelled an enrollment, or after the maximum number of attendees for an event has increased. The application 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 continue to use the existing functionality and select a learner from the list of waitlisted learners after a cancellation or an increase in the maximum number of attendees.

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 Profile Options, page 12-31

Double-Booking Learners

You cannot double-book learners whose enrollment statuses occupy a place in a class:

- Placed
- Attended
- Any user-defined statuses based on Placed and Attended

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

You can, however, double-book learners with the following statuses:

- Requested
- Waitlisted
- Cancelled
- Any user-defined statuses based on Requested, Waitlisted, or Cancelled

In effect, the application assumes that until learners are placed in or have attended a class, you can book them onto another, conflicting class. This double-booking option provides you with some flexibility in defining and managing enrollments.

OLM checks for double-bookings only when the status of the class is Confirmed, enabling you to double-book learners while you are planning a class and, perhaps, testing various class date scenarios.

Enrollment Security

Your system administrator may have set up security to limit access to these enrollment tasks:

- Enrolling learners in secure classes
- Enrolling learners in a class of a specific status
- Changing an enrollment price

Enrolling Learners in Secure Classes

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

See: Organization Security, page 12-30

Enrolling Learners in a Classes of Specific Statuses

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

See: Enrollment Status Security, page 12-59

Changing Enrollment Prices

Financial security, if set up, enables only users with specific responsibilities to update and delete the following prices:

- Monetary

- Standard

If financial security is not set up, all users can update and delete prices.

See: Financial Security, page 12-23

Letter Generation

Standard letters enable you to manage your enterprise's enrollment activities more easily. You can issue standard letters to learners, triggered by changes in enrollment status. For example, you can set up a standard enrollment confirmation letter that is triggered when a learner's enrollment status is set to Placed.

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 class joining instructions based on the date, venue, and instructors)
- Reports for instructors (listing the learners to attend an event)
- Follow-up letters (for non-response or non-payment)
- Acknowledgement letters (for cancellations)
- Certificates (of successful course completion)

Generating Letters

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

Use ADE 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 enrollment by performing a mail merge from the Request Letter window.

Restricting Letters By Vacancy or Class

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

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

When the profile "HR: Restrict Letter by Vacancy or Event [Class]" is set to "Yes", the application creates or updates a letter request automatically whenever an enrollment is created or updated and a letter type exists for the booking status type.

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

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

Configuring Learner Enrollments

Enrollment configuration options enable system administrators or learning administrators to:

- Create their own enrollment statuses, page 6-7 from the default enrollment statuses.
- Configure workflow notifications, page 12-44 (the recommended method) or create standard letters, page 3-5.
- Enter the following lookup codes, page 12-5:
  - The source of an enrollment, such as a brochure or agency (BOOKING_SOURCE)
  - The ranking of an enrollment, useful when a class is oversubscribed (PRIORITY_LEVEL)
  - The reasons a learner can fail to complete a class successfully (DELEGATE_FAILURE_REASON)
- Activate automatic waitlist enrollments by defining profile options, page 12-31
- Configure enrollments windows, page 12-57
- Define competency-related functions, page 11-50
- Set up security to determine which users can:
  - Update and delete classes, page 12-30
  - Enter, update, and delete enrollments for secure classes, page 12-57
  - Override class price information, page 12-25
- Show or hide the Enrollment Details window tabbed regions:
  - Correspondence
  - Enrollment Details
  - Finance
  - Attendance
  - Third-Party Contact (for customer enrollments only)

  Some of these regions may not automatically appear, depending on how your system administrator has configured the enrollment windows.

1.

The Enrollment Entry Process

When you enter a new enrollment, the minimum information you need to enter is the name of the customer or organization that is sponsoring the enrollment, and a learner or contact. By default, the number of places enrolled for the customer or organization is one, 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 class. If you do not know the class name or code, you can search for appropriate classes using a wide range of selection criteria.

   See Searching for Classes, page 11-8

2. Select the name of the customer or internal organization sponsoring the enrollment, and enter the learner or contact name.

   See Entering an Enrollment, page 3-7

3. For fast entry of multiple enrollments, copy and paste the enrollment.

   See Making Multiple Enrollments, page 3-11

Entering an Enrollment

You enter learner enrollments for customers and internal organizations using the Learner Enrollment item from the Navigator (for customer-restricted classes, you must first select one or more customers in the Customers for Restricted Class window). When you select the item, one or more of the following windows open, depending on how your system administrator has defined the menus at your site.

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

  See: Searching For Classes, page 11-8

- 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 class, or with a particular status.
- Enrollment Details: 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 Class window opens, query a class, select it, then place your cursor in an enterable field of the Enrollment Details window. Provided you have not changed the setup options, the application automatically queries any enrollments already entered for the class. If an existing enrollment appears, choose New Record from the Edit menu.

- If the Search for Class window does not open, select a class in the Class Title field of the Enrollment Details window.

  Note: If the class is Secure, you can enroll a learner only if you are assigned to the organization that is administering the class.

2. Enter the number of places to enroll. The default is 1. If the class originated in Order Management and the places have not already changed, the number of places equals the maximum number of places available for the class.
3. Select the Internal check box if the enrollment is for an internal learner. OLM warns you if this enrollment exceeds the maximum number of internal learners who can attend the class.
4. Select a status for the enrollment. The class status and the number of enrollments already entered may restrict your choices.

   Note: If your enterprise uses enrollment status exclusion, you may be unable to select certain status values.

5. Select the priority level for the enrollment to help you decide which waitlisted enrollments to confirm if you receive cancellations. Add values using the Lookup Type PRIORITY_LEVEL.
6. Select the Authorized check box to display your name in the By field, or leave the box blank.

Enrolling Learners Retrospectively or In Advance:

1. You can change the Enrollment Start Date and Enrollment End Date only from the Create Class or Update Class pages. See Enrolling Learners Retrospectively or In Advance, page 2-6

Entering Personal Details:

1. Identify who is sponsoring the learner:
   - For an external enrollment, select a customer (if the learner 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 4-4
   - For an internal enrollment, select an organization (if the learner is an employee held in Oracle HR).
2. Select a learner to enroll. If you are entering an internal enrollment, select a worker and assignment from the list. If you are entering an external enrollment, select or enter the learner details.

   Leave the Learner fields blank to book one or more unnamed places.
3. Select a contact. To enter an internal enrollment, select an employee and assignment from the list. To enter 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.

Depending upon how your enterprise has configured OLM, you may not have access to the correspondence and enrollment details regions. to gain access, contact your system administrator.

Entering Correspondence Details:

1. Select the Correspondence region to identify a recipient for all correspondence (the default recipient is the contact).

   - Select Contact or Learner for an internal enrollment. Select the Internal region 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, Learner, or Third Party for an external enrollment. To manage the enrollment through an agency or reseller, choose the Third Party Contact region, then select the contact.

2. Select the address details (generally available only if you have set the profile OTA: Hide Employee External Address to Yes).

Entering Enrollment Details:

1. In the Enrollment Details region, enter details such as the enrollment's source and 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.

2. Save your changes.

   Tip: Once you have entered an enrollment in the Enrollment Details window, you can perform many of the update functions by choosing List of Enrollments from the Class page in the Catalog.

What to do Next:

- **Copy Enrollments:** To speed the entry of multiple enrollments, you can copy information from an enrollment into a template, edit the template, then use it as the basis for entering new enrollments.

  See Making Multiple Enrollments, page 3-11

- **Enter Financial Details**: You can enter financial details for an enrollment.

  See Entering Financial Details for an Enrollment, page 3-10

Enrolling Customers in Restricted Classes (Secure Customer-Based)

If you have implemented Oracle Human Resources, some customer-based classes might be secured. This means you can enter and update enrollments in these classes only if you are assigned to the organization that is administering the class.

If you use Order Management, creating a restricted class automatically enters an enrollment with the number of places equal to the number you specify in the OTA Pricing Attribute. If you want to add enrollments or name the individual enrollees, you must follow the procedures detailed in Using Oracle Learning Management with Order Management, page 12-61.

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

1. Create a class on the Create Class page.
2. Select the class in the Customers for Restricted Class window.
3. Select one or more customers for this class, 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 3-7

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

1. Create a class on the Create Class page.
2. Select the class in the Customers for Restricted Class window.
3. Select one or more customers for this class.
4. Enter the number of places each customer requires.
5. Select a contact for the enrollments, and enter the enrollment status. You can also select the source of the enrollment.

Entering Financial Information:

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

   Select a Standard or Prepayment header if you want to issue an invoice to the customer.

Creating a Finance Header:

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

   See: Creating a Finance Header, page 5-5.
3. Choose Use Header button (in the Enrollment Details window) to use your new header for this enrollment.

What to do Next:

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

  See: Entering an Enrollment, page 3-7

Entering Financial Details for an Enrollment

Use the Finance Region in the Enrollment Details window to enter financial details for each enrollment.

Creating a Finance Header:

1. Perform one of the following steps:
   - Choose Finance to Create a Finance Header, page 5-5 for this customer.
   - Select a Finance Header, page 3-11

     Note: The application generates the finance line and identity for you.

Selecting a Finance Header:

1. Select one of the following finance headers in the Header field:
   - An existing finance header if the class is priced Per Learner.
   - A Standard header to issue an invoice to the customer.

     Note: The customer on the finance header does not need to be the customer for whom the learner works.

2. 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 class record or a price list.
3. Override the price displayed in the Finance Total field only if you do not want to invoice the customer for the amount displayed (you need the appropriate responsibility). This is the amount charged the customer on a finance line.
4. Save your changes.

Making Multiple Enrollments

You can enter enrollments for individual learners, or for customers specifying a certain number of anonymous places. To speed the entry of multiple enrollments, you can copy information from an enrollment into a template, then edit the template and use it as the basis for entering new enrollments.

If you are entering several enrollments that share common information, such as enrollments for one class 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, or
   - Enter and save the first enrollment you want to copy
2. Choose the Copy button in the Enrollment Details window.
3. To copy selected fields from the first enrollment, 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 to copy all the fields from the first enrollment.
4. To copy selected fields from the first enrollment, in the Enrollment Details window, choose New Record from the Edit menu.
5. Choose Paste.

6. Add any additional information and save.

Opening Hidden Enrollment Windows and Configuring Setup Options

You can open enrollment windows that do not appear by default, and temporarily change setup options that determine what enrollment information appears automatically.

To open a window that does not appear by default:

1. Choose Functions in the Enrollment Summary or Enrollment Details windows.
2. Select the window you want to open.

Changing the Setup Options

Three setup options determine whether the class you select in the Search for Class 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 Functions in the Enrollment Summary or Enrollment Details windows.
2. Select Setup Options.
3. Select the options you want to use:
   - Select Auto Query Enrollments for Selected Class to direct the Enrollment Summary folder to requery automatically each time you select a new class in the Search for Class window. Application performance improves if you deselect this option.
   - Select Default Selected Class For Querying to restrict every query you run in the Enrollment Summary folder to the class selected in the Search for Class window.
   - Select Default Selected Class When Creating Enrollments to default the class information on new enrollments to the class selected in the Search for Class window.

Producing the Registration Report

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

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

Limiting Output

You can limit the output to one of the following:

- One class
- All classes of a selected type within a date range
- Classes within a date range and center
- All classes 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 report:

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

   The Parameters window opens.

2. Select a class title to include learners scheduled to attend the class. Only learners with the status Attended appear in the report.
3. Select the class type. To report on class types within the date range and center, you can select a class type without selecting a class title.
4. Select the training center that controls the class.
5. Enter the start and end dates to include classes or class types within the given range.
6. Select OK and Submit Request.

Report Output:

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

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

Recording Attendance and Results

You can record the results of learner attendance, including success and failure. You can use the Mass Update feature to record this information for many learners simultaneously.

We recommend that you enter attendance and results from the List of Enrollments page, accessible from the Class page in the Catalog.

To record the results of a learner's attendance:

1. Query the enrollment in the List of Enrollments page or the Enrollment Details window.

   > **Note:** If the class is Secure (the Secure box is checked), you can record attendance and results for the class only if you belong to the organization that is administering the class.

2. Change the enrollment status to Attended.

   Steps 3-5 are optional.

3. If the learner completed the class successfully, check the Successful Attendance check box.
4. If the learner did not succeed, select a Failure Reason.
5. Enter a result, such as a grade or a certificate, in the Result field.
6. Save your work.

Producing the Attendance and Signature Sheet Report

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

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

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

To run the Attendance and Signature Sheet report:

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

Report Parameters:

The parameters window includes eight optional fields:

- **Class Title**

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

- **Training Center**

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

- **Class Start Date**

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

- **Class End Date**

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

- **Enrollment Number**

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

- **Optional Column Heading**

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

- **Display Payment Confirmation**

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

- **Display Trainer Signature**

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

Report Output:

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

The report prints in landscape orientation.

Producing the Learner Sign-In Sheet Report

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

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

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

To run the Learner Sign-In Sheet report:

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

Report Parameters:

The parameters window includes eight optional fields:

- **Class Title**

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

- **Training Center**

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

- **Class Start Date**

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

- **Class End Date**

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

- **Enrollment Number**

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

- **Optional Column Heading**

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

- **Display Payment Confirmation**

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

- **Display Trainer Signature**

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

Report Output:

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

The report prints in landscape orientation.

Viewing the Status History of an Enrollment

You can view the history of enrollment statuses for any learner enrollment, enabling you to identify when, for example, a learner moved from the waiting list to placement in the class.

To view status history for an enrollment:

1. Query the enrollment in the Enrollment Details window.
2. Choose the History button and select Enrollment Status History.

Viewing Learning History

You can view a summary of all classes a learner has attended, most recent first. The Learning History window shows the status of enrollments, and whether the attendance was successful. It can also show details of any classes that the person has attended outside of your enterprise.

To view a summary of a learner's learning history:

1. In the Enrollment Details window, query an enrollment.
2. Choose History and select Combined Learning History. Choose OK.

   OR

   In the External Learning window, query a learner, then enter or query a course.

   See Entering External Learning, page 3-23

3. Choose Learning History or History.

Updating Enrollments

Enrollment Updates

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

> **Tip:** Once you have entered an enrollment in the Enrollment Details window, you can perform many of the update functions from the List of Enrollments page off the Class page in the Catalog.

Mass Updates

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

Attendance and Results

You can record the successful attendance or non-attendance of a learner, and the results of the attendance. You can use the Mass Update feature to record this information for many learners together.

Competency Profile

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

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

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

You can, of course, override the start date and the proficiency levels. For example, a learner may not be proficient in a competency until midway through a class. If the learner is proficient in the delivered competencies, but not at the level identified for the course, you can override the proficiency level and select the correct one. If the learner has not gained some of the competencies identified for the course, or if the class does not deliver identified competencies, you do not have to apply them to the learner's competency profile.

Enrollment Correction, Cancellation, and Deletion

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

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

If you delete an enrollment, you also delete the learner history, so be careful when using this facility. Consider cancelling the enrollment instead. Cancel an enrollment, for example, if the class does not run (or if a learner cancels attendance). See Cancelling a Single Enrollment, page 3-21

Deleting a Learner Enrollment

You can delete an enrollment to correct a mistake. 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 learner history, so be careful when using this facility.

To delete a single enrollment:

1. Query the enrollment in the Enrollment Details window.

   > **Note:** If the class is Secure (the Secure box is checked), you can delete an enrollment only if you are assigned to the organization administering the class.

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 class, 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. You could update the priority requests to the status Placed, then update the remaining requests to the status Waitlisted.

If a placed learner cancels, you can choose the highest priority waitlisted learner to fill the place. You can update all waitlisted learners to roll them over to the next scheduled class for the course.

Mass Updates and Cancellations

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

To make mass updates to enrollments:

1. In the Enrollment Summary window, query the group of enrollments you want to update.
2. Choose Mass Update to open the Bulk Change window.
3. Move the Bulk Change window so you can see the Enrollment Summary window and choose Select All.
4. Deselect the Change check box for specific enrollments you do not want to update, or leave all enrollments selected to update them all.

   Choose Deselect All if you do not want to update any enrollments for this class.
5. In the Bulk Change window, select the new values you want to apply. Enter a new class only if you want to roll the enrollments forward into a new class.
6. Click OK.

   OLM changes all the enrollment statuses, and rolls the enrollments forward into a new class, if specified.

Updating a Competency Profile

Even if you have set up automatic updates to competency profiles, you can still update a learner's competency profile manually.

To update a competency profile manually:

1. Do one of the following:
   - If the Enrollment Details window displays the learner's details, choose Functions and select Update Learner Competencies.
   - If the Enrollment Details window does not display the learner's details, first select the class and learner, then choose Functions and select Update Learner Competencies.

   The Competencies window displays the competencies this class delivers.

   > **Tip:** We suggest that you select the Learner button to see the competencies the learner already possesses, and at which level, before you update the competency profile.

2. You can either:
   - Make changes to the competencies first. See Making Changes to Competencies, page 3-21
   - Apply the competencies exactly as they are. See Applying the Competencies, page 3-21

Making Changes to Competencies:

1. To change the proficiency level at which the learner demonstrates the competency, select the new proficiency level from the Override field.
2. The date on which the person acquires the competency at this level defaults from the class start date. You can change this date, but you cannot enter a date that starts before the class start date. You can also enter the end date.
3. In the Source field, you can select the method by which the person gained the competency, such as training course or previous experience.
4. Enter a date to review the person's proficiency in this competency.
5. Select the method of certifying that the person attained the competency at the recorded level.
6. Enter any comments.

Applying the Competencies:

1. Select the Apply box alongside each competency you want to add to the learner's competency profile.
2. Click Apply.

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

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

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

See Making Mass Updates to Enrollments, page 3-19

To cancel a single enrollment:

1. Query the enrollment in the Enrollment Details window or select the enrollment in the Enrollment Summary window.

   Note: If the class is Secure (the Secure box is selected), you can cancel an enrollment for the class only if you belong to the organization that is administering the class.

2. Change the enrollment status to Cancelled (or 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 can 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. You can track the history of the enrollment by selecting History, then Enrollment Status History.

4. Save your changes.

   If the class was previously Full and contains a waiting list, a text box appears, enabling you to fill the freed space from the waiting list.

Selecting from the Waiting List:

1. Click Yes to select a learner from the waiting list.

   From the Waitlisted Enrollment window, select learners. The number of vacancies appears at the bottom of the window.

2. Select the learner you want to enroll by clicking 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 class.

3. Click OK.

Saving the Cancellation Without Selecting from the Waiting List:

1. Click No if you do not want to placing a learner from the waiting list. The class status returns to Normal and you and other users can fill the places as usual.

External Learning

External Learning

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

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

Entering External Learning

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

See Viewing Learning History, page 3-16

To enter external learning:

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

4

Resources

Resources

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

Managing the learning needs of your employees includes tasks, such as scheduling and managing class room and instructor resources. You might also have to define the required resource types and assign resources to various learning programs in your enterprise. Resource type refers to the type of resource, such as computers, required to conduct a class. To manage resources effectively, to best suit your business needs, you can:

- Set up resource types
- Assign each resource to a resource type
- Add resources to an offering to create a resource checklist
- Book resources for a class
- Set up suppliers and customers
- Block book resources
- Update and delete resources

Using Oracle Learning Management (OLM), you can book resources for classes of a particular offering. OLM classifies resource types as:

- Trainer
- Venue
- Others

You can manually define generic resource types, such as overhead projectors, networked PCs, and stationery, using the Others type of resources.

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

Key Concepts

The following key concepts enable you to manage resources effectively using OLM:

- Training Resource Key Flexfield, page 4-5
- Resource Booking, page 4-8
- Resource Management, page 4-9

Resources Requirements

In OLM, you can handle the resource management for both classroom and online classes effectively. The resource management functionality helps you manage the learning needs of an enterprise using a standard Web interface.

Must You Use only Oracle Application Framework Pages for Resource Management?

No. OLM retains most of the resource-related PUI forms for legacy customers. This ensures a trouble-free transition for the current OTA users, who wish to migrate to OLM.

What is the Impact of the Catalog on Resource Management?

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

Can You Define Any Type of Resource?

Yes. OLM provides the following predefined resource types:

- Trainer
- Venue
- Others

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

Why Specify Resources as Required?

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

Checking the Resource Dates

If you specify a resource as Required, ensure that the start and end dates for the resource cover a wide enough period to enable you to book the resource for classes in the future. The resource must be available on or before the start date of the class for which it is required; but not necessarily on the date.For example, if you run a class from December 16th to the 19th, the resource dates you specify for the course could be from December 1st to 17th. The resource in this example is available before the start date of the class for which it is required.

Resources

Resources

You can specify resource details at the offering and class levels. For example, you can specify the quantity, maximum usage, and the status of resources that are required to run classes of a particular offering.

You can also:

- Book resources for a class and at the same time create a payment header to the supplier, if appropriate.
- In the case of instructors, specify the role, such as demonstrator or primary presenter for which you require the instructor.

Suppliers and Customers

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

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

You set up as customers:

- The names and addresses of the organizations where external learners work, or through which they can be contacted.
- The names and addresses to appear on invoices for learner enrollments.
- Any third-party agencies through whom you handle enrollments.
- The customer learners for which you run private classes and those for which you create special enrollment agreements.

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

Shared Supplier and Customer Information

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

Creating a Supplier

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

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

To enter a new supplier:

1. Enter the supplier name and a unique number (depending on your setup options, OLM may enter the supplier number for you).
2. Click Open to access the Suppliers window.
3. Select the Sites region and click Open to navigate to the Supplier Sites window.
4. Enter the site name. This is only for your reference and does not appear on finance headers.
5. Select a Country to determine the address style, then enter the address details. OLM does not use the Site Uses fields.
6. Select the Contacts region. Enter the names, details, and telephone numbers of as many contacts as you require for this supplier.
7. Save your work.

Creating a Customer

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

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

To enter a new customer organization:

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

   Depending on your setup options, OLM may enter the customer number automatically.
2. Click New to open the Customer Addresses window.
3. Select a Country.
4. Enter the address details and save your work. Some of the address components may be required if you are using address validation.

   OLM does not use the Business Purposes fields.

   The application enters a unique reference number for the customer at that address.
5. Select the Contacts: Telephones region and enter the names and telephone numbers of as many contacts as you require for this customer. If you enter a telephone number, you must select a Type, such as General or Fax.
6. Ensure that the Active check box remains selected for all active contacts and save your work.
7. Select the Contacts: Roles region and select a role description for the contacts in the Description field. Ensure that the Active check box remains selected for all active roles.
8. Save your work.

Training Resources

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.

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

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

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

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

- Name
- Center
- Capacity

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

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

Setting Up Training Resources

OLM enables you to create resource types, add lookup values, and enter the resources.

To create resources:

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

   See Adding Lookup Types and Values, page 12-5

To enter instructors:

1. Enter your instructors.

   Depending on how you set up the Training Resource key flexfield structure for the Trainer resource type, you may have to add instructors before you can select them as resources. You can enter instructors as individuals with their own addresses. Alternatively, you can simply record that a certain supplier provides a certain number of unnamed instructors.

You can enter instructors in two ways:

- Use the HR People window to enter your instructors, training administrators, and managers.

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

- To enter the instructor as a contact associated with the supplier, use the Suppliers, page 4-3 window.

To enter resources:

1. Enter your resources. See Entering Resources, page 4-6
2. Define usage reasons as values for the lookup type RESOURCE_USAGE_REASON.

   See Adding Lookup Types and Values, page 12-5

Entering Resources

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

Prior to entering resources in the Resources window, you may have to create or add to resource lookup types and values.

See Setting Up Training Resources, page 4-5

To enter a resource:

1. Select a resource type.
2. Enter the resource name. An Additional Information window for the resource type appears.
3. In the Additional Information window for the resource type, enter a combination of information that uniquely identifies the resource. For example, enter the name of the training center and the venue name when you enter a resource of the Venue type.

   Note: During resource booking, OLM checks an instructor's competency only if the instructor already has a Trainer ID. This restriction enables you to employ instructors who do not have a Trainer ID. Also note that the Trainer ID is linked to the field Trainer Name, not the Name field.

4. When you enter a resource of the Trainer type, enter the name of the instructor in the Trainer Name field. To use the instructor's competencies to match the resource needs of an offering, you must enter the instructor as a person in Oracle HRMS. Then, choose the person from the Name list.
5. Enter a training center (an organization) to associate a resource with a particular training center.
6. Enter a location to associate a resource with a particular location.

7. Enter a start date when the resource becomes available for booking. You can also enter an end date.
8. Select the supplier. You can also enter a reference, such as a code the supplier uses to identify the resource.
9. Select Consumable if the resource is not reusable. For example, pens and paper are typically consumable, whereas computers and venues are reusable.

   Note: OLM 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 instructors and venues, an error.

10. Enter, in number of days, the normal lead time required for booking.
11. Enter the address of the resource, such as the internal address within a training center.
12. Enter any special booking instructions, such as a delivery address or alternate supplier.
13. Save your work.
14. In the Amount field, 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.
15. Save your work.

Resource Booking

Resource Booking

You can book resources for the classes of an offering.

Primary Venue

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

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

The application prevents you from double-booking certain types of resource:

- Trainer
- Venue

By definition, you can use each named trainer (instructor) or venue (room) for only one scheduled class at a time, so the application prevents you from double-booking the resource.

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

- Consumable resource types, such as manuals and stationery, which are not returned to stock after a class, and
- Non-consumable resource types, such as overhead projectors and computers, which are loaned for the duration of the class only.

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

> **Note:** The application checks for double-bookings only when the status of the booking is Confirmed. You can double-book trainers and venues while you are planning a class and, perhaps, testing various class dates and booking scenarios. To check whether a booking with the status of Planned overlaps another booking, use the Resources Booked folder to view existing bookings.

Required Resources

You, or your supervisor, may have previously defined resources, and the quantity, that are required to run classes for a particular offering.

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

- Automatically
- Individually

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

When Do You Use the Automatic Method?

Use this short cut to list all the resources that have been specified as Required for a class. You can then book them all together, to save time.

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

When Do You Use the Individual Method?

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

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

Resource Management

Use the Resources Booked folder in the Resources Booked window to help you manage your resources. It helps you determine how effectively you utilize the resources. For example, you can see all the bookings for a specific instructor or room, or all resources for a supplier.

You can choose which classes to list and which fields of information to view.

You can also run the Budget and Cost Breakdown report to enable you to view the profitability of your classes.

See Running the Budget and Cost Breakdown Report, page 5-15

Unavailable or Block-Booked Resource

You can book resources for provisional and block bookings without associating them with a class. You can also make a resource unavailable for booking, for example, if an instructor is on holiday or is away sick, or if a room is unavailable for any reason.

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

The Resource Process at a Glance

To enter and book resources for an offering or a class, perform the following steps:

1. Enter a resource of the type Trainer, Venue, or Others using the Resource window. See Entering Resources, page 4-6

   Important: *To use a new resource type other than the default Others, Trainer, and Venue, you must create the new resource lookup type and add its lookup values prior to entering resources.*

See Setting Up Training Resources, page 4-5

2. Use the Offerings page to select the offering for which you want to book the resource. For a class, use the Classes page. These pages display a list of the available offerings or classes.
3. Use the Resource Checklist page to view the list of resources already booked for the offering and update them. For a class, use the Resource Bookings page.
4. For an offering, use the Add Resource page to enter the details of the resource, such as type, name, quantity, start and end dates, and reason. If a particular resource is mandatory to run the classes of the offering, specify the resource as Required.

   Caution: Ensure that a resource is available on or before the start date of the offering or class before you book it.

5. For a class, use the Add Resource Bookings page to enter resource information.
6. Save your work.

Finding Specific Locales and Instructors

Use the Advanced Search page to find specific locales and instructors according to their training center, location, language, or competencies.

1. Select a class on the Classes page.
2. Navigate to the Add Resource Bookings page and click Advanced Search.
3. Enter the criteria for the search and click Go to find the specific locales and instructors.

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 class in the Search for Class window but display the Book Resources window instead.
2. Do not select the Use Class 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 Booked By field displays the name of the person responsible for these bookings.
8. Save your work.

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

1.

5

Finance and Pricing

Finance and Pricing Overview

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

- Price Lists, page 5-10 (in money and training units)

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

- Finance Headers and Lines, page 5-3

  A finance header holds generic financial information about the dealings you have with a particular customer or supplier. Each individual transaction with a customer or supplier is a finance line. You can use the Receivable, Payable, Cancellation, or Cost Transfer types of finance headers to manage financial information.

- Cross-Charging, page 12-23

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

- Currencies, page 12-23

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

- Financial Security, page 12-23

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

- Organization Training Plans, page 5-17

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

Oracle Financial Applications Integration

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

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

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

Key Concepts

OLM finance and pricing uses these additional key concepts:

Header and Line Types, page 5-3

Finance Transfer Process, page 5-4

Finance and Pricing Requirements

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

What finance headers does OLM provide?

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

- Payable, for supplier payments
- Cost transfer, for manual or automatic cross-charging
- Cancellation, for superseding previously transferred headers
- Receivable, for standard invoices

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

Can you create your own headers?

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

How do you cross-charge class fees and resources?

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

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

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

Finance Headers and Lines

Finance Headers and Lines

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

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

Header and Line Types

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

Header Types

The four predefined types of finance header are:

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

  Cross-charging for resources is beneficial if you operate a business in which cost centers within your enterprise or other organizations, rather than external suppliers, provide resources.
- Cancellation - for superseding a previous header that the application has transferred to your financial system and that cannot be updated

Line Types

The three predefined types of finance line are:

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

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

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

Automatic Finance Line Creation

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

You can, however, create a finance line manually.

Update and Delete Prices

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

- Monetary
- Standard

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

See Financial Security, page 12-23

Headers and Currency

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

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

Finance Transfer Process

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

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

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

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

- External reference
- Date
- Message
- Paid flag

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

Cost Transfer of Enrollments and Resources to General Ledger

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

See Setting Up Cross-Charge Accounting, page 12-24

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

1. A resource booking status of Confirmed.
2. A header transfer status of Awaiting Transfer.
3. A corresponding resource booking date of today or before.
4. A header value of Authorized.
5. One or more lines not cancelled.

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

Preventing Processing of Finance Headers

OLM enables you to prevent further processing of finance headers.

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

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

Cancelling a Finance Header

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

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

Creating a Finance Header

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

- Enrollment Details: to create a receivable header for an enrollment (use Order Management integration instead)
- Resource Booking: to create a payable header to the supplier of a resource
- Customer for Restricted Class: to create a receivable header for a customer learner associated with a restricted class that is priced on a Per Customer basis.

The Finance Header Window

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

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

To create a finance header:

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

Receivables and Payables:

1. For a Payable Header, select Payable.
2. For a Receivable header, select Receivable and a Standard subtype.
3. Select the customer or supplier if the correct information does not appear by default.
4. Select a contact and an address.
5. For a Receivable header, select the appropriate payment method.

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.

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

Transfer:

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

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

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

2. Save your work.

What to do Next:

- **Enter an Enrollment**: If you are manually creating a finance header while you are entering an enrollment, return to entering an enrollment, page 3-7.

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

  See Creating a Finance Line Manually, page 5-7

Creating a Finance Line Manually

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

To create a finance line manually:

1. Enter or query the appropriate finance header in the Finance Header window.
2. Click Finance Lines.
3. Select a blank line.
4. Select a line type.
5. Click New Line.
6. Select one of the following to associate with this line:
   - An enrollment
   - A resource booking
7. Enter an amount in money.
8. Save your work.

To change the transfer status of a line:

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

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

Moving Finance Lines To a New Header

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

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

To move finance lines to a new header:

1. First create the finance header, page 5-5 to which you want to move the lines.
2. Query the header in the Finance Header window to which the lines currently belong.
3. Click Finance Lines.
4. Click Change Header in the Finance Lines window.
5. Select the header to which you want to move the lines.
6. Select the Move check box for each line you want to move to the new header.
7. Save your changes.

Cancelling Finance Headers and Lines

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

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

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

You can also cancel individual finance lines.

To cancel a finance header:

1. Query the header in the Finance Header window.
2. Click Cancel Invoice.
3. Save your changes.

   OLM cancels every finance line that belongs to this header.

To cancel and replace a finance header:

1. Query a header in the Finance Header window that has the status Successful Transfer.
2. Click the Cancel/Recreate button, and save.

   The application creates a Cancellation header and a new header, based on the old one, to replace it.
3. Enter information for the new header, and save.

To cancel a finance line:

1. Enter or query the appropriate finance header in the Finance Header window.
2. Click Finance Lines.
3. Mark the line you want to cancel and click Cancel.
4. Save your changes.

   OLM selects the Cancelled check box for this line.

Deleting Finance Headers and Lines

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

Deleting Headers

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

You cannot delete a Transferred finance line.

Deleting Lines

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

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

To delete a finance line:

1. Enter or query the appropriate finance header in the Finance Header window.
2. Click Finance Lines.
3. Choose the line you want to delete and select Delete Record from the Edit menu.
4. Save your changes.

To delete a finance header:

1. Query a header in the Finance Header window.
2. Select Delete Record from the Edit menu.
3. Save your changes.

Restoring Cancelled Lines and Headers

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

To restore cancelled lines and headers:

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

Pricing

Price Lists

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

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

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

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

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

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

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

Overlapping Price List Entries

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

Price Basis

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

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

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

Effective Price List Dates

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

Calculating Price List Entries

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

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

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

Example 1

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

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

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

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

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

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

Example 2

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

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

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

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

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

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

Pricing for Customer-Restricted Classes

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

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

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

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

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

Creating a Price List

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

To create a price list:

1. Enter a unique name for the price list.
2. Select a currency for the prices.
3. Select the Default check box to set the prices on this list to appear as the default standard price for classes.

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

4. Enter a start and end date to define when the price list is effective.
5. Display the Learner region to make entries priced on a per-learner basis.
6. Select the course, enter the price, and enter a start date. The start and end dates of an entry must be within the start and end dates of the price list.
7. Display the Customer region to make entries priced on a per-customer basis.
8. Select the course, and enter the price and the range of learner numbers to which it applies. Enter a start date for the entry.
9. Save your work.

Extending a Price List

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

To extend a price list:

1. Query the price list to extend and click Copy List.
2. Enter the name of the new, extended price list.
3. Enter the start and end date of the new list. The start date of each entry changes in line with the change for the list.
4. Enter the percentage to increase the prices on the new list (the amount must be between 0 and 100).

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

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

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

Changing Price List Dates

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

To change the price list dates:

1. Query the price list in the Price List window.
2. Click Change Dates.
3. Enter the new start and/or end dates.
4. Select the Alter Entry Dates check box to allow changes to the dates of price list entries.
5. Choose Change Dates. The application applies and saves your work.

Alter Entry Dates:

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

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

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

Changing Prices for Entries Within a Price List

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

The application calculates the dates of the entries based on

- The end dates of existing entries
- The end dates of the course
- Any price dates you enter
- Today’s date

Example

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

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

Changing Prices for Entries Within a Price List:

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

To change prices for entries within a price list:

1. Query the price list on which you want to change prices.
2. Select Change Prices.
3. Enter the effective date for the new entries. You can also enter a new end date. If you leave the end date blank, the new entries have the same end date as the price list.
4. To copy entries starting after a given date, select Entries Starting From and enter the start date.
5. To copy all entries, select All Entries.
6. Enter the percentage (between 0 and 100) to increase the prices of the new entries by that percentage.
7. Select a direction and unit for rounding the new prices. For example, if the prices are in US dollars and you want to round the new prices up to the nearest 10 cents, select Up and enter 0.1 in the Nearest To field.
8. Select Change. The application applies and saves your work.

Running the Budget and Cost Breakdown Report

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

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

- Catalog Category (formerly Activity Type)
- Course
- Class
- Program

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

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

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

  You run this report in the Submit Request window.

Different Currencies

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

To run the Budget and Cost Breakdown report:

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

   The Parameters window opens.

2. Select one of the following values to produce the report:
   - Catalog Category--if you select a catalog category, you do not have to select a course title; the application lists all courses for the category.
   - Course--if you select a course you do not have to select a class title; the application lists all classes for the course.
   - Class Title

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

3. Select the status of any finance headers transferred to your accounting application. Leave this field blank to see finance headers of all statuses.
4. Select the resource booking statuses (such as Planned) to include in the report. Leave this field blank to see resource bookings of all statuses.
5. Select a currency to restrict the report to learner enrollments for that particular currency. If you do not select a currency then the report includes enrollments for all currencies.
6. Select the learner display currency.
7. Select a currency to restrict the report to resource bookings for that particular currency. If you do not select a currency then the report includes bookings for all currencies.
8. Select the resource display currency.
9. Select Yes to include summary only information in the Summary Display Mode field, or select No to include detailed information.
10. Enter start and end dates to report on classes within that range.
11. Select Yes to include all learner enrollments for which payment has been made, or No to include learner enrollments that have not been paid.
12. Enter the standard price of the classes you want to include in the report. The report lists all classes with standard amounts up to and including the price you enter. Leave this field blank to view all prices.
13. Click Submit Request.

Organization Training Plans

Organization Training Plans

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

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

Training Plan Measurement Types

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

- Money
- Integer
- Number

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

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

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

Training Plan Budgets

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

- Plan
- Plan Member
- Class

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

Training Plan Costs

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

- Plan
- Class
- Student

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

Budget and Cost Reconciliation Report

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

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

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

Prerequisites for the Budget and Cost Reconciliation Report

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

- A default payroll
- Exchange rates
- Actual hours duration of the class measurement type

You must also set up any other measurement types required to fulfill the costing needs of your company, and enter all the costing information you want to include in this report against these types into the Training Plan Costs, Training Plan Class Costs, and Training Plan Student Costs windows. See: Entering Training Plan Cost Information, page 5-20

When running the report you can set the level of detail you see using the Rollup Level option. This defines the level at which you want the values to be totaled. You can select one of four options:

- Plan
- Catalog Category
- Course
- Class

For example, if you set the rollup level to Course, all the values entered at the class and delegate level are summed and displayed against their parent course. To break the report down further, you can set the rollup level to Class, which displays the costs against each individual class.

Entering a Training Plan Measurement Type

Use the Training Plan Measurement Types window to set up measurement types.

To enter training plan measurement types:

1. Select the required measurement type. The available measurement types are defined in the OTA_PLAN_MEASUREMENT_TYPE extensible Lookup Type.

2. Select the required units for the measurement type and enter the sequence if required. This enables you to define a reporting order should you want to write a report based on measurement types.
3. Select the budgeting level. If you want to allow users to set up multiple occurrences of this budgeting type for a training plan you must check the Allow multiple values check box. This enables you to break the budget down into employee categories. For example, when setting up an Estimated Salary Per Category measurement type, you will need to check this box so that you can enter a salary for each employee category.
4. Select a costing level, if required.
5. If you want to dynamically calculate a cost, select the name of the template that contains the required calculation and select the item type that is to be used.

   Note: Organizations outside France do not need to take this step, which exists only to assist French companies in filing their Declaration 2483.

6. Save your changes.

Entering a Training Plan

Once you have set up the courses required you can group them together into a training plan. This will set out all the training that is proposed by your organization.

You define training plans in the Organization Training Plan window.

To enter a training plan:

1. Enter a name for the training plan and select the status.

   Note: Training plans with a status of Cancelled will not be available when running the Budget and Costs Reconciliation Report.

2. Select the organization to which the training plan applies and select the currency in which the plan will be budgeted.
3. Select the required calendar and period. This will usually be a yearly calendar with a twelve month period. You may only have one active training plan for any given date, for your organization.

   For more information on setting up budget calendars see Defining Calendars in the Oracle HRMS online help.

   Note: Any training plan or training plan member status that is not Cancelled is considered to be active.

4. Select a training plan member for the training plan. This can either be a course type or a course. You are only able to select courses, or course types whose start date is before the end date of the period, and whose end date is after the start date of the period.
5. Select the status of your training plan member. You are prevented from having an active course if the parent course type is also included in the training plan and is also active.

6. Enter as many training plan members as required and save your work.

Entering Training Plan Budget Information

To enter budget information:

1. Query the required training plan in the appropriate window.
2. Select the measurement type for which you want to enter a budget.
3. If you are entering budgets at the training plan member level, select the required member.
4. If you are entering budgets at the class level, select the required class. As one-time events are generally not planned far in advance, they are not associated with a course and therefore are not available for budgeting purposes.

   Note: All classes must have an end date for them to be available in this window. If an end date is not known, for example, in the case of a development event, you will only be able to record costs.

5. Enter the value for the budget line. If you want to assign the budget value to a particular employment category, click in the Extra Information field and select the required employment category. You should only select an employment category for measurement types that have the Allow multiple values checkbox checked in the Training Plan Measurement Types window.

   Note: You must only have one entry per employment category for each measurement type. If you enter duplicate records for the same employment category the reports will only use the first entry, not sum the entries together.

6. Enter as many budget lines as required and save your work.

Entering Training Plan Cost Information

To enter actual costs information:

1. Query the required training plan in the appropriate window.
2. Select the measurement type for which you want to enter a cost. The currency defaults to the budget currency for the training plan if the selected measurement type has been set up to use monetary values.
3. If you are entering costs at the class level, select the required class.
4. If you are entering costs at the student level, select the required student.
5. Enter the cost amount. If the cost has been set up to use a cost calculation, choose the Calculate button. This will run the SQL calculation associated with the measurement type and display the result in the Amount column.
6. If you are using the Actual hours duration of class measurement type, click in the Statutory column to display the Further Plan Cost Information window. Select who has subsidized the training.
7. Enter as many cost lines as required and save your work.

What to do next:

Once you have entered all the costing information for your training plans, you can run the Budget and Cost Reconciliation report. This will list all the budget and associated cost information for a training plan so that you can compare them. See Budget and Cost Reconciliation Report, page 5-18

Running the Budget and Cost Reconciliation Report

Run reports in the Submit Requests window.

To run the Budget and Reconciliation Report:

1. Select Budget and Costs Reconciliation Report in the Request field.
2. Select the training plan for which you want to run the report and select the report currency. All monetary values are converted into, and displayed, in this currency.
3. Select the rollup level.
4. Click Submit.

   You can now view and print the report from the Requests window.

6

Class and Enrollment Tracking

Class and Enrollment Tracking Overview

Class and enrollment tracking relies on combinations of class and enrollment statuses to drive waiting lists, letters, notifications, invoicing, and reports.

Class and Enrollment Statuses

Oracle Learning Management (OLM) provides statuses, such as Planned and Full, that reflect typical stages in the class life cycle. You can use these class statuses as they are, or you can create your own. Enrollment statuses, such as Requested and Attended, determine waiting lists and drive other processes. Again, you can use these as they are, or you can create your own based on the existing enrollment statuses. The combination of class and enrollment statuses enables you to schedule and track classes and to manage enrollments.

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

If you set up and activate automatic waitlist enrollments, each time a learner cancels an enrollment, or you increase the maximum number of attendees for a class, the application moves the first eligible waitlisted person onto the class automatically.

To set up automatic waitlist enrollments, you set Profile Options, page 12-31.

If you do not want to activate automatic waitlist enrollments, you can manually select learners 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 learners fail to complete a class. This enables you to track the effectiveness of your class marketing, or to analyze the success rates of certain classes, for example.

Workflow Notifications

The application provides a number of workflow notifications that inform learners, managers, and administrators of enrollment-related events such as waitlisting, placement, and competency profile updates.

See Workflow Notifications, page 12-44

You can also create and issue letters, but we recommend that you use the more versatile and scalable notifications method instead.

See Letter Generation, page 3-5

Reporting on Enrollment Tracking

OLM reports relating to class and enrollment tracking include:

- Attendance and Signature Sheet Report, page 3-13
- Registration List Report, page 3-12
- Student Sign-in Sheet Report, page 3-15

Key Concepts

Class and enrollment tracking relies upon these key concepts:

- Class Statuses, page 6-4

  The five default class statuses--Planned, Normal, Full, Closed, and Cancelled--reflect typical stages in the class life cycle.

- Enrollment Statuses, page 6-4

  The five default enrollment statuses--Requested, Placed, Waitlisted, Attended, and Cancelled--enable you to track and control the progress of enrollments.

- Automatic Waitlist Enrollments, page 3-3

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

Class and Enrollment Tracking Requirements

You can use statuses to create the typical life cycle of a class, and control the type of enrollments that you enter.

How are waiting lists handled?

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

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.

How do you issue letters?

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

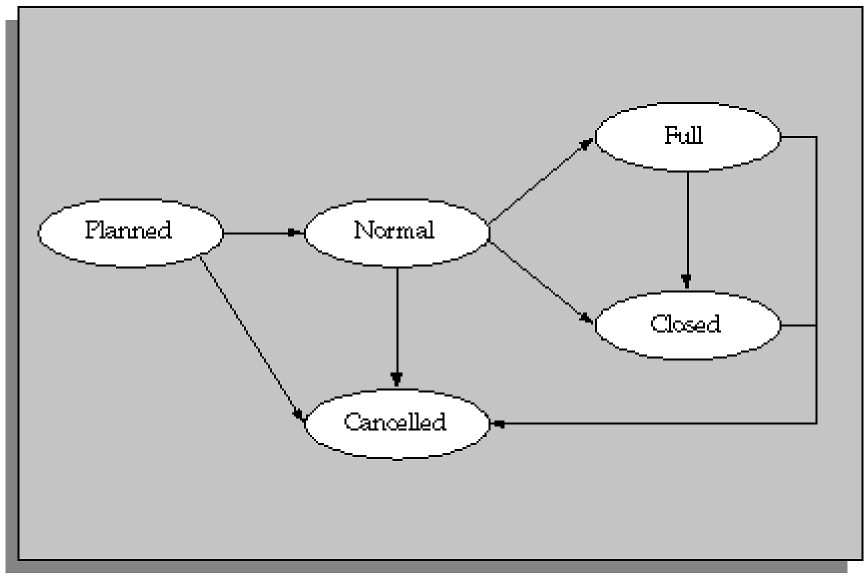
Class and Enrollment Statuses

Class and Enrollment Statuses

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

In a typical class life cycle, these statuses operate as follows:

Class Life Cycle Management



1. Create a new class with the status **Planned**.
2. Update the class status to **Normal** when you have sufficient interest to meet the minimum numbers required to run the class.
3. The application automatically sets the class status to **Full** when all the class places are filled.
4. When you are ready to prevent any new enrollments, you can update the class status to **Closed**. Once you Close (or **Cancel**) a class, you cannot enter enrollments of any kind.

Creating Your Own Class Statuses

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

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

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

Enrollment Statuses

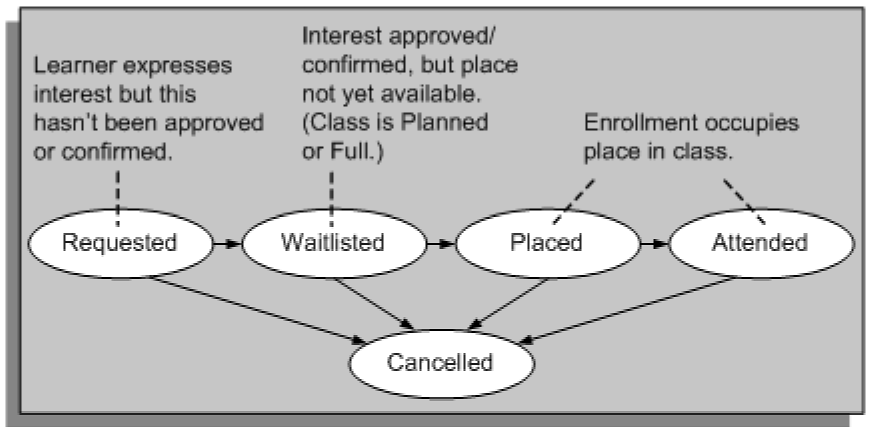
OLM provides five predefined enrollment statuses:

- Requested
- Placed
- Waitlisted
- Attended
- Cancelled

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

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

Enrollment Statuses



Although the application provides these five predefined statuses, during setup you must name all the statuses yourself. For example, enter the name Requested as the status that you want to appear for enrollments of the type Requested and associate it with the predefined status Requested. You must do this for the remaining four statuses. Alternatively, enter the name Nominated (or another term you wish to use) as the status that you want to appear for enrollments of the type Requested and associate it with the predefined status 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 notifications. You can view the history of statuses for each enrollment.

Combining Statuses to Track and Control Enrollments in Classes

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

Typically, you might follow this sequence of steps:

1. Create a new class with the status **Planned**.
2. Enter enrollments with the status **Requested** as learners express an interest in the class.
3. Update the status of these enrollments to **Waitlisted** when the learners confirm their interest and/or management approves their attendance.
4. Update the class status to **Normal** when you have:
   - Sufficient Waitlisted enrollments to meet the minimum numbers required to run the class
   - Booked all the resources required
5. Update the status of the Waitlisted enrollments to **Placed**.

   When the number of Placed enrollments equals the maximum number of places defined for the class, the application automatically sets the class status to **Full**.
6. Continue entering Waitlisted enrollments, or close the class.

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

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

Closing a Class

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

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

Cancelling a Class

When you cancel a class, OLM automatically cancels all enrollments. You can choose which cancellation status to use for the enrollments (if you have defined more than one). You can also choose whether to cancel any finance lines associated with the enrollments.

Changing a Class Status to Planned

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

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

Which Statuses Occupy Places in a Class?

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

- Placed
- Attended
- Any statuses based on Placed and Attended

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

Priority Levels

If you have entered more requested enrollments than available places, you must decide which enrollments to place and which to put on a waiting list in case of cancellations. To help you decide which enrollments to place, 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, then update the remaining requests to the status Waitlisted.

If a placed learner cancels, you can choose the highest priority waitlisted learner to fill the place. You can do a mass update of all waitlisted learners to roll them over to the next scheduled class for the course.

Filling All Class Places

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

Increasing the Maximum Number of Places in an Offline Class

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

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

See: Changing the Class Status or Maximum Attendees, page 11-26

Creating Class Statuses

To create class statuses:

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

Creating Enrollment Statuses

Use the Enrollment Statuses window to create enrollment statuses.

To create enrollment statuses:

1. Enter a name for the first status.

2. Select the status type to associate it with.
3. Select the Default check box if you want this status to be the default for the type.

   Important: You must create one, and only one, default status for each status 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 status 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. Select the Default check box if you want this status to be the default for the type.

   Note: You must have one, and only one, default status for each type.

4. Save your work.

Deactivating an Enrollment Status

You cannot delete a status used in any learner enrollment records. However, you can deactivate a status to prevent its use in any new enrollments.

To deactivate an enrollment status:

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

7

Content

Content Administration Overview

Content is learning material that is made available to learners online through a catalog offering. Courseware developers and subject matter experts design and build the content, which learners view online in a player that runs inside a web browser. Content can use any web-playable format, such as slides, text documents, html pages, video clips, or other multimedia format.

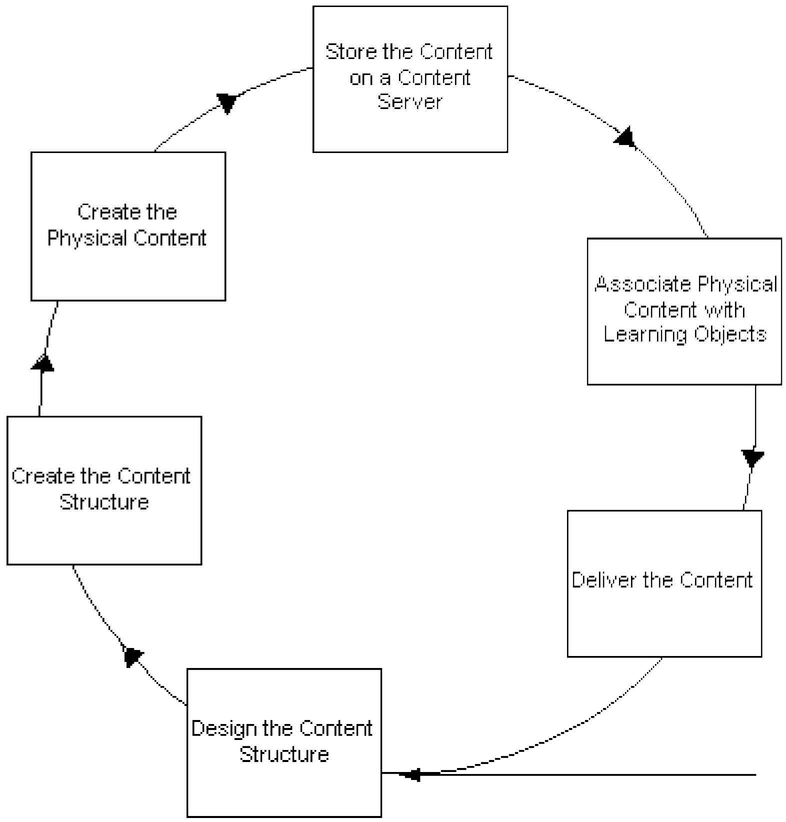
You can use Oracle Learning Management (OLM) to manage and deliver content. OLM makes the content available to your learners over the Web.

> **Important:** The delivery of online content is possible only if your enterprise has purchased the OLM Online Learning Option and enabled the Online Learning Option Licensed profile.

Content Administration Using OLM

A detailed look at the needs in your organization will help you decide how to use OLM to manage your learning requirements. One of the important functions of online learning management is creating and managing the content structure. You should identify the tasks needed to manage the course content. Content administration within any learning management system has a common cycle of tasks:

Content Administration Tasks



- **Design the Content Structure** This is a task for curriculum managers outside of the application. Before creating objects in the application, you should already have a design of how you want to organize your content, in terms of content folders and the learning objects and tests within those folders. A folder is an organizing container for different types of content based on a common factor, such as the subject matter, training initiative, or audience. Learning objects are logical objects that point to the actual physical content that the course developer has designed.
- **Create the Content Structure** Creating a content structure involves creating a hierarchy of folders and sub folders in the application, then creating learning objects and tests within those folders.
- **Create the Physical Content** This is a task for curriculum developers outside of the application. OLM supports any Web-playable material, so there is no restriction on the courseware development tools that you choose to create that material, as long as it is playable on the Web. This stage is not applicable if you have existing content, or if your content is custom-built by a third party, or purchased off the shelf.
- **Store the Content on a Content Server** To make the content playable, it must reside on an accessible web server. Optionally, you can set up a content server, recognized within OLM itself, to upload content easily to that server location. This stage is not applicable if you are accessing content that is already stored on a third-party web server. This stage is not applicable for tests that you create in OLM, using the Test Builder, page 8-1.

- **Associate the Physical Content with Learning Objects** To associate the physical content with the learning objects, you set content location properties in the learning objects to point to the content files.
- **Deliver Content** This is the final stage of making the content available to the learners over the web. As a first step in content delivery, you create a course in the catalog area. You should associate this course with a learning object that you created in the content area, and that you have published to make it available to the catalog. You can then offer this course on the web by creating offerings for that course.

Key Concepts

Content administration uses the following concepts:

- Importing and exporting content, page 9-1
- Online content setup, page 12-16
- Online tests, page 8-1
- Content delivery through the Catalog, page 2-4

Content Administration Requirements

Oracle Learning Management (OLM) enables you to create organize and manage content for online distribution.

What is the difference between online and offline modes?

In the online mode, learners view and play the available online content from within the OLM player. In the offline mode, learners either attend a physical classroom class, also known as instructor-led training (offline synchronous), or receive the content in some offline form such as a book or a standalone disk, or local computer-based training (offline asynchronous).

You create offerings of both types within the Catalog, and maintain the content for your online courses in the Content page. Offline classes do not have associated online content.

> **Important:** The delivery of online content is possible only if your enterprise has purchased the OLM Online Learning Option and enabled the Online Learning Option Licensed profile.

How can you associate physical content with a content structure?

You associate physical content with a content structure by specifying the actual location of the content, such as an accessible URL, in the learning object properties.

Can you reuse an existing content structure?

Yes, you can reuse an existing content structure by creating a copy of the content structure. You can copy an individual learning object, a hierarchy of objects, or a hierarchy of folders. Once you have copied the content structure, you can modify the new objects to fit your needs.

How can you offer online content?

You offer the online content to your learners by associating the relevant learning object, which you created in the Content page, with an offering in the Catalog. You create courses and offerings in the Catalog.

Online Content Management and Delivery

Content Structure

Use the Content tab to manage online content. The first step in the online content management process is designing and planning the content structure based on your learning needs. Creating a content structure involves creating a hierarchy of folders and grouping the learning objects and tests within them, to organize the content in a logical flow and make it easy to find the learning objects you want to reuse.

You can create content metadata manually, or use the application's powerful import and export feature to transfer an existing content structure from an external source, such as content purchased from another company or a content structure available in another learning management system (LMS). This feature eliminates the need to recreate the structure manually. See Content Import and Export, page 9-4

Content Folder Structure

Use a logical hierarchy and meaningful naming scheme for the folders. You should set up your content folders to reflect the structure of your learning material, for example by subject matter, faculty, or learner job roles. To help you locate and manage the objects efficiently, you can establish naming conventions for all objects created on your OLM instance.

For example, assume the training department in your company has decided to provide courses on Oracle to the employees: certification courses that prepare employees for the Oracle Certification exams, and other courses for Oracle Applications. To achieve a logical structure, you decide on a top level folder named Oracle, which contains two sub folders named Oracle Certification and Oracle Applications, within which you group the relevant sets of learning objects and tests.

You create folders from the Content page. To create a sub folder, ensure that you first select the relevant folder within which you want to create the sub folder.

> **Note:** The application does not verify folder or learning object names, enabling the use of duplicate names.

Assembling Content

Once you have designed your content structure, and created the folders, you create the learning objects, page 7-6 that you require, organizing them within the relevant folders. Learning objects are database objects that provide the metadata to represent your actual physical content, including the location of the physical content on a server. Learning objects enable you to organize, reuse, track, and deliver online content.

Assembling Tests

A test measures a learner's performance, knowledge, and skills. You can create a test in Flash or HTML, representing it in the application as a learning object that points to the content. Alternatively, you can use OLM's test builder to create tests from questions drawn from a question bank. These OLM tests are a specific type of learning object, but they do not point to any physical content.

To assemble a test, you create a question bank, write the appropriate questions and response options, then create the test using the question bank.

See Test Builder, page 8-1

Searching the Content Structure

You must browse several folders if you are searching for a particular object in a long hierarchy of folders, sub folders, learning objects, and tests. You use the Search list on the Content page to search for folders, learning objects, and tests within the content hierarchy. Use the Advanced Search link to search for objects based on additional parameters such as keywords and published status.

Learning Object Management

Learning objects are the database objects that represent the actual content residing on a content server.

The Content page displays your content folders, learning objects, and tests. From there you can create and delete new folders, learning objects, and tests; copy and reorder folders and their contents.

Creating Learning Objects

To create a learning object, you use one of three methods:

- **Manually:** Select a parent object on the Content page, then select Learning Object from the Create list.
- **Importing:** From a learning object page, import existing objects, page 9-4 from another site, another learning management system, or a third party such as SkillSoft or NetG.
- **Copying:** Use the Copy command on the Content page to copy existing objects to the selected destination in the Content page. Copying an existing learning object enables you to modify the copy to fit your needs, while safely preserving the original learning object.

When you create a learning object, the application automatically enters some required information. You modify the default values, if necessary, and enter the other required information. You can also include optional information such as the a description and duration.

Setting Learning Object Properties

When you create a learning object, the application navigates to the object properties page, where you enter the relevant information for the new learning object. To update properties for an existing learning object, click Update on the properties page. The properties fall into two categories:

- **General:** The general properties include both required and optional fields that identify the learning object. These properties help users find, reuse, and manage learning objects. Creating a learning object automatically sets default values for the mandatory fields Identifier, Published Status, Tracking Type, and Language. You can change the information in any of these fields. The optional fields appear in the table below:

Property	Definition
Duration	Descriptive character field to indicate duration of a course to learners when they are selecting from the catalog
Description	A brief description of the learning object
Audience	The target learning audience
Hardware Software Requirements	System requirements required to run the content
Mastery Score	The percentage score that the learner should attain to master the content represented by the learning object.
Mime Type	The format of the content. This information is used when exporting learning object metadata in IMS format.
Author	The author or publisher of the content
Catalog	The entry specified in the catalog
Catalog Number	Catalog ID or number for use within an external cataloging system.
Version	Version ID or number

- **Content Location:** The Content Location properties identify the location of your physical content.
  - **Starting URL** is the only field displayed when you select URL Access from the Type list. The URL Access option indicates that your content is located on an external content server (not on a content server managed by OLM itself). Specify the complete path of the content in the Starting URL field.
  - **Content Server** appears when you select Content Server Access from the Type list. The Content Server Access option indicates that an OLM content server hosts your content. The Content Server list displays only available OLM content servers, added using the Setup page. Use the Setup page to add or edit a content server by entering the host name, port, physical directory and other content server properties. If you require an OLM content server, contact your site administrator.

    See Content Servers, page 12-16
  - **Directory** represents the directory on the selected content server where the content is located. This field appears only when you select Content Server Access from the Type list.
  - **Initial Field** specifies the file launched when a learner accesses a learning object in the Player. If you do not know the initial page at this stage, you can enter a dummy file name and update the property later.

Defining Player Prerequisites

A prerequisite is a required learning object that a learner must complete before beginning or continuing a sequence of learning. You set a player prerequisite for a learning object to prevent learners from launching that learning object until they complete the prerequisite. For example, you can require learners to complete an introductory sequence of learning before attempting the advanced material, making the introductory learning object, or hierarchy of objects, a prerequisite for the advanced learning object.

Like other learning objects, prerequisites represent Web-playable material located on a server. You must create and publish a learning object before you can specify it as a prerequisite.

The Player Prerequisite link is available from the learning object properties page. You can assign multiple prerequisites to a learning object, and learners must complete all prerequisites before they can launch the learning object.

Publishing Learning Objects

By default, all learning objects are initially unpublished. You publish learning objects when you are ready to assign a learning object to a catalog offering, Click Publish or Unpublish on the Content page, to publish or unpublish one or more selected learning objects.

When you publish a learning object that contains nested objects, the system publishes all learning objects and tests currently contained within the parent object. When you add a nested content object or test to a parent object that is already published, you must explicitly republish the new object. Learners cannot see a nested object that remains unpublished.

You can unpublish learning objects if the content requires maintenance. When you unpublish a learning object, you are visually indicating that the class which launches this content should not be playable by learners, and other administrators should not create other offerings containing this learning object. For example, if you make structural changes in a learning object, you do not want the learning object to be accessed while the changes are being made. You can unpublish the learning object and make the required changes. After completing the changes, you can publish the learning object indicating that it is ready to be offered to the learners.

> **Note:** When copying learning objects the status of the newly copied objects is always "Not Published". When you select a learning object in the tree and click either Publish or Unpublish, it publishes or unpublishes that learning object and all child learning objects. The same behavior occurs when you change the published status for a learning object in its properties page. You cannot unpublish a learning object if it has an active offering. In addition, when a learning object is unpublished, the Play button on the learner home and learning history pages is disabled. A message is shown stating "Learning Object Unpublished".

Online Content Delivery

When you have the content structure and learning objects in place, the next step is to deliver the online content to learners as a course within the Catalog.

Important: The delivery of online content is possible only if your enterprise has purchased the OLM Online Learning Option and enabled the Online Learning Option Licensed profile.

The application provides a systematic approach to creating courses, offerings and classes. The process is similar whether you are creating online or offline offerings. For details see: Catalog Administration, page 2-3.

When creating an online offering, define the delivery mode as Online Asynchronous. The offering properties page provides a learning object field, where you associate the learning object or test that you want for the offering.

As for other offerings, you can define learner access, page 2-11 to restrict the learners who can enroll in and play the online offering.

Note: Only published learning objects and tests are visible, when you search for learning objects or tests to associate with the offering.

8

Test Builder

Test Builder Overview

The Test Builder enables you to create and manage tests either as topics within a course offering, or as offerings in their own right. A test is a means of measuring a learner's performance, knowledge, and skills. Tests can be scored or not scored. When a test is scored, and a mastery score is specified, a learner passes or fails a test based on the results. Tests that are not scored can provide survey functionality.

Building Online Tests

The Test Builder is an integral part of the application, and is available to all administrative users, assuming the Online Learning option is enabled for the application. No licence or separate software is required.

Reporting on Tests

The Test Builder provides a number of statistical screens for you to analyze learners' performance and test results, either for the test or for individual questions. See Reviewing Test and Question Statistics, page 8-12.

Key Concepts

To use the Test Builder effectively, you must understand the following key concepts:

- Tasks to Assemble a Test, page 8-4

  Before attempting to create and offer a test, first understand the tasks involved.

- Question banks, page 8-9

  A question bank is a repository of questions and responses. The Test Builder can maintain many questions and responses in one or more question banks, to organize your questions by subject matter, level of expertise, job role, or other criteria. Question banks help you to manage and reuse questions in multiple tests. At least one question bank must exist before you create a test.

- Questions, page 8-9

  The Test Builder supports five question types, and also supports HTML to embed multimedia objects and links.

- Tests, page 8-6

  Each test that you create draws questions from one or more question banks. You can select the specific questions that you require in the test, or you can simply specify a number of questions, which the test draws randomly from the question bank when learners attempt the test.

- Quick Tests, page 8-11

  A quick test is a quick way of creating a test that contains all questions from one question bank, instead of manually creating the test object, the test section and then choosing all the questions. You can later edit the default test properties.

Test Builder Requirements

Can you create more than one test that reuses the same questions?

Yes, you can create many questions in a question bank, for example all related questions for a specific subject, and reuse those same questions in many tests.

Can you import tests created by a third party content provider?

Yes, if the tests conform to the IMS QTI (Question and Test Interoperability) specification. Use the Import function at either the folder or the learning object level.

See Importing and Exporting Tests, page 9-6

What question types can you create?

The Test Builder supports the following question types: Fill-in-the-Blank (text response), Fill-in-the-Blank (numeric response), True/False, Multiple Choice Single Response, and Multiple Choice Multiple Response.

Can you display multimedia files and hyperlinks in test questions or responses?

Yes, all text fields support HTML code if you select the Render HTML option when creating or editing your test.

Can you delete questions from a question bank?

Yes, but only if the question has not yet been attempted. Once a learner has attempted the question in any test, you can no longer delete the question from the question bank, since it is required for learning history and performance records. If a question is no longer applicable for future tests, you can make it inactive, to prevent the administrator from selecting the question in any future test.

Can you test learners' knowledge at intervals throughout a course?

Yes, one or more tests can exist as part of a content structure, which is offered as an entire course, so that you test learners' knowledge as they progress through the course.

Alternatively, a test can be a separate offering in its own right.

Can you force learners to take a test before launching specific online content?

Yes, you can define the test to be a player prerequisite for another online learning object, to prevent learners from attempting subsequent sections of a course, or a separate course, until they have successfully passed the test.

Can you limit the time a learner takes to complete a test?

Yes, you can specify a time limit for a test (a timed test), to restrict the amount of time a learner has to complete a test and to alert the learner as the time limit approaches.

Test Assembly

Test Assembly Tasks

For flexibility and reusability, you do not create questions and responses directly in a test. Instead, questions and responses reside in one or more question banks, and you build the contents of your test by drawing upon the existing questions in a bank.

The first task, when creating a test, is to ensure that the question banks and questions exist, and if not, to create them. Once the questions exist and the question bank is published, you can create a test, and add the questions required. Finally, if the test is a standalone offering, rather than one topic within a course, you must create an offering to provide access to the learners.

When preparing to create a test, ask yourself the following:

- Do the questions required already exist? If not, create questions in existing or new question banks.
- Is the test a topic in a course or a standalone offering? This determines where in the content hierarchy you create the new test object. It also determines whether you must create an offering after creating the test.
- Is the test a simple, one-section test that uses all, or the majority of, questions in a question bank? If so, create a quick test from a question bank, and modify the test properties. If not, create a test object explicitly.
- Do you want to provide random questions from a question bank each time a learner launches the test, rather than providing the same specified questions to all learners? If so, create the test yourself. You cannot use the quick test method, since this builds a test using all questions explicitly from the bank. The quick test method does not support the Rule-Based test option that dynamically extracts a given number of questions from a bank at run time.

Test Previews

When creating a test, preview the questions to see how they appear to learners, including the appearance of any HTML code in your questions or responses. The preview screen shows the questions, with the correct response indicated by an asterisk (*). It also provides the question feedback, if any, and the points allocated to each question.

The application provides a Preview option, either a button or icon, on several different screens, to preview questions at different stages, either when creating questions in a question bank, or when creating a test:

- Question Banks: Click Preview in the tabular list of question banks to preview all questions in a specific bank.
- Manage Questions: Click Preview in the tabular list of questions, within a bank, to preview an individual question.
- Test Section: Click Preview in the tabular list of test sections to preview the questions in a specific section of the test.
- Test Properties: Click Preview to preview all questions in the test.

Test Delivery

You deliver a test to your learners in two different ways:

- Topic within a course: Create your test within the structure of an online course, in the content tree. The test becomes a learning object, which the learner accesses within the course, either direct from the overview in the course details page, or from the outline in the player after launching the course. A course can contain multiple tests (if the tests are grouped within one learning object).
- Separate offering: Create your test as a top-level object within a folder in the content tree. The test becomes an individual playable object, for which you then create an offering in the catalog. When learners launch the offering, the test appears in the player. A separate offering usually consists of only one test.

Offering a Timed Test

When you create a timed test, it is usual to deliver the test as a separate offering, rather than as an embedded test within a course. Although you can created timed tests under the content, if the offering is not based on the test alone, then the administrator is not able to extend or reduce the time for individual test takers when the test is in progress.

Working with Tests

Test Creation

Before creating a test, you must have access to at least one published question bank. If the test you require is based on only one question bank, you can create a "quick test" directly from the Question Bank, and then edit the test properties, instead of explicitly creating a separate test.

A test must contain at least one test section and at least one question. When you create a test, you draw on questions from one or more question banks.

Most text fields in the test properties page support the use of HTML tags, to provide specific formatting.

A survey is simply a test that is not scored. Setting the test scoring option to Not Scored enables you to create questions to retrieve information only from learners, as opposed to testing their knowledge.

Selecting Specific or Random Questions at Run Time

For each test section, you can select exactly the questions you wish to add (pre-selected) or you can simply enter the number of questions you require but allow the test to extract a random selection of questions at run time, each time a learner launches the test (rule-based). The default is pre-selected.

Randomizing the Sequence of Sections and Questions

You can choose whether multiple sections always occur in the same sequence, or in a randomized sequence each time learners launch the test. There is a similar option for sequencing questions within a section. However, you cannot randomize questions across more than one section.

Resuming Tests

Select the Is Resumable check box for learners to resume a test if they previously exited or were logged out without submitting the test. If a learner resumes a test, the application interprets the next attempt by the learner as a continuation of the same previous attempt.

In the case of a resumed test, learners are taken to the page where they last left the test. If the time has expired for the test, learners are taken to the page that allows only submission of the test.

The Resumable Instructions are displayed each time a learner resumes a test. After reading the instructions, the learner returns to the page that was current at the time of exiting the test.

If you do not select the Is Resumable check box, the application interprets the next attempt by the learner as a new attempt.

Scoring a Test

The scoring options are percentage scored, or sum of item scores. If your test is rule-based (random questions at run time), be aware that the sum of item scores will vary if some questions have different points from others. In this case, select the option of percentage scored.

A third option, not scored, enables you to create a test that is simply a self-review, but does not result in a pass or fail grade for the learner.

If you select either the percentage or sum scoring options, you can also set the mastery score to indicate the minimum pass mark for the test. For example, using the percentage scored option, enter a mastery score of 75 to indicate a 75 per cent pass mark. Note that you do not enter the percentage sign. Using the sum of item scores option, enter a mastery score of 12, to indicate the learner must obtain at least 12 points to pass the test.

When you set a mastery score for the test, a learner passes or fails a test based on the results. If you do not define a mastery score, the application calculates the points scored, but marks the learner's test attempt as completed, rather than passed or failed.

Providing Feedback

The default type of feedback is End of Test. Learners respond to all questions before seeing any feedback. Change the feedback type to After Each Page to provide more frequent feedback (depending on the value for Questions Per Page). Change to None to provide no feedback at all, for example for certification tests.

Select Questions Inherit Feedback if you have test questions that do not have defined feedback, and you want them to inherit (and display) the section or test feedback. (The default is deselected.)

Deselect Show Correct Answers During Feedback to prevent learners seeing the correct answers when they review the feedback. This option is useful to encourage learners to retake the test. (The default is selected.)

Enter text for Correct Response Feedback and Incorrect Response Feedback, to provide different feedback for the learners' responses.

Enter Post Test Feedback to display a message to learners at the end of the test.

Limiting Test Attempts

You can restrict the number and frequency of attempts that each learner makes:

- Limit the maximum number of times that a learner can attempt the test before being prevented from launching the test.
- Specify the minimum time (in days) that must elapse between each attempt.

Timed Test Creation

To restrict the time allowed for a learner to complete a test, enter values for the duration properties of the test.

If you specify a value for Time Allowed in Minutes, you can optionally set the additional duration fields.

For example, if the time allowed is 30 minutes, you can enable the Time Remaining Alert, and display an alert five minutes prior to the end, so the alert appears after 25 minutes into the test.

The warning that learners receive is that the timer changes from blue to red.

Note: The timer resides on the server, not on the learner's client, so this message is only updated each time the browser page is refreshed. As long as the learner remains on the same page, the alert is not updated.

Changing the Time Allowed

For a test that is specified as timed, and that is resumable, an administrator may have to alter the time of the test, either to extend or shorten the time allowed for a specific learner.

You can change the time allowed for a timed test only if the test is defined as resumable, and if the test is an offering in its own right, not a test topic contained within a course offering.

The Change Time option is available from the offering related to the test. Use this option to reduce the time allowed for a test, or to allocate additional time, for example when a learner encounters a hardware problem during the test.

You can change the time of a test that a learner is attempting, or for which the time has expired.

You cannot change the time of a test that the learner has not started or that a learner has already submitted.

The Change Time option applies only to an individual learner and to the individual attempt of the test that is in progress. To alter the length of a test for all learners in the future, change the duration of the test itself.

Test and Section Management

You can delete a test, or a test section within a test, but this action is only appropriate while you are still developing and testing your tests prior to production. Once you make a test available to your learners, and at least one learner has taken the test, you cannot delete the test or section, since this affects learner performance and test statistics on your production system.

If a test becomes outdated or not valid, unpublish the test. This ensures that the test is no longer available to learners, although past performance and statistic information remains in the system.

If one section becomes outdated or invalid, but the test itself is still valid, make the section inactive, instead of deleting it.

Question Banks

Question Bank Creation

You create question banks within a content folder. A question bank must contain at least one question.

When a question bank is ready to be made available for use in a test, you publish the question bank. Once a question bank is published, you or other administrators can use the question bank to create tests, or select the Quick Test option to create a test based on all the questions in the bank.

Questions

A question consists of the question text (or question stem or prompt), plus the possible responses and feedback (if any).

Use feedback to provide replies to users taking a test. You can provide specific feedback for correct and incorrect responses to a question. This feedback typically informs the test taker if they have answered correctly, and can include a learning tip. Alternatively, the question can inherit more generalized feedback, if any exists, from the test section or test.

The feedback that you provide for a question is shown to the learner as defined in the feedback option set on the test.

Questions are contained within question banks. To work with a specific question, find the relevant question bank, and display the list of questions. You can create, edit or delete questions, or preview a question.

Question Types

The Test Builder provides five question types:

- Fill-in-the-blank (Text Response)
- Fill-in-the-blank (Numeric Response)
- True or False
- Multiple Choice (Single Correct Response)
- Multiple Choice (Multiple Correct Responses)

The text areas of questions and responses support HTML, to embed graphics, video or other links.

Changing a Question Type

When you create a question, you decide what type it is, for example multiple choice or true-or-false. Once you create the question, you cannot change from one type to another, since the style of responses depends on the question type.

The exception is for multiple choice, since there are two similar types. You can change from a multiple choice single correct response to a multiple choice multiple correct response.

Removing Questions

While you are creating a new question bank, you can delete questions that you do not require, or that you created in error.

However, once you use a question in one or more tests, and a learner has taken that test, you cannot delete the question from the question bank, because existing performance records are affected if some questions no longer exist.

To prevent future tests having access to a question, for example because it is no longer valid or relevant, you mark the question as inactive, in the question bank. Previously-created tests and existing performance records are not affected, but the question is no longer available for selection when creating new tests.

> **Important:** You must also remove the question from existing tests, if learners must not attempt that question in the future.

Responses

A response is a possible answer to a question. Questions can have multiple response options.

When you create new questions, enter response values in the Response Options region. To edit responses for an existing question, click Manage Responses in the list of questions. The page displays a list of response values. Use this page to create, edit or delete response values, or to reorder responses to change the sequence in which they appear to learners.

Managing Response Values for Different Question Types

Each question has a set of responses, depending on the question type. For a True or False question type, you cannot edit the response values. The other question types allow you to create and edit the response values.

- True or False: The two values, True and False, are not editable. Select the response value that is correct, either True or False.
- Fill-in-the-Blank: Enter one or more responses that are correct. Text responses are case-sensitive, so enter the correct response in both lower and upper case, if either is correct.
- Multiple Choice (Single Correct Response): Enter two or more response values, from which the learner must select one correct choice. Click one option button to identify the response value that is the correct response.
- Multiple Choice (Multiple Correct Responses): Enter three or more response values, from which the learner must select two or more correct choices. Select the check boxes to identify the response values that are the correct responses. Learners must select all the correct responses, and no incorrect responses, to gain the points, otherwise they receive zero points.

Removing Response Values

You cannot delete a response value if the question is already used in a test and if at least one learner has answered that question. Instead, make the response value inactive, so that it does not appear in to future learners, but performance statistics are unaffected.

Creating a Quick Test

A quick test is a quick way of creating a test. When you have created and published a question bank, click the Create Quick Test icon in the question bank list. The resulting test has a number of default properties, and contains a single test section that holds all questions (pre-selected) from the question bank.

You cannot use the quick test option to create a rule-based test, in which you display a number of questions extracted randomly from the question bank at run time. Instead, for rule-based tests, create the test object explicitly in the content tree.

Edit the test to modify the properties, for example to set the scoring option and mastery score, or to add or remove questions, before making it available to your learners in a course or as a standalone test in the catalog.

> **Caution:** You cannot edit the Question Source property. The value for quick tests is always Pre-selected.

Analyzing Test Results

Reviewing Test and Question Statistics

Statistics are available for you to analyze learners' performance for a given test or question. Statistics exist only after at least one learner has attempted the test or question.

Reviewing Test Statistics

For each test, the Test Statistics page provides a summary of learner scores for the selected test. Use the statistics to analyze both overall performance and individual attempt results. The page initially displays summary results in a tabular format, and provides an option to display a graph for each summary.

The summary statistic sections are:

1. **Score Summary:** Summarizes performance records for all learners. Each learner has one performance record that in turn is a summary of the learner's attempts. A performance record shows the score for the first Pass attempt, or the score for the first Fail attempt. A performance record is updated from Fail to Pass (including the Pass score), if a learner subsequently passes the test. However, a performance record is never updated from Pass to Fail if a learner subsequently fails the test. A performance record is not updated once the learner achieves a Pass. A learner's performance record may show a Pass with a score of 60, even though the learner achieves a Pass with a score of 70 in a later attempt.

   The User Score Summary graph displays the number of users who achieved a specific performance score.

2. **Learner Summary:** Summarizes the total number of learners who launched the test, and the total number of performance records (one record per learner). Performance records are categorized as one of the following:

   - Passed: The learner completed the test and achieved the mastery score or better.
   - Failed: The learner completed the test but failed to achieve the mastery score.
   - Completed: The learner completed the test, but the test has no mastery score, or the scoring option is specified as not scored.
   - Incomplete: The learner started the test but exited the player without submitting the test.

   The table enables you to drill down to more detailed statistics for each learner. Click the Total Learners number to view all learners, or click the Passed number to view only those learners who passed the test. The drill-down table shows one performance record for each learner. Click an individual learner name to view all attempts for the learner. An individual attempt can show a higher score than the learner's performance record, since a performance record stores only the score for the first pass.

   The User Attempt Score Summary graph displays the score for each individual attempt number. Attempts are color coded to show the day of the attempt.

   In the table, click a specific attempt number to view the learner's individual attempt details for each question in the test.

The Learner Performance Status graph shows the percentage of Passed, Failed, Completed or Incomplete performance records.

3. **Attempt Summary:** Summarizes all attempt records for all learners, not just performance records.

   The Monthly Attempt Summary graph shows the number of attempts made in each month.

4. **Question Summary:** Summarizes the total number of questions displayed to all learners in all attempts.

Reviewing Question Statistics

For each question bank, the Question Statistics page provides a summary of learners' performance for each question, across multiple tests. Statistics appear in both tabular and graphical formats. The graph shows Correct, Incorrect and Skipped totals as percentages of the total number of attempts for the question.

9

Content Import and Export

Content Import and Export Overview

The import and export utilities enable the transfer of learning objects, content files, and test objects, between this application and other learning management systems. These utilities work with XML files and adhere to various industry specifications available for sharing content and test information.

These utilities are applicable to online content only, not to offline content.

Third-party content providers often supply their content with metadata files that conform to the IMS, AICC, or SCORM specification, so you can easily import the required learning objects into learning management systems that support those specifications. Oracle Learning Management (OLM) provides a user interface, the import and export utilities, for you to load these objects simply and quickly, instead of creating the content structure manually in OLM.

Key Concepts

To enable you to successfully import or export metadata, you must understand the following key concepts:

- Creating and Managing Learning Objects, page 7-6
- Creating and Managing Test Objects, page 8-1
- Managing Content Servers, page 12-16

Content Import and Export Requirements

The import and export utilities in OLM simplifies the transfer of online content metadata, in particular the loading of third-party data, eliminating the need to create the learning structure manually within the application interface and to then link the metadata to the physical content.

When should you import metadata?

Use the import utility to import metadata into the application when the content structure exists in another learning management system, or you have purchased online content, from a third party, which consists of multiple learning objects. After importing, you can organize the learning within the course catalog and make it available to learners.

Can you import and export metadata between any two learning management systems?

You can import any content metadata into the application if the metadata information is available in XML files and adheres to the SCORM or IMS specifications. Similarly, you can import metadata that complies with the AICC specification.

You can export metadata from the application, and create XML files adhering to SCORM or IMS specifications. The export utility does not support the AICC specification.

What are specifications and why are they required?

The e-Learning community needs guidelines and specifications for managing online learning content. When content and metadata adhere to common specifications, it enables authors and administrators to create, manage and distribute online content across multiple learning management systems, without significant changes.

Content Import and Export

Metadata Import and Export

The import and export utilities enable the transfer of learning objects, content files and test objects. These utilities work with XML files and adhere to **IMS, Shareable Content Object Reference Model (SCORM),** or **Aviation Industry CBT Committee (AICC)** specifications. These specifications ensure that you can reuse content and metadata across various learning platforms without any significant changes.

You can import and export the following types of metadata:

- **Content:** When you export content metadata, the application creates and stores the information in XML files, zipped in a .zip or .jar file. The XML files include the required information to create learning objects (excluding tests) and the content structure.

  When you import content metadata, the application creates learning objects from the information in the XML files. You can also import the actual content files along with the content metadata.

- **Test:** You can import and export tests between this application and other learning management systems that adhere to the IMS Question and Test Interoperability (QTI) specification. The test import and export utilities can import and export tests, test sections, questions and responses.

  When you import tests, the application creates test objects based on test metadata available in XML files, that adheres to the IMS QTI specification.

- **Content and Assessment Hierarchy:** This option is OLM-specific, to transfer all learning objects, both content and test objects, between different instances of OLM. That is, you can export a learning object hierarchy that includes tests, and then re-import it back into OLM as a one-step import process, instead of importing each type of object separately and then reconstructing the hierarchy.

Supported Specifications

Adhering to specifications ensures that users can access your content and test metadata across learning platforms without any significant changes.

The application supports the following set of specifications for importing and exporting content and test metadata:

- IMS
- SCORM
- AICC

IMS

IMS is a consortium of learning institutions and vendors. IMS formulates standards for learning servers, learning content, and the enterprise integration of these capabilities. IMS promotes the widespread adoption of specifications that enables distributed learning environments and content from multiple authors to work together. IMS develops and promotes open specifications for:

- Facilitating online distributed learning activities, that is, locating and using educational content
- Tracking learner progress
- Reporting learner performance
- Exchanging student records between administrative systems

For more information about IMS, see the IMS Web site at: www.imsproject.org

SCORM

Shareable Content Object Reference Model (SCORM) is a specification that was developed by the Advanced Distributed Learning (ADL) group. ADL collaborates with governments, academia, and the industry to accelerate effective online learning.

SCORM is a reference model that defines a Web-based learning content model. It is a set of interrelated specifications that are designed to enable interoperability among various content providers.

SCORM combines features from other specifications such as IMS and Aviation Industry CBT Committee(AICC). These specifications enable the reuse of Web-based learning content across multiple environments and products.

For more information about SCORM, see the SCORM Web site at: www.adlnet.org.

AICC

AICC is an international group of technology-based training professionals who create guidelines related to computer-based training (CBT) for the aviation industry. Because these guidelines apply to any CBT, they are also used by other industries for more cost-effective, efficient, and sustainable training.

The AICC guidelines for computer-managed instruction (CMI) help you create content that communicates with the broadest base of CMI and learning management systems (LMS).

More details about AICC are available from their website: www.aicc.org.

Content Import and Export

OLM can import and export content metadata adhering to IMS, SCORM, or AICC (import only) specifications.

The application provides a separate OLM-specific utility for importing or exporting a content hierarchy that includes both learning objects and test objects.

> **Note:** You cannot import or export values in descriptive flexfields. The import and export utilities ignore descriptive flexfields.

Importing Learning Objects

You can import learning objects by using an XML file stored in a zip or jar file, that adheres to IMS, SCORM, QTI, or AICC specifications.

The import utility supports both the creation of new objects and changes or deletions to existing objects. An option on the import utility screen specifies whether the utility attempts to update an existing object by matching an identifier value. If you specify that option, and the utility finds a matching identifier during the import process, the existing object is updated. If the utility does not find a match, it creates a new object with a different unique id.

If the site administrator has set up an OLM content server, page 12-16, you can import the actual content files to that server, as well as creating the content metadata.

Consider the following points before using the import utility:

- Place the import files in the correct location, in a directory to which you will have the necessary access when importing the files.
- Ensure that you have access to an OLM content server before attempting to load content files, if using the SCORM 1.2 option.

Specifications for Importing Learning Objects

You can use one of the following types of specifications for importing learning objects:

- **Import Content and Assessment Hierarchy:** Imports all learning objects (metadata only) and all assessment tests contained within the selected hierarchy or folder

  Note: Use this option for importing metadata from one OLM instance to another OLM instance.

- **SCORM 1.2 Content Aggregation:** Imports both content metadata and content files
- **AICC Metadata:** Imports an AICC specification file

Creating Learning Objects

When you import content metadata, the application creates learning objects from the information in the XML file. Learning objects are database objects that represent, and provide information about, your physical content files. Imported objects appear in the content tree, just as any other learning objects or test objects that you create directly in the application. The XML file must include the required information to create a learning object, specifically Identifier, Title, Tracking Type, Content Type, Language, and Starting URL. Your XML file can also include optional information, such as the learning object's description.

Updating Learning Objects

Update existing learning objects by matching the identifier values (External ID and the External Source tags) found in the XML import file. Select the "Attempt to Update the Matching Object" check box for updating existing objects. The check box specifies whether the import always creates a new object, or first attempts to update an existing object. It is checked by default.

To ensure that the import utility always creates a new object, even when the identifier is the same, deselect this check box. In this case, the import process creates duplicate objects.

Updating Attribute Values

To remove an existing value entirely from an optional attribute when updating learning objects, ensure that you include the relevant XML tag in the content metadata (XML file), but with a blank, or "empty", value. If you do not include the tag in your XML file, the existing value is not changed.

To update only some values for the learning object, but leave others unchanged, ensure that you exclude the XML tags for those optional attributes that you do not want to update.

You cannot update a mandatory attribute to be blank. Mandatory attributes are indicated on the learning object property page by an asterisk. Because these attributes always require a value, a mandatory XML tag that has no value is ignored during the import process.

Exporting Learning Objects

You can export content information at a folder or individual learning object level. When you export learning objects, the utility creates and stores the information in XML files, zipped in a .zip or .jar file. This information includes both required and optional information that the content metadata contains.

If the site administrator has set up an OLM content server, you can export the actual content files from that server, as well as exporting the content metadata.

Specifications for Exporting Learning Objects

You can use one of the following types of specifications available in the Export: Specifications page for exporting content metadata:

- **Export Content and Assessment Hierarchy:** Exports all learning objects (metadata only) and all assessment tests contained within the selected hierarchy or folder
- **SCORM 1.2 Content Aggregation:** Exports content metadata

> **Note:** To export the content files associated with the learning objects that are exported, select the "Download physical content files with metadata" check box in the Export: Specifications page.

Test Import and Export

You can import and export test objects adhering to the IMS Question and Test Interoperability (QTI) specification. When you export tests, the utility creates and stores the information in XML files, zipped in a .zip or .jar file. This information includes both required and optional attributes that the test metadata contains. When you import test metadata, the application creates test objects from the metadata information available in the XML files.

> **Note:** You cannot import or export values in descriptive flexfields. The import and export utilities ignore descriptive flexfields.

Importing and Exporting Tests

You can import and export the following test components in OLM:

Test Component	Properties of the component that are imported
Test	Name, type, feedback message, time allowed, test instructions
Sections	Name, feedback message, number of questions
Questions	Question text, score, question type, feedback message
Responses	Response text, correct response

Updating Test Objects

You can update existing test objects by matching the identifier values (External ID and the External Source tags) found in the XML import file. When you select the "Attempt to Update the Matching Object" check box for updating an existing test object, it updates only the test object, but not the test sections and questions inside. The External ID and External Scr tags are not available for test sections and questions. So, if you import the same test more than once, the import process updates the same test object, as opposed to creating a new test, but it creates new sections and questions every time.

Specifications for Importing and Exporting Test Objects

OLM supports the following specification for importing and exporting test-related objects:

IMS QTI 1.01: Imports or exports assessment test objects contained within the selected hierarchy or folder

> **Note:** You can also import and export tests along with other learning objects as part of a content hierarchy by using the Import Content and Assessment Hierarchy option.

Content Hierarchy Import and Export

To import and export a content structure, use the Import Content and Assessment Hierarchy option. This is different from the other specifications, which only import or export tests (QTI specification) or learning objects (SCORM specification).

This option is applicable for exchanging metadata between OLM applications only. You cannot import the metadata that it generates into any application other than OLM.

The Import Content and Assessment Hierarchy option:

- Loads the learning objects, including tests, as part of a content hierarchy
- Creates learning objects by reading an XML file (conforming to IMS and SCORM specifications) stored in a jar file or a zip file
- Creates test objects by reading an XML file (conforming to IMS QTI specifications) stored in a jar file or a zip file

The Export Content and Assessment Hierarchy option:

- Exports the learning objects, including tests, as part of a content hierarchy

- Creates a jar or zip file that contains XML files for learning objects and a QTI file for test objects.

Content Upload

A separate option in the application uploads physical content files to an OLM content server, without creating new learning objects in the content structure. Use the Upload feature on the learning object, or folder, property page to upload only the content files, when the learning objects already exist.

Options for Uploading

You can upload a single content file or multiple content files to the OLM content server. To upload multiple files, you either repeat the process for each individual file, or create a zip file to upload the files all at one time. The application automatically unzips the contents of a zip file on the OLM content server. The Content Location properties of the learning object are updated with the new location.

> **Note:** Your instance must already have access to an OLM content server to perform the content upload. If your instance does not have an OLM content server available, contact your site administrator.

Importing Objects

You import objects on the Content tab. You can import learning objects or tests into a folder, or a parent learning object or test. Importing into a parent object creates child learning objects or test objects within the structure of the selected parent object.

Steps to import an object:

1. Select the folder or learning object within which you want to import the new objects.
2. In the relevant property page, click Import. The Import File Type and Location page is displayed (except for individual test objects, since there is only one specification option, IMS QTI).
3. Specify the relevant import file and options. For more details, See: Using the Import File Type and Location page, page 9-9

   > **Note:** For two options, IMS QTI or Content and Assessment Hierarchy, an additional page, Import: Select Question Bank, is displayed. Select the name of the question bank that you wish to hold the questions for your assessment tests. Alternatively, select Create New Question Bank, which creates a new bank and imports all questions into that bank.

4. This step applies to SCORM imports only, not QTI. Use the Import: Content Location page to identify the location of the associated content files:
   - **Define path for URL access to content:** specify a starting URL that will be prefixed to all existing content locations in the metadata during import. This is applicable if the metadata contains only a directory and file location. This value will not overwrite a complete URL.

- **Specify content server location:** specify a valid OLM content server and directory to upload physical content contained within the import file to an existing OLM content server. This OLM content server must already be set up within the application.
- **Retain learning object content location:** select this option to retain the value in the location specified in the import file.

5. In the Import: Analysis Results page, view the results of the application validation of your file, and identify any errors that require attention. This page shows the actions that will be performed if you continue with the import process.
6. If you continue the import, an alert is displayed indicating the objects are being imported. If you click Cancel in this alert, the objects are not imported, and you remain on the Analysis Results screen.
7. The Import: Success page is displayed when the import process is complete.
8. Click View Log to display the Import: Log page, which shows the actions that were performed during the import process, with any errors or warnings.

Using the Import File Type and Location Page

In the Import File Type and Location page, specify the relevant import file and options.

1. Specify the file and the relevant specification of that file. If the file does not meet the specification that you select, an error message is displayed when you attempt to import the file.

   Tip: First select a specification and then specify a file name. If you select the specification after specifying the file, you must re-enter the file name.

2. Select the applicable tracking type option:
   - **Auto:** The application automatically tracks and records performance at the individual topic level. CMI calls, which can exist within the content, are ignored. This is the default tracking type for importing via the SCORM 1.2 specification. Not valid for IMS QTI or AICC specifications.
   - **CMI:**The application recognizes CMI tracking function calls that exist within the content. The application also records performance at the individual topic level. Choose this option when your content contains CMI function calls. Not valid for AICC specification.
   - **HACP:**The application communicates through the HACP protocol. This is the default tracking type for importing via the AICC specification. Not valid for other specifications.
3. The final option on this page is a check box that specifies whether the import always creates a new object, or attempts to update an existing object. By default, the check box is selected. The application will attempt to update existing objects, by matching the identifier values found in the XML import file. To ensure that a new object is created, even when the identifier is the same, select this check box. Be aware that deselecting this check box can result in "duplicate" objects being created. This check box is not applicable, and will be ignored, for the AICC specification.

Exporting Objects

You export objects on the Content tab. You can export learning objects or tests from a folder or individual learning object. When you export learning objects or tests, the application creates and stores the information in XML files, zipped in a .zip or .jar file.

Steps to Export an Object:

1. Select the folder, learning object or test object that you want to export.
2. In the relevant property page, click Export. The Export: Specifications page is displayed (except for individual test objects, since there is only one specification option, IMS QTI).
3. In the Export: Specification page, select the specification on which the export file is based.
4. You will be prompted to save the .zip file. You can change the default filename and save to a directory.

Uploading Content

To upload the content files to an OLM content server:

1. Select the learning object whose content files are to be uploaded.
2. In the relevant property page, click Upload.
3. In the resulting page, enter the details required to upload the content to an OLM content server. The page displays the following fields:
   - **Content Server:** The Content Server list displays the list of OLM content servers available to host your content. You can only select from the list of OLM content servers displayed. This ensures that your content is hosted by an OLM server. This list is populated from the OLM content servers created in the Setup tab in the application. If you do not have an OLM content server available, or require an additional OLM content server, contact your site administrator.
   - **Directory:** Use this field to specify the directory on the OLM content server, where the zip file contents will be extracted. Enter the highest level directory in the **Directory** field as necessary, and use the **Initial file** field to put in the sub directories eventually leading to the starting file for that learning object.
   - **Initial File:**Use this field to specify the file that is launched when the learning object is accessed in the Player.

     > **Note:** If you do not know the initial file name at the upload stage, you can enter a dummy file name and update the property later.

   - **File Location:** You can upload a single content file or multiple content files to the OLM content server. To upload multiple files, you can upload them one at a time, or put them in a zip file, and load them all at once. You specify the location of the content file or the zip file in this field. If it is a zip file, the application automatically unzips the contents of this file in the specified directory on the OLM content server. Your content files are transferred from your local directory onto the OLM content server.

4. After the upload process is complete, the learning object Content Location properties are automatically updated, to point to the OLM content server.

10

Learner and Manager Interfaces

Learner and Manager Interfaces Overview

Managing Your Learning through Learner Self Service

Oracle Learning Management (OLM) provides a learner interface that is a central location for finding all your learning. The learner interface has the following pages:

- **Home:** The Current Learning tab on the Home page displays details of courses in which you are currently enrolled. You can view details of offline courses, play online courses if applicable. You can view learning paths in which you are subscribed, and create your own personal learning paths. Use the Requested Learning page to view courses that are pending for enrollment.
- **Catalog:** This page displays courses in which you are able to enroll. The catalog provides a list of categories under which courses are grouped. Click a category name to view its subcategories, courses, and learning paths. Click a course name to view the offerings and classes available for the course. You can enroll in a class or cancel an enrollment.
- **Learning History:** This page displays details of courses that you have completed or cancelled, or that have expired. A class expires if an end date has been defined at the course or class level and the date has been reached.

Use the Search window to search for categories, courses or learning paths based on various criteria such as name, description, or location.

Managing your Employees through Manager Self Service

The Manager interface is almost identical to the Learner interface. The only difference is that the manager first selects the specific employee for which to view the learning. Every manager is also a learner, so managers can take learning for themselves.

Use the Manager self-service to set specific learning goals for your employees and track their learning progress. You can define and manage the training requirements and the corresponding learning paths for your employees. This service is available to you only when you log in to Oracle Applications as a manager. Using the Manager Self Service, you can:

- Access the learning details of your employee. This includes the employee's past, current and future learning.
- Enroll or unenroll your employee in a class.
- Enter or alter external learning records for your employee.

- Create a learning path for your employee.

  Note: When you log in as a manager, you see the list of employees available to you according to the HR security group.

Key Concepts

You must understand the following key concepts to manage your learning, and that of your employees, effectively:

- Enrollment, page 3-1
- Class and Enrollment Statuses, page 6-4
- Learning Paths, page 2-8

Learner and Manager Interfaces Requirements

Employees or managers can set learning goals for themselves, or their employees, so that they become competent enough to take on new responsibilities and roles. Use the learner and manager user interfaces to define and track the learning needs.

Can a learner record external learning information?

Yes. A learner can use the External Learning page to record the learning details of courses provided by an external training provider, which are not part of the OLM catalog. Learners and managers can record these external learning for information purposes, to retain a comprehensive learning history.

When does a class move to Learning History?

Any class, online or offline, that has passed its end date automatically moves to the Learning History (expired section).

When a learner completes an offline class, for example when an administrator marks an instructor led class as completed by the learner, the class automatically moves to the Learning History (completed section).

When a learner completes an online class, the class remains on the learner home page, so that the learner can easily access the class again. The learner selects Move to History to move an online class to the Learning History (completed section).

Can a learner update a learning path created by the manager?

No. A learner cannot update a learning path created by the manager, as only the manager has the rights to update the learning path. This ensures the manager has control over the learning that the manager determines is necessary for the employee.

Can a learner unenroll from a class after requesting enrollment?

Yes, after the learner is enrolled, but the application disables the Unenroll button until the manager has approved the request for enrollment.

Can a learner enroll in a class when the learner has already enrolled in or has requested another class that has overlapping dates?

Yes. A learner can enroll for multiple courses that fall within the same date range.

Can a manager play the online course to which an employee is enrolled?

No. In the Manager Self Service screens, a manager can view the employee's current learning and learning history, but cannot play an online course in which the employee is enrolled.

Learner and Manager Interfaces

The Learner Home

You can use the learner home page to manage your learning needs quickly and effectively. It provides a snapshot of your current learning, where you can view the enrollment details for offline classes and play online courses for which you have enrolled, as well as learning paths in which you are subscribed.

A learning path can be created by an administrator, and appear in the catalog, or created by your manager or by yourself. Use the home page to create, update, and unsubscribe from your own personal learning paths.

Some courses can require the approval of your manager before you enroll. For these courses, you request approval instead of enrolling immediately, and await confirmation of approval and enrollment.

The requested learning details include a list of enrollments pending manager approval and classes that are currently waitlisted.

Announcements help circulate important messages or warnings among all the learners. The Announcements bin notifies the learner of the latest announcements. Select a specific link in the bin to view more details of an announcement.

> **Note:** You define announcements at the business group level and so the announcements are accessible to all learners in the current business group.

The home page also displays a list of notifications, if you have any. You can view more details and take whatever action is necessary.

Use the Browse Catalog section to find information about categories. This includes details of associated subcategories, courses, and learning paths.

The Learner's Catalog View

Use the catalog page to find courses, self enroll in courses or request enrollment from an approver. The catalog provides one central location to find all learning, whether offline or online, synchronous or asynchronous (self paced).

Searching and Browsing the Catalog

Use the Search window to search for a course or a class when you have some general knowledge about the title or topic of the learning event you want to locate. Note that search and browse show only those learning events to which you have access. Use the Browse Catalog window or the catalog page to locate learning by category.

Click a category to view the subcategories, courses and classes within that category. From the class details page, view the class details such as the start date and time, location, duration, class and enrollment status. The class status provides information on the current availability of seats calculated on current enrollments and the total class capacity. The class status can be one of the following:

- **Normal:** A scheduled class that has both start and end dates defined, and for which the maximum capacity has not yet been reached. Your enrollment status is **Placed** when you enroll in this class, or **Requested** if your enrollment is awaiting approval.

- **Planned:** A class for which the class dates have not been confirmed. The class information exists only to assess interest in the class if it were available. Your enrollment status is **Requested** when you enroll in this class.
- **Full:** A class for which the maximum capacity has been reached. Your enrollment status is **Waitlisted**, when you request enrollment in this class. You are enrolled (placed) only if another learner cancels his enrollment and if you are at the top of the wait list.
- **Closed:** A class that is closed for further enrollments. You cannot enroll in this class.
- **Cancelled:** A class that has been cancelled.

Enrolling and Unenrolling in a Class

When you find the class that you want in the catalog, click Enroll to enroll in the class. If the class allows self enrollment, then you receive either a confirmation that you have successfully enrolled, or a message indicating that you are wait-listed for the class, based on the availability. If the class requires approval, then your enrollment request is sent to an approver. Your manager is the approver by default.

You cannot enroll in a class in which you are already enrolled; the Enroll icon is disabled, and appears grayed out.

To view the enrollment details or unenroll from the class, click the class name. You can unenroll from a class only if you enrolled yourself. You cannot unenroll from a class in which either your manager or an administrator enrolled you.

Learning History

Use the learning history page to view your past learning details, for courses that you have completed, or that have expired or been cancelled, or that you have chosen to move from your home page to the learning history.

> **Note:** To move a course from the home page to the learning history page, click Move to History for a specific course on the home page.

The learning history page displays up to four sections, depending on the setup of your application: Courses, Learning Paths, External Learning, Expired Learning.

In the courses section, you can continue to play completed online courses from the learning history page. You cannot play online courses for which your enrollment is cancelled.

The learning path section includes past learning paths from all sources, whether you created the learning path yourself (learner) or subscribed to a manager or catalog learning path.

The expired learning section displays the courses that have passed their end date. You were enrolled in a scheduled class but attendance has not yet been registered or your online self-paced class has expired and can no longer be played.

External learning is learning that was conducted by a supplier outside the organization, and that is not a recognized course within the application. If applicable, either you or your manager can enter external learning records.

11

Legacy Training Administration

Legacy Training Administration Overview

The topics in this area primarily address the need for enterprises who have previously run Oracle Training Administration (version 11.5.9 and before) to access windows and data fields made obsolete by Oracle Learning Management.

For example, learning paths have replaced programs, but you may have scheduled programs that you want to retain or view after migration. The catalog and catalog objects have obsoleted activities and events as well as the OTA-iLearning integration, catalog categories have replaced OTA categories, and so on.

> **Warning:** If your enterprise has never used OTA, you should not use the functionality covered in this Legacy OTA area. Instead use the windows and pages available from your Oracle Learning Management Administrator menu.

Legacy Training Administration Requirements

Who should use Legacy Training Administration functionality?

Only enterprises who have previously run Oracle Training Administration (version 11.5.9 and before) and need to access windows and data fields made obsolete by Oracle Learning Management should use the functionality described in this chapter.

> **Warning:** If your enterprise has never used OTA, you should not use the functionality covered in this Legacy OTA area. Instead use the windows and pages available from your Oracle Learning Management Administrator menu.

Legacy Courses

Legacy Courses

> **Warning:** If your enterprise has never used OTA, you should not use the functionality covered in this Legacy OTA area. Instead use the windows and pages available from your Oracle Learning Management Administrator menu.

To enable you to design and build all your courses, OLM provides these components:

- Courses
  - Classes based on a course
  - Programs (of classes)
  - Sessions
- Class Types, Concurrent Versions, and Versions
- Generic information for a course
- Categories
- Competencies
- Resources
- Class types you can create
- One-Time and Development Events

Legacy Course Model

To save you from entering the same (or similar) information each time you schedule a class, you can hold generic information at course 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 a class.

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

Money and Training Units

You can create price lists in:

- Monetary terms (for example, in a particular currency)
- Training units

A *training unit* is a way of pricing a course not in monetary terms. For example, you can express the value of a course in instructor time. You might define the training unit as Half an Hour, so that a full-day class costs 16 training units, at ten dollars per unit.

To use prices as training units, you 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 instructor time.

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

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

Next, to charge a customer using training units, you create an enrollment agreement (of the type Prepurchase) based on the price list you created. Enter the number of units that you want. In our example, this is 16 (as the unitary amount). The application then calculates 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 classes. 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 class
- All classes on a price list
- All classes in a package
- All classes scheduled for one course

The standard price to be discounted is the one defined for the class or, in the case of agreements based on a price list, the amount defined on the price list.

You can limit the agreement to a maximum number of places per customer for each class or for all classes 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 class, 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 they can enroll under the agreement.

Prepurchase Agreements

A prepurchase agreement is an agreement with a single customer, based on a price list. The customer agrees to spend a certain sum of money (or training units) on classes 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, which is the amount purchased minus the sum of all the finance lines on a Prepurchase Use finance header that references the agreement.

If the agreement allows the customer to carry a negative balance, you can specify the amount by which the customer can go into overdraft.

Creating a Course

Use the Courses window to create training courses.

> **Note:** Courses (RCOs) imported from Oracle iLearning prevent data entry into several fields in the Courses window. To change information such as Course Name, Description, Audience, and Language, you must change the RCO from within OiL.

To create a course:

1. Enter a type and description for the course.
2. Uncheck the Concurrent Courses box if you want to prevent the creation of multiple courses of this type with overlapping validity dates. If you uncheck the Concurrent Courses box, you cannot create a course with validity dates that overlap another course of this type.
3. If you are using Oracle Order Management to manage external learning, enter your inventory organization and the inventory item to which you want to link the course. OLM automatically populates the Name field with the item description you gave in the Oracle Inventory module.
4. If you have not set up the course in Inventory, enter a name and description for this course. It is this name (not the course type name) that you see elsewhere in OLM.
5. Enter the dates for the course. You must enter the start date, but the end date is optional.

   > **Caution:** If you end-date the course, you must enter an end date for the associated resources. This end date must occur on or before the end date of the course.

6. Enter the target audience and the course objectives.
7. Select the supplier of the course.
8. Select the organization that sponsors (administers) the course, and select the name of the person responsible for it.
9. Select a language and status for the course, if appropriate.

   The status is for information and reporting only. Use the validity dates, not the status, to control whether learners can create classes for the course.
10. In the Success Criteria field, select the measure you use to determine successful completion of the course (such as "Satisfactory Attendance", "Pass Examination", or "Positive Appraisal").
11. Check the Allow Expenses box if you want to allow internal learners to claim expenses against classes scheduled for this course.

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

12. Enter the minimum and maximum number of learners required to run the course, and the maximum number of internal learners. These numbers provide a default when you create classes for the course.
13. Select a currency and enter the budget for running classes for this course if you want to hold cost information. You can also enter the actual cost.
14. Enter a default duration for classes based on the course.
15. Select the type and amount of professional credits that students can receive upon successful completion of this course.
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 courses deliver.

  See: Entering Competencies Delivered by a Course, page 11-5
- **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 a Course, page 11-6
- **Entering Required Resources:** You can specify resources that are required or useful to run classes for a particular course version.

  See: Entering Resources Required for a Course, page 11-6
- **Copying Objects:** You can copy objects from an existing course into a new course.

  See: Copying a Course, page 11-7

Entering Competencies Delivered by a Course

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

Use the Competency Types window to enter the competencies and proficiency levels that your training courses are expected to deliver. You can then update a person's Personal Competency Profile after they have successfully gained the competency.

To enter the competencies delivered by a course:

1. Enter or query the course in the Courses window.
2. Choose the Competencies button.
3. From the Competency Types window, select Student Competency.
4. Select the competency delivered by the course.
5. Optionally, for each competency, select the proficiency level delivered by the course.
6. Enter the dates between which the competency 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 course, then save your changes.

Entering Competencies Required of a Trainer

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

To find trainers qualified to teach a course, see Finding Specific Locales and Trainers, page 11-54.

To enter the competencies required of a trainer:

1. Enter or query the course in the Courses window.
2. Choose the Competencies button.
3. From the Competency Types window, select Trainer Competency.
4. Select a competency required to teach the course.
5. Optionally, select the proficiency level you require of the trainer.
6. Enter the dates between which the competency 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 course, then save your changes.

Entering Special Information Types Delivered by a Course

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

If you have set up special information types, you can enter information about the skills that your courses 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 a course:

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

Entering Resources Required for a Course

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

To enter the resources required for a course:

1. Enter or query the course in the Courses 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 course.
5. Check the Required check box to require the resource or resource type and to enable automatic resource booking.

   See Booking Resources, page 11-51
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 course.
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.

   > **Warning:** If you have end-dated the course, you must enter an end date for the associated resources. This end date must occur on or before the end date of the course.

   Ensure that the dates you enter cover a wide enough period to enable you or other learners to book the resource for classes in the future.
9. Continue to enter useful or required resources for the course version.
10. Save your work.

Copying a Course

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

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

To copy an existing course:

1. Enter or query the course type for which you want to create a new course.
2. Ensure that the Concurrent Courses check box is checked.
3. Choose the Copy Objects button.
4. Enter the name of the course you want to copy from and the new course 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 course, 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 course, if required.

Ending a Course and Entering the Next Course

You can end a course by entering an end date. You cannot create scheduled classes for a course after its end date.

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

To end a course and enter the next course:

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

   Oracle Learning Management 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 Course, if this is later.

Searching for Classes

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

This window opens automatically when you choose Find from the Find Classes window. It also opens when you open the Student Enrollments and Resources Bookings windows, to help you find the classes for which you want to enter enrollments or bookings.

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

You can combine the following criteria to find the classes that best match your learner's' requirements.

- Date

  Classes that are currently enrolling, or starting on or after a certain date
- Resource

  Classes taking place at a given room, or using a particular instructor or other resource
- Training center or location

  Classes under the control of a given training center, or held at a specific location
- Customer, supplier, or sponsor

  Classes set up for a customer, provided by a particular supplier, or sponsored by a particular organization
- Course, category, or category type

Classes scheduled for a certain course or for all courses in a selected category or category type

Choosing the Fields to View in the Search for Class 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 class, program, or development event

Course: the training course on which a scheduled class is based or for which a development event is scheduled

Attended: the number of learners who have attended the class.

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

Center: the location where the class takes place

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

Costing Currency: the currency in which the course was priced

Currency: the currency in which places on the class 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 class is scheduled to run

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

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

External Attended, External Placed, External Requested, and External Waitlisted: the number of external learners enrolled in the class and with the specified status

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

Language: the language in which a scheduled class is delivered

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

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

Maximum Attendees: the maximum number of learners allowed to be Placed in a scheduled class.

Minimum Attendees: the minimum number of learners allowed to be Placed in a scheduled class.

Parent Class: for sessions only, the scheduled class of which the session is a part

Placed: the number of learners placed in the class

Price Basis: pricing information for scheduled classes 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 class is part of the program displayed in the Program Title field

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

Public: a check mark indicates that a scheduled class 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 classes only

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

Requested: the number of learners who have requested to attend the class.

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

Sponsor: the organization responsible for the class

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

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

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

Title: the name or number identifying the class

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

User Status: the user-defined statuses for the class (held in the Lookup CLASS_USER_STATUS)

Vendor: the organization supplying the class; for scheduled classes and one-time events only

Venue: the primary locale booked for a scheduled class, session, or development event; a venue is a room or other area within a *Location*

Waitlisted: the number of learners on the waiting list for the class

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

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

Viewing Course Categories in the Search for Class Window

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

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

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

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

1.

Creating a Price List in Training Units

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

Step 1 - Add Lookup Types and Values, page 12-5

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. Select the Default check box to set the prices on this list as the default standard price for classes.
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. In the Unit field, select the type of training unit, such as Half an Hour.
7. In the Unit Price field, enter the value of one unit, such as 10.00.
8. Save your work.

Step 3 - Create a Finance Header, page 5-5

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

Step 4 - Create a Prepurchase Agreement, page 11-13

Create an enrollment agreement of the type Prepurchase Use.

1.

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 4-4
- If the agreement is based on a package, create the package category
- If the agreement is based on a price list, create the price list, page 5-13

Step 2 - Create a discount agreement:

- Enter a name to identify the agreement.

- 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.
- 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.

- Select the type Discount.
- Select the Basis of the agreement. The agreement can apply to one class only or all classes scheduled for:
- Enter the start and end dates to restrict the classes covered by the agreement. You must enter an end date if the course on which it is based has an end date. If you selected a class as the basis of the agreement, these dates are automatically set to the class dates.
- You cannot use the agreement for classes 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 course, if you have specified one
- Enter the percentage discount to be applied to each price

Step 3 - Restricting the Number of Places

- 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
- Save your work.

1.

Creating a Prepurchase Agreement

Create prepurchase agreements in the Enrollment Agreements window.

Step 1 - Create the Customer, page 4-4.

Step 2 - Create a Price List on which the agreement is based, page 5-13.

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, OLM 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 11-13.
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.

Creating a Prepurchase Payment Finance Header

The finance lines that show the amount of learning a customer learner 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 Pre-Purchase Payment.
2. Select the organization that is raising the header in the Raised By field.

3. Select the customer learner and select a contact and an address for the customer.
4. Select the appropriate payment method.
5. Save your work.

Deleting an Agreement (Prepurchase and Discount)

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

If there are finance lines associated with the enrollment agreement, you must 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 5-8 for more information.
2. Query the enrollment agreement you want to delete.
3. Select Delete Record from the Edit menu.
4. Save your work.

Legacy Classes and Events

Classes to Create

Warning: If your enterprise has never used OTA, you should not use the functionality covered in this Legacy OTA area. Instead use the windows and pages available from your Oracle Learning Management Administrator menu.

Classes you can create include:

- Scheduled classes--training classes that you schedule and into which you enroll learners
- Programs of related training classes
- One-time classes--unique or informal events
- Development events--to enable you to design and prototype new training courses
- Self-Paced classes--classes your employees can enroll in and take over the Web

  Note: You can create Self-Paced classes only in Oracle iLearning, then import them into OLM.

You can also restrict a class to internal employees or customers.

Programs

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

You might have a number of training courses that you regularly run as a program. If so, you can categorize these courses 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 a class for each course in the category.

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

Why Set Up Programs?

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

You can then enroll learners onto a program and choose whether or not to enroll them onto all classes automatically.

You can also charge learners for the whole program rather than the individual classes.

See: Programs of Classes, page 11-15.

How Do You Create a Program?

You create a program by selecting a category of courses, creating a class for each course in the category. You can then customize the program by:

- Deleting some of these classes
- Adding repeat classes if a course runs more than once in the program
- Adding classes based on other courses
- Rearranging the sequence and dates of classes within the program

Subgroups

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

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

Automatic Enrollment

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

Program Pricing

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

Program Customization

Classes within a program are not restricted to courses 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 classes from the regular program and add any number of additional classes.

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

Program and Classes Status

If you create a program with a status of Normal, you can include only classes 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 classes 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 learners onto the classes later. If you are not assigned to the organization that is administering the program, you can neither update nor delete the class, nor enroll learners in the class.

See: Organization Security, page 12-30

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 class
- Conferences
- Team ’away’ days
- Seminar
- Kick-off meeting

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

See: Creating a One-Time Event, page 11-24

One-Time (One-Off) Events and Resources

If you need to create a one-time event and book resources for the event, we suggest an alternative solution. Create a course, called ’Seminar’ (or something similar), and create a class 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.

Development Events

If you want to use Oracle Learning Management to schedule and manage the development of new training courses, or to enhance existing courses, 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 classes. For example, you can set a budget for the development event, then allocate resources and calculate the actual costs for the event.

You can also cost the event in detail by booking resources down to the minute.

> **Note:** You cannot enroll customers into development events.

Cost Analysis of Classes

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

You track classes, resources or resource bookings through OLM 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 classes), you can itemize the expenses in Project Accounting, and invoice them through the standard Project Accounting (PA) to Accounts Receivable (AR) interface.

Restricted Classes (Internal)

You can restrict enrollments in a class 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 a class.

> **Note:** Only classes 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 class, but you want to prevent administrators from all other organizations from attending, you could set up the following class 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.

Scheduling a Class

Use the Scheduled Class window to create new scheduled classes based on courses. To create Self-Paced classes, page 11-25, use the Self-Paced Class window.

To schedule a class:

1. Enter a title to identify the class, or leave the Title field blank if you want OLM to generate a number when you save the class.
2. Select the course you want to run. Certain information (such as the status and the course duration) defaults from the course, but you can override it.
3. In the Training Center field, select the training organization that controls the location of the class.

4. In the Location field, select the location where the class is to run.
5. In the Owner field, select a person who is to be responsible for the class administration.

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

6. Enter the start and end dates. You leave the dates blank only if you want to create a class with the status of Planned. You might want to do this if you are gauging demand for the class.

   If you do not enter dates, the class cannot attain the status Normal and you cannot select an enrollment agreement when enrolling learners in the class.
7. In the fields next to the Start Date and End Date fields, enter the start and end times (in the format 14:00 for 2 pm), if you want to create sessions for the class. 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 class, OLM 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 Class:

1. Select your own organization as the sponsoring (administering) organization.
2. Check the Secure check box.

Making the Class Part of a Program:

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

Restricting the Class to Customers or Employees:

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

Entering Administration Details:

1. Select a status for the class. You can also select a default user status.

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

   See Class and Enrollment Statuses, page 6-4.
2. Enter enrollment dates to define the period in which you can create new enrollments for the class.

3. Enter the minimum and maximum number of learners who can enroll in the class. OLM automatically sets the class status to Full when enrollment reaches the maximum.

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

Entering Project Details:

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

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

Entering Price Details:

1. Select the price basis for the class:
   - Customer-based means that you plan to charge customers associated with the class a block price for a certain number of enrollments. If you select Customer, you must associate one or more customers with the class and enter enrollments in the Customers for Restricted Class window.
   - Student-based means that you plan to charge a price for each student enrollment.
   - No charge
2. Enter the price basis details for the class. Ensure that the finance line uses the same currency as the price basis for the class:
   - 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 class in the Customers for Restricted Class window.
   - If the price basis is Student, you can select a currency and a price. This price becomes the standard class 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 class.
3. Save your work.

What to do Next:

- **Restrict an Internal Event:** You can restrict an internal class to selected employees. Press the Assignments button.

  See: Restricting an Internal Class to Selected Employees, page 11-29.
- **Enroll Customers in Secure Customer-Based Classes:** You can enroll customers in secure customer-based classes.

  See: Enrolling Customers for Restricted Classes (Secure Customer-Based), page 3-9.
- **Create Class Sessions:** You can create sessions for the class. Press the Sessions button.

  See: Creating Class Sessions, page 11-21.

- **Book Resources:** You can book resources for the class.

  See Booking Resources, page 11-51

Creating Class Sessions

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

Use the Class Sessions window, from Scheduled classes to create sessions.

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

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

2. Choose the Sessions button.
3. Enter the name of the session in the Title field.

   For example, if you run the class *Setting Up and Using Oracle Learning Management* over three days, you might enter *Introducing Oracle Learning Management* as the first session.
4. Select the training center where the class 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 class.
7. Select the training center where the class is run, and the date and duration.

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

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

Scheduling a Program

Schedule programs of classes in the Programs window.

Step 1 - Create an Activity Category

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

Step 2 - Create the names of the SubGroups, page 12-5

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 a class within a program (such as Preparation, or Follow-up Test) as values for the Lookup Type PROGRAM_MEMBERSHIP_ROLE.

Step 3 - Schedule a Program

Enter a title to identify the program.

3. Select a category of courses.
4. Select a status.
5. Check the Restricted check box only if you want to restrict enrollments to internal learners with certain assignments, or to restrict enrollments to external learners from selected customers. Otherwise, leave the box unchecked to open the class to any customer or external learners.

Securing the Class

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

Entering Price Details

8. 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 Class window.
   - Student-based means that you plan to charge a price per student enrollment.
   - No charge
9. 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 Class 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.
10. Save your work.

Entering New Classes for the Program

11. Enter the name of the class, and the dates the class runs.
12. Select the course on which the class is based.
13. Assign events to groups and specify the role of each class within the program if you have set up roles and groups.
14. Check the Required box if the learner must attend the class as part of the program.
15. Save your work.

    You can enter further details about the class, if required. To do this:
    - Select the Classes button and Oracle Learning Management displays the Scheduled Class window.
    - Query the class and enter further details.

      For more information about entering further details for the class, see Scheduling a Single Class, page 11-18.

Selecting Existing Classes for the Program

16. Select the name of the class you want to include in the program. If you want to view the class before you include it, select the Classes button. Oracle Learning Management displays the Scheduled Class window where you can query the class and view it before including it in the program.

    If you create a program with a status of Normal, you can only include classes 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 classes of the status Normal and Planned.

17. Assign classess to groups and specify the role of each class within the program if you have set up roles and groups.
18. Check the Required box if the learner must attend the class as part of the program.
19. Save your work.

Creating a Default Class for Each Course

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

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

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

Creating a Development Event

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

> **Note:** You cannot enroll customers into development events.

Step 1 - Create a course:

Create the course for which you want to schedule a development event.

Step 2 - Create your Classifications as values, page 12-5

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 Course Design, Testing, and Review.

Step 3 - Create a development event:

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

   If you want to enroll learners in this event later, you must enter the start and end dates for the class.
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 11-51.

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 class.
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 Class window enables rapid entry of minimum class information to support learner enrollments. It does not support the full features of the Scheduled Class window.

Alternatives for creating classes quickly

If you need to create and book resources for a one-time event, we suggest an alternative solution. Create a course called 'Seminar' (or something similar), and create a class 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 class.
2. In the Training Center field, select the training organization that controls the location of the class.
3. Select the location where the class is to run.
4. Select the supplier of the class.
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.

1. Select either the project number or name to link the class with an open project to analyze the cost of running the class.
2. Save your work.

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

Updating or Viewing a Self-Paced Class

Use the Self-Paced Class window to update or view self-paced classes based on Oracle iLearning offerings. Except for the Secure and Program Only check boxes and the Change Status and Sessions buttons, this window includes the same fields as the Scheduled Class window.

To create Scheduled classes, page 11-18, use the Scheduled Class window.

> **Note:** You cannot create Self-Paced classes in OLM. The application automatically creates these classes from offerings imported from Oracle iLearning.

To update a Self-Paced class:

1. Query the class.
2. You can update any of these fields below. You cannot update any other fields.
3. In the Training Center field, select the training organization that controls the location of the class.
4. In the Location field, select the location where the class is to run.
5. In the Owner field, select a person who is to be responsible for the class 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. Check the Restricted check box only if you want to restrict enrollments to internal learners with certain assignments, or to restrict enrollments to external learners from selected customers. Otherwise, leave the box unchecked to open the class to any customer or external learners.
7. Select your own organization as the sponsoring (administering) organization.
8. Select a default user status.
9. Enter the minimum--but not maximum--number of learners who can enroll in the class. OLM automatically sets the class status to Full when enrollment reaches the maximum.

Entering Price Details:

1. Select the price basis for the class:
   - Student-based means that you plan to charge a price for each learner enrollment.
   - No charge

     Note: Self-paced classes cannot use the price basis of Customer.

2. Enter the price basis details for the class. Ensure that the finance line uses the same currency as the price basis for the class:
   - If the price basis is Student, you can select a currency and a price. This price becomes the standard class 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 class.

3. Save your work.

What to do Next:

- **Restrict an Internal Class:** You can restrict an internal class to selected employees. Press the Assignments button.

  See: Restricting an Internal Class to Selected Employees, page 11-29.

- **Book Resources:** You can book resources for the class.

  See Booking Resources, page 11-51

Changing the Class Status or Maximum Attendees

Once you have scheduled a class, 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 class status:

1. Query the class 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 class if you are assigned to the organization that is administering the class.

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

   For example, change the class status to Cancelled or back to Planned. OLM 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 class and check the Status field reflects the new status.

To change the maximum attendees:

1. Query the class 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 update the class only if you are assigned to the organization that is administering the class.

3. Click the Change Max Attendees radio button.

   You can see the number of learners enrolled on the class. Remember, you cannot reduce the maximum below the number of learners currently enrolled with the status Placed or Attended.
4. Enter the new maximum number of attendees for the class and select the OK button.

   #### Waitlist Enrollments

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

   If you increase the maximum attendees and your enterprise does not use automatic waitlist enrollments (or the automatic enrollment date for the class has passed), OLM displays a pop up box to let you know there is a waiting list for the class. You can take one of the following actions:

   - Continue and save the changes to the maximum number of attendees
   - Select learners from the waiting list to fill the new places

Selecting from the Waiting List:

1. Choose Yes to select a learner(s) from the waiting list.

The Waitlisted Enrollment window opens. The number of vacancies for the class appears at the bottom of the window.

2. Select the learner you want to enroll by positioning the cursor in the Booking Status field and selecting Placed from the List.

   These steps enable you to fill the places before someone else enters new enrollments for the class.

3. Choose the OK button.

Saving the New Maximum Numbers Without Selecting from the Waiting List:

1. Choose No if you do not want to select a learner from the waiting list. The class status remains Full, however, so that any subsequent enrollments do not receive higher priority than the currently waitlisted learners. Before you switch the status to Normal, you may wish to manually place the currently waitlisted learners in the class.

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

Measuring Demand for Training

You can gauge demand for training before you schedule a class. Create a class for the course you want to run, but leave the class dates blank. The class status must be Planned.

You can then enroll learners in the class to gauge interest, then do a mass update of all waitlisted learners and roll them onto other classes when you have enough interest.

1. Create a new class with the status Planned, and leave the class starting and ending dates blank.

   See: Scheduling a Class, page 11-18.

2. Enroll students onto the class with the status Waitlist.

   See: Entering an Enrollment, page 3-7.

3. Roll over the waitlisted learners onto the next scheduled class for the course.

   See: Making Mass Updates to Enrollments, page 3-19.

Finding Specific Classes

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

- Choose Classes Search from the OLM Navigator to open the Find Classes 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 classes in the Find Classes window:

1. Choose Classes Search from the OLM Navigator to open the Find Classes window.

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

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

2. Check one or more of the class type check boxes to restrict the search to classes of these types only.

   Note: Choosing the Program class type finds programs and the classes that each program contains.

3. Check the Enrolling box to find classes that are currently enrolling.
4. Enter a class title, course, training center (the organization that controls a location), location (not the room), class 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 classes that are scheduled to run on the date you enter.
6. Enter a week number from 1 to 52 to find classes 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 class is taught.
8. Enter a supplier or customer.
9. Enter up to three rows of category types, categories, instructors, rooms, or other resources as search criteria. Use the Matching option buttons to choose whether to retrieve classes 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 classes 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 a course information type and enter course information that denote an expected outcome from the classes you want to find.
11. Choose the Find button. OLM opens the Search for Class window, which displays classes that match your criteria.

Restricting an Internal Class to Selected Employees

After you create a class in the Scheduled Class window, you can restrict the class to members of certain organizations and holders of specific jobs and positions. You can also restrict Self-Paced classes imported from Oracle iLearning.

To restrict an internal event to selected employees:

1. Create an class in the Scheduled Class window or query a class in the Self-Paced Class window. You can enter a price-per-student for the class, or (for scheduled

classes only) you can select the price basis of Customer-based. In the latter case, you do not enter a price in the Scheduled Class window.

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

2. Choose the Assignments button.
3. Enter the organization, job, or position you want to use as class criteria. For example, to enable employees in the Sales organization who hold the position of Junior Secretary to attend the class, 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 class open to all members of that organization. Entering only a job or position on a line leaves the class open to all holders of that job or position, regardless of organization.
4. Optionally, enter further class criteria.
5. Save your work.

Oracle iLearning and OTA

Using Oracle Training Administration with Oracle iLearning

> **Warning:** If your enterprise has never used OTA, you should not use the functionality covered in this Legacy OTA area. Instead use the windows and pages available from your Oracle Learning Management Administrator menu.

The integration of Oracle Training Administration (OTA) with Oracle iLearning (OiL) enables OTA customers to administer, design, and offer online training events to their own employees.

The first phase of OTA's integration with OiL maintains each product's distinct identity, using XML and concurrent processing to shuttle information between applications, combined with a self-service interface to handle e-class enrollments and player access.

For specific information concerning OiL site administration within the integration, see Oracle iLearning: Site Administration Guidelines for the OTA Integration, page 11-39

For specific information regarding the creation and distribution of RCOs and offerings within the integration, see Oracle iLearning: Content Assembly and Scheduling in the OTA Integration, page 11-41

Terminology

OTA and OiL use different terms for a few key concepts. The terms are often functionally equivalent, not exact: for example, OiL RCOs provide access to the actual course content, while activity versions only reference the resources that may constitute course materials as described in the table.

OTA	OiL
Activity (Activity version)	Reusable Content Object (RCO)
Event	Offering
Self-Paced Event	eClass, eSeminar, or eStudy (self-paced)
Students	Learners

Business Groups

OTA Business Groups, whether global or local, map one-to-one with OiL Sites (called by the OiL Site ID). In other words, each OTA Business Group can share data with just one OiL Site ID. Multiple Business Groups cannot share a single OiL site, nor can a single Business Group share multiple OiL sites.

Concurrent Programs

OTA and OiL exchange information by way of three XML-based concurrent programs:

- iLearning User XML Export, which exports user data to OiL;

- iLearning Content and Offering Import, which extracts RCO and Offering data from OiL; and
- iLearning Performance Import, which obtains user training history data from OiL

Activities and Events

All OiL RCOs transfer into OTA as activities of the type "OTA iLearning Activity" (or another activity type you create and specify in the *OTA:Default Activity for iLearning* system profile). You can query imported RCOs as activities in the Activities window.

In general, if you can update a field in an OiL RCO or Offering, you cannot update it in OTA. For example, RCOs imported from OiL prevent data entry into several fields in the Activities window. To change information such as Activity Name, Description, Audience, and Language, you must change the RCO from within OiL, then import the RCO again.

Self-Paced Events

The integration uses a new event type and window called Self-Paced Event. The window closely resembles the Scheduled Event window. When you import offerings from OiL, they become self-paced or scheduled events, depending on the offering type.

You can query these events in their respective windows or search for them in the Event Search window, just as you would any event originating in OTA. The main difference is that, as with the imported activities, you cannot update fields containing information originating in OiL.

> **Note:** You cannot create sessions for a Self-Paced Event.

Enrollments

OTA handles all enrollments. Do not enroll or unenroll learners from the OiL admin interface.

Cross-Charging

Learners can cancel enrollments if their status is Placed, Requested, or Waitlisted, but their cost center is charged once the OiL Player has run.

Learners can select a cost center from the popup list in the self-service enrollment window *if:*

- cross-charging is enabled, *and*
- cross-charging defaults to their primary assignment, *and*
- they are assigned to multiple cost centers

Approvals

Workflow defaults to Self-Approval. The implementation steps detail the tasks necessary to require Manager Approval.

Self-Service Interface

The integration employs a redesigned Oracle Training Self-Service interface. Features include:

- Combined Enroll in a Class and Cancel Enrollment

  Users can enroll and unenroll from the same set of windows.

- Views

  From a single starting point, users can view Current and Planned Training, Cancelled Training, Completed Training, and Expired Training (for self-paced events, content providers can set deadlines for course completion.

- Additional Training

  Managers and employees can view training events taken outside of OTA in addition to those administered within OTA.

- Search Results

  The Search Results window shows both Activities and Events, and enables enrollment in the events shown.

- Save For Later

  Users can put transactions on hold for later retrieval and action.

- Dynamic Approvals

  Users can select additional approvers from the Review window.

- Configuration

  System administrators have greater latitude in configuring the user interface.

Setting Up the Legacy OTA-iLearning Integration

> **Important:** These implementation steps apply only to the OTA-Oracle iLearning integration prior to OTA Minipack I.

The Oracle iLearning site specifically serves internal users requiring both web-based and instructor-led training, and who are registered users within the OTA application. This integration does not currently support external users--only your organization's employees can enroll in and take courses originating in OiL. Create a separate site, or sub site, in OiL for these external users.

> **Note:** For simplicity, throughout this document we abbreviate Oracle iLearning to OiL.

The following instructions assume that you are familiar with the general concepts of OiL. Each section describes the specific requirements and restrictions in an OTA-integrated implementation only. For detailed training and instructions on all OiL features and functionality refer to the OiL help system and online training courses.

OTA Setup for Oracle iLearning

The OTA-side setup consists primarily of two tasks: setting system profiles and preparing for the transfer of data between OTA and OiL. Optional setup steps include workflow and self-service configuration.

Before you begin your implementation of the integrated products, please review Using Oracle Training Administration with Oracle iLearning, page 11-31.

Oracle iLearning: Perform Initial Site Setup

1. Create an OiL site. Contact your Oracle representative to obtain necessary user information, including an administrator username and password.

2. Log in to your OiL site using the administrator username and password.

   Note: All usernames and passwords in OiL are case sensitive.

3. From the Users tab, create one organization called OTA Learner. This integration does not support multiple organizations.

4. Define default self-enrollment conditions for the OTA Learner organization. Select the site name in the navigator tree. Navigate to More, then Manage Enrollment Conditions. Add OTA Learner to the self-enrollment condition.

5. Define the languages available to content assemblers in OiL. On the site properties page, enter the upper-case language codes found in the standard Oracle Applications (FND) table, page 11-45. Enter the values from the Language_code column into the Name field. Note that this list of language codes applies to content metadata only, not to the OiL interface itself. The language table does not indicate the languages into which the OiL interface itself is translated.

   Warning: Use only the languages and codes appearing in the table. You must enter at least one language code.

6. Define Trusted URLs for the OiL site. Trusted URLs enable the user to be authenticated in OTA, then gain immediate access to the OiL player at run time.

   Determine all URLs in OTA from where users will launch the OiL player--that is, all your OTA Self-Service URLs. On the Trusted URLs page for the site, enter the URLs for each OTA page.

   Note: The URLs within OTA are often long and may differ even for the same pages, because of multiple parameters. Therefore, minimize the URL string by using the "starts with" option. For example: *mymachine.cisco.com/somepath/*.

OTA: Obtain Oracle iLearning Site ID

Obtain the OiL Site ID, which is the number displayed in brackets to the right of the site name in the Navigator. You need this number to set the *OTA:iLearning Site ID* profile, page 11-35 and run the concurrent programs.

Oracle iLearning: Prepare Admin User Groups and Users

1. Create user groups for three types of OiL administrators. Name the groups *Site Admin UG*, *Content Assembler UG*, and *Scheduler UG.*

2. Grant appropriate privileges to each of the user groups:

   - Grant the *Site Admin* role to *Site Admin UG*.
   - Grant the *Content Assembler* role to *Content Assembler UG*.
   - Grant the *Scheduler* role to *Scheduler UG*.

3. Create additional administrator users. If specific employees must create RCOs (Reusable Content Objects) and offerings, add a new administrator user for each.

- For each employee who requires an administrator role, you must create a user name that is completely different from the employee's OTA user name. We recommend you adopt a standard naming convention for all admin users that you create. You might choose the employee's OTA username with an additional prefix or suffix. For example, OTA user *jsmith* might have an OiL admin user *jsmith_admin*.
- Assign each administrator to the relevant user group. If one user occupies a dual role--content assembly and scheduling, for example--assign both roles to the same user.
- Notify each user of their administrator username and password.

  Warning: *Do not use the employee's OTA username for their admin account*.OTA users have learner access only, and must access the OiL player from OTA. OiL administrators must always participate in their learning through OTA screens using their OTA user, not by entering OiL directly.

OTA: Create Default Activity Type

From the Activities window, create a default Activity Type named "OTA iLearning Activity". All imported RCOs must appear under this activity type.

OTA: Set System Profiles

Switch to the System Administrator responsibility.

Set three system profiles:

OTA:Default Activity for iLearning

For any responsibilities you have designated as OTA administrators, enter "OTA iLearning Activity" at the Responsibility level.

OTA:iLearning Site Address

For any responsibilities you have designated as OTA administrators, enter the OiL Site URL (Web address) provided by the OiL System Administrator (the hosted site URL is typically http://ilearning.oracle.com).

You must then repeat the step for any responsibilities to which you have given Self-Service access.

Warning: Omit any slash (/) at the end of the URL, or the link will fail.

OTA:iLearning Site ID

Enter the OiL Site ID number provided by the OiL System Administrator.

You must then repeat the step for any responsibilities to which you have given Self-Service access.

OTA-OiL: Import Users into OiL

Every person you want to enable to take OiL classes must be entered as a person in OTA. To enable OiL to recognize these users, in OTA you create an export file using the iLearning User XML Export concurrent program. Then in OiL, you import the data from the export file.

After the initial export, you should manually submit this program at regular intervals, to add new users and update existing ones. We suggest at least once a week, but you can vary that according to the number and stability of your workforce. Note that, to ensure the transfer of all data, the three concurrent programs add margins of two hours to each end of the concurrent request time parameters. Thus, a request with a start time of 2.30 AM and an end time of 9.30 AM contains data generated between 12.30 AM and 11.30 AM. Data redundancy is not a problem.

> **Warning:** Running this program establishes a permanent link between your Business Group and its corresponding Site ID. Before you run this or either of the other two concurrent programs, ensure that you are signed into the correct Business Group and that you have entered the correct Site ID into the *OTA:iLearning Site ID* profile.

> **Note:** If you want to test the integration before you go live, you must use *both* a different OTA Business Group *and* a different OiL site, to avoid linking your test group and site to your live group and site.

OTA-side tasks

Execute the iLearning User XML Export program from your OTA administrator responsibility.

The User Export program takes three parameters: iLearning Site ID, Start Date (and time), and End Date (and time). In the Site ID field, enter the number you entered in the *OTA:iLearning Site ID* profile.

> **Warning:** Initially, you may need to export thousands of users, especially if you have chosen to use a global Business Group. To ensure smooth operation, we suggest that you adjust your start and end dates and times to restrict exports to no more than 2,000 users at a time.

The User Export program generates an XML data file and a log file. The data file includes user names, HR (FND) user IDs, and a random string that uniquely identifies the user in OiL. To import the users into OiL, the OiL System Administrator must have physical access to the export file, which typically sits in the standard concurrent manager file directory.

Run the concurrent program manually, not automatically. This ensures that the export does not run automatically more often than the manual import in OiL.

Note that the output file generated by this concurrent program must end with the suffix *.xml* or OiL generates an error message during the user import. You can choose the Reports > View Report menu item to view and save this file locally from your Training Administrator responsibility.

OiL-side tasks

The OiL administrator who performs the import must be a trusted and secure user, as this user requires access to the OTA directory containing the export file.

Ensure you select the OTA Learner organization before performing the import. If you select the site and choose Import, you receive a permissions error. If you select a different organization, users are imported into the wrong organization. However, your site should have only one organization.

To perform the import, log in to the Admin user interface, select the OTA Learner organization, and click Import. The application prompts you for the XML file name.

A password is randomly generated for each imported user. This is to prevent learners from accessing OiL directly. All learner access to OiL must be through OTA.

Oracle iLearning: Site Administration Guidelines

The integration changes the behavior of both applications. OiL Site Administrators must be aware that OTA manages some tasks normally performed in OiL. Some standard OiL features also function differently.

See Oracle iLearning: Site Administration Guidelines for the OTA Integration, page 11-39

Oracle iLearning: Content Assembly and Scheduling Tasks

Content assembly and scheduling also changes under the integration. It is important for all content assemblers and schedulers to be familiar with these changes. In some cases, the integration completely ignores inapplicable field entries, but in other cases setting fields inappropriately may impair the ability of OTA to function correctly.

See Oracle iLearning: Content Assembly and Scheduling in the OTA Integration, page 11-41

OTA: Import Content and Offerings from OiL

To import activity (Reusable Content Object or RCO) and event (Offering) information from OiL, use the iLearning Content and Offering Import concurrent program.

Each new or modified RCO is exported from OiL if (and only if) a published Offering exists for the RCO in OiL.

- OTA creates a new Activity for each new RCO created since the previous import.
- OTA updates the Activity related to a modified RCO, if the Activity already exists for this same RCO.
- Activities are updated only if the relevant RCO has been modified since the last export.

  A published Offering must exist in order to prevent unfinished web-based events being exported from OiL prematurely and becoming available to learners in OTA.

Unlike the User Export program, you can run the Content Import program automatically, at regular intervals. We suggest once a week, though you may run it more often if your content changes frequently. Note that, to ensure the transfer of all data, the three concurrent programs add margins of two hours to each end of the concurrent request time parameters. Thus, a request with a start time of 2.30 AM and an end time of 9.30 AM contains data generated between 12.30 AM and 11.30 AM. Data redundancy is not a problem. You must use the Published-Unpublished option in OiL to control content availability.

> **Warning:** Whatever interval you choose, be sure to follow the import with a quick review of the valid assignments for imported events. Until you restrict events in the Valid Assignments window, any employee can enroll in any event.

Before the Content Import program runs, the OiL site administrator should run the OTA Import Validation Report, page 11-41 to reveal field length errors and duplicate names.

The Content Import program takes 10 parameters: Start Date, End Date, Activity Type (which should be OTA iLearning Activity or whatever you have used as the default), OiL Site ID, OiL Admin User Name and Password, Server Proxy Set (the default is TRUE), Server Proxy Port, Server Proxy Host, and iLearning Site Address (if your OiL site is hosted, the address is normally http://ilearning.oracle.com).

> **Note: Proxy settings:** The concurrent program now ignores web proxy parameters input by the user, and instead uses the values it finds in three profile options shared by Applications:
>
> - Applications Server-Side Proxy Host And Domain
> - Applications Proxy Port
> - Applications Proxy Bypass Domains

To avoid an error, set the 'Server Proxy Set' parameter to FALSE (its default value is TRUE).

If you have installed AutoConfig follow the instructions with that tool for setting their values.

If you do NOT have AutoConfig installed, then log in as SYSADMIN and set site-level values for these profile options values using the System Profile Option Values window.

Note that if both OTA and OiL both reside on the internet, or if both reside within your firewall, you do not need to enter any proxy values.

For 'Applications Server-Side Proxy Host And Domain' and 'Applications Proxy Port' enter the host name and port number for the proxy server.

'Applications Proxy Bypass Domains' indicates the hosts that should be connected to directly and not through the proxy server. The value can be a list of hosts, each separated by a '|', and you can also use a wildcard character (*) for matching. For example, the value "*.foo.com|localhost" would indicate direct connections should be made to all domains ending with 'foo.com' or to 'localhost'.

When you schedule this program to repeat periodically, be sure to check the "Increment date parameters each run" check box.

You can query any offerings imported with the delivery method "eStudy" from the OTA Self-Paced Event window. You can query any offerings imported with the delivery method "Scheduled" from the OTA Scheduled Event window. If OiL delivery methods do not already exist in OTA, the application creates them automatically.

> **Warning:** Do not use duplicate RCO or Offering names. Such records fail to import.

OTA: Import Training History Data

To import the results of employees' online training, run the iLearning Performance Import concurrent program.

The program automatically transfers enrollments and results by mapping OiL statuses to OTA enrollment statuses:

OiL statuses *Not Attempted*, *Attempted*, *Incomplete*, and *Failed* map to OTA status *Placed*.

OiL statuses *Passed* and *Complete* map to OTA status *Attended*.

The Performance Import program transfers Score, Time (to complete), and the number of completed and total modules (4 of 6, for example). Note that the program transfers test information only if the test is itself an offering--tests taken as part of another offering do *not* transfer.

The log file contains the number of history records updated successfully and the number that failed.

The Performance Import program uses the same 10 parameters taken by the Content Import program.

We suggest that you run the program quite often--hourly or even more often, depending on the size of your internal training business (larger businesses may desire more frequent runs). When you schedule this program to repeat periodically, be sure to check the "Increment date parameters each run" check box. Note that, to ensure the transfer of all data, the three concurrent programs add margins of two hours to each end of the concurrent request time parameters. Thus, a request with a start time of 2.30 AM and an end time of 9.30 AM contains data generated between 12.30 AM and 11.30 AM. Data redundancy is not a problem.

Configure Oracle Workflow

The integration defaults to Self-Approval--that is, any users can enroll themselves in any available course without a manager's approval. If you want to require Manager Approval, you must configure Oracle Workflow by changing a setting in two functions.

In the Cost Center and Review Page functions, change the HR_APPROVAL_REQ_FLAG to Yes. To do so, explore each function in the process, then click on the Node Attribute tab.

> **Note:** Do not change the value of the attribute at the Attribute level.

For standard Workflow procedures, consult the *Oracle Workflow Guide*.

Configure Self-Service OTA

The self-service side of the integration gives you the option of hiding default columns or revealing hidden ones. Be careful, of course, not to hide information the user might require.

By enabling Special Instructions in AK, you can enable learners to enter additional enrollment details--that is, the Delegate Booking Descriptive Flexfield--as they enroll (or cancel an enrollment) from the self-service interface.

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

Oracle iLearning: Site Administration Guidelines for the OTA Integration

Features you should *not* implement in an OTA-integrated Oracle iLearning instance include:

- **Categories:** The concept of categories in OiL is completely different from categories in OTA. The integration ignores OiL categories.

- **Enrollment:** Never unenroll a learner directly from OiL. Always use OTA to unenroll learners from events.
- **Enrollment Conditions**: Do not add enrollment conditions to anything other than the site level. Always use self-enrollment conditions to enroll anyone (in your OTA Learner organization) in any courses in OiL.
    - The enrollment must remain completely open, since OTA controls access to all courses. Restricting enrollment at any other level will prevent access from OTA.
    - To control access to courses, set the assignment feature in OTA, after the offering and content object information is transferred from OiL to OTA.
    - If an administrator manually enrolls a user in an OiL offering using the Enrollment List, the learner is not automatically enrolled in the OTA event. The user must still enroll in the course within OTA to gain access.
- **Imported Users:** Do not manually update any user (learner) information in OiL that was transferred from the OTA or HR system. Manual changes to imported users will be lost when the next user import is performed. However, updates to administrative users, created manually within OiL, are allowed.
- **Organizations:** Do not create an organization or manager hierarchy manually in OiL. Create only one organization, OTA Learner. Multiple OiL organizations are ignored by the integration, and should not be manually maintained in OiL.
- **Payment Server:** Use the OTA payment mechanism, not the OiL payment server functionality.
- **Permissions:** Do not grant OiL permissions to imported OTA users (learners). Any administrative permission for a user disables the Trusted URL feature that allows seamless login between the two products for that user. For users who require permissions to perform administrative duties in OiL, create a separate user name and password manually in OiL.
- **Ratings:** Disable the OTA-based learner's ability to rate courses from within the Player, as the results are not viewable from within OiL. You can use surveys instead.
- **Resource Management:** Use the OTA scheduling mechanism to manage resources, once the offering and content information is transferred. The integration ignores OiL resource management functionality, including resource types, resources, and booking resources.
- **Waitlisting:** Set up waitlisting through OTA. Do not use the OiL waitlisting feature.

Other OiL features change under the integration:

- **Announcements:** OTA learners do not see any type of OiL announcement (site, content, or offering level). However, administrative users who log in directly to OiL can view announcements.
- **Content Folders:** Creating an extensive folder hierarchy may assist a site administrator in assigning permissions to individual administrators on related content, and in organizing and locating content within OiL. However, OTA does not use OiL folders.
- **Content Types:** You can create or modify your content type hierarchy for use by the content assemblers. However, this information has no bearing on the integration, since it is viewable only from within OiL.

- **Custom Attributes:** OiL custom attributes are applicable for user objects only, not content objects, since the content description is not visible to learners. Ensure you create user custom attributes in OiL before exporting or importing users. Export your users from OTA using the appropriate XML format, and import the users into OiL.
- **Custom Reports:** An OiL custom report retrieves no OTA information.
- **Published Offerings:** By default, all published offerings are immediately available to all learners after an export of offerings and content objects to OTA. To prevent some offerings being immediately available, use the following techniques:
    - Ensure the offering is not published until you want to transfer it to OTA
    - Change the offering start date to a date in the future
    - Change the assignment information on the OTA event after the transfer
- **References:** Any reference material created on content objects is available to learners only while they are playing a course.
- **Roles:** Roles, in the OiL permissions model, have no relevance to the integration except to disable Trusted URL access from OTA for administrative users. However, roles can assist management of administrative users, such as assemblers and schedulers, in OiL.
- **Site Customization:** Only the admin and player customizations are available in the integration, since learners do not see the OiL home page.
- **Time Zone:** OTA uses the time zone exactly as entered in OiL. Ensure that you set an applicable default time zone. Schedulers can alter the time zone for specific offerings if necessary. Note, however, that OTA does not validate these changes.
- **User Groups:** OiL user groups have no impact on the integration. However, they may assist management of administrative users in OiL.
- **Validation Report:** Before the iLearning Content and Offering Import program runs, you should run the OTA Import Validation Report to correct import errors before they occur. The report lists duplicate RCO and Offering names, page 11-43 as well as fields that exceed the maximum allowed number of characters, page 11-43, all of which cause the import program to fail.

  The OTA Import Validation Report is a custom report that you run from the Reports tab in the Admin interface. If your site is hosted or installed, you may need to request this report from your Oracle account manager.

Oracle iLearning: Content Assembly and Scheduling Tasks

Content assembly and scheduling tasks are performed on an ongoing basis by the administrator users, which a site administrator sets up within OiL. Different users can perform each role, or one user may perform both roles.

Content assemblers and/or Schedulers create RCOs and Offerings in OiL. These objects are the basis for all web-based content transferred (exported) to OTA as Activities and/or Events.

The following sections highlight some features of OiL that are required in the standalone product, but which are not applicable when integrated with OTA, since OTA provides the front-end interface for managing the relationship between content and learners.

It is important for all content assemblers and schedulers to be familiar with these issues. In some cases, the integration totally ignores inapplicable field entries, but in other cases setting fields inappropriately may impair OTA.

Overview of Content Assembly and Scheduling

1. Create required RCOs in OiL.
   - Specify the language that the associated content is written in.
   - Define prerequisite RCOs, if required, to prevent learners from playing the current content until they have completed the required RCOs. These prerequisites must be manually typed in the Activity description field in OTA after export to notify the learners in advance, before they attempt to enter the player.
2. Create Offerings in OiL.
   - When your RCOs are completed and ready for OTA learners, create and publish an offering. For new RCOs, the simplest method is to use the Offer command available on the RCO property sheet. This method publishes the RCO, creates an initial offering, and publishes the offering.
   - Edit the offering. In the Player Preferences, it is vital to deselect Exit. Optionally, edit other properties such as start or end date.

     Warning: *Failure to deselect Exit grants all learners access to all offerings*by giving learners access to the OiL home page).

Content Assembly Guidelines

- **Announcements:** OTA learners do not see any type of OiL announcement (site, content, or offering level). However, administrative users who log in directly to OiL can see announcements.
- **Assessments:** Assessment tests are either topics within a content structure, or standalone test objects that have offerings in their own right.
  - Test topics themselves are not viewable from within OTA.
  - For test topics within an offering, learner test scores are available directly only within the OiL player, or from custom reports created and run from OiL, since the OiL transcript page is not available within OTA.
  - Learner test score information does not transfer to OTA if the test is a topic within a course--for these tests, the program transfers only Passed or Failed. Transfer occurs only if the test has an offering in its own right.
- **Categories:** The integration ignores OiL categories, which differ completely from OTA categories.
- **Content Folders:** Creating an extensive folder hierarchy greatly assists content assemblers and schedulers in organizing and locating content within OiL. However, OTA does not recognize OiL folders.
- **Content Object hierarchy:** The content object hierarchy for a course is not transferred to OTA. Only the content objects that have associated offerings are transferred to OTA. However, learners can view the content hierarchy when they play a course.
- **Content Object metadata:** The integration ignores the following metadata, generated when creating content objects in OiL.

- General: Hardware/Software, Requirements, Mastery Score, Mime Type, Author, Catalog, Catalog Number, Version
- Content Location: External, iLearning Secured
- Rights: Price, Monetary Unit, Copyright, Payment Server
- Custom Attributes

Enter any additional OTA-related information only after transferring the offering and content object information from OiL to OTA.

- **Deletion:** Never delete RCOs or Offerings after the concurrent program has passed them to OTA.
- **Duplicate RCO or Offering Names:** Give each RCO and Offering a unique name. Duplicate names cause the OTA Content and Offering Import program to fail.

  Note: Before the Content Import program runs, the OiL site administrator should run the OTA Import Validation Report to reveal field length errors and duplicate names.

- **Field Length Restrictions:** RCO and Offering names must not contain more than 80 characters each. RCO descriptions, audiences, and objectives must contain no more than 2000 characters.
- **Payment Server:** Use the OTA payment mechanism, not the OiL payment server functionality.
- **Prerequisites:** Prerequisites still work to restrict learner access until a prerequisite is completed. However, be aware of the following:
  - Since OTA does not recognize RCO hierarchies, the Content Import program transfers descriptions only from top-level RCOs, not from nested RCOs. Therefore, your top-level RCO descriptions must include all critical RCO information, including prerequisites.
  - When launching a course, learners receive an error message if they have not met a required prerequisite. They must exit the player, and launch the prerequisite first.
- **Resource Management:** Use the OTA scheduling mechanism to manage resources, once the offering and content information is transferred. The integration ignores OiL resource management functionality, including resource types, resources, and booking resources.

Scheduling Guidelines

- **Enrollment:** Never unenroll a learner directly from OiL. Always use OTA to unenroll learners from events.
- **Enrollment Conditions:** Do not change the enrollment conditions for any object.
  - The enrollment must remain completely open in OiL, since OTA controls access to all courses.
  - Restricting enrollment at any other level prevents access from OTA.
  - Always use the self-enrollment condition to enroll students in OiL courses.

- Do not manually enroll a user in an OiL offering using the Enrollment List; the learner is not automatically enrolled in the OTA event. To gain access the user must still enroll in the course within OTA.
- To control access to courses, set the assignment feature in OTA, after the offering and content object information is transferred from OiL to OTA.

- **Event types:** The only OiL event type that OTA supports is an Offering.
  - Do not create Open Chat or Open Forum events, as they are not accessible from OTA. However, you can associate forums and chats with a specific offering, since these are available within the player when a learner launches the relevant content.
  - Do not create Integrated Learning events. This type of event is not transferred to OTA.
- **Offering properties:** You can modify some properties of an Offering. However, several properties and sections on the Offering properties page do not apply to OTA, as the table below specifies.

Offering Property Section	Applicable	Not Applicable
General	Name, Content Object, Description, Style (all except inClass, Offline)	Style=inClass, Offline (create any inClass offerings--physical classroom training events--in OTA)
Student Access	None	All
Schedule	All but Duration	Duration
Repeat	None	All (Use the OTA event session feature)
Enrollment	None	All (Use the OTA waitlisting features)
Player Preferences	All except those listed in the next cell	Exit, Rate

Warning: You*must* deselect Exit in *every* offering, to avoid granting learners access to the OiL home page and thus to all offerings, bypassing the access control of OTA. Instead, select Logout, which enables learners to close the browser window and return to their training page in OTA.

You may, however, use Rate to encourage feedback from learners, though learners cannot view existing ratings made by themselves or others, since they lack access to the content description pages in OiL. Administrators can write a custom report to extract rating information.

FND Language Codes for Oracle iLearning

Language_code	Description
US	AMERICAN
GB	ENGLISH
F	FRENCH
FRC	CANADIAN FRENCH
D	GERMAN
DK	DANISH
NL	DUTCH
SF	FINNISH
AR	ARABIC
N	NORWEGIAN
E	SPANISH
S	SWEDISH
ZHS	SIMPLIFIED CHINESE
JA	JAPANESE
KO	KOREAN
PT	PORTUGUESE
PTB	BRAZILIAN PORTUGUESE
HU	HUNGARIAN
ESA	LATIN AMERICAN SPANISH
CS	CZECH
BG	CATALAN
HR	CROATIAN
EL	GREEK
IW	HEBREW
I	ITALIAN
LT	LITHUANIAN

Language_code	Description
PL	POLISH
RO	ROMANIAN
RU	RUSSIAN
SK	SLOVAK
SL	SLOVENIAN
TH	THAI
TR	TURKISH
ZHT	TRADITIONAL CHINESE
EG	EGYPTIAN

Legacy Training Administration Setup

Legacy Profile Options

Warning: If your enterprise has never used OTA, you should not use the functionality covered in this Legacy OTA area. Instead use the windows and pages available from your Oracle Learning Management Administrator menu.

Set these options to activate features used by OTA Classic.

Legacy OTA-iLearning Integration Profile Options

Set these profiles only if you are using the original OTA-iLearning integration.

Profile	Configurable Level	Values (default value in boldface)	Value Required?
OTA: Default Course for iLearning interface	Responsibility	<course title>	Yes for OiL integration only
OTA: iLearning Default Attended Enrollment Status	Responsibility	<enrollment status based on Attended>	Yes for OiL integration only

OTA: Default Course for iLearning interface

Sets the default course for offerings imported from Oracle iLearning. In most installations, the value is OTA iLearning Activity.

Warning: Choose a course that belongs to the same business group that you intend to use for your iLearning responsibility. If you do not, the import will fail.

OTA: iLearning Default Attended Enrollment Status

Establishes a default value for the Attended enrollment status. Used by the Performance Import concurrent program.

The Skills Approach

If you have chosen to implement the skills approach, the following can help you set them up. You can also enable the Competencies and Skills buttons on the Legacy Courses window, though note that you can view competency information from within the catalog.

Caution: If you have not previously implemented the skills approach, we strongly recommend that you use the competency approach instead.

Skills Information

If you are not developing the competency approach, you can define skill types to record the qualifications, knowledge, and experience provided by courses.

Caution: We strongly recommend that you use the competency approach rather than the skills approach, as significant automated OLM functionality uses only the competency approach.

You can hold skills information in OLM. 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, 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 can 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 courses, as expected outcomes. You can also use skills as selection criteria when you are searching for classes that match a particular profile.

If you use Oracle Human Resources, you can record the skills held by employees, applicants, external learners, instructors, 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, about people, jobs and positions, and courses.

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 OLM). 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 to give different sets of people access to each special 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 can ensure that when a language skill is entered, a fluency level is also selected.

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 selected.

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 can 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 can 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 Learning Management, you can use them for skills provided by courses.

You can use each special information type for one or more of these purposes. The options you select control the windows in which each type appears.

Delivering Competencies Through Training Courses

You define functions to phase in the delivery of competencies through courses. Functions enable you to indicate whether you want the Skills or the Competencies button to be available from the Courses window. When you first receive OLM, the Skills button appears on the Courses window for users to enter skills. If you want users to enter competencies, not skills, change the parameter values COMPETENCIES from NO to YES, and SKILLS from YES to NO.

You prevent either the Competencies or the Skills button from appearing by changing the parameter values from YES to NO. For example:

- COMPETENCIES=NO

  This hides the Competencies button.
- SKILLS=NO

  This hides the Skills button.

Enabling Updates to a Learner's Competency Profile

You also define functions to enable selected users to add competencies gained through a course directly to a learner's competence profile. If you want selected users to add competencies to learners' competence profiles, enter the following:

- COMPETENCIES=YES

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 or skills:

1. Query the function to configure.

   Use **OTA_OTAPDDAV** to enable the Competencies or Skills button on the Courses window, and **OTA_OTATAEDB** to enable users to update learner competencies.

2. Enter the parameters in the Parameters field.

   To activate the Competencies button on the Courses window, query the window (OTA_OTAPDDAV) and enter COMPETENCIES=YES in the Parameters field of the Form Functions window (the default is no). To disable the Skills button enter SKILLS=NO (the default is yes).

   Similarly, to enable users to update learner competencies, query the Enrollment Details window (OTA_OTATAEDB) and enter COMPETENCIES=YES in the Parameters field.

3. 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.
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 to use in your business group.
2. To enable each type, select the Enabled check box.
3. Select the other boxes to specify how 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 Class windows in OLM

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

Legacy Resources

Legacy Resources

Warning: If your enterprise has never used OTA, you should not use the functionality covered in this Legacy OTA area. Instead use the windows and pages available from your Oracle Learning Management Administrator menu.

Booking Resources

You enter resources using the Book Resources window.

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

Search for Class Window

When you open the Resource Bookings window, the Search for Class window also opens so that you can select a class for viewing or entering bookings. In the Search for Class window, you can:

- Select a folder to view the classes for a predefined query.
- Use Query-by-Example to retrieve a list of classes in the folder.

To book resources for a class:

Querying a Class

1. Query the class or the session of a class for which you want to book resources in the Search for Class window.
2. Select the Class then switch to the Book Resources window.
3. Select Use Class to display resources attached to the offering of the class and to display the class information in the Class region.

   Selecting Use Class automatically populates the From Date, To Date, Status, and Booking Date fields on the first resource line.

Identifying Resources to Book:

1. You can book resources using four options:
   - Automatically
   - Individually
   - Manually
   - Specifying Locales and Instructors

   After you have identified resources using one of the four options, proceed to Entering Essential Details, page 11-52.

Option 1: Book Resources Automatically

1. Choose the Book Required button to book the required resources automatically. OLM displays the resources in the Resource Bookings window. However, using the Book Required button skips any mandatory validations of the Training Resources flexfield. You need to add the necessary flexfield information manually.

   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 class.

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 11-52 about the resource.

Option 2: Book Resources Individually

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

   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 11-52 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 the resources that are available on the booking date. In the Available Resources window that appears, choose the All Available Resources option to display all the available resources.

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

   See Finding Specific Locales and Instructors, page 11-54.

   You then enter essential details, page 11-52 about the resource.

Option 4: Find Specific Locales and Instructors

To identify trainers and locales that satisfy a set of criteria you specify, see Finding Specific Locales and Instructors, page 11-54.

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 class is Normal or Full, you can select the status Confirmed.
3. Select the Primary Venue check box to designate the resource as the primary venue for the class. You can use this indicator to notify students and instructors where to attend the class. You can designate only one venue as the primary venue for a given class.

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

    To change the primary venue, see: To change the Primary Venue, page 11-54.

Entering Other, Delivery, and Provider Details:

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

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

Entering Finance Details:

1. 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 5-5.

    To cross charge resource expenses for the Others category of resources:

    1. Save the resource booking details without closing the Book Resources window and then click the Finance Headers button.

        Important: Ensure that you attach a price to the resource before you start the cross-charge process.

    2. Enter the relevant cost-transfer details, such as the General Ledger cross-charge information in the Finance Headers window.

3. Save your work without closing the Finance Headers window.
4. On the Book Resources window, click the Use Header button and save your work. The application creates a finance line with cost of the resource.

2. Save your work.

To change the Primary Venue:

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

Checking Resources

You can use the Resources Booked window 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 classes to list and which fields of information to view.

To check resources:

1. Query the class for which you want to check resources in the Search for Class window (if the class is not displayed already).
2. Select the class then switch to the Book Resources window.
3. Choose the Resource Booked button.
4. Query the room, supplier, or other criteria for which you want to check resources.

Viewing Resources

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

Viewing previously booked resources for all classes:

1. Do not query the class in the Search for Class window but display the Book Resources window instead.
2. Query the resources you want to view. For example, to see all instructors booked for all classes, enter Trainer and run the query.

Finding Specific Locales and Instructors

Use the Resources Booking window to find specific locales and instructors according to their training center, location, language, or competencies.

To find specific locales and instructors:

1. Choose the Available Resources button on the Book Resources window to open the Find Resources window. Then select Specific Resources from the Available Resources lookup.
2. To find locales or instructors attached to a particular Training Center or Location, select a value from either or both fields.
3. To find an instructor who speaks the language of the offering, select a language from the Language lookup.
4. To find an instructor who has taught the offering before, select the Taught Before radio button.
5. To find an instructor who can provide all the competencies required for an offering, select the Full Instructor/Offering Competency Match radio button.
6. To find an instructor who can provide up to three specific competencies, select the Specific Instructor/Offering Competency Match 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 competence fields.

7. Choose Find to display the qualifying resources in the Resources Booking window.

12

Setup and Configuration

Setup and Configuration Overview

Setting up, configuring, and extending Oracle Learning Management (OLM) requires an understanding of some basic constituents.

Key and Descriptive Flexfields

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

There are two types of flexfield:

- *Key* flexfields are essential, so you must configure them before you can use the application.

  OLM includes one required key flexfield, the Training Resource flexfield. If you have installed other Oracle Applications, they may require you to configure other key flexfields. Oracle Human Resources users, for example, may have to configure the Personal Analysis key flexfield.

- *Descriptive* flexfields are optional and can define additional information you want to record in most of the application's windows.

Lookups

Lookups provide lists of valid values on certain fields. For many types of code you can add your own values and change the values that are predefined. Lookups not only ensure that all users use the same terminology, they also speed up data entry.

Structures and Data

You must also set up other structures and data that all users share across the application. The structures and data include:

- Business groups are the largest organizational unit on the system. You must set up at least one business group, but large or multinational organizations may wish to create multiple groups. Organizations are your internal training departments and other departments.
- Customers and Suppliers are the internal or external agencies with whom your enterprise exchanges goods or services.
- Resources (including instructors) are facilities, people, or equipment that you must book to run a class.

- Competencies hold the qualifications, attributes, and knowledge that learners can expect to attain by attending courses.
- Financial Reference Data enables you to transfer costs and use the Customers and Suppliers windows. If you have not installed Oracle General Ledger in your enterprise, you must set up additional financial information.

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

Function and Security Configuration

Function and security options can restrict user access to records, windows, and functions. Setting these options can secure your data and grant users access appropriate to their needs. Function security also regulates the display of the competencies and skills.

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

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

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

Profile Options

A *user profile* is a set of changeable options that govern a range of features, including waitlisting, interactions with other applications, and the automated creation and transfer of financial details.

Setup and Configuration Requirements

Oracle Learning Management (OLM) enables you to configure important parts of the application, and to define additional information you want to record.

What are the advantages of valid lists of values?

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

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

Can you use more than one business group?

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

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

How do you handle resources?

You can identify all resources--facilities, people, and equipment--you must book to run classes. You can enter instructors as individual workers. Alternatively, you can simply record that a certain supplier can provide a number of unnamed instructors.

Can you update competencies after completion of a class?

If you have implemented the competency approach, you can automatically add these competencies to a learner's competency profile after successful completion of a class. Once added to the profile, these competencies are available for career planning as well as candidate placements, performance appraisals, and other activities.

Lookups

Lookups

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

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

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

Each Lookup Type supports a maximum of 250 Lookups.

Predefined Lookup Types

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

Access Level	Meaning
User	You can add codes and disable supplied codes.
Extensible	You can add codes, but you cannot disable supplied codes because the application requires them.
System	You can neither add codes nor disable supplied codes. You can change only the meaning or description of supplied codes.

User and Extensible Lookups, page 12-4 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 Learning Management (OLM) as the table specifies:

User and Extensible Lookups

Field or Function	Lookup
Cross Charge Type	OTA_CROSS_CHARGE_TYPE
Content Server Protocol Types	OTA_CS_PROTOCOL_TYPE
Units of Duration	OTA_DURATION_UNITS
Date of Enrollment in Class	OTA_ENROLL_CLASS_DATE
Interface Source	OTA_INTERFACE_SOURCE
Status (of training plan component)	OTA_MEMBER_USER_STATUS_TYPE
Object Data Source	OTA_OBJECT_DATA_SOURCE
Training Plan Component Cancellation Reason	OTA_PLAN_CANCELLATION_SOURCE
Name (of measurement type)	OTA_PLAN_MEASUREMENT_TYPE
Status (of training plan)	OTA_PLAN_USER_STATUS_TYPE
Time Periods	OTA_TIME_PERIOD
Status of Learning (External Learning)	OTA_TRAINING_STATUSES
Types of (Additional) Training	OTA_TRAINING_TYPES

Adding Lookup Types and Values

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

Defining Lookup Types

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

To define a new lookup type and the lookup values:

1. Select the access level for the lookup type.
2. Enter the lookup type.
3. Enter the user name of the lookup. This is the name that users see from within the application.
4. In the application field, select Learning Management.
5. Optionally, add a description of the lookup type.
6. Enter the code, meaning and optionally a description for each value.

   If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.
7. Save your work.

8. Optionally, click the Usages button and select other Oracle Applications in which you want to use this new lookup type.

To add Lookup values to an existing Lookup type:

1. Query the lookup type to which you want add a value.

   You cannot add values if the access level is System.

2. Enter the code, meaning and optionally a description for each value.

   If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.

3. Save your work.

4. Optionally, click the Usages button and select other Oracle Applications in which you want to use this new lookup type.

Removing Lookup Values

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

To remove a user defined Lookup:

1. In the Lookups window, do one of the following:

   - Enter an end date to prevent users selecting this value after a certain date.
   - Disable the code by deselecting the Enabled check box to prevent users from selecting this value with immediate effect from the current date.
   - Change the meaning and description to create a replacement lookup.

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

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

Flexfields

Key Flexfields

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

You do not have to define structures for these flexfields before you begin using OLM. Define them only when you want to define learning resources and additional personal information.

OLM provides two key flexfields:

- Training Resources, page 4-5
- Personal Analysis, page 11-48

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

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

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

Descriptive Flexfields

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

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

You can define two types of descriptive flexfield segments:

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

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

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

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

User-Definable Descriptive Flexfields in OTA

Descriptive Flexfield Title	Window and Page Titles
Additional Course Information	Courses
Additional Course Version Information	Courses
Additional Address Details (HR)	Address, Applicant Entry Contact
Additional Booking Deal Information	Enrollment Agreements
Additional Booking Status Information	Enrollment Statuses
Additional Budget Values Details	Training Plan Budgets, Training Plan Member Budget, and Training Plan Events Budget
Additional Category Inclusion Details	Category Usages
Additional Delegate Booking [Learner Enrollment] Information	Enrollments
Additional Class Association Information	Customers for Restricted Classes
Additional Class Information	Scheduled Classes, Programs, Development Events, One-Time Events
Additional Finance Header Information	Finance Headers
Additional Finance Line Information	Finance Lines
Additional Learning Object Information	Catalog
Additional Learning Object Folder Information	Catalog
Additional Learning Path Information	Create and Update Learning Path
Additional Learning Path Member Information	Create and Update Learning Path Component
Additional Learning Path Category Inclusion Information	Learning Paths
Additional Letter Details (HR)	Letter
Additional Location Details (HR)	Location
Additional Non-OLM Training History Information	Learning History
Additional Organization Information (HR)	Organization
Additional Organization Unit Details (HR)	Organization
Additional Plan Details	Organization Training Plan

Descriptive Flexfield Title	Window and Page Titles
Additional Plan Cost Details	Training Plan Costs, Training Plan Class Costs, or Training Plan Student Costs
Additional Plan Measure Details	Training Plan Measurement Types
Additional Plan Member Details	Organization Training Plan (Training Plan Members)
Additional Price List Entry Information	Price Lists
Additional Price List Information	Price Lists
Additional Question Information	Questions
Additional Question Bank Information	Question Banks
Additional Resource Bookings	Resource Bookings
Additional Resource Usage Information	Resource Usages
Additional Suppliable Resource Details	Resources
Additional Test Section Information	Test Sections
Additional Training Details--replaced by Additional Non-OLM Training History Info	--
Additional Vendor Supplies Information	Suppliers

The Org Developer Flexfield

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

Descriptive Flexfields (with Startup Data)

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

- Personal Address Information
- Location Address

Address Styles in Oracle HRMS

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

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

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

These flexfields provide address styles as startup data. For additional address styles, you must define a new context and segments.

To change the address style for any country, disable those segments that you do not require. Then define new segments to record your own information.

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

Organization

Organization Definitions

Define a business group and internal training organizations so that you can select these organizations when you define courses and schedule classes. You can share your organization definitions with other Oracle Applications.

Business Groups

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

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

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

Global or Local?

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

Running a globalized training organization can result in a more efficient use of resources, greater flexibility and control over classes, and simplified enrollment and accounting procedures. For example, you can quickly identify a Spanish-speaking instructor from Spain who can teach a class in Argentina. If the class and instructor belonged to different HR business groups, you could not view them together at the same time, leading you to miss the appropriate match. However, if you plan to take advantage of the delivered extensions for French legislation, do not implement this global setup. Instead, implement OLM with a French Legislation for your business group.

> **Warning:** *Once you have set up a global business group, it is impossible to switch to a local business group.* So, if you believe you will require a localized (in other words, country-specific) version of OLM in the future, implement a local OLM business group. Note, too, that any responsibility can view either global *or* local classes, but not both.

For specific procedures, see Creating a Business Group, page 12-13

Organizations

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

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

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

Key Flexfields Associated with the Business Group

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 business groups and organizations in the following order.

To create Business Groups and Organizations:

1. Create Locations, page 12-12
2. Create a Business Group, page 12-13
3. Create a Training Organization, page 12-14

Creating Locations

Create addresses in the Location window.

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

To create a location and its address:

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

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

Removing Locations:

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

To remove an address from the Location list:

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

Creating a Business Group

If you run Oracle Human Resources, you will probably want to use your HR business group or groups in OLM, to share data on people, organizations, locations, and skills across the applications.

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

Global or Local Business Groups

OLM gives you the option of using a global or local business group, page 12-13. If you decide to implement a global business group, you must undertake several additional setup steps, specified below.

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

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

To use an HR business group or the setup business group for OLM:

1. Query the business group in the Organization window.
2. Click the Others button and select Business Group Information.
3. Check that the legislation code and currency are appropriate for your business group. The legislation code determines the default style for addresses. The currency selected here is the default currency for the business group, but you can enable and use other currencies.
4. Do not enter any other information in this window, which belongs to Oracle HR, not OLM.
5. Click OK and save your work.

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

To set up a global business group:

1. Create your business group in the Organization window, or follow the above procedure to use the setup business group.
2. Switch to the System Administrator responsibility, and open the System Profile window.
3. In the Find System Profile Values window, select the Responsibility check box and enter your responsibility. In the Profile field, enter OTA:Global Business Group and then click Find.
4. In the Responsibility column on the OTA:Global Business Group line, enter the name of your business group.
5. Back in the Find System Profile Values window, select the Site check box, deselect the Responsibility check box (if it has remained selected), and enter HR:Cross Business Group in the Profile field.
6. In the Site column on the HR:Cross Business Group line, enter Yes.
7. Save your work.
8. To ensure that you can view and use competencies, verify that each competency is selected as Global. If you can access an HR responsibility, you can reach the Competencies window from Talent Management on the HR Navigator. If you run Oracle HR but cannot access an HR responsibility, contact your System Administrator.
9. To ensure that you can view all available Training Centers, you must define them in your OLM global business group.

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

Creating a Training Organization

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

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

To create a new organization:

1. Enter a name that is unique within the business group, and optionally, select an organization type.
2. Enter a start date early enough for any historical information you must enter.
3. Optionally select a location to record the site address. You can also enter an internal address to add more details such as a floor or office number.
4. Select Internal or External.

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

5. Save your work.

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

Online Content

Content Servers

Defining a content server is not mandatory. OLM can play content associated with any URL. This can be a third-party web server, or your own web server, inside or outside a firewall.

However, if you define one or more content servers within OLM, you can transfer content to the server through the OLM interface, with no requirement for an ftp server, using the Upload and Import utilities:

- Load files from a local machine to a content server--Upload (on folder or learning object details page)
- Load files contained within a SCORM 1.2 zip file from a local machine to a content server--Import (on folder or learning object details page)

Content Security

An OLM content server does not automatically provide any additional security to your content. Learners can access the content direct from any browser, if they know the URL, unless you explicitly protect the server, using operating system or software authentication.

SCORM Adapters

Set up a SCORM adapter if your content explicitly uses SCORM CMI calls.

The Oracle SCORM adapter enables SCORM-compliant learning objects to communicate with OLM 11i using the SCORM JavaScript API. The adapter is necessary to avoid the JavaScript security restriction that HTML documents in two frames cannot communicate unless they are downloaded from the same Internet domain. Learners cannot launch SCORM-compliant learning objects in the OLM player until you have installed this adapter.

If your content does not contain SCORM CMI calls, the SCORM adapter setup is not necessary. You can perform these steps later, if your company purchases or develops SCORM content at a later time.

Installing the Oracle SCORM Adapter

You require three standard Oracle SCORM adapter files in order for the CMI calls to work. Oracle Learning Management (OLM) provides the following three adapter files as a patch, available in the OLM 11i area on Metalink:

```
Oracle_SCORM_Adapter.html
lms_blank.html
lms_adapter.html
```

For the SCORM adapter to function correctly, you must place a copy of all three files in a web-accessible location on **each** web server from which you intend to serve SCORM learning objects, and all three files must exist together in the same directory.

`Oracle_SCORM_Adapter.html` is the primary file, and is the file to which you refer when registering SCORM adapters in the Setup tab in OLM, accessible from the Learning Administrator responsibility.

The URL to the adapter files must have the same protocol, host, and port number as the URL to the content files.

Registering the Oracle SCORM Adapter

Once you have installed the Oracle SCORM adapter in an appropriate location on each web server, you must register the SCORM adapter location in OLM. This enables OLM to determine the URL to the corresponding SCORM adapter, based on the starting URL of each learning object.

If you have multiple business groups, you must register the adapter for each business group.

Diagnosing Problems

If you or your learners encounter problems when playing SCORM-compliant content, and you have verified that the URL properties of the SCORM adapter are correctly set up, select the check box, Show diagnostic messages, on the adapter properties page.

This option displays diagnostic messages in the browser's Java console, when you launch and play the content. The messages show each CMI function call made by the content, the arguments to the call, the messages sent to and from the server to execute the call, and the value returned from the call.

> **Note:** The Java console must be enabled in the browser for you to see the diagnostic messages.

Using the Signed SCORM Applet

The adapter properties page includes a check box, Use signed SCORM applet. The default value of this check box is deselected, and is it likely you will never have to select this option. The adapter works in such a way that signing is not necessary.

However, if you experience communication problems in your SCORM-compliant content, and if you have exhausted all other possibilities both in the adapter setup and in the content itself, select the Use signed SCORM applet check box and test your content again. If the problem is fixed, keep the check box selected for that adapter. If not, deselect the select box and keep looking!

Setting up a Content Server

OLM uses a servlet to upload or download physical content files. So, you do not require an FTP server, nor a middle tier installation on the content server. You simply require one container for the servlet, such as Apache and ApacheJserv, or Tomcat. So that only the trusted servers can access OLM content, the IP addresses of the APPS middle tiers are specified in the container property file as arguments passed to the Java interpreter.

> **Caution:** The servlet does not work for a group that has multiple processes (or JVMs).

You set up a content server in two stages:

1. Set up the container.
2. Define the content server in the OLM administration interface.

Steps to set up the container:

1. Install the container, such as Apache and ApacheJserv.
2. Create a servlet repository called `servlets`. For example, in Jserv, the servlets repository exists by default.
3. Copy the following files to your servlet repository directory:
   ```
   $JAVA_TOP/oracle/apps/ota/admin/common/util/
   ContentServerServlet.class
   $JAVA_TOP/oracle/apps/ota/admin/common/util/ProtocolConstants.
   class
   $JAVA_TOP/oracle/apps/ota/admin/common/util/SystemUtils.class
   $JAVA_TOP/oracle/apps/ota/admin/common/util/
   SystemUtils$JarUtility.class
   $JAVA_TOP/oracle/apps/ota/admin/common/util/
   ContentServeerClientData.class
   ```
4. Also ensure the `oracle.apps.fnd.common.VersionInfo.class` file is located under the class path directory that is defined for the repository.
5. In `zone.properties`, add the following:
   ```
   # ----- OLM Content server ----- # servlet.
   OtaContentServerServlet.code=oracle.apps.ota.admin.common.
   util.ContentServerServlet servlet.OtaProtocolConstants.
   code=oracle.apps.ota.admin.common.util.ProtocolConstants
   servlet.OtaSystemUtils.code=oracle.apps.ota.admin.common.
   util.SystemUtils servlet.OtaSystemUtils$JarUtility.code=
   oracle.apps.ota.admin.common.util.SystemUtils$JarUtility
   servlet.OtaContentServerClientData.code=oracle.apps.ota.admin.
   common.util.ContentServerClientData #
   ----- END OLM
   ```
6. Create an alias for the directory where the content will be stored. For example, in Apache, to create an alias for the physical directory `D:/apache/rootdir/`, add the following inside the `httpd.conf` file: `Alias /content/ 'D:/apache/rootdir/'`
7. Add the list of middle tiers and the temporary file location as arguments to the Java Interpreter. For example, in Jserv, add following lines inside the `jserv.properties` file: `wrapper.bin.parameters=-Dmiddletier=148.87.19.51+148.87.19.50+144.25.78.202+10.10.20.140 wrapper.bin.parameters=-DTemp=D:\temp wrapper.bin.parameters=-Djava.io.tmpdir=/dbfiles/applcsf/log`
   Here the numbers, such as 148.87.19.51 and 148.87.19.50, are IP addresses of all trusted middle tiers, and + is the separator for multiple addresses. Servers not specified in the list are not able to access the servlet.
   `D:\temp` is the absolute path of the temp location where files are saved temporarily while handling physical content.
   `/dbfiles/applcsf/log` is any existing directory for log files.

Steps to define the content server in OLM:

1. Log in to OLM with Learning Administrator responsibility.
2. Click the Setup tab.
3. Click Content Servers.
4. Click Create Content Server.
5. Provide the following information:
    1. **Name:** `XYZ` (your choice of content server name)
    2. **Protocol:** `http` or `https` (generally http)

        Note: To use a content server protocol other than ftp, http, or https, you must add the value to the Content Server Protocol Types lookup.

    3. **Host:** The machine name on which your servlet container is running. Example: `ap1234.oracle.com`.
    4. **Port:** The port at which servlet container is running (by default the port is `80`)
    5. **Physical Directory:** The absolute path of the location where the content will be stored. For example, according to the example above: `D:/apache/rootdir/`
    6. **Virtual Directory:** The alias you created when setting up the container properties. For example, according to the example above: `/content`.

Setting up a SCORM Adapter

You set up a SCORM adapter in two stages:

1. Copy the necessary files to the same web server as your SCORM-compliant content. If you have multiple servers that provide SCORM content, each server requires a copy of the files.
2. Register each adapter in OLM. If you have multiple business groups, you must register the adapter for each business group.

Steps to copy the SCORM adapter files:

1. Download the patch, from the OLM 11i area on Metalink, to a temporary location.
2. Unzip the patch file, and copy the three adapter files to a web-accessible location on **each** web server from which you wish to serve SCORM learning objects. All three files must exist together in the same directory.

Steps to Register a SCORM adapter in OLM:

1. Log in to OLM with Learning Administrator responsibility.
2. Click the Setup tab.
3. Click SCORM Adapters.
4. Create an adapter, and enter the following fields:
    - URL Prefix: A starting URL that commonly identifies the location of content on one web server, for example:
      `http://www.mycompany.com`

- Adapter URL: The complete URL for the Oracle SCORM Adapter file on the same server, for example: `http://www.mycompany.com/Oracle_SCORM_Adapter/Oracle_SCORM_Adapter.html`

5. Repeat the previous step for each business group.

Competency Setup

Competencies

If you have installed Oracle Human Resources, you can maintain competencies for courses and learners. Competencies hold the qualifications, attributes, and knowledge that learners gain from attending classes.

You can also allow specific users to add the competencies delivered by the class to a learner's competency profile.

To use competencies, you must set up a framework of competencies.

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

> **Warning:** *Do not use this software as the sole method of assessment for making judgements about hiring, performance, or deployment. Your company may be held liable if you rely on incorrect computer data or computerized rules to make such judgements.*
>
> It is the customer's responsibility to take all appropriate measures to comply with the Data Protection and Privacy laws of the countries in which they operate.
>
> All personal information that you store or use with this software must be up to date, accurate, and relevant. You should confirm the details of the restrictions that apply to the computerized storage and use of personal information with your own legal department or representative.

Competency Automation Setup

To automate updates to learner competency profiles, you must use Oracle Workflow to configure approval settings, page 12-22. You should also review the default competency-related workflow notifications.

Mapping Competencies to Languages

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

See Finding Specific Locales and Instructors, page 4-10

To map competencies to languages:

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

6. Save your work.

Configuring Competency Update Automation

Use Oracle Workflow to enable and configure automatic competency updates.

To enable and configure automatic competency updates:

1. From Workflow Builder, query the workflow process name OTA_COMPETENCE_UPDATE_JSP_PRC.
2. Set the Attribute Name HR_APPROVAL_REQ_FLAG to one of these four options (the default is Notification, Manual Update):
   - Notification, Automatic Update after Approval
   - Notification, Automatic Update without Approval (automatic update occurs without approval)
   - No Notification, No Auto Update
   - Notification, Manual Update (learner or manager notified that they must manually update profile)

Financial Setup

Currencies

You can use multiple currencies to hold price and cost information in OLM.

Your startup data includes the definitions of all world currencies. These definitions are shared by all Oracle Applications and are controlled by the system administrator responsibility. You enable those currencies in the Currencies window.

You can never delete a currency, but you can disable it.

> **Note:** You must enable at least one currency as the default currency for all information related to money. This default is known as the *base currency* for your business group.

Cross-Charging

For internal classes, OLM can charge a learner's cost center when the learner enrolls in an OLM class. The cross-charge accounting window enables implementers to establish links between OLM and Oracle General Ledger. Several system profiles control automatic cross-charging.

Ensuring accurate cross-charging of enrollments takes five steps:

1. The learner enrolls in a class.
2. The application automatically creates finance headers and lines, as long as the implementers have accurately mapped accounting fields between OLM/HR and General Ledger.

   See Setting Up Cross-Charge Accounting, page 12-24
3. Once the course has finished, the learning administrator marks the learner's enrollment status as Attended.
4. The administrator runs the Create Cross Charging GL Lines for Transfer concurrent process.
5. To complete the cross-charge transfer, the administrator runs the Journal Import process in GL.

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

Financial Security

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

How Financial Security Works

You can prevent users of a certain responsibility from being able to update and delete the following amounts:

- Monetary
- Unitary (invoice)

- Standard

Monetary and Unitary (Invoice) Amounts

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

Standard Amounts

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

Which Windows Does Financial Security Affect?

Once financial security has been set up (depending upon whether you are preventing users from updating money, unitary, or standard amounts), it affects the following windows:

- Enrollment Details
- Customers for Restricted Class
- Finance Lines

Enabling Currencies

Use the Currencies window to enable or disable currencies.

To enable a currency:

1. Query the currency you want to enable.
2. Select the Enabled check box.
3. Save your change to enable the currency.

To disable a currency:

1. Query the currency you want to disable.
2. Deselect the Enabled check box or enter an end date for the currency.
3. Save your changes to disable the currency.

Setting Up Cross-Charge Accounting

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

See Cross-Charging, page 12-23

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

Note: To ensure that workflow notifies the appropriate person if the cross-charge processing fails, you must include a value in the Owner field of the Class or Update Class pages.

Setting Up Cross-Charge Accounting:

1. From the lists of values, select an HR business group and a General Ledger Set of Books. The cross charge type defaults to Enrollment when you click the list of values icon.
2. Select From in the From/To field. Enter a starting date in the Date From field. You can also enter an ending date in the Date To field. Save your work.
3. In the Segment Mapping Details region, the GL Chart of Accounts column automatically fills with segments drawn from the GL Set of Books you have specified.

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

4. If you use the HR Costing Data Source, select from one of four choices: Assignment, Business Group, Organization from Assignment, or Sponsor Organization. If you select Sponsor Organization, then the Sponsor field in the Scheduled Class window must contain an organization with a cost center value.
5. If you use the HR Costing Segment, select from the list of values taken from the Payroll Cost Allocation flexfield linked to the specified HR business group.
6. In the Constant Value field, select from the list (taken from the corresponding segment in GL) a default value that the function can use if it finds no legitimate value in the previous two columns.
7. Save your work, then repeat the above steps, using To in the From/To field.

Setting Up Financial Security

Use the Menus window to set up financial security.

To set up financial security:

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

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

3. To prevent users from updating and deleting monetary and unitary amounts, enter OTA_FIN_ST_PRICE_NO_UPDATE in the Function field .
4. To prevent users from updating and deleting standard amounts, insert a new line and sequence number and enter OTA_FIN_MONEY_NO_UPDATE in the Function field.
5. Save your changes.

Creating a Calendar

Use the Calendar window to create a calendar for use by supplier and customer windows.

You have to set up only one period for the calendar. You do not have to enter multiple periods or calendars.

> **Note:** This form is shared with other Oracle Applications. OLM does not use some of the fields in this window.

To create a calendar:

1. Enter a name for the calendar; for example, **OLM Calendar**.
2. Enter a description for the calendar.
3. Enter a period prefix; for example, **OLM**.
4. Enter the period type, typically **Year**.
5. Enter the four-digit year.
6. Enter the quarter, **1, 2, 3,** or **4**.

   OLM creates a name (displayed in the Name field in the Periods region) from the prefix and year you entered.
7. Enter the period number, which must be **1**.
8. Enter the start and end dates the period covers; for example, **01-JAN-2000** to **31-DEC-2000**.

   > **Note:** These dates are for reference only. OLM does not use them.

9. Save your work.

Defining a Set of Books

Use the Set of Books window to determine the currency, account structure, and accounting calendar.

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

To define a set of books:

1. Name the set of books; for example, **OLM Set of Books**.
2. Enter a short name for the set of books; for example, **OLM**.
3. Enter a description for the set of books.
4. Select the name of your Chart of Accounts (that is, the name of the Accounting Flexfield structure you have set up).
5. In the Functional Currency field, select the functional currency used by your enterprise; for example, **USD**.
6. Select the accounting calendar you created previously; for example, **OLM Calendar**.

Entering Closing Information:

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

Entering Journalling Information:

1. Ensure that the Balance Intercompany Journals and Suspense check boxes are selected.
2. Enter zeros in all the segments as account information in the (Suspense) Account field.
3. Save your work.

   Note: These accounts are for reference only. They are not used by OLM.

Choosing the Set of Books

Use the Choose Set of Books window to select the set of books to use.

To choose a set of books:

1. Select the set of books you previously created.

   OLM displays the Chart of Accounts, currency, and calendar you previously created.
2. Save your work.

Defining Financials Options

Use the Financials Options window to set up your financials options.

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

To define financials options:

1. Select the Accounting tabbed region (if not already displayed).

Entering Accounting Information:

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

Entering Supplier-Entry Information:

1. Select any invoice match option from the list.
2. Select the Supplier Numbers of Automatic as the entry and Numeric as the type from the lists.

Entering Supplier-Payables Information:

1. Select 45 Net as the payment terms.
2. Select Check (cheque) as the payment method.

Entering Supplier-Purchasing Information:

1. Select any Ship to Location from the list.
2. Select any Inventory Organization from the list.

Entering Human Resources Information:

1. Enter a business group; for example, **OLM DEMO Business Group**.
2. Select Home in the Expense Reimbursement Address region.
3. Select Automatic as the payment method.
4. Enter **5** in Next Automatic Number.
5. Save your work.

Defining System Options

Use the System Options window to set up your system options.

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

To define system options:

1. Ensure that the Accounting tabbed region is displayed.

Accounting Information:

1. Enter **Cash Basis** as the accounting method.
2. Enter **OLM Set of Books** as the name.
3. Select zeros (000.000.000) in the following fields:
   - Finance Charge Activity
   - Realized Gains Accounts
   - Realized Losses Account
   - Tax Account
4. Leave the default number of days per posting cycle as they are.

Tax Information:

1. Select Sales Tax as the method of paying tax.
2. Select No Validation - Country as the location flexfield structure.

3. Leave 000000 to 99999-99999 as the default postal code range.
4. Select No Validation as the address validation.
5. Select Total Tax Only for printing invoices.
6. Leave the default tax cache size as it is.
7. Select Line as the calculation level.
8. Select Nearest as the rounding rule.

Transaction and Customer Information:

1. Leave the maximum memory in bytes as 65535.
2. Leave the log file message level as 0.
3. Select DEFAULT as the grouping rule name.

Miscellaneous Information:

1. Enter **5000** as the split amount.
2. Enter **90** as the number of days in the Days Sales Outstanding Calculation
3. Leave the Invoices per Commit as 1000.
4. Leave the Receipts per Commit as 1000.
5. Select Open Invoice Due Date as the charge back due date.
6. Select United States as the country.
7. Select None as the source of territory.
8. Select Line First-Tax After as the applications rule set.

Function and Security Configuration

Organization Security

If your enterprise uses Oracle HRMS with OLM, you can identify which workers belong to the organization sponsoring and managing a class.

Set up organization security to enable only those users who belong to the sponsoring organization to update and delete classes, enroll learners, and update enrollments.

How Does Organization Security Work?

If a user who belongs to the organization sponsoring (administering) the class or program selects the Secure select box on the Create Class page, only users who belong to the same organization can do the following:

- **Update and delete classes, or enroll and maintain learners in those classes**

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

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

  - Enroll learners in those classes (and customers for customer-based classes)
  - Update an enrollment
  - Delete an enrollment

  You also prevent users who do not belong to the sponsoring organization from creating, deleting, or updating the following for the class:

  - Sessions
  - Internal assignments
  - Categories
  - Class associations

  A user from the sponsoring organization can remove security from a class, providing no enrollments exist for the class.

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

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

  - Enroll learners or customers in those classes 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 classes and programs and enter, delete, and update enrollments.

Profile Options

A system profile is a set of changeable options that determines how (or whether) a particular function runs. You can set profiles at different levels as described in the following table:

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

Values set at a higher level cascade as defaults to the lower levels. Values set at a lower level override a default from a higher level. Many profiles enable you to enter a value only at one or more of the levels (see the Configurable Level column in the tables below).

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

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

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

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

Profile Options Tables and Descriptions

The tables and text below list all the OLM profile options, grouped according to category: General, Waitlisting, Order Management integration, and Self-Service.

The tables indicate the levels at which the User or System Administrator can enter values for the profile options.

Some profile options require you to provide a value, and some already provide a default value that you can change.

To view profiles used in OLM prior to the Online Learning option (previously Oracle Training Administration), see Legacy OTA-iLearning Integration Profile Options, page 11-47.

General Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
HR: Query-Only Mode	All	Yes, **No**	Yes
OTA: Assessment Branding Image	Responsibility	<name of image>, <**null**>	No
OTA: Data Source Module	Responsibility	iLearning, iRecruitment, <**null**>	Yes, if using iRecruitment
OTA: Default Attended Enrollment Status	Responsibility	<enrollment status based on Attended>	Yes
OTA: Global Business Group	Responsibility	<global business group>	Yes if using globalization
OTA: Hide Employee External Address	Site	Yes, No, <**null**>	Yes, at Site level
OTA: Project Accounting Integration	All	Yes, **No**	No
OTA: Oracle Online Learning Option Licensed	Site, Application	Yes, **No**	Yes
OTA: Restrict Employees from Customer-Restricted Classes	Responsibility, Site	Yes, No, <**null**>	No
OTA: XSD Server Location	Application	<server address>	Yes if using content

HR: Query-Only Mode

To restrict access to query-only for all OLM windows on a menu, set HR: Query-Only Mode to Yes.

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

See Restricting Access to Query-Only Mode, *Oracle HRMS Implementation Guide*

OTA: Assessment Branding Image

Enables other applications to use alternative branding images in assessment headers. Omit any file extension from the name.

OTA: Data Source Module

Restricts access to Generalized Assessment data for users of iRecruitment. Select "iLearning" to enable these users to view data originating in OLM, or "iRecruitment" to enable them to view data only from iRecruitment.

OTA: Default Attended Enrollment Status

Establishes a default value for the Attended enrollment status.

OTA: Global Business Group

Enables globalization. Enter the name of the business group you wish to designate as global.

OTA: Hide Employee External Address

Hides or reveals, at site level, the external (home) addresses of your employees. The default value is null, but is equivalent to Yes (addresses remain hidden).

> **Warning:** To continue to view external employee addresses, existing customers must set this profile to No. For existing enrollments, however, any formerly selectable external address selected remains visible. To ensure data privacy under these circumstances, the user cannot change the address (the lookup contains no items).

OTA: Oracle Online Learning Option Licensed

Set this value to Yes to enable the setup and play of online classes, if you have licensed OLM with the Online Learning option. If you have not licensed OLM with the Online Learning option, set this profile to No.

OTA: Project Accounting Integration

Identifies whether OLM is integrated with Project Accounting 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: Restrict Employees from Customer-Restricted Classes

Prevents employees in your organization from enrolling in customer-restricted classes.

OTA: XSD Server Location

Identifies the directory that holds required XSD files used during export of learning objects or tests. Set the value to http://[machine name]:[port]/OA_HTML/

Waitlisting Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
OTA: Activate Automatic Waitlist Enrollments	All	Yes, **No**	Yes, at Site level
OTA: Automatic Waitlist Enrollment Default Booking Status	All	Placed, <value based on Placed>, <**null**>	Yes
OTA: Automatic Waitlist Enrollments: Hours Prior To Class	All	<numeric> (**0**)	Yes, at Site level
OTA: Waitlist Sorting Criteria	All	**Booking Priority**, Date Placed	Yes, at Site level

OTA: Activate Automatic Waitlist Enrollments

Indicates whether you are activating the automatic waitlist enrollments functionality. Enter Yes or No.

OTA: Automatic Waitlist Enrollment Default Booking Status

Holds the default enrollment status for automatic waitlist enrollments. Enter either Placed or a user-defined value based on Placed.

> **Warning:** Select an enrollment status with the same business group that you intend to use for your OLM responsibility. If you do not, OLM cannot use that status to enroll learners from the waitlist.

OTA: Automatic Waitlist Enrollments: Hours Prior To Class

Specifies, in number of hours prior to a class, when you want to stop automatic waitlist enrollments for any class. You must manually control any enrollments for the period specified. Enter a numeric value (0, 1, 2,...n).

OTA: Waitlist Sorting Criteria

Identifies which criterion--booking priority or date and time placed--takes priority on the waitlist. If waitlisted enrollments share the same priority, their enrollment then depends on date and time placed.

Oracle Order Management Integration Profile Options

The profiles in this section apply *only* to classes and enrollments originating in Order Management. Setting a value for OTA: OM Default Class Owner, for instance, does not set the default owner for classes originating in OLM, self-service Training, or OLM.

Oracle Order Management Integration Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
OTA: OM Default Enrollment Cancelled Status	All	<enrollment status based on Cancelled>	No
OTA: OM Default Class Owner	Responsibility	<employee from lookup>	No
OTA: OM Default Class Training Center	Responsibility, User	<training center from lookup>	No
OTA: OM Default Class System Status	Responsibility	Normal, Planned, Full, Closed, Cancelled	No
OTA: OM Default Class User Status	Responsibility	<status from lookup>	No
OTA: OM Restrict Enrollment by Country	Responsibility	Yes, No, <**null**>	No
OTA: OM Waitlist Priority	Site	<user-specified value from lookup>	No

OTA: OM Default Enrollment Cancelled Status

Establishes a default value for the Cancelled enrollment status. Use this profile to use an enrollment status you have created in place of the standard Cancelled status.

OTA: OM Default Class Owner

Sets a default class owner. Enter a person to receive workflow notifications automatically if no other approver is set.

OTA: OM Default Class Training Center

Sets a default training center for each class created in OM.

OTA: OM Default Class System Status

Establishes a default class system status: Normal, Planned, Full, Closed, or Cancelled.

OTA: OM Default Class User Status

Establishes a default value for the user class status, taken from the values for the lookup type EVENT_USER_STATUS.

> **Note:** Do not confuse this status with the class system status.

OTA: OM Restrict Enrollment by Country

Restricts enrollments to only those learners whose Operating Unit's country matches the country where the class takes place. You enforce this restriction by setting the profile value to Yes. Note that this restriction largely defeats the purpose of globalization: learners in Colmar, France, for instance, could not take classes in Basel, Switzerland or Freiburg, Germany, all within an hour's drive of one another.

OTA: OM Waitlist Priority

Sets the default OM waitlist priority value taken from the user-defined values for the lookup type PRIORITY_LEVEL.

Self-Service Learning Profile Options

As with OM, the profiles in this section apply *only* to self-service Learning (enrollments originating in the Learner or Manager interfaces). Setting a value for OLM: Automatic Transfer to GL, for instance, does not automatically transfer headers created in the OLM Finance Headers window.

Profile	Configurable Level	Values (default value in boldface)	Value Required?
OLM: Automatic Creation of Finance Headers and Lines	Site	Yes, **No**	Yes
OLM: Automatic Finance Header Approval	Responsibility, Site	Yes, **No**	Yes
OLM: Default Training Administrator	Responsibility	<Person name>, **<null>**	Yes
OLM: Automatic Transfer to GL	Responsibility, Site	Yes, **No**	Yes
OLM: Minimum Hours to Cancel for Free	Site	<numeric value>, **0**	Yes
OLM: Read-only Enrollment Message	User	<Message text>, **<null>**	No

OLM: Automatic Creation of Finance Headers and Lines

Indicates whether you are activating the automatic creation of finance headers and lines. Select Yes if you are running Oracle General Ledger.

OLM: Automatic Finance Header Approval

Indicates whether automatically created finance headers also receive automatic approval. Select Yes if you are running Oracle General Ledger.

OLM: Default Training Administrator

Set a default training administrator. Enter a person to receive workflow notifications automatically if no other approver is set.

OLM: Automatic Transfer to GL

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

OLM: Minimum Hours to Cancel for Free

Specifies, in number of hours prior to a class, when a learner can no longer cancel an enrollment without being charged. You must manually control any enrollments for the period specified. Enter a numeric value (0, 1, 2,...n).

OLM: Read-only Enrollment Message

Sets a user's access to read-only and specifies the message sent when the user attempts to change any enrollment details.

> **Warning:** Placing any value in the field automatically sets the user's access to read-only.

Publicly Callable Business Process APIs in OLM

Application Programmatic Interfaces (APIs) are a logical grouping of all external process routines. The OLM API strategy delivers a set of PL/SQL packages procedures and functions that provide an open interface to the database.

The following table shows the APIs delivered with OLM.

Business Process APIs in OLM

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
ota_ocl_api	otoclapi.pkh	CREATE_ COM PETENCE_ LANGUAGE	N	Y	WW
ota_ocl_api	otoclapi.pkh	UPDATE_ COM PETENCE_ LANGUAGE	N	Y	WW
ota_tcc_api	ottccapi.pkh	CREATE_ CROSS_ CHARGE	N	Y	WW
ota_tcc_api	ottccapi.pkh	UPDATE_ CROSS_ CHARGE	N	Y	WW
ota_tdb_ waitlist_api	ottdb03t.pkh	AUTO_ ENROLL_ FROM_WA ITLIST	N	Y	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
ota_thg_api	otthgapi.pkh	CREATE_ HR_GL_ FLEX	N	Y	WW
ota_thg_api	otthgapi.pkh	UPDATE_ HR_GL_ FLEX	N	Y	WW
HR_KI_H IERARCH IES_API	hrhrcapi.pkh	CREATE_H IERARCHY_ NODE	N	Y	WW
HR_KI_H IERARCH IES_API	hrhrcapi.pkh	CREATE_ TOPIC_H IERARCHY_ MAP	N	Y	WW
HR_KI_H IERARCH IES_API	hrhrcapi.pkh	CREATE_TO PIC_UI_MAP	N	Y	WW
HR_KI_H IERARCH IES_API	hrhrcapi.pkh	CREATE_ UI_H IERARCHY_ MAP	N	Y	WW
HR_KI_H IERARCH IES_API	hrhrcapi.pkh	DELETE_H IERARCHY_ NODE	N	Y	WW
HR_KI_H IERARCH IES_API	hrhrcapi.pkh	DELETE_H IERARCHY_ NODE_MAP	N	Y	WW
HR_KI_H IERARCH IES_API	hrhrcapi.pkh	UPDATE_H IERARCHY_ NODE	N	Y	WW
HR_KI_H IERARCH IES_API	hrhrcapi.pkh	UPDATE_H IERARCHY_ NODE_MAP	N	Y	WW
HR_KI_ INTEGRAT IONS_API	hrintapi.pkh	CREATE_ INTEGRAT ION	N	Y	WW
HR_KI_ INTEGRAT IONS_API	hrintapi.pkh	DELETE_ INTEGRAT ION	N	Y	WW
HR_KI_ INTEGRAT IONS_API	hrintapi.pkh	UPDATE_ INTEGRAT ION	N	Y	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
HR_KI_INTEGRATIONS_API	hrintapi.pkh	VALIDATE_INTEGRATION	N	Y	WW
HR_KI_OPTIONS_API	hroptapi.pkh	CREATE_OPTION	N	Y	WW
HR_KI_OPTIONS_API	hroptapi.pkh	DELETE_OPTION	N	Y	WW
HR_KI_OPTIONS_API	hroptapi.pkh	UPDATE_OPTION	N	Y	WW
HR_KI_OPTION_TYPES_API	hrotyapi.pkh	CREATE_OPTION_TYPE	N	Y	WW
HR_KI_OPTION_TYPES_API	hrotyapi.pkh	DELETE_OPTION_TYPE	N	Y	WW
HR_KI_OPTION_TYPES_API	hrotyapi.pkh	UPDATE_OPTION_TYPE	N	Y	WW
HR_KI_TOPICS_API	hrtpcapi.pkh	CREATE_TOPIC	N	Y	WW
HR_KI_TOPICS_API	hrtpcapi.pkh	DELETE_TOPIC	N	Y	WW
HR_KI_TOPICS_API	hrtpcapi.pkh	UPDATE_TOPIC	N	Y	WW
HR_KI_TOPIC_INTEGRATIONS_API	hrtisapi.pkh	CREATE_TOPIC_INTEGRATION	N	Y	WW
HR_KI_TOPIC_INTEGRATIONS_API	hrtisapi.pkh	CREATE_TOPIC_INTEGRATION	N	Y	WW
HR_KI_TOPIC_INTEGRATIONS_API	hrtisapi.pkh	CREATE_TOPIC_INTEGRATION_KEY	N	Y	WW
HR_KI_TOPIC_INTEGRATIONS_API	hrtisapi.pkh	DELETE_TOPIC_INTEGRATION	N	Y	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
HR_KI_ TOPIC_ INTEGRAT IONS_API	hrtisapi.pkh	UPDATE_ TOPIC_ INTEGRAT ION	N	Y	WW
HR_KI_ TOPIC_ INTEGRAT IONS_API	hrtisapi.pkh	UPDATE_ TOPIC_ INTEGRAT ION_KEY	N	Y	WW
HR_KI_ USER_ INTERFACES_ API	hritfapi.pkh	CREATE_ USER_ INTERFACE	N	Y	WW
HR_KI_ USER_ INTERFACES_ API	hritfapi.pkh	DELETE_ USER_ INTERFACE	N	Y	WW
HR_KI_ USER_ INTERFACES_ API	hritfapi.pkh	UPDATE_ USER_ INTERFACE	N	Y	WW
OTA_ACT IVITY_ CATEGORY_ API	otaciapi.pkh	CREATE_ ACT_CAT_ INCLUSION	N	Y	WW
OTA_ACT IVITY_ CATEGORY_ API	otaciapi.pkh	DELETE_ ACT_CAT_ INCLUSION	N	Y	WW
OTA_ACT IVITY_ CATEGORY_ API	otaciapi.pkh	UPDATE_ ACT_CAT_ INCLUSION	N	Y	WW
OTA_ACT IVITY_VERS ION_API	ottavapi.pkh	CREATE_ ACTIVITY_ VERSION	N	Y	WW
OTA_ACT IVITY_VERS ION_API	ottavapi.pkh	DELETE_ ACTIVITY_ VERSION	N	Y	WW
OTA_ACT IVITY_VERS ION_API	ottavapi.pkh	UPDATE_ ACTIVITY_ VERSION	N	Y	WW
OTA_ ANNOUNCEMENT_ API	otancapi.pkh	CREATE_ ANNOUNCEMENT	N	Y	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
OTA_ ANNOUNCEMENT_ API	otancapi.pkh	DELETE_ ANNOUNCEMENT	N	Y	WW
OTA_ ANNOUNCEMENT_ API	otancapi.pkh	UPDATE_ ANNOUNCEMENT	N	Y	WW
OTA_ CATEGORY_ USAGE_API	otctuapi.pkh	CREATE_ CATEGORY	N	Y	WW
OTA_ CATEGORY_ USAGE_API	otctuapi.pkh	DELETE_ CATEGORY	N	Y	WW
OTA_ CATEGORY_ USAGE_API	otctuapi.pkh	UPDATE_ CATEGORY	N	Y	WW
OTA_ EVENT_API	otevtapi.pkh	CREATE_ CLASS	N	Y	WW
OTA_ EVENT_API	otevtapi.pkh	DELETE_ CLASS	N	Y	WW
OTA_ EVENT_API	otevtapi.pkh	UPDATE_ CLASS	N	Y	WW
OTA_LEARN ING_PATH_ API	otlpsapi.pkh	CREATE_ LEARNING_ PATH	N	Y	WW
OTA_LEARN ING_PATH_ API	otlpsapi.pkh	DELETE_ LEARNING_ PATH	N	Y	WW
OTA_LEARN ING_PATH_ API	otlpsapi.pkh	UPDATE_ LEARNING_ PATH	N	Y	WW
OTA_LP_ CATEGORY_ API	otlciapi.pkh	CREATE_ LP_CAT_ INCLUSION	N	Y	WW
OTA_LP_ CATEGORY_ API	otlciapi.pkh	DELETE_ LP_CAT_ INCLUSION	N	Y	WW
OTA_LP_ CATEGORY_ API	otlciapi.pkh	UPDATE_ LP_CAT_ INCLUSION	N	Y	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
OTA_LP_ MEMBER_ API	otlpmapi.pkh	CREATE_ LEARN ING_PATH_ MEMBER	N	Y	WW
OTA_LP_ MEMBER_ API	otlpmapi.pkh	DELETE_ LEARN ING_PATH_ MEMBER	N	Y	WW
OTA_LP_ MEMBER_ API	otlpmapi.pkh	UPDATE_ LEARN ING_PATH_ MEMBER	N	Y	WW
OTA_OFFER ING_API	otoffapi.pkh	CREATE_ OFFERING	N	Y	WW
OTA_OFFER ING_API	otoffapi.pkh	DELETE_ OFFERING	N	Y	WW
OTA_OFFER ING_API	otoffapi.pkh	UPDATE_ OFFERING	N	Y	WW
OTA_ RESOURCE_ BOOKING_A PI	ottrbapi.pkh	CREATE_ RESOURCE_ BOOKING	N	Y	WW
OTA_ RESOURCE_ BOOKING_A PI	ottrbapi.pkh	DELETE_ RESOURCE_ BOOKING	N	Y	WW
OTA_ RESOURCE_ BOOKING_A PI	ottrbapi.pkh	UPDATE_ RESOURCE_ BOOKING	N	Y	WW
OTA_ RESOURCE_ USAGE_API	otrudapi.pkh	CREATE_ RESOURCE	N	Y	WW
OTA_ RESOURCE_ USAGE_API	otrudapi.pkh	DELETE_ RESOURCE	N	Y	WW
OTA_ RESOURCE_ USAGE_API	otrudapi.pkh	UPDATE_ RESOURCE	N	Y	WW
OTA_SKILL_ PROVISION_ API	ottspapi.pkh	CREATE_SK ILL_PROVIS ION	N	Y	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
OTA_SKILL_ PROVISION_ API	ottspapi.pkh	DELETE_SK ILL_PROVIS ION	N	Y	WW
OTA_SKILL_ PROVISION_ API	ottspapi.pkh	UPDATE_SK ILL_PROVIS ION	N	Y	WW
PQH_FR_ GLOBAL_ PAYSCALE_ API	pqginapi.pkh	CREATE_ GLOBAL_ INDEX	N	Y	FR
PQH_FR_ GLOBAL_ PAYSCALE_ API	pqginapi.pkh	CREATE_ INDEMN ITY_RATE	N	Y	FR
PQH_FR_ GLOBAL_ PAYSCALE_ API	pqginapi.pkh	DELETE_ GLOBAL_ INDEX	N	Y	FR
PQH_FR_ GLOBAL_ PAYSCALE_ API	pqginapi.pkh	DELETE_ INDEMN ITY_RATE	N	Y	FR
PQH_FR_ GLOBAL_ PAYSCALE_ API	pqginapi.pkh	UPDATE_ GLOBAL_ INDEX	N	Y	FR
PQH_FR_ GLOBAL_ PAYSCALE_ API	pqginapi.pkh	UPDATE_ INDEMN ITY_RATE	N	Y	FR
ota_nhs_api	otnhsapi.pkh	CREATE_ NON_OTA_ HISTORIES	N	Y	WW
ota_nhs_api	otnhsapi.pkh	UPDATE_ NON_OTA_ HISTORIES	N	Y	WW
ota_tdb_api_ ins2	ottdb02t.pkh	CREATE_ ENROLLMENT	N	N	WW
ota_tdb_api_ upd2	ottdb02t.pkh	UPDATE_ ENROLLMENT	N	N	WW
ota_tmt_api	ottmtapi.pkh	CREATE_ MEASURE	N	Y	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
ota_tmt_api	ottmtapi.pkh	UPDATE_ MEASURE	N	Y	WW
ota_tmt_api	ottmtapi.pkh	DELETE_ MEASURE	N	Y	WW
ota_tpc_api	ottpcapi.pkh	CREATE_ COST	N	Y	WW
ota_tpc_api	ottpcapi.pkh	UPDATE_ COST	N	Y	WW
ota_tpc_api	ottpcapi.pkh	DELETE_ COST	N	Y	WW
ota_tpm_api	ottpmapi.pkh	CREATE_ TRAINING_ PLAN_ MEMBER	N	Y	WW
ota_tpm_api	ottpmapi.pkh	UPDATE_ TRAINING_ PLAN_ MEMBER	N	Y	WW
ota_tpm_api	ottpmapi.pkh	DELETE_ TRAINING_ PLAN_ MEMBER	N	Y	WW
ota_tps_api	ottpsapi.pkh	CREATE_ TRAINING_ PLAN	N	Y	WW
ota_tps_api	ottpsapi.pkh	UPDATE_ TRAINING_ PLAN	N	Y	WW
ota_tps_api	ottpsapi.pkh	DELETE_ TRAINING_ PLAN	N	Y	WW

Workflow Notifications

Workflow notifications are messages that communicate information to learners and managers. Notifications can be delivered to users through e-mail or the web.

See the Oracle Workflow User Guide.

OLM offers four categories of notifications, detailed in the table below.

- Competency Update Notifications, page 12-45
- Class Enrollment Notifications, page 12-49

- Class Cancellation Notifications, page 12-53
- External Learning Notifications, page 12-54

Competency Update Notifications

When learners gain a competency, the application sends the following notifications:

Notifies Learner of Competency Update

Short Description	Notify learner that automatic update has occurred.
Sent To	Learner
Process Name	Competency Update (OTA_COMPETENCE_UPDATE_JSP_PRC)
Message Name	Notify Learner of Competency Update
Internal Name	OTA_AUTO_COMP_UPD_TO_EMP
Subject	Competency Profile Has Been Updated
Body Text	Your completion of the Course &COURSE_TITLE has automatically updated your personal competency profile with the following competencies. DISPLAY COMPETENCIES AND LEVELS GRANTED. No action is required.

Notifies Manager of Competency Update

Short Description	Notify manager that automatic update has occurred.
Sent To	Manager
Process Name	Competency Update (OTA_COMPETENCE_UPDATE_JSP_PRC)
Message Name	Notify Manager of Competency Update
Internal Name	OTA_AUTO_COMP_UPD_TO_MGR
Subject	Competency Profile of &EMPLOYEENAME has been updated
Body Text	&EMPLOYEENAME has completed the Course &COURSE_TITLE, automatically updating the personal competency profile with the following compencies. DISPLAY COMPETENCIES AND LEVELS GRANTED. No action is required.

Competency Update Requiring Manager Approval

Short Description	Notify approver to approver
Sent To	Approver
Process Name	
Message Name	Notify Approver Competency Requires Approval
Internal Name	
Subject	Competency Update for &EMPLOYEENAME Requires Your Approval
Body Text	&EMPLOYEENAME has completed the Course &COURSE_TITLE, which is designed for the learner to attain the competencies listed below. You may approve these competencies, updating &EMPLOYEENAME personal competency profile, or you may reject these competencies, leaving &EMPLOYEENAME personal competency profile unchanged. Click Update Action to delegate or change levels for individual competencies. DISPLAY COMPETENCIES AND LEVELS GRANTED. No action is required.

Notifies Learner of Competency Approval

Short Description	Notify learner of competency approval
Sent To	Learner
Process Name	Competency Update
Message Name	Notify Learner of Competency Approval
Internal Name	OTA_CREATER_OF_COMP_UPD
Subject	Competency Profile of &EMPLOYEENAME Approved by &Approver
Body Text	Following your completion of the Course &COURSE_TITLE, &APPROVER has added the competencies to your personal competency profile.

Notifies Learner of Competency Rejection

Short Description	Notify learner of competency rejection
Sent To	Learner
Process Name	Competency Update
Message Name	Notify Learner of Competency Rejection
Internal Name	OTA_COMP_UPD_REJECT_MSG
Subject	Competency Profile of &EMPLOYEENAME Rejected by &Approver
Body Text	&APPROVER has rejected an update to your personal competency profile, following your completion of the Course &COURSE_TITLE. Competencies have not been added to your personal competency profile. Your personal competency profile has not changed. No action is required.

Notifies Learner of Manual Competency Update

Short Description	Notify learner comps should be granted, but nothing has happened in system (need to manually update)
Sent To	Learner
Process Name	Competency Update
Message Name	Notify Learner of Manual Competency Update
Internal Name	OTA_COMP_UPD_TO_CREATER_MSG
Subject	Your Competency Profile Eligible for Update
Body Text	After completing the Course &COURSE_T ITLE, you are eligible to add the following competencies to your personal competency profile. DISPLAY COMPETENCIES AND LEVELS ASSOCIATED w/COURSE To add the competencies to your profile, you must manually update your profile. Unless you or your manager perform this update, your personal competency profile will not change.

Notifies Manager of Manual Competency Update

Short Description	Notify manager comps should be granted, but nothing has happened in system (need to manually update)
Sent To	Manager
Process Name	Competency Update
Message Name	Notify Manager of Manual Competency Update
Internal Name	OTA_NOTIFY_OCMPETENCE_INFO_MSG
Subject	Competency Profile of &EMPLOYEENAME Eligible for Update
Body Text	&EMPLOYEENAME has completed the Course &COURSE_TITLE. You can now update their personal competency profile with the following competencies: DISPLAY COMPETENCIES AND LEVELS ASSOCIATED w/COURSE To add the competencies to your profile, you must manually update your profile. Unless you or the employee perform this update, their personal competency profile will not change.

Notifies Competency Update Correction

Short Description	Notify learner of return for correction
Sent To	Learner
Process Name	Competency Update
Message Name	Notify Competency Update Correction
Internal Name	OTA_NOTIFY_COMPETENCE_CORR_MSG
Subject	&PROCESS_DISPLAY_NAME for & CURRENT_PERSON_DISPLAY_NAME is cancelled
Body Text	Final Approver: &FORWARD_TO_DISPLAY_ NAME User Name: &FORWARD_TO_USERNAME &FORWARD_TO_DISPLAY_NAME has rejected the competency achievements of &CURRENT_PERSON_DISPLAY_NAME in training class '&OTA_EVENT_TITLE' (course name &OTA_COURSE&_VERSION_NAME). Please contact &FORWARD_TO_DISPLAY_ NAME before resubmitting.

Class Enrollment Notifications

When a learner's request to enroll in a class is approved or disapproved, the application sends the following notifications.

Notifies that the Learner Enrollment Status Cancelled for Correction

Short Description	Notify the person who created the booking request of the enrollment if it is cancelled
Sent To	Creator's Username
Process Name	Enroll in Learning
Message Name	Notify Enrollment Status to Enrollee for Correction
Internal Name	OTA_LNR_NOTIFY_ENROLL_CORRECT
Subject	&PROCESS_DISPLAY_NAME request is cancelled
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME, &FORWARD_TO_DISPLAY_NAME has rejected your enrollment in the class &OTA_CLASS_TITLE (Course name &OTA_COURSE_VERSION_NAME). Your enrollment is cancelled. Please contact &FORWARD_TO_DISPLAY_NAME before reenrolling. Class Name: &OTA_CLASS_TITLE Enrollment Number: &BOOKING_ID Start Date: &OTA_COURSE_START_DATE End Date: &OTA_COURSE_END_DATE

Notifies Class Owner CC Transfer To Not Found

Short Description	Notify class owner cc transfer to not found
Sent To	Class Owner's Email ID
Process Name	Enroll in Learning
Message Name	Notify Class Owner CC Transfer To Not Found
Internal Name	OTA_LNR_CC_TRANSFER_TO_NOT_FND
Subject	Cross Charge 'Transfer To' value not found
Body Text	The 'Transfer To' value (the receiving cost center) cannot be found for the enrollment record shown below: Employee: &CURRENT_PERSON_DISPLAY_ NAME Class Name: &CLASS_TITLE Enrollment Number: &BOOKING_ID Please manually create the Finance Header and Line, as these cannot be automatically created.

Notifies Class Owner CC Transfer From Not Found

Short Description	Notify class owner cc transfer from not found
Sent To	Class Owner Email ID
Process Name	Enroll in Learning
Message Name	Notify Class Owner CC Transfer From Not Found
Internal Name	OTA_LNR_CC_TRANSFER_FR_NOT_FND
Subject	Cross Charge 'Transfer From' value not found
Body Text	The 'Transfer From' value (the paying cost center) cannot be found for the enrollment record shown below: Employee: &CURRENT_PERSON_DISPLAY_ NAME Class Name: &CLASS_TITLE Enrollment Number: &BOOKING_ID Please manually create the Finance Header and Line, as these cannot be automatically created.

Notifies about the Learner Enrollment Request Status (online sync dm)

Short Description	Notify learner enrollment request status (online sync dm)
Sent To	Creator's Username
Process Name	Enroll in Learning
Message Name	Notify Enrollment Status to Enrollee (online sync dm)
Internal Name	OTA_LNR_NOTIFY_ENROLL_STS_OS
Subject	&PROCESS_DISPLAY_NAME is approved
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME, &FORWARD_TO_DISPLAY_NAME has approved your enrollment in the class &OTA_CLASS_TITLE (Course name &OTA_COURSE_VERSION_NAME) beginning on &OTA_COURSE_START_DATE. Your enrollment status is: &ENROLL_IN_A_CLASS_STATUS. This is your enrollment confirmation for the class below. Please keep a copy of this information for your reference. Class Name: &OTA_CLASS_TITLE Enrollment Number: &BOOKING_ID Start Date: &OTA_COURSE_START_DATE Start Time: &OTA_COURSE_START_TIME End Date: &OTA_COURSE_END_DATE Delivery Mode: &OTA_DELIVERY_MODE_NAME

Notifies about the Learner Enrollment Request Status (offline dm)

Short Description	Notify learner enrollment request status (offline dm)
Sent To	Creator''s Username
Process Name	Enroll in Learning
Message Name	Notify Enrollment Status to Enrollee (offline dm)
Internal Name	OTA_LNR_NOTIFY_ENROLL_STATUS
Subject	&PROCESS_DISPLAY_NAME is approved
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME, &FORWARD_TO_DISPLAY_NAME has approved your enrollment in the class &OTA_CLASS_TITLE (Course name &OTA_COURSE_VERSION_NAME) beginning on &OTA_COURSE_START_DATE. Your enrollment status is: &ENROLL_IN_A_CLASS_STATUS. This is your enrollment confirmation for the class below. Please keep a copy of this information for your reference. Class Name: &OTA_CLASS_TITLE Enrollment Number: &BOOKING_ID Start Date: &OTA_COURSE_START_DATE Start Time: &OTA_COURSE_START_TIME End Date: &OTA_COURSE_END_DATE Delivery Mode: &OTA_DELIVERY_MODE_NAME Location: &OTA_LOCATION_ADDRESS

Notifies about the Learner Enrollment Request Status (online async dm)

Short Description	Notify learner enrollment request status (online async dm)
Sent To	Creator's Username
Process Name	Enroll in Learning
Message Name	Notify Enrollment Status to Enrollee (online async dm)
Internal Name	OTA_LNR_NOTIFY_ENROLL_STS_OA
Subject	&PROCESS_DISPLAY_NAME is approved
Body Text	Dear &CURRENT_PERSON_DISPLAY_NAME, &FORWARD_TO_DISPLAY_NAME has approved your enrollment in the class &OTA_CLASS_TITLE (Course name &OTA_COURSE_VERSION_NAME) beginning on &OTA_COURSE_START_DATE. Your enrollment status is: &ENROLL_IN_A_CLASS_STATUS. This is your enrollment confirmation for the class below. Please keep a copy of this information for your reference. Class Name: &OTA_CLASS_TITLE Enrollment Number: &BOOKING_ID Delivery Mode: &OTA_DELIVERY_MODE_NAME Expiration Date: &OTA_COURSE_END_DATE

Class Cancellation Notifications

When a learner's enrollment in a class is cancelled, the application sends the following notifications

Notifies Learner of Enrollment Cancellation

Short Description	Notify learner of enrollment cancellation
Sent To	Current person's Username
Process Name	Cancel Learning Enrollment
Message Name	Notify Learners of Enrollment Cancellation
Internal Name	OTA_LNR_CANCEL_CLASS_MSG
Subject	Your enrollment in the class &CLASS_TITLE is cancelled
Body Text	Dear &CURRENT_PERSON_DISPLAY_ NAME, &APPROVER_CREATOR_ DISPLAY_NAME has cancelled your enrollment in the class &CLASS_TITLE (course name &OTA_ COURSE_VERSION_NAME) beginning on &OTA_COURSE_START_DATE.

Notifies Manager of Cancellation of Enrollment

Short Description	Notify Manager of cancellation of enrollment
Sent To	Current person's Username, Manager's Username
Process Name	Cancel Learning Enrollment
Message Name	Notify Learners of Cancellation of Enrollment
Internal Name	OTA_LNR_CANCEL_CLASS_SUP_MSG
Subject	&APPROVAL_CREATOR_DISPLAY_NAME has cancelled an enrollment in &CLASS_TITLE
Body Text	&APPROVER_CREATOR_ DISPLAY_NAME has cancelled your enrollment in the class &OTA_CLASS_TITLE (course name &OTA_ COURSE_VERSION_NAME) beginning on &OTA_COURSE_START_DATE.

External Learning Notifications

When an external learning record of a learner is added, deleted, updated, or corrected, the application sends the following notifications:

Notifies Enrollee of External Learning Delete

Short Description	Notify enrollee of external learning delete
Sent To	Current person's Username
Process Name	External Learning
Message Name	Notify External Learning Deleted
Internal Name	OTA_NOTIFY_EXTLRNG_DEL_MSG
Subject	&PROCESS_DISPLAY_NAME record has been deleted
Body Text	Dear &CURRENT_PERSON_DISPLAY_ NAME, The record of your attendance in the class &OTA_CLASS_TITLE has been deleted. If this is an error, you must re-enter the record as external learning. You do not have to take any further action.

Notifies Enrollee of External Learning Create

Short Description	Notify enrollee of external learning create
Sent To	Current person's Username
Process Name	External Learning
Message Name	Notify External Learning Created
Internal Name	OTA_NOTIFY_EXTLRNG_INS_MSG
Subject	&PROCESS_DISPLAY_NAME record has been created
Body Text	Dear &CURRENT_PERSON_DISPLAY_ NAME, Your attendance in the external class &OTA_CLASS_TITLE ending on &OTA_ COURSE_END_DATE has been recorded.

Notifies Enrollee of External Learning Update

Short Description	Notify enrollee of external learning update
Sent To	Current person's Username
Process Name	External Learning
Message Name	Notify External Learning Updated
Internal Name	OTA_NOTIFY_EXTLRNG_UPD_MSG
Subject	&PROCESS_DISPLAY_NAME record has been updated
Body Text	Dear &CURRENT_PERSON_DISPLAY_ NAME, The record of your attendance in the external class &OTA_CLASS_TITLE ending on &OTA_COURSE_END_DATE has been updated.

Notifies External Learner of Return for Correction

Short Description	Notify external learner of return for correction
Sent To	Current person's Username
Process Name	External Learning
Message Name	Notify External Learner Correction to Initiator
Internal Name	OTA_NOTIFY_EXTLRNG_CORR_MSG
Subject	&PROCESS_DISPLAY_NAME for & CURRENT_PERSON_DISPLAY_NAME has been returned for correction
Body Text	Final Approver: &FORWARD_TO_DISPLAY_ NAME User Name: &FORWARD_TO_USERNAME Comments: &WF_NOTE WF_NOTIFICATION (HISTORY) This notification is for information only.

Function and Windows Configuration

You can configure OLM so that administrators see only the windows and functions they need to perform their jobs. Function security enables you to define which functions they see when they enter a learner enrollment, or whether they enter competencies or skills delivered by a course.

> **Warning:** All users with Learning Administration access can search for catalog items and can view limited enrollment details (learner, company). The windows governed by these configuration

options reveal much more information, including attendance results and financial arrangements.

Enrollment Windows

You use parameters to configure the following functions:

- Which windows (Enrollment Summary, Enrollment Details, and Search for Class) appear by default when users select the Enrollments menu option.
- Which regions of the Enrollment Details window are displayed.
- Whether users can enter employee enrollments, customer enrollments, or both in the Enrollment windows.

Delivered Competencies Windows

You use parameters to enable users to enter and hold qualifications, attributes, and knowledge that learners can expect to attain by attending courses, as competencies or skills. You can do this only if you have both Oracle Human Resources and OLM installed at your enterprise.

> **Note:** Customers who have not previously used the skills method should use the competency method.

You also use parameters to enable selected users to add competencies gained through a course directly to a learner's Competency Profile.

Enrollments Windows Configuration

You can configure the Enrollments windows in the following ways:

- Which windows (Enrollment Summary, Enrollment Details, and Search for Class) appear by default when users select the Learner Enrollments menu option

  See Number of Enrollment Windows Displayed, page 12-57
- Which regions of the Enrollment Detail window are displayed
- Whether users can enter employee enrollments, customer enrollments, or both in the Enrollment windows

Enrollment Window Display

When you first install the application, the three windows (Enrollment Summary, Enrollment Details, and Search for Class) appear by default when users select the Learner Enrollments menu option. To prevent all three appearing, enter up to two of the following parameter values:

- EVENT=NO

  This prevents the Search for Class window from displaying
- SUMMARY=NO

  This prevents the Enrollment Summary window from displaying
- DETAIL=NO

This prevents the Enrollment Details window from displaying

Caution: Do not customize the windows so that only the Search for Class 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 12-59

Regions Displayed

The Enrollment Details window by default contains six regions. You cannot prevent the display of three of the regions:

- CORRESPONDENCE - the Correspondence region
- ENROLLMENT_DETAILS - the Enrollment Details region
- ORDER_DETAILS - the Order Details region (populated automatically and only if the enrollment has originated in Oracle Order Management)

You can, however, prevent the other three regions from appearing. For example, you can prevent the Third-Party Contact region from appearing, if your enterprise handles external enrollments only.

You prevent any of the three regions from appearing by changing the parameter values from YES to NO. For example:

- FINANCE=NO

  This hides the Finance region.

- ATTENDANCE=NO

  This hides the Attendance region.

- THIRD_PARTY=NO

  This hides the Third-Party Contact region.

If you do not change the values for the three updatable parameters, users see all six regions in the Enrollment Details window.

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

To configure the regions displayed, see Configuring Functions, page 12-59

Enrollment Types

You can also define whether users can enter the following types of enrollments in the Enrollment windows:

- Internal organization (worker)
- Customer
- Both internal organization (worker) and customer

If you want users to enroll internal learners only, you define INTERNAL in the parameters. If you want users to enroll customer learners only, you define

EXTERNAL. Then, when users select the Enrollments window, they see the appropriate region (Customer or Organization).

If you want users to enroll organization and customer learners, 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 learners but you occasionally enroll internal learners. In this case, the Enrollment Details window displays the Customer region, but the user can change it to Organization.

You configure 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 the default.

Enrollment Status Security

Set up enrollment status security to prevent users with specific responsibilities from entering, updating, or deleting enrollments of a certain status. For example, your enterprise can allow all users to request enrollments, but allow only the course administrator to place an enrollment.

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 the statuses you specify.

See Setting Up Enrollment Status Security, page 12-60

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. OTA_OTATAEDB controls the Enrollment windows.
2. Enter the parameters you require to configure the Enrollment windows in the Parameters field.

   For example, to display the Enrollment Detail window with only the Finance and Attendance regions for both organization and customer learners (defaulting to customer), enter the following:

EVENT=NO SUMMARY=NO THIRD_PARTY=NO ENROLLMENT_TYPE=BOTH_EXTERNAL

For other configurations, see Enrollment Windows Configuration, page 12-57

3. Save your work.

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.

Order Management and OLM

Using OLM with Order Management

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

> **Note:** In some cases, the OM interface uses Oracle Training Administration terminology: "event" or "EVT" for "class", "activity" for "course", and "OTA" for "OLM".

Before you can order classes and enrollments, you must add units of measure, place items in inventory, set up price lists, and link courses to inventory. Then you can add classes and enrollments, and change the maximum number of attendees for a class.

Setting Up Order Management for OLM

For OM to recognize OLM courses, you must set up an OLM-specific Unit-of-Measure Class and two Units of Measure (UOMs). To transfer financial information to Accounts Receivable, you must set up OLM-specific transaction types. To enable direct access from the OLM Enrollment Details window to the OM Sales Order window, you must add two form functions to the OLM menu of the responsibility to which you wish to grant access.

To add the Units Of Measure:

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

   > **Note:** Do not use other names for the UOMs.

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

See Defining UOM Classes, *Oracle Order Management User Guide* and Defining UOMs, *Oracle Inventory User Guide*.

To set up OLM-specific transaction types:

1. Navigate to Setup > Transaction Types > Define.
2. Set up 3 transaction types:
   - Type: Invoice in Advance; Type Code: Line; Order Category: Order; in the Finance tab, set the Invoicing Rule to Advance and Accounting Rule to Immediate

- Type: Invoice Upon Attendance; Type Code: Line; Order Category: Order; in the Finance tab, set the Invoicing Rule to Arrears and Accounting Rule to Immediate
- Type: RMA; Type Code: Line; Order Category: Return; in the Finance tab, set the Invoicing Rule to Arrears (or Advance, depending on your policy) and Accounting Rule to Immediate

3. Query the transaction type that includes the Order Category of Order and the Order Workflow of Order Flow-Generic. Click on Assign Line Flows.
4. In the Line Workflow Assignments window, select the Order Type you just queried. You must create two new rows.
5. Create a new row with Line Type: Invoice in Advance; Item Type: Standard item; Process Name: Line Flow - OLM Item; and Start Date as early as possible.
6. Create another new row with Line Type: Invoice in Arrears; Item Type: Standard item; Process Name: Line Flow - OLM Item; and Start Date as early as possible. Click OK.
7. Query the transaction type that includes the Order Category of Return and the Order Workflow of Order Flow-Generic. Click on Assign Line Flows.
8. In the Line Workflow Assignments window, select the Order Type you just queried.
9. Create a new row with Line Type: RMA; Item Type: Standard item; Process Name: Line Flow - OLM Return for Credit Only; and Start Date as early as possible.
10. Save your work.

To grant OLM users direct access to the Sales Order window:

1. From the System Administrator responsibility, navigate to the Menus window.
2. Using the standard procedure for adding items to menus, add two functions to the OLM responsibility to which you want to grant access:

   --Order Organizer, ONT_OEXOEORD_SUMMARY

   --Order Organizer View, ONT_OEXOEORD_VW

   See Defining Menus, *Oracle HRMS Configuring, Reporting, and System Administration Guide*
3. Save your work.
4. If you want the Sales Order window under such access to be Read Only, in the Form Functions window you must query the Enrollment Details form OTAEDB, then set the Parameter ORDER_QUERY_ONLY=YES. The default value is NO.

   See Configuring Functions, page 12-59

Placing Items in Inventory

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

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

To place an activity in inventory:

1. Under Items, navigate to the Master Items window.
2. Select your inventory organization from the list of values.

3. To ensure that your system recognizes the links you create between inventory and OLM, you must set the HR: Security Profile (a System Profile under the System Administrator responsibility) to equal your HR business group in the "Responsibility" column.
4. Name the item. We suggest that you begin each item name with a fixed prefix, which will group all training items alphabetically on any long list of items.

   Warning: Inventory training item names must contain fewer than 80 characters.

5. Under the Main tab, select your primary UOM (Enrollment) from the list of values. User Item Type is optional, though you may wish to fill in a value to enhance reporting.
6. Under the Inventory tab, select two boxes: Inventory item and Reservable.
7. Under the Order Management tab, select the boxes Customer Ordered and Customer Orders Enabled.
8. Under the Invoicing tab, select Invoiceable Item and Invoice Enabled, if applicable. Save your work.

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

Creating Price Lists for OLM Classes

Oracle Pricing requires you to set up price lists and pricing formulas. As a prerequisite, you must set up (or verify) an Oracle Pricing descriptive flexfield.

To set up the Pricing Contexts descriptive flexfield:

1. From the System Administrator responsibility, navigate to Application > Flexfield > Descriptive > Segments.
2. Query the flexfield Pricing Contexts, and enter a Context Field Value with the code OTA, Name OTA Pricing, and Description OTA Pricing Context. Select the Enabled check box.
3. Click the Segments button to bring up the Segment Summary window. Enter the Number 10, Name Number of students, Window Prompt Number of students, Column PRICING_ATTRIBUTE1, and Value Set QP: Number. Select the Displayed and Enabled check boxes.
4. Save your work.

To set up Pricing Formulas for restricted events:

1. From the Order Management responsibility, navigate to Pricing > Pricing Formulas > Formulas Setup.
2. Name your formula--for instance, OLM Restricted 5-day Classes. Enter 1 in the Formula field. Save your work.
3. For Formula Type, select Factor List. The Component depends on the list of values set; you may use Number of Trainees or OLM Restricted 5-Day Classes, for example. In the Step column, type 1.

4. Click the Factors button. For Base Pricing Attribute Context, select OTA Pricing. For Base Pricing Attribute, select Number of Students. The Operator is Between. Repeat these values for each row you need.
5. In the Value From, Value To, and Adjustment Factor columns, you configure your price points. For instance, to charge $4,000 for 1 to 8 students and $10,000 for 9 to 20 students, you set up two rows as described in the table:

Value From	Value To	Adjustment Factor
1	8	4,000
9	20	10,000

6. Click OK and save your work.

To set up Price Lists:

1. Navigate to Pricing > Price Lists > Price List Setup.
2. Create a price list as instructed in the Overview of Price Lists document in the *Oracle Pricing User's Guide*.
3. In the List Lines region, enter all the inventory items (courses) you wish to sell. Note that, to sell a course both as a restricted class and as enrollments in a public class, you must create one line for EVT and one for ENR. Note also that EVT items need only a formula, not a price.
4. Save your work.

For further instructions, see Overview of Price Lists, *Oracle Pricing User Guide* and Overview of Formulas, *Oracle Pricing User Guide*

Linking Courses to Order Management

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

To link an inventoried course to OLM:

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

Changing the Maximum Number of Attendees

When you decide to raise or lower the maximum number of attendees for a class initiated in OM, you must alert the system by changing the OLM Pricing Attribute from within OM.

Changing the Maximum Number of Attendees in OM:

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

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

6. Save your work.

Ordering Classes and Enrollments

In OM, to order classes and enrollments, you initially follow the standard OM Sales Order Form procedures, then click Actions, to detail the enrollment or class request.

> **Note:** Cancelling a class (an order line of the type EVT) in OM automatically cancels the class in OLM. However, you must manually cancel any resources already booked.

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

To Order a Public Class Enrollment in OM:

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

    Note: The enrollee defaults as the customer contact in OLM. If you want the student to show up as a learner in OLM, you must enter the student as the Ship To Contact under the Addresses tab of the order line.

2. Select Training from the list of values.
3. If the unit of measure of the selected line is ENR, selecting Training brings up the Class Availability form, which gives you a read-only list of the classes scheduled for the course you have selected. Select the class.
4. Click the Select Enroll button, which brings up the Enter New Student Enrollment window. Fill out the form and save your work.

To Change a Public Class Enrollment in OM:

1. Query the existing order line and click Actions.
2. Select Training from the list of values.
3. When the Modify Student Enrollment window opens, change the Class Title or make other permitted changes. Save your work.

To Order a Restricted Class in OM:

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

   Note: Before you can enter a new class in OM, you must be sure that you have entered a value in the Number of Students field of the OTA Pricing Attribute. This number serves as the maximum number of students for the class and automatically creates an equal number of enrollments.

   See Changing Maximum Attendees in Order Management, page 12-64

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

   Note: If you specify a class status of Full, the student enrollment status is Placed. If you specify a class status of Normal, the student enrollment status is Requested. See Class and Enrollment Statuses, page 6-4

Ordering a Restricted Class Enrollment in OM

You cannot directly enroll a student in a restricted class from within OM. Ordering a restricted class automatically creates a number of enrollments equal to the Number of Students you set in the OLM Pricing Attribute.

To add enrollments to a restricted class, you must query the enrollments in OLM, then create a new line in the enrollment summary window and fill out the enrollment details form. Note that if you do so without decreasing the number of places specified in the original enrollment, the learners you enroll will be waitlisted.

To specify learner names for the block of enrollments created when you created the event in OM, you must query the enrollments in OLM, then decrease the number of places (to 1, typically) and add each student as a new enrollment.

See Entering an Enrollment, page 3-7

Attendance and Processing

OM interfaces to Accounts Receivable on the date when OLM marks the enrollment as Attended. Therefore, you should *not* mark attendance before the last day of the class, nor too long after the class has concluded.

Processing service revenue before the service has concluded may violate national or local accounting principles, and marking attendance long after the class may cause revenue to be recognized in a later accounting period.

Restricting Enrollments by Country

The *OTA: Restrict Enrollments by Country* profile option can restrict enrollments to only those learners whose Operating Unit's country matches the country where the class takes place. To enforce this restriction, set the profile value to Yes. The Operating Unit must also include a location in a specified country.

Note that this restriction largely defeats the purpose of globalization: employees in Colmar, France, for instance, could not take classes in Basel, Switzerland or Freiburg, Germany, all within an hour's drive of one another.

The application determines the class's country by searching for:

- primary venue--the country of the resource venue; if none is specified, then
- event location--the country of the class's location; if none is specified, then
- training center--the country of the training center sponsoring the class

OLM - OTA Glossary

The following table displays terms used in OLM and the OTA terms they replaced.

OLM	OTA	Notes
Asynchronous, page Glossary-1	Self-Paced	-
Catalog Category, page Glossary-1	Activity Category	-
Class, page Glossary-1	Event, Scheduled Event	-
Competency, page Glossary-1	Skill, Competence	-
Completed, page Glossary-2	Completed	-
Course, page Glossary-2	Activity	-
Customer Restricted, page Glossary-2	Event Types: restricted	-
Delivery Mode, page Glossary-2	Delivery Method	-
Enrollment End , page Glossary-3	Enrollment To	-
Enrollment Start, page Glossary-3	Enrollment From	-
Instructor, page Glossary-3	Trainer, Instructor	Note that for backward compatibility, we use Trainer as the resource type in OLM
Invoice Total, page Glossary-3	Finance Total	-
Learner, page Glossary-4	Student, Delegate, or User	-
Learning History, page Glossary-4	Training History	-
Learning Path, page Glossary-4	Training Path	-

OLM	OTA	Notes
LMS Administrator, page Glossary-4	User, Training Administrator	-
Price, page Glossary-5	Amount	-
Proficiency Level, page Glossary-5	Proficiency, skill, or performance level	HRMS has proficiency and performance level. OTA supports proficiency. Only the appraisal function supports performance.
Room, page Glossary-5	Venue	-
Session, page Glossary-5	Event Types: session	-
Successfully Completed, page Glossary-5	Successfully Attended	-
Training Center, page Glossary-6	Training Center	-

13

Learning Management Functions

Learning Management Function Requirements

Can I customize the regions and messages in OLM pages?

Yes. You can customize regions, flexfields, tips, and instructions in the OLM pages. This area lists the flexfields, configurable tips, and instructions available in the pages.

Can I configure the pages at the function level?

Oracle Learning Management delivers predefined function-level customizations that you cannot update or delete. If you wish to modify you can make the personalizations either at the site or the responsibility level. If you create a copy of the function and make your own personalizations, you may lose the delivered function-level personalizations.

Learning Management Functions

Add Approvers and Recipients

Document Name:

/oracle/apps/ota/learner/webui/OtaDynamicApprovalsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_DYN_APPROVALS_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Additional Enrollment Details

Document Name:

/oracle/apps/ota/shared/webui/AdditionalEnrollmentDtlsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_SHARED_ADD_ENR_DTLS_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Enrollment Details	AddEnrDtlsDescFlexSs	Add'l Delegate Booking Info.	OTA_DELEGATE_ BOOKINGS

Seeded Function Level Personalizations:

Not applicable.

Additional Member Details

Document Name:

/oracle/apps/ota/learner/learningpath/webui/TPMemberDescFlexTrainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_TP_MBR_DFF_TRN

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	DescFlex	Additional Plan Member Details	OTA_TRAINING_ PLAN_MEMBERS

Seeded Function Level Personalizations:

Not applicable.

Announcement Properties

Document Name:

/oracle/apps/ota/admin/content/webui/AnnouncementMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_STP_ANNOUNCEMENTS_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Announcement Body	shortTip	OTA_443415_HTML_SUP PORTED_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	DescFlex	Add'l Announcements Info	OTA_ ANNOUNCEMENTS

Seeded Function Level Personalizations:

Not applicable.

Announcements

Document Name:

/oracle/apps/ota/admin/content/webui/ListOfAnnouncementsMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_STP_ANC_LIST

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Attachment

Document Name:

/oracle/apps/ota/admin/common/webui/AttachmentPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_ATTACHMENT

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Browse Categories

Document Name:

/oracle/apps/ota/learner/webui/LearnerCatalogPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443595_LRN_ CATALOG_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Catalog

Document Name:

/oracle/apps/ota/admin/catalog/webui/CatalogPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Catalog Administration	OTA_ADMIN_CATALOG

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443198_CATALOG_ HGRID_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Catalog Add Enrollment Details

Document Name:

/oracle/apps/ota/learner/webui/AddlEnrollmentDtlsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_ADDLENR_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Enrollment Details	AddEnrDtlsDescFlexSs	Add'l Delegate Booking Info.	OTA_DELEGATE_BOOKINGS

Seeded Function Level Personalizations:

Not applicable.

Catalog Advanced Search

Document Name:

/oracle/apps/ota/learner/webui/AdvSrchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_SRCH_BR_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443189_A_SRCH_CRITERIA_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Catalog Advanced Search Results

Document Name:

/oracle/apps/ota/learner/webui/AdvSrchResultsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_SRCH_RS_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443230_SEARCH_ RESULT_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Catalog Component Search

Document Name:

/oracle/apps/ota/learner/webui/CompSrchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_COMP_SR_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Catalog Copy

Document Name:

/oracle/apps/ota/admin/catalog/webui/CatalogCopyPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CATALOG_COPY

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443239_CATALOG_CO PY_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Catalog Course Details

Document Name:

/oracle/apps/ota/learner/webui/CourseDetailsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_CRS_DTL_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Categories	Instruction	OTA_443599_LRN_CRS_CATEG_TIP
Delivered Competencies	Instruction	OTA_443600_LRN_CRS_COMPET_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Course Details	ActivityDescFlex	Add'l Course Info.	OTA_ACTIVITY_VERSIONS
Additional Offering Details	OfferingDescFlex	Add'l Offering Information	OTA_OFFERINGS
Page Level	EventDescFlex	Additional Class Information	OTA_EVENTS
Location Address	LocationAddress	Location Address	Address Location
Other Details	ExtTrngDescFlex	Add'l Non OTA Training History Info.	OTA_NOTRNG_HISTORIES

Seeded Function Level Personalizations:

Not applicable.

Catalog EL Redirect

Document Name:

/oracle/apps/ota/learner/webui/ELRedirectPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_EL_ACCESS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Catalog Enrollment Detail

Document Name:

/oracle/apps/ota/learner/webui/EnrollmentDtlPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_ENROLL_DTL

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	EnrollmentDetailsFlex	Add'l Delegate Booking Info.	OTA_DELEGATE_ BOOKINGS
Enrollment Details	ExtTrngFlex	Add'l Non OTA Training History Info.	OTA_NOTRNG_H ISTORIES

Seeded Function Level Personalizations:

Not applicable.

Catalog Learning Object Details

Document Name:

/oracle/apps/ota/learner/webui/LrnObjDtlsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_LO_DTLS_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Catalog Search

Document Name:

/oracle/apps/ota/admin/catalog/webui/CatalogSrchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CATALOG_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443241_CATALOG_ RESULTS_TIP
Page Level	Instruction	OTA_443241_CATALOG_ RESULTS_TIP
Page Level	Instruction	OTA_443241_CATALOG_ RESULTS_TIP
Page Level	Instruction	OTA_443241_CATALOG_ RESULTS_TIP
Page Level	Instruction	OTA_443241_CATALOG_ RESULTS_TIP
Page Level	Instruction	OTA_443240_CATALOG_ SEARCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Catalog Training Center Search

Document Name:

/oracle/apps/ota/learner/webui/TrgCenterSrchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_TRGC_SR_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Category Learner Access

Document Name:

/oracle/apps/ota/admin/catalog/webui/CategoryEnrollCondPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_CAT_LRNR_ACCSS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443516_PUBLIC_LRN_ACC_ERR
Page Level	Instruction	OTA_443607_LRN_ACCESS_LIST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Category Learner Access Edit

Document Name:

/oracle/apps/ota/admin/catalog/webui/CategoryEnrollCondEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_CAT_LN_ACCS_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443608_LRN_ACCESS_EDIT_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	EventAssociationDescFlex	Add'l Learner Access Info.	OTA_EVENT_ASSOCIATIONS

Seeded Function Level Personalizations:

Not applicable.

Category Maintain

Document Name:

/oracle/apps/ota/admin/catalog/webui/ActCategoryMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_CTGR_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443344_ACT_CAT_EDIT_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	CrDescFlex	Add'l Category Inclusion Det's	OTA_ACT_CAT_ INCLUSIONS

Seeded Function Level Personalizations:

Not applicable.

Category Usage Maintain

Document Name:

/oracle/apps/ota/admin/catalog/webui/CategoryUsageMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_CATEGORY_DEL,OTA_ ADMIN_CTG_CATEGORY_PS,OTA_ADM IN_STP_CATEGORY_PS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	CatFlexField	Add'l Category Information	OTA_CATEGORY_ USAGES

Seeded Function Level Personalizations:

Not applicable.

Change Duration

Document Name:

/oracle/apps/ota/admin/event/webui/UserAttemptMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_EVT_EXT_TIME_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443169_USER_EXT_TIME_P

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Class Learner Access

Document Name:

/oracle/apps/ota/admin/event/webui/ClassEnrollCondPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_EVT_LRNR_ACCSS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443516_PUBLIC_LRN_ACC_ERR
Page Level	Instruction	OTA_443607_LRN_ACCESS_LIST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Class Learner Access Edit

Document Name:

/oracle/apps/ota/admin/event/webui/ClassEnrollCondEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_EVT_LN_ACCS_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443608_LRN_ACCESS_EDIT_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	EventAssociationDescFlex	Add'l Learner Access Info.	OTA_EVENT_ASSOCIATIONS

Seeded Function Level Personalizations:

Not applicable.

Class Properties

Document Name:

/oracle/apps/ota/admin/assessment/webui/OfferTestPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ASMT_OFFER_TEST

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Competency Details

Document Name:

/oracle/apps/ota/shared/webui/CompetenceInfoPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_SHARED_CMPTNCY_DTLS_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Competency List View

Document Name:

/oracle/apps/ota/admin/competence/webui/ListCompetencyViewPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_COMPETENCE_VIEW

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	HR_REVIEW_TX_ REMOVED_SS

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Competency Update

Document Name:

/oracle/apps/ota/admin/competence/webui/ListComptencyPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_COMPETENCE_UPDATE

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	HR_REVIEW_TX_ REMOVED_SS
Page Level	Instruction	OTA_443510_COM PETENCE_NTF_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Content

Document Name:

/oracle/apps/ota/admin/content/webui/ContentPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONTENT_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443199_CONTENT_ HGRID_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Content Copy

Document Name:

/oracle/apps/ota/admin/content/webui/ContentCopyPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONTENT_COPY

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443249_CONTENT_COPY_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Content Delete

Document Name:

/oracle/apps/ota/admin/content/webui/ContentDeletePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONTENT_DELETE

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443197_OFF_DEL_ CNFRM

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Content Folder Edit

Document Name:

/oracle/apps/ota/admin/content/webui/LOFolderEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_LOF_PS_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	FolderDFF	Additional LO Folder Information	OTA_LO_FOLDERS

Seeded Function Level Personalizations:

Not applicable.

Content Reorder

Document Name:

/oracle/apps/ota/admin/content/webui/ContentReorderPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONTENT_LO_REORDER

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13650_CONTENT_ REORDER_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Content Search

Document Name:

/oracle/apps/ota/admin/content/webui/ContentSrchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONTENT_SRCH

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Content Server Properties

Document Name:

/oracle/apps/ota/admin/content/webui/ContentServerEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_CONTENT_SERVER_EDIT_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443548_EDIT_CS_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Content Servers

Document Name:

/oracle/apps/ota/admin/content/webui/ListOfContentServersPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_CONTENT_SERVER_LIST_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443547_LIST_CS_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Copy Class

Document Name:

/oracle/apps/ota/admin/event/webui/EventCopyPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_EVT_CPY

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Course

Document Name:

/oracle/apps/ota/admin/catalog/webui/ActivityVrsnMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_DEL_MODE,OTA_ADMIN_CTG_ACT_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
General	shortTip	OTA_443415_HTML_SUPPORTED_TIP
General	shortTip	OTA_443415_HTML_SUPPORTED_TIP
General	shortTip	OTA_443415_HTML_SUPPORTED_TIP
General	shortTip	OTA_443415_HTML_SUPPORTED_TIP
Inventory	Instruction	OTA_13040_ACT_INV_TIP
Page Level	Instruction	OTA_443360_COURSE_EDIT_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Inventory	InvKeyFlex	System Items	MSTK
Additional Information	DescFlex	Add'l Course Info.	OTA_ACTIVITY_VERSIONS

Seeded Function Level Personalizations:

Not applicable.

Course Learner Access

Document Name:

/oracle/apps/ota/admin/catalog/webui/CourseEnrollCondPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_LRNR_ACCSS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443516_PUBLIC_LRN_ACC_ERR
Page Level	Instruction	OTA_443607_LRN_ACCESS_LIST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Course Learner Access Edit

Document Name:

/oracle/apps/ota/admin/catalog/webui/CourseEnrollCondEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_LN_ACCS_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443608_LRN_ACCESS_EDIT_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	EventAssociationDescFlex	Add'l Learner Access Info.	OTA_EVENT_ASSOCIATIONS

Seeded Function Level Personalizations:

Not applicable.

Create Quick Test

Document Name:

/oracle/apps/ota/admin/assessment/webui/QuestionBankQuickTestPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_QUICK_TEST_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13795_Q_TEST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Current Learning

Document Name:

/oracle/apps/ota/learner/webui/CurrentLearningPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_HOME_CURR_LRNG_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Delete Class

Document Name:

/oracle/apps/ota/admin/event/webui/EventDeletePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_EVT_DEL

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Delete Resource Booking

Document Name:

/oracle/apps/ota/admin/resource/webui/ResourceBookingDeletePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_RES_BOOKING_DEL

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443197_OFF_DEL_ CNFRM

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Delete Trainer Competency

Document Name:

/oracle/apps/ota/admin/offering/webui/TrCompetenciesDeletePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_OFF_TR_COMP_DEL

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Delivery Modes

Document Name:

/oracle/apps/ota/admin/catalog/webui/ListOfDelModesMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_STP_DEL_MODE_LIST

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Enrollment Review

Document Name:

/oracle/apps/ota/learner/webui/EnrollmentReviewPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_TRAINING_REVIEW_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13037_REVIEW_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Enrollment Details	DescFlex	Add'l Delegate Booking Info.	OTA_DELEGATE_BOOKINGS

Seeded Function Level Personalizations:

Not applicable.

Export: Specifications (Folder)

Document Name:

/oracle/apps/ota/admin/content/webui/LOFExportSpecPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_LOF_ES_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443201_SELECT_LOF_SPEC_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Export: Specifications (Learning Object)

Document Name:

/oracle/apps/ota/admin/content/webui/LOExportSpecPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_LO_ES_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443202_SELECT_LO_SPEC_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Freeze Training Plan

Document Name:

/oracle/apps/ota/learner/learningpath/webui/FreezeTrainingPlanPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_TP_FRZ

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

General Assessment Exit

Document Name:

/oracle/apps/ota/player/assessment/webui/GenAsmtExitDemoPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_GEN_ASMT_EXIT_URL

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443401_TEST_EXIT_ DEMO_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

General Assessment Exit

Document Name:

/oracle/apps/ota/player/assessment/webui/GenAsmtExitPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ASMT_EXIT_URL

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Generated Hyperlink

Document Name:

/oracle/apps/ota/admin/catalog/webui/ELAdminPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CATALOG_EL

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443519_ADMIN_EL_LINK_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Import Final

Document Name:

/oracle/apps/ota/admin/content/webui/ImportFinalPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_FINAL_IMPORT_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443209_VIEW_LOG_TIP
Page Level	Instruction	OTA_443550_IMP_ ANOTHER_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Import: Analysis Results

Document Name:

/oracle/apps/ota/admin/content/webui/ImportAnalysisPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_ANALYSE_IMPORT_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443204_IMPORT_ ANALYSIS_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Import: Content Location

Document Name:

/oracle/apps/ota/admin/content/webui/ContentLocationPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_LOCATION_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	longMessage	OTA_443437_LOC_XML_TIP
Page Level	longMessage	OTA_443432_EXT_CONT_SERV_TIP
Page Level	shortTip	OTA_443433_EXT_SERV_LOC_TIP
Page Level	longMessage	OTA_443434_SEC_CONT_SERV_TIP
Page Level	shortTip	OTA_443435_CONT_SERV_TIP
Page Level	longMessage	OTA_443436_CONT_DIR_TIP
Page Level	Instruction	OTA_443537_CONTENT_LOC_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Import: Log

Document Name:

/oracle/apps/ota/admin/content/webui/ImportLogPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_IMPORT_LOG_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Import: Select Question Bank (Folder)

Document Name:

/oracle/apps/ota/admin/content/webui/TestBankSelectionPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_TESTBANK_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443560_TB_SELECTION_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Import: Select Question Bank (Learning Object)

Document Name:

/oracle/apps/ota/admin/content/webui/FolderTestBankSelectionPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_FOLDERTESTBANK_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443560_TB_SELECTION_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Import: Specifications

Document Name:

/oracle/apps/ota/admin/content/webui/ImportSpecPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_IMPORT_SPEC_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443231_IMPORT_SPEC_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learner Category

Document Name:

/oracle/apps/ota/learner/webui/LearnerCatalogSubPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CATALOG_SUB_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443597_LRN_SUBCATEGORY_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learner Competencies

Document Name:

/oracle/apps/ota/admin/catalog/webui/ListOfStCompetenciesMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_ST_COMP

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443326_COURSE_COMP_LST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learner Home

Document Name:

/oracle/apps/ota/learner/webui/LearnerHomePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Learner Manager, Learner Self-Service	OTA_LEARNER_HOME_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Learning Paths	Instruction	OTA_443467_CURRENT_LP_TBL_TIP
Courses	Instruction	OTA_443594_LRN_MYCLASESS_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learner Home Announcement

Document Name:

/oracle/apps/ota/learner/webui/LearnerAnnouncementPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_HOME_ANNOUNCE_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learning History

Document Name:

/oracle/apps/ota/learner/webui/TranscriptViewPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_PROFILE_TRANSCR_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443606_LRN_HISTORY_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learning Object Edit

Document Name:

/oracle/apps/ota/admin/content/webui/LOEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_LO_PS_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	LoDFF	Add'l Learning Object Information	OTA_LEARNING_OBJECTS

Seeded Function Level Personalizations:

Not applicable.

Learning Path Add Courses

Document Name:

/oracle/apps/ota/learner/learningpath/webui/AddCoursesTrainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_LP_ADD_CRSE_TRN

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Search for Courses	Instruction	OTA_SS_SIMPLE_SEARCH_TIP
Page Level	Instruction	OTA_SS_SIMPLE_SEARCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learning Path Categories List

Document Name:

/oracle/apps/ota/admin/learningpath/webui/ListofLPCategoriesPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_CTGR

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443465_PRIMARY_CTG_IND
Page Level	Instruction	OTA_443390_LPS_CAT_VIEW_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learning Path Category Maintain

Document Name:

/oracle/apps/ota/admin/learningpath/webui/MaintainLPCategoryPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_CTGR_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443389_LPS_CAT_EDIT_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	DescFlex	Add'l Learning Path Category Inclusion Info	OTA_LP_CAT_ INCLUSIONS

Seeded Function Level Personalizations:

Not applicable.

Learning Path Competencies List

Document Name:

/oracle/apps/ota/admin/learningpath/webui/ListOfLPCompetenciesMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_COMP

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443371_LP_COMP_L IST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learning Path Competencies Maintain

Document Name:

/oracle/apps/ota/admin/learningpath/webui/LPCompetenciesMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_COMP_EDIT

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	DescFlex	Add'l Competence Element Det's	PER_COMPETENCE_ELEMENTS

Seeded Function Level Personalizations:

Not applicable.

Learning Path Competencies Search

Document Name:

/oracle/apps/ota/admin/learningpath/webui/CompetenceSearchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_COMP_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_SS_COMP_SEARCH_TIP
Page Level	Instruction	OTA_SS_SIMPLE_SEARCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learning Path Component: Additional Information

Document Name:

/oracle/apps/ota/admin/learningpath/webui/LrngPathCompAdnlInfoPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LPM_INFO

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13593_LPM_ADNL_ INFO_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	DescFlex	Add'l Learning Path Member Info.	OTA_LEARNING_ PATH_MEMBERS

Seeded Function Level Personalizations:

Not applicable.

Learning Path Components Reorder

Document Name:

/oracle/apps/ota/admin/learningpath/webui/LrngPathCompReorderPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LPM_REORDER

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13646_LPM_ REORDER_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learning Path Components Maintain

Document Name:

/oracle/apps/ota/admin/learningpath/webui/MaintainLrngPathCompsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LPM_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443387_LPM_EDIT_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learning Path Course Detail

Document Name:

/oracle/apps/ota/learner/learningpath/webui/ViewCourseDtlPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_LP_CRSE_DTL_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Categories	Instruction	OTA_443599_LRN_CRS_CATEG_TIP
Delivered Competencies	Instruction	OTA_443600_LRN_CRS_COMPET_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Course Details	ActivityDescFlex	Add'l Course Info.	OTA_ACTIVITY_VERSIONS
Additional Offering Details	OfferingDescFlex	Add'l Offering Information	OTA_OFFERINGS
Page Level	EventDescFlex	Additional Class Information	OTA_EVENTS
Location Address	LocationAddress	Location Address	Address Location
Other Details	ExtTrngDescFlex	Add'l Non OTA Training History Info.	OTA_NOTRNG_HISTORIES

Seeded Function Level Personalizations:

Not applicable.

Learning Path Course Detail Train

Document Name:

/oracle/apps/ota/learner/learningpath/webui/ViewCourseDtlTrainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_LP_CRSE_DTL_TRAIN

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Categories	Instruction	OTA_443599_LRN_CRS_CATEG_TIP
Delivered Competencies	Instruction	OTA_443600_LRN_CRS_COMPET_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Course Details	ActivityDescFlex	Add'l Course Info.	OTA_ACTIVITY_ VERSIONS
Additional Offering Details	OfferingDescFlex	Add'l Offering Information	OTA_OFFERINGS
Page Level	EventDescFlex	Additional Class Information	OTA_EVENTS
Location Address	LocationAddress	Location Address	Address Location
Other Details	ExtTrngDescFlex	Add'l Non OTA Training History Info.	OTA_NOTRNG_H ISTORIES

Seeded Function Level Personalizations:

Not applicable.

Learning Path Details

Document Name:

/oracle/apps/ota/learner/learningpath/webui/LearningPathDetailPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_HOME_LP_DTL_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443654_LP_DT_DETAIL

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	TPDescFlex	Additional Plan Details	OTA_TRAINING_ PLANS
Additional Information	LPDescFlex	Add'l Learning Path Info	OTA_LEARNING_ PATHS

Seeded Function Level Personalizations:

Not applicable.

Learning Path Details For:

Document Name:

/oracle/apps/ota/learner/learningpath/webui/LearningPathSrchDtlPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_CAT_LP_DTL_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443520_LRNR_CAT_L P_DETAILS

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	DescFlex	Add'l Learning Path Info	OTA_LEARNING_ PATHS

Seeded Function Level Personalizations:

Not applicable.

Learning Path Enrollment Detail

Document Name:

/oracle/apps/ota/learner/learningpath/webui/ViewEnrollmentDtlPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_LP_ENRL_DTL_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	EnrollmentDetailsFlex	Add'l Delegate Booking Info.	OTA_DELEGATE_ BOOKINGS
Enrollment Details	ExtTrngFlex	Add'l Non OTA Training History Info.	OTA_NOTRNG_H ISTORIES

Seeded Function Level Personalizations:

Not applicable.

Learning Path Home

Document Name:

/oracle/apps/ota/learner/learningpath/webui/LearningPathHomePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_HOME_LEARN_PATH_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learning Path Learner Access

Document Name:

/oracle/apps/ota/admin/learningpath/webui/LearningPathEnrollCondPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_LRNR_ACCSS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443516_PUBLIC_LRN_ACC_ERR
Page Level	Instruction	OTA_443607_LRN_ACCESS_LIST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Learning Path Learner Access Edit

Document Name:

/oracle/apps/ota/admin/learningpath/webui/LearningPathEnrollCondEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_LN_ACCS_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443608_LRN_ACCESS_EDIT_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	EventAssociationDescFlex	Add'l Learner Access Info.	OTA_EVENT_ASSOCIATIONS

Seeded Function Level Personalizations:

Not applicable.

Learning Path Maintain

Document Name:

/oracle/apps/ota/admin/learningpath/webui/MaintainLrngPathPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_DEL_MODE, OTA_ADMIN_CTG_LP_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	shortTip	OTA_443415_HTML_SUPPORTED_TIP
Page Level	shortTip	OTA_443415_HTML_SUPPORTED_TIP
Page Level	shortTip	OTA_443415_HTML_SUPPORTED_TIP
Page Level	shortTip	OTA_13589_LPS_CT_TIP
Page Level	shortTip	OTA_443384_LPS_START_DATE_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	DescFlex	Add'l Learning Path Info	OTA_LEARNING_PATHS

Seeded Function Level Personalizations:

Not applicable.

List of Categories Maintain

Document Name:

/oracle/apps/ota/admin/catalog/webui/ListOfActCategoriesMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_CTGR

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443465_PRIMARY_CTG_IND
Page Level	Instruction	OTA_443250_ACT_CTGR_LIST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

List of Classes

Document Name:

/oracle/apps/ota/admin/event/webui/ListOfEventsMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_EVT_LIST

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13770_EVT_LIST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

List of Skills

Document Name:

/oracle/apps/ota/admin/catalog/webui/ListOfSkillsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_SKLLS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443355_ACT_CAT_SKILL_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

List of Enrollments

Document Name:

/oracle/apps/ota/admin/event/webui/ListOfEnrollmentsMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_EVT_ENROLLMENT_LIST

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443439_EVT_LST_ENR_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

List of User Attempts Maintain

Document Name:

/oracle/apps/ota/admin/event/webui/ListOfUserAttemptsMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_EVT_EXT_TIME

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443167_USER_EXT_TIME_INST

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

New Offering: Delivery Mode

Document Name:

/oracle/apps/ota/admin/offering/webui/SelectDelModePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_OFF_DEL_MODE

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443195_OFF_DEL_MODE_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

New Question

Document Name:

/oracle/apps/ota/admin/assessment/webui/QuestionEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_Q_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	shortTip	OTA_443517_HTML_SUPPORT_TIP_Q
Page Level	shortTip	OTA_443517_HTML_SUPPORT_TIP_Q
Page Level	shortTip	OTA_443517_HTML_SUPPORT_TIP_Q

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	AsmtDFF	Add'l Question Information	OTA_QUESTIONS

Seeded Function Level Personalizations:

Not applicable.

New Question Bank

Document Name:

/oracle/apps/ota/admin/assessment/webui/QuestionBankEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_QB_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13738_QB_PS_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	AsmtDFF	Add'l Question Bank Information	OTA_QUESTION_BANKS

Seeded Function Level Personalizations:

Not applicable.

New Test

Document Name:

/oracle/apps/ota/admin/assessment/webui/TestEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TEST_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
General	shortTip	OTA_443415_HTML_SUPPORTED_TIP
General	shortTip	OTA_443415_HTML_SUPPORTED_TIP
General	shortTip	OTA_443415_HTML_SUPPORTED_TIP
General	shortTip	OTA_443415_HTML_SUPPORTED_TIP
General	shortTip	OTA_443415_HTML_SUPPORTED_TIP
Resume	Instruction	OTA_443562_TEST_PS_RESUME_TIP
Resume	shortTip	OTA_443415_HTML_SUPPORTED_TIP
Feedback	Instruction	OTA_443563_TEST_PS_FEEDBCK_TIP
Feedback	shortTip	OTA_443415_HTML_SUPPORTED_TIP
Feedback	shortTip	OTA_443415_HTML_SUPPORTED_TIP
Feedback	shortTip	OTA_443415_HTML_SUPPORTED_TIP
Attempts	Instruction	OTA_443564_TEST_PS_ATT_TIP
Duration	Instruction	OTA_443565_TEST_PS_DUR_TIP
Page Level	Instruction	OTA_13750_TEST_PS_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	AsmtDFF	Add'l Learning Object Information	OTA_LEARNING_ OBJECTS

Seeded Function Level Personalizations:

Not applicable.

New Test Section

Document Name:

/oracle/apps/ota/admin/assessment/webui/TestSectionEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TS_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
General	shortTip	OTA_443415_HTML_SUP PORTED_TIP
General	shortTip	OTA_443415_HTML_SUP PORTED_TIP
Page Level	Instruction	OTA_13751_T_SECTION_PS_ TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	AsmtDFF	Add'l Test Sections Information	OTA_TEST_SECT IONS

Seeded Function Level Personalizations:

Not applicable.

Offering Delete

Document Name:

/oracle/apps/ota/admin/offering/webui/OfferingDeletePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_OFF_DEL

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Offering Maintain

Document Name:

/oracle/apps/ota/admin/offering/webui/OfferingMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_OFF_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
General	Instruction	OTA_443316_OFF_INVALID_DATES
Enrollment	Tip	OTA_13055_OFF_ENR_TIP
Cost Information	Tip	OTA_13056_OFF_CST_TIP
Pricing Information	Tip	OTA_13057_OFF_PRC_TIP
Player Preferences	Tip	OTA_13058_OFF_PLYR_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	DescFlex	Add'l Offering Information	OTA_OFFERINGS

Seeded Function Level Personalizations:

Not applicable.

Offerings

Document Name:

/oracle/apps/ota/admin/offering/webui/ListOfOfferingsMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_OFF_LIST,OTA_ADMIN_CONT_TST_OFF_LIST,OTA_ADMIN_CTG_OFF_LIST

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443163_OFF_LIST_LO_TIP
Page Level	Instruction	OTA_443161_OFF_LIST_ACT_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Offering Details Maintain

Document Name:

/oracle/apps/ota/admin/event/webui/EventDetailsMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_EVT_CHG_DTL

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443490_EVT_CH_DTL_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Offering Learner Access

Document Name:

/oracle/apps/ota/admin/offering/webui/OfferingEnrollCondPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_OFF_LRNR_ACCSS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443516_PUBLIC_LRN_ACC_ERR
Page Level	Instruction	OTA_443607_LRN_ACCESS_LIST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Offering Learner Access Edit

Document Name:

/oracle/apps/ota/admin/offering/webui/OfferingEnrollCondEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_OFF_LN_ACCS_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443608_LRN_ACCESS_EDIT_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	EventAssociationDescFlex	Add'l Learner Access Info.	OTA_EVENT_ASSOCIATIONS

Seeded Function Level Personalizations:

Not applicable.

Offering Maintain

Document Name:

/oracle/apps/ota/admin/event/webui/EventMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_EVT_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Schedule	shortTip	OTA_13709_EVT_TIME_TIP
Schedule	shortTip	OTA_13709_EVT_TIME_TIP
Page Level	Instruction	OTA_13771_EVT_PS_PG_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	EventsDescriptiveFlex	Additional Class Information	OTA_EVENTS

Seeded Function Level Personalizations:

Not applicable.

Personal Learning Paths

Document Name:

/oracle/apps/ota/learner/learningpath/webui/MaintainTrainingPlanPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_TRNG_PLAN_EDIT

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	DescFlex	Additional Plan Details	OTA_TRAINING_ PLANS

Seeded Function Level Personalizations:

Not applicable.

Prerequisite Maintain

Document Name:

/oracle/apps/ota/admin/content/webui/PrerequisiteMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CNT_PREREQ_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443484_LO_PREREQ_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Prerequisite List Maintain

Document Name:

/oracle/apps/ota/admin/content/webui/ListOfPrerequisitesMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CNT_PREREQ_LIST,OTA_ ADMIN_CNT_TEST_PREREQ_LIST

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443484_LO_PREREQ_T IP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Question Bank Search

Document Name:

/oracle/apps/ota/admin/assessment/webui/QuestionBankSearchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_QB_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13737_QB_SRCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Question Bank List

Document Name:

/oracle/apps/ota/admin/assessment/webui/QuestionBanksListPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_QB_LST

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13737_QB_SRCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Question Bank Preview

Document Name:

/oracle/apps/ota/admin/assessment/webui/QuestionBankPreviewPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_QB_PV

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Question Preview

Document Name:

/oracle/apps/ota/admin/assessment/webui/QuestionPreviewPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_Q_PV

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Question Statistics

Document Name:

/oracle/apps/ota/admin/assessment/webui/QuestionStatPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_Q_STAT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443377_QB_STAT_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Question Type

Document Name:

/oracle/apps/ota/admin/assessment/webui/QuestionCreatePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_Q_TYPE_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13741_Q_TYPE_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Questions

Document Name:

/oracle/apps/ota/admin/assessment/webui/QuestionSearchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_Q_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13739_Q_SRCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Remove Learning Path Competency

Document Name:

/oracle/apps/ota/admin/learningpath/webui/LPCompetenciesDeletePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_COMP_DEL

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Requested Learning

Document Name:

/oracle/apps/ota/learner/webui/RequestedLearningPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_HOME_REQ_LRNG_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443596_LRN_ REQCLASSES_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Resource Booking

Document Name:

/oracle/apps/ota/admin/resource/webui/ResourceBookingMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_RES_BOOKING_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Resource Booking Dates	shortTip	OTA_13709_EVT_TIME_TIP
Page Level	Instruction	OTA_443315_RES_BOKING_ EDIT_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	ResBookingDescriptiveFlex	Additional Resource Bookings	OTA_RESOURCE_ BOOKINGS

Seeded Function Level Personalizations:

Not applicable.

Resource Booking Search

Document Name:

/oracle/apps/ota/admin/resource/webui/ResBookingSrchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_RES_BOOKING_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13061_RES_BOKING_ SRCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Resource Bookings List Maintain

Document Name:

/oracle/apps/ota/admin/resource/webui/ListOfResBookingsMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_RES_BOOKING_LIST

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443309_RES_BOKING_LIST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Resource Usage Maintain

Document Name:

/oracle/apps/ota/admin/offering/webui/ResourceUsageMaintainPG

Description: PageLayout Region

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_OFF_RES_USG_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443334_COURSE_RES_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	ResDff	Add'l Resource Checklist Info.	OTA_RESOURCE_ USAGES

Seeded Function Level Personalizations:

Not applicable.

Resource Usages

Document Name:

/oracle/apps/ota/admin/offering/webui/ListOfResUsagesMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_OFF_RES_USG

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443331_LIST_OF_RES_ TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Response Options

Document Name:

/oracle/apps/ota/admin/assessment/webui/ResponseOptionsSearchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_RES_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	shortTip	OTA_443517_HTML_SUPPORT_TIP_Q

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Response Options Reorder

Document Name:

/oracle/apps/ota/admin/assessment/webui/ResponseOptionsReorderPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_RES_REORDER

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13790_RESP_ REORDER_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

SCORM Adapters

Document Name:

/oracle/apps/ota/admin/adapter/webui/CmiAdapterListPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CMI_ADAPTERS_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443170_CMI_ADAPT_LIST_INST

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Search for Courses

Document Name:

/oracle/apps/ota/admin/learningpath/webui/SearchForCoursesPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_ACT_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443385_LP_COURSE_SRCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Section Questions

Document Name:

/oracle/apps/ota/admin/assessment/webui/SectionQuestionSearchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TS_Q_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13753_SECTION_Q_ SRCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Section Questions Reorder

Document Name:

/oracle/apps/ota/admin/assessment/webui/SectionQuestionReorderPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TS_Q_REORDER

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13792_TS_Q_ REORDER_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Select Question Bank

Document Name:

/oracle/apps/ota/admin/assessment/webui/DynamicQuestionBankSelectPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TS_D_QB_SEL

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13754_D_TEST_QB_SEL_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Select Question Bank

Document Name:

/oracle/apps/ota/admin/assessment/webui/StaticQuestionBankSelectPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TS_S_QB_SEL

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13755_S_TEST_QB_SEL_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Select Questions

Document Name:

/oracle/apps/ota/admin/assessment/webui/StaticQuestionSelectPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TS_S_Q_SEL

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13756_S_TEST_Q_SEL_ TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Session List Maintain

Document Name:

/oracle/apps/ota/admin/event/webui/ListOfSessionEventsMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_EVT_SESSION_LIST

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13073_SSN_EVT_LIST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Session Maintain

Document Name:

/oracle/apps/ota/admin/event/webui/SessionEventMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_EVT_SESSIONS_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	shortTip	OTA_13709_EVT_TIME_TIP
Page Level	shortTip	OTA_13709_EVT_TIME_TIP
Page Level	Instruction	OTA_443159_EVT_SSN_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	EventsDescriptiveFlex	Additional Class Information	OTA_EVENTS

Seeded Function Level Personalizations:

Not applicable.

Setup List

Document Name:

/oracle/apps/ota/admin/setup/webui/SetupAdminListPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_STP_LIST

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Skill Prvsn Maintain

Document Name:

/oracle/apps/ota/admin/catalog/webui/SkillPrvsnMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_SKILL_EDIT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443329_SKILL_EDIT_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	KeyFlex	Personal Analysis Flexfield	PEA
Page Level	DescFlex	Add'l Skill Provision Info.	OTA_SKILL_PROVISIONS

Seeded Function Level Personalizations:

Not applicable.

St Competencies Delete

Document Name:

/oracle/apps/ota/admin/catalog/webui/StCompetenciesDeletePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_ST_COMP_DEL

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

St Competencies Maintain

Document Name:

/oracle/apps/ota/admin/catalog/webui/StCompetenciesMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_ST_COMP_MNT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443325_COURSE_COMP_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	DescFlex	Add'l Competence Element Det's	PER_COMPETENCE_ELEMENTS

Seeded Function Level Personalizations:

Not applicable.

Test Confirm

Document Name:

/oracle/apps/ota/player/assessment/webui/TestConfirmPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_EBS_TEST_CONFIRM,OTA_GEN_TEST_CONFIRM

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Test Enrollment

Document Name:

/oracle/apps/ota/player/assessment/webui/UserAsmtEnrollmentPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_GEN_ASMT_USER_TEST_ENROLL

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13750_TEST_PS_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Test Overview

Document Name:

/oracle/apps/ota/player/assessment/webui/TestOverviewPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_EBS_TEST_OVERVIEW,OTA_GEN_TEST_OVERVIEW

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Test Player

Document Name:

/oracle/apps/ota/player/assessment/webui/TestPlayerPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_GEN_TEST_PLAYER

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Test Preview

Document Name:

/oracle/apps/ota/admin/assessment/webui/TestPreviewPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TEST_PV

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Test Score

Document Name:

/oracle/apps/ota/player/assessment/webui/TestScorePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_EBS_TEST_SCORE,OTA_GEN_TEST_SCORE

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Test Search

Document Name:

/oracle/apps/ota/player/assessment/webui/UserAsmtSearchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_GEN_ASMT_USER_TEST_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	TO_WORK

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Test Section Preview

Document Name:

/oracle/apps/ota/admin/assessment/webui/TestSectionPreviewPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TS_PV

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Test Section Reorder

Document Name:

/oracle/apps/ota/admin/assessment/webui/TestSectionReorderPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TS_REORDER

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13788_TS_REORDER_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Test Sections

Document Name:

/oracle/apps/ota/admin/assessment/webui/TestSectionSearchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TS_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13752_T_SECTION_ SRCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Test Statistics

Document Name:

/oracle/apps/ota/admin/assessment/webui/TestStatReportPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TEST_STAT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443378_TEST_STAT_ SUM_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Tests

Document Name:

/oracle/apps/ota/admin/assessment/webui/TestSearchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TEST_SRCH

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443236_TEST_SRCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Trainer Competencies List Maintain

Document Name:

/oracle/apps/ota/admin/offering/webui/ListOfTrCompetenciesMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_OFF_TR_COMP

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443327_OFF_COMP_LIST_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Trainer Competencies Maintain

Document Name:

/oracle/apps/ota/admin/offering/webui/TrCompetenciesMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_OFF_TR_COMP_MNT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443324_OFF_COMP_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
General	DescFlex	Add'l Competence Element Det's	PER_COMPETENCE_ELEMENTS

Seeded Function Level Personalizations:

Not applicable.

Training Center Search

Document Name:

/oracle/apps/ota/shared/webui/TrainingCenterSearchPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_SHARED_CENTER_SEARCH_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Select Training Centers	Instruction	OTA_SS_SIMPLE_SEARCH_TIP
No Search Requested	Instruction	OTA_SS_TRN_CENTER_SEARCH_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Training Path Member Descriptive Flexfield

Document Name:

/oracle/apps/ota/learner/learningpath/webui/TPMemberDescFlexPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_TP_MBR_DFF

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	TPMDescFlex	Additional Plan Member Details	OTA_TRAINING_PLAN_MEMBERS
Page Level	LPMDescFlex	Add'l Learning Path Member Info.	OTA_LEARNING_PATH_MEMBERS

Seeded Function Level Personalizations:

Not applicable.

Training Path Member Maintain

Document Name:

/oracle/apps/ota/learner/learningpath/webui/MaintainTPMemberPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_TP_MBR_EDIT

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Training Path Search Course

Document Name:

/oracle/apps/ota/learner/learningpath/webui/SearchCoursePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_TP_SRCH_CRSE

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Training Review

Document Name:

/oracle/apps/ota/shared/webui/EnrollmentReviewPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_TRAINING_REVIEW_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Review	Instruction	OTA_13037_REVIEW_TIP
Review	Instruction	HR_REVIEW_TX_ REMOVED_SS

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Enrollment Details	DescFlex	Add'l Delegate Booking Info.	OTA_DELEGATE_ BOOKINGS

Seeded Function Level Personalizations:

Not applicable.

Transcript Course Detail

Document Name:

/oracle/apps/ota/learner/webui/TransCourseDtlPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_TRANSCR_COURSE_DTL

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Course Details for	Instruction	OTA_13997_COURSE_DTLS_TIP
Course Details for	Instruction	OTA_13998_COURSE_EVT_DTLS_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Course Details	ActivityFlexfield	Add'l Course Info.	OTA_ACTIVITY_VERSIONS
Class Details	OfferingDescFlex	Add'l Offering Information	OTA_OFFERINGS
Class Details	EventDescFlex	Additional Class Information	OTA_EVENTS
Location Address	Address	Location Address	Address Location
Other Details	ExtTrngDescFlex	Add'l Non OTA Training History Info.	OTA_NOTRNG_HISTORIES

Seeded Function Level Personalizations:

Not applicable.

Transcript Course Details

Document Name:

/oracle/apps/ota/learner/webui/TranscriptCourseDetailsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_TRANSCRIPT_CRS_DTL_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Categories	Instruction	OTA_443599_LRN_CRS_ CATEG_TIP
Delivered Competencies	Instruction	OTA_443600_LRN_CRS_ COMPET_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Course Details	ActivityDescFlex	Add'l Course Info.	OTA_ACTIVITY_ VERSIONS
Additional Offering Details	OfferingDescFlex	Add'l Offering Information	OTA_OFFERINGS
Page Level	EventDescFlex	Additional Class Information	OTA_EVENTS
Location Address	LocationAddress	Location Address	Address Location
Other Details	ExtTrngDescFlex	Add'l Non OTA Training History Info.	OTA_NOTRNG_H ISTORIES

Seeded Function Level Personalizations:

Not applicable.

Transcript Enrollment Details

Document Name:

/oracle/apps/ota/learner/webui/TransEnrolDtlPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_TRANSCR_ENROLL_DTL

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Page Level	EnrollmentDetailsFlex	Add'l Delegate Booking Info.	OTA_DELEGATE_ BOOKINGS
Enrollment Details	ExtTrngFlex	Add'l Non OTA Training History Info.	OTA_NOTRNG_H ISTORIES

Seeded Function Level Personalizations:

Not applicable.

Update Enrollment Status

Document Name:

/oracle/apps/ota/admin/event/webui/EnrollmentMaintainPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_EVT_ENROLLMENT_PS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	DescFlex	Add'l Delegate Booking Info.	OTA_DELEGATE_BOOKINGS

Seeded Function Level Personalizations:

Not applicable.

Upload Content for: (Folder)

Document Name:

/oracle/apps/ota/admin/content/webui/FolderUploadFilePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_FOLDER_UPLOAD_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	shortTip	OTA_443435_CONT_SERV_TIP
Page Level	shortTip	OTA_443436_CONT_DIR_TIP
Page Level	Instruction	OTA_443549_UPLOAD_FILES_LO

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Upload Content for: (Learning Object)

Document Name:

/oracle/apps/ota/admin/content/webui/LOUploadFilePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LO_UPLOAD_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	shortTip	OTA_443435_CONT_SERV_TIP
Page Level	shortTip	OTA_443436_CONT_DIR_TIP
Page Level	Instruction	OTA_443549_UPLOAD_FILES_LO

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Upload Final

Document Name:

/oracle/apps/ota/admin/content/webui/UploadFinalPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_UPLOAD_FINAL_SS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

Update SCORM Adapter

Document Name:

/oracle/apps/ota/admin/adapter/webui/CmiAdapterEditPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CMI_ADAPTER_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443171_CMI_ADAPT_PS_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

User Attempt Details

Document Name:

/oracle/apps/ota/admin/assessment/webui/TestStatAttemptStatusPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TEST_ATT_STAT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443405_USER_TEST_ATT_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

User Attempt Review

Document Name:

/oracle/apps/ota/admin/assessment/webui/UserTestAttemptPreviewPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_USR_TEST_PV

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

User Performance Details

Document Name:

/oracle/apps/ota/admin/assessment/webui/TestPerformanceStatusPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TEST_PER_STAT

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443403_USER_TEST_PER_TIP

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

View Activity Version

Document Name:

/oracle/apps/ota/admin/catalog/webui/ViewActivityVersionPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_ACT_VIEW

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13041_ACT_VIEW_PS_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Inventory	InvKFF	System Items	MSTK
Additional Information	DescFlex	Add'l Course Info.	OTA_ACTIVITY_VERSIONS

Seeded Function Level Personalizations:

Not applicable.

View Attachments

Document Name:

/oracle/apps/ota/admin/common/webui/ViewAttachmentsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADM_VIEW_ATTACHMENT

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

View Category Properties

Document Name:

/oracle/apps/ota/admin/catalog/webui/ViewCategoryUsagePG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_CATEGORY_VIEW

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	DescFlex	Add'l Category Information	OTA_CATEGORY_ USAGES

Seeded Function Level Personalizations:

Not applicable.

View Class Details

Document Name:

/oracle/apps/ota/admin/event/webui/ViewEventPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_VIEW_EVT_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443438_EVT_VIEW_PS_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	EventsDescriptiveFlex	Additional Class Information	OTA_EVENTS

Seeded Function Level Personalizations:

Not applicable.

View Content

Document Name:

/oracle/apps/ota/admin/content/webui/ViewLOPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_LO_VIEW

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443559_VIEW_LO_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	LoDFF	Add'l Learning Object Information	OTA_LEARNING_ OBJECTS

Seeded Function Level Personalizations:

Not applicable.

View Content Folder

Document Name:

/oracle/apps/ota/admin/content/webui/ViewLOFolderPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_LOF_VIEW

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443558_VIEW_FOLDER_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	FolderDFF	Additional LO Folder Information	OTA_LO_FOLDERS

Seeded Function Level Personalizations:

Not applicable.

View Course Details

Document Name:

/oracle/apps/ota/admin/learningpath/webui/ViewCourseDetailsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LP_CRS_DTLS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	OTA_ADMIN_CTG_LP_CRS_ DTLS	OTA_13997_COURSE_DTLS_ TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Course Details	DescFlex	Add'l Course Info.	OTA_ACTIVITY_ VERSIONS

Seeded Function Level Personalizations:

Not applicable.

View Enrollments

Document Name:

/oracle/apps/ota/learner/learningpath/webui/ViewMultipleEnrollmentsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_LEARNER_LP_MLT_ENRL_DTL_SS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443542_LPM_CURR_ ENRL

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

View Learning Path

Document Name:

/oracle/apps/ota/admin/learningpath/webui/ViewLrngPathPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_VIEW_LP_PS

Configurable Tips and Instructions:

Not applicable.

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	DescFlex	Add'l Learning Path Info	OTA_LEARNING_ PATHS

Seeded Function Level Personalizations:

Not applicable.

View Learning Path Components

Document Name:

/oracle/apps/ota/admin/learningpath/webui/ViewLrngPathCompsPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CTG_LPM_VIEW,OTA_ADMIN_CTG_VIEW_LPM

Configurable Tips and Instructions:

Not applicable.

Flexfields:

Not applicable.

Seeded Function Level Personalizations:

Not applicable.

View Offering

Document Name:

/oracle/apps/ota/admin/offering/webui/ViewOfferingPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_VIEW_OFF_PS

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_13042_OFF_VEW_PS_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	DescFlex	Add'l Offering Information	OTA_OFFERINGS

Seeded Function Level Personalizations:

Not applicable.

View Test Properties

Document Name:

/oracle/apps/ota/admin/assessment/webui/ViewTestPG

Description:

Menu and Function Names:

This module can be accessed from the following menus and functions presented in the table:

Menu and Function Names

User Menu Name	Function Name
Not directly accessible from a menu	OTA_ADMIN_CONT_TEST_VIEW

Configurable Tips and Instructions:

The following table presents a list of configurable tips and instructions:

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Page Level	Instruction	OTA_443561_TEST_PS_ READ_TIP

Flexfields:

The following table presents a list of flexfields:

Flexfields

Region Name	Item Name	Flexfield Name	Flexfield Code
Additional Information	AsmtDFF	Add'l Learning Object Information	OTA_LEARNING_ OBJECTS

Seeded Function Level Personalizations:

Not applicable.

Glossary

Asynchronous

An attribute of Delivery Mode, to define learning that does not require a time, place, or live instructor. Asynchronous learning is also known as self-paced learning. Asynchronous learning can be either online, such as a recorded seminar or other self-paced web content, or offline, such as a book or a CD-ROM

See also Delivery Mode, page Glossary-2

Attended

A status that verifies that a learner has participated in a synchronous offering. For online offerings, the application can capture the change in status; for offline offerings, an instructor can record the change in status.

Blended Learning

The ability to employ multiple delivery modes in delivering a single piece of learning or a series of learning events. Blended learning describes both the ability to deliver a single piece of learning through multiple modes, and the ability to construct a series of learning events that employ different delivery modes.

Catalog

What the learner sees when browsing through available courses and learning paths. You can divide the Oracle Learning Management (OLM) catalog into categories to facilitate the learners' search for related learning. The single catalog organizes and displays all learning, regardless of delivery mode.

Catalog Category

A sub division of the catalog. You create categories to organize courses in the catalog, and to help learners search for related learning. You can create a hierarchy of categories, and a course can be a part of more than one category.

Class

The entity that is an individual instance of an offering, and in which learners enroll, typically for synchronous offerings. For each class, you can create multiple sessions.

See Session, page Glossary-5

CMI Adapter

See SCORM Adapter, page Glossary-5

Competency

A measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competence can be a piece of knowledge, a skill, an attitude, or an attribute.

Completed

A status that indicates a learner has "been through" the course. The completed status depends on the delivery mode of the offering: for online asynchronous offerings, Completed is when the learner has played the offering, dependent on the type of tracking; for offline asynchronous offerings, it is when the learner has read a book or other offline material;, for offline or online synchronous offerings it is when the learner has attended the class.

Content

A piece of online learning material that is delivered to the learners through offerings.

Content Folder

An organizing container for online learning objects. You set up content folders to reflect the structure of your content, for example, by subject matter, curriculum, or learner job roles. You create content folders and sub folders to organize and group related learning objects.

See also Learning Object, page Glossary-4

Content Location

A URL that identifies and locates your physical content that is located on a content server, either an external server or an OLM content server.

Content Tree

The content hierarchy consisting of content folders, its sub folders, learning objects and tests.

See also Learning Object, page Glossary-4,Test, page Glossary-6

Course

A catalog entity that is described by attributes such as objectives and learner competencies. It is the entity that defines and describes the learning, without specifics such as content and delivery mode which are defined in the offering. An offering is a child of a course.

Cross Charge

The transfer of the cost of training fees or resources between organizations, departments, or cost centers within an enterprise.

Customer Restricted

Offerings or classes that are restricted to one or more customers (learner or customer/order priced).

Delivery Mode

Identifies the style in which learning is delivered. Delivery modes are either synchronous (real time) or asynchronous (self paced), and either online (viewed through the player) or offline (such as a class in a classroom, or a book to be read). The four combinations are: online synchronous, online asynchronous, offline synchronous, and offline asynchronous. Once defined, customers can name the delivery modes whatever they wish, to describe their different styles of learning.

Descriptive Flexfields

A field that your organization configures to capture additional information required by your business but not otherwise tracked by Oracle Applications.

See also Key Flexfield, page Glossary-3

Enrollment

A status describing a learner's engagement with a learning catalog entity. For example, a learner must enroll in a class in order to access it. You must set appropriate learner access conditions for your offering or class to ensure that only specific learners enroll in the class.

Enrollment End

Date by which an offering or class no longer shows in the learner catalog. Learners cannot enroll after that date.

Enrollment List

List of enrollments against an offering or class.

Enrollment Start

Date on which an offering or class shows up in the learner catalog.

Finance Header

A record of a monetary amount against a learner enrollment or a resource booking. A finance header can consist of multiple finance lines.

Finance Line

An individual financial transaction within a finance header.

Finance Total

Total of finance lines against enrollment for a class. Finance can be of type Receivable or Cross Charge.

See also Finance Line, page Glossary-3, Cross Charge, page Glossary-2

Flexfields (Key And Descriptive)

Configurable additional data entry fields that are not predetermined by Oracle Applications. They are not altered by patch install or upgrades.

See also Key Flexfields, page Glossary-3, Descriptive Flexfields, page Glossary-3

Instructor

A person in charge of delivering a synchronous offering. Note that for backwards compatibility, "Trainer" is the predefined name of the resource type.

Key Flexfield

A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups.

See also Descriptive Flexfield, page Glossary-3

Learner

One who enrolls and takes up a course on OLM. There can be different types of learners: internal learners, or external learners such as customers and partners.

Learner Access

A definition of the list of learners who can access a catalog object. You can define learner access at the category, course, offering, and class levels. An object lower in the hierarchy derives access from the parent object (inherited access). For example, a course inherits access that is defined for the category above it. You cannot modify access inherited from another object.

Learning History

The list of past courses a learner has taken that are captured on the system.

Learning Object

An entity that defines online course content within OLM. Learning objects provide the metadata to represent and describe the actual physical content located on the content server. You can structure online content as a hierarchy of learning objects, to be delivered as a single offering. OLM automatically tracks learner progress at the learning object level.

Learning Path

A sequence of two or more courses that enables tracking of learner progress against a higher level learning objective than is associated with an individual course. A learning path can be created by a learner, manager, or administrator.

LMS Administrator

A role of a user in the system. This is the role of a user who is tasked with managing the system, entering and maintaining data, and handling the setup related tasks.

Location

The physical address of a particular class or other.

Manager

The "person" manager to whom one or more learners report.

Offering

An entity under a course. Attributes such as delivery mode, language, and content define offerings. An offering consists of one or more classes.

See also Synchronous, page Glossary-5

Offline

Learning that a learner can complete while not logged into the learning management system. Examples include instructor led training in a classroom, paper-based study, or CD-ROM offerings.

Online

Learning for which the learner must log into the learning management system to participate. Online learning content is delivered and tracked by the learning management system.

Package Category

Courses packaged together to be the subject of discounting or special pricing.

Player

The functionality within the learning management system that delivers online content.

Price

The price at which a class is charged for attendance. The price can be overwritten by administrators and is not relevant if OM is used.

Proficiency Level

The perceived level of expertise of a person in a competence, in the opinion of the assessor, over a given period. For example, a person may demonstrate the communication competence at Expert level.

Question Bank

A storage of questions that are used in one or more tests.

Resource

A person or object that is necessary to deliver a class, for example, a named instructor or a specific classroom required for a synchronous offline offering. In OLM, you create resource types and define the resources that are available for each resource type.

Room

The physical room identifier where a class takes place.

Schedule

A list of learning, and associated dates, that is due to take place for a learner or for an instructor.

SCORM Adapter

A set of files enabling communication between your content and OLM when your content contains SCORM CMI calls, and when your content is outside the Oracle domain. With the SCORM adapter, the content can successfully communicate tracking information to the learning management system irrespective of the content location. The SCORM adapter files reside on the same content server as your content.

Session

A catalog entity that is a subset of a class. Used when a single synchronous class meets at more than one time, or in more than one location, on more than one date, or with more than one instructor. This entity, as a child of the class entity, allows for these distinctions.

Successfully Completed

A learner has successfully completed an offering when the learner is verified as not only having attended or attempted the offering, but having demonstrated sufficient competence sufficient to achieve the competencies associated with the course.

Synchronous

An attribute of Delivery Mode for learning that requires a time, place, or live instructor. Synchronous learning can be either online, such as a live web seminar, or offline, such as an instructor led class in a physical room.

See also Delivery Mode, page Glossary-2

Test

A grouping of questions taken from question banks and delivered through the player. Tests are designed to test explicit knowledge, skill level, and/or ability of a learner.

See also Question Bank, page Glossary-5

Trainer

A predefined resource type. The Trainer resource type is named for backward compatibility. However, the application refers to the resources of this type as instructors.

Training Center

A place where learning occurs, or a hierarchy used for reporting on classes and resources.

Transcript

An official report that shows whether a learner has completed, attended, or failed a class. Transcript covers for instance one larger goal such as a degree or comprehensive goal that perhaps could be attained through successfully completing a learning path.

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