

Implementing Oracle[®] Training Administration

Release 11i

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Implementing Oracle Training Administration Release 11i

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Preface

Audience for This Guide

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

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

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

If you have never used Oracle Human Resources Management Systems, Oracle suggests you attend one or more of the Oracle Human Resources Management Systems training classes available through Oracle University.

- The Oracle Applications graphical user interface.

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

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

How To Use This Guide

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

- Chapter 1 helps you plan your implementation. It emphasizes the decisions you must make before you begin your implementation. It also contains an implementation checklist and flowchart.
- Chapter 2 provides step-by-step instructions to guide your implementation. Product combination matrices assist you in determining which steps you need to undertake, given your combination of Oracle and other applications.
- Appendix A lists the default navigation paths for all the windows and reports in OTA.
- Appendix B addresses customers who have not installed Oracle Financials, providing step-by-step instructions for setting up alternate accounting structures.

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Other Information Sources

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

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

Online Documentation

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

- **Online Help** – The new features section in the HTML help describes new features in 11*i*. This information is updated for each new release of Oracle Training Administration. The new

features section also includes information about any features that were not yet available when this guide was printed. For example, if your administrator has installed software from a mini-pack as an upgrade, this document describes the new features. Online help patches are available on Metalink.

- **11i Features Matrix** – This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on Metalink.
- **Readme File**– Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

Related User's Guides

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

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

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Guides Related to This Product

Using Oracle Training Administration (OTA)

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

Using Oracle HRMS – The Fundamentals

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

Managing People Using Oracle HRMS

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

Running Your Payroll Using Oracle HRMS

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

Managing Compensation and Benefits Using Oracle HRMS

Use this guide to learn about setting up the application to store and process information on your total compensation package, including salary administration, other earnings, deductions, benefits, and absence management and PTO accrual plans. For US users, standard and advanced benefits is covered in a separate guide, *Managing Total Compensation Using Oracle HRMS*.

Configuring, Reporting and System Administration in Oracle HRMS

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

Implementing Oracle HRMS

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

Implementing Oracle Self-Service Human Resources (SSHR)

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

Using Oracle FastFormula

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

Using Oracle SSP/SMP

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

Using Application Data Exchange

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

Oracle Business Intelligence System Implementation Guide

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

BIS User Guide 11i

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

Using Oracle Time Management

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

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. 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 11i, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to

install Oracle Applications and the Oracle8 technology stack, and the Oracle8i Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

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

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the applications file system and database.

Oracle Applications System Administrator's Guide

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

Other Implementation Documentation

Oracle Applications Product Update Notes

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

Multiple Reporting Currencies in Oracle Applications

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

Multiple Organizations in Oracle Applications

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

Oracle Workflow Guide

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

Oracle Applications Flexfields Guide

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

Oracle Technical Reference Manuals

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

Oracle Manufacturing and Distribution Open Interfaces Manual

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

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

Training and Support

Training

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

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep *Implementing Oracle Training Administration* working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you

risk destroying the integrity of your data and you lose the ability to audit changes to your data.

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

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

About Oracle

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

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

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CHAPTER

1

Planning Your Implementation

Implementing Oracle Training Administration

Implementation takes place after a successful installation of the system, and describes the process you follow to customize Oracle Training Administration to meet your own specific business needs.

For information on installing OTA in a Windows environment, consult the *Oracle Applications Installation Manual for Windows Clients*, release 11i or later.

Making Decisions

Before you set up Oracle Training Administration, you need to look at certain factors before you decide and plan how to implement the application in your enterprise.

There are two key implementation decisions to make:

- Do you plan to integrate OTA with Oracle Human Resources now or in the future? Doing so can change the way in which you hold information about internal students and trainers. It also has implications if you are developing the competence approach.
- Do you plan to hold financial information (about resource costs and enrollment charges) in OTA? What kind of arrangement do you need? Do you need an interface between OTA and your own financial system to trigger customer invoices if you run external courses, or cross-charge other departments if you run internal courses?

Other decisions you need to make include:

- Is your enterprise planning to run
 - External training courses only?
 - Both internal and external training courses?
 - Internal training courses only?
- What information do you need to record about students, trainers, customers and suppliers? For internal students you may already have gathered a large amount of information, (especially if you run Oracle HR). What further information do you need to record?
- What is your enrollment procedure? What are the stages each student goes through from enrollment to completion of the course? Do you want to link these stages (**statuses**) to standard letters?
- How do you want to organize your budgeting?

- Where do you teach? What is the maximum number of students allowed in each room (and therefore on each course in each room)? How do you describe each location? Are some of these external to your organization and supplied by an external supplier? How are you going to organize locations, training centers, and resource revenues?
- What are the qualifications, skills, and expertise your courses offer? In which way (competencies or skills) do you want to record these for each student, once they have completed a course?
- Do you have any special agreements with customers, if you run external courses? Do you want to give special discounts to customers who book many places on courses or groups of courses (packages)?
- Which of your users should access which parts of OTA? What are the roles within your training department? Which roles need full or restricted access?
- What kind of facilities and resources do events need? What skills do trainers require to teach this course? Where do your trainers come from—internal sources or an external supplier? At what point do you want to hold different versions of activities, either changing them over time, or offering alternative versions?
- How do you want to organize your resource categories? What information do you want to store for each resource type? Where and how do you want to hold trainer data?
- What type of development events do you want to record?

You can adopt a staged approach to implementation, by focusing only on the essential areas of the system. For example, you could begin by implementing event scheduling and enrollment management. Then later you could add resource management and skills management to the basic implementation. In a third stage, you could implement price lists, discounts, and other financial information to support invoicing and payments.

Implementation Checklist

Use the following checklist to record which parts of Oracle Training Administration you want to use. Then refer to the implementation flowcharts to see the high-level steps you must complete for each business function you have chosen to implement.

- ☐ Flexfields: page 2 – 3
Define key and descriptive flexfields.
- ☐ Administration: page 2 – 10
Define currencies, lookups, and a primary user.
- ☐ Organizations: page 2 – 12
Define Business Groups and create other organizations.
- ☐ Training Activities: page 2 – 15
Define activity types and versions.
- ☐ Event and Enrollment Management: page 2 – 17
Define enrollment and event status types.
- ☐ Pricing and Financial Relationships: page 2 – 19
Define finance headers and lines for each financial transaction, and set pricing for courses.
- ☐ Reports, Letters, and Folders: page 2 – 23
Create reports, letters, and configurable folders.
- ☐ Security: page 2 – 26
Set menu, enrollment, and user security. Set user profiles.
- ☐ Self-Service Enrollment and Training Administration: page 2 – 31
Set up self-service class enrollments and automatic finance transfer and waitlisting processes.
- ☐ Audit Requirements: page 2 – 33
Set up the audit process.
- ☐ Online Help Configuration: page 2 – 35
Localize Oracle Applications Help.
- ☐ Oracle Order Management for OTA: page 2 – 36
Set up Oracle Order Management for use with OTA.

Implementation Flowchart

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

Figure 1 – 1 Implementation Flowchart for Oracle Training Administration 1

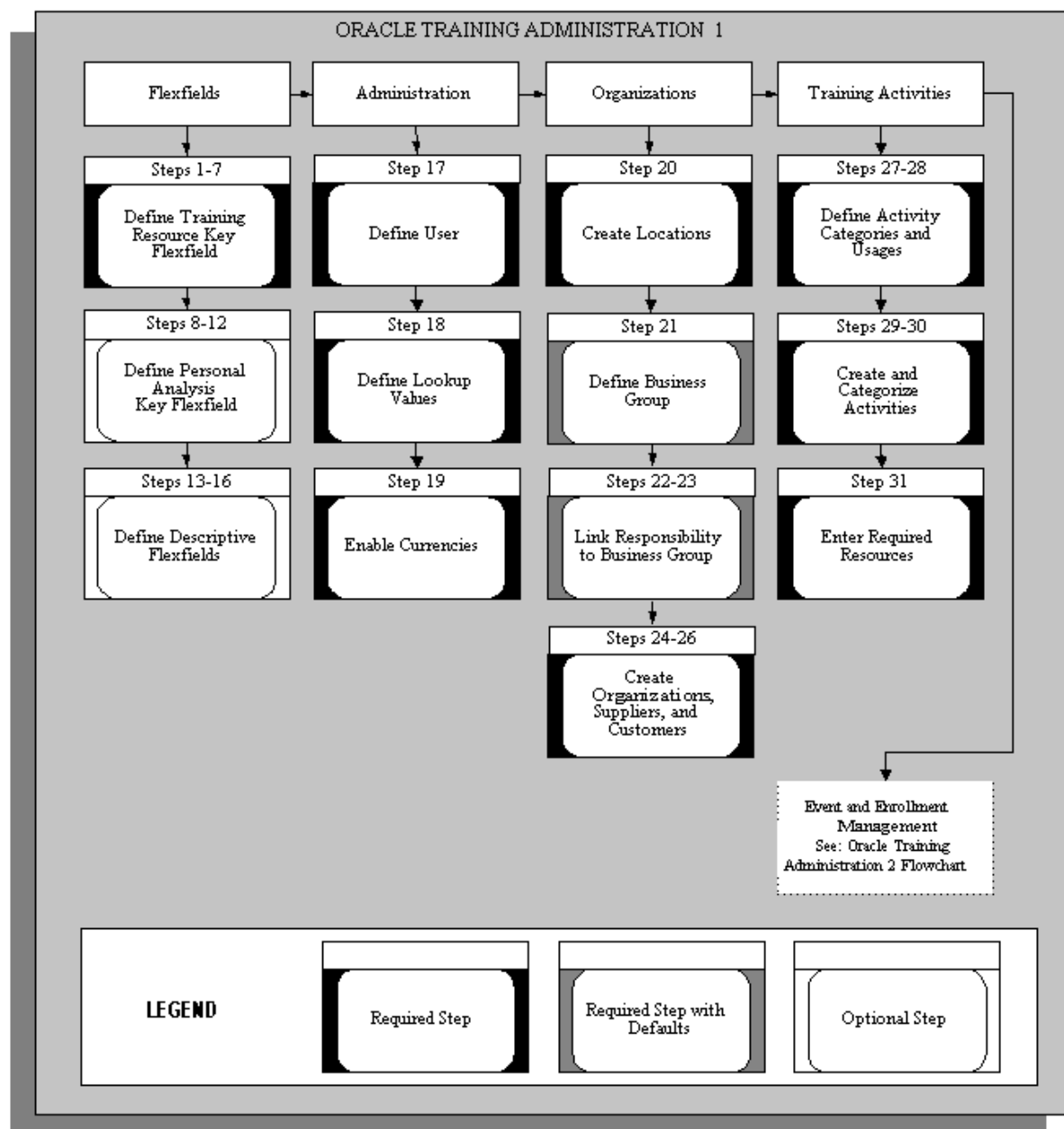


Figure 1 – 2 Implementation Flowchart for Oracle Training Administration 2

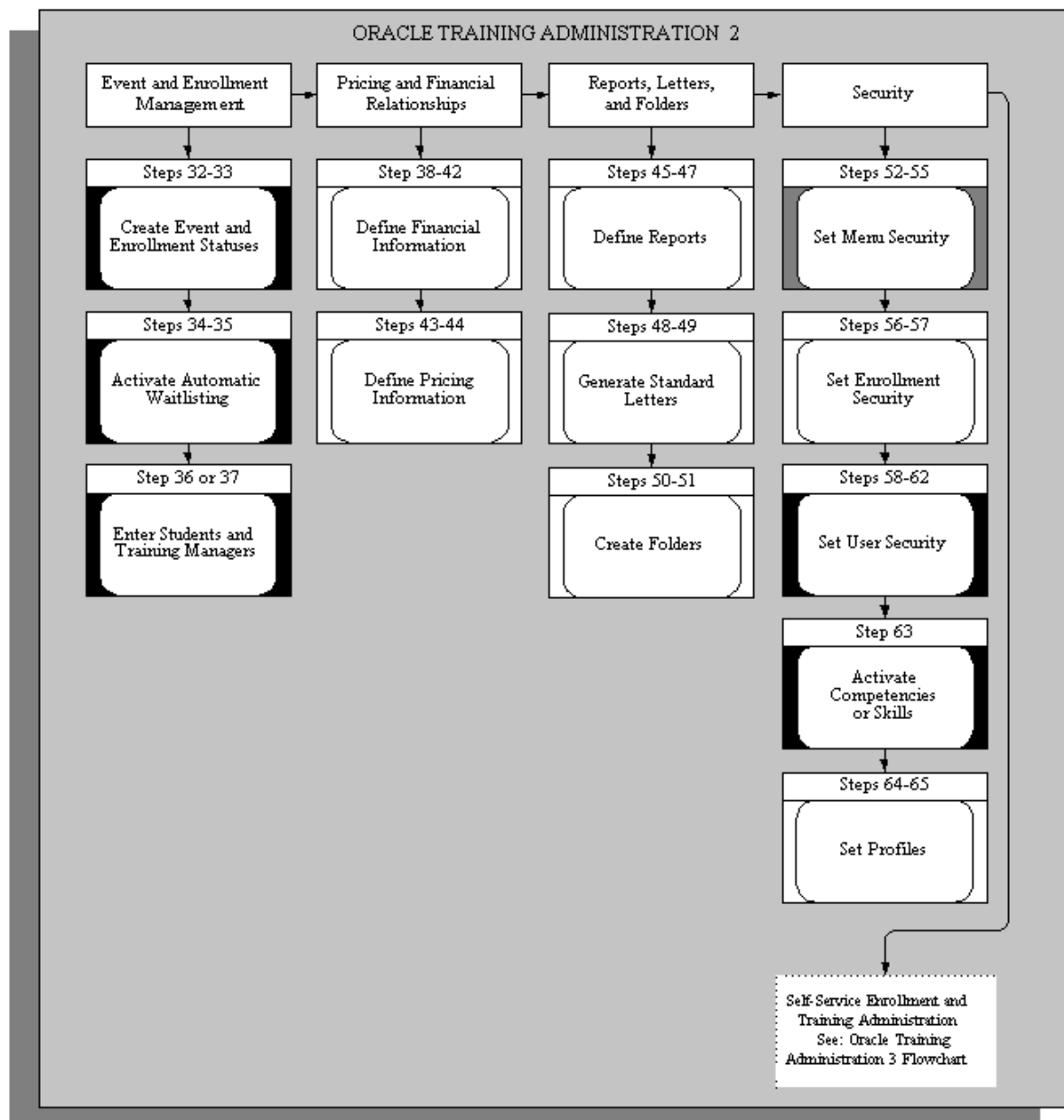
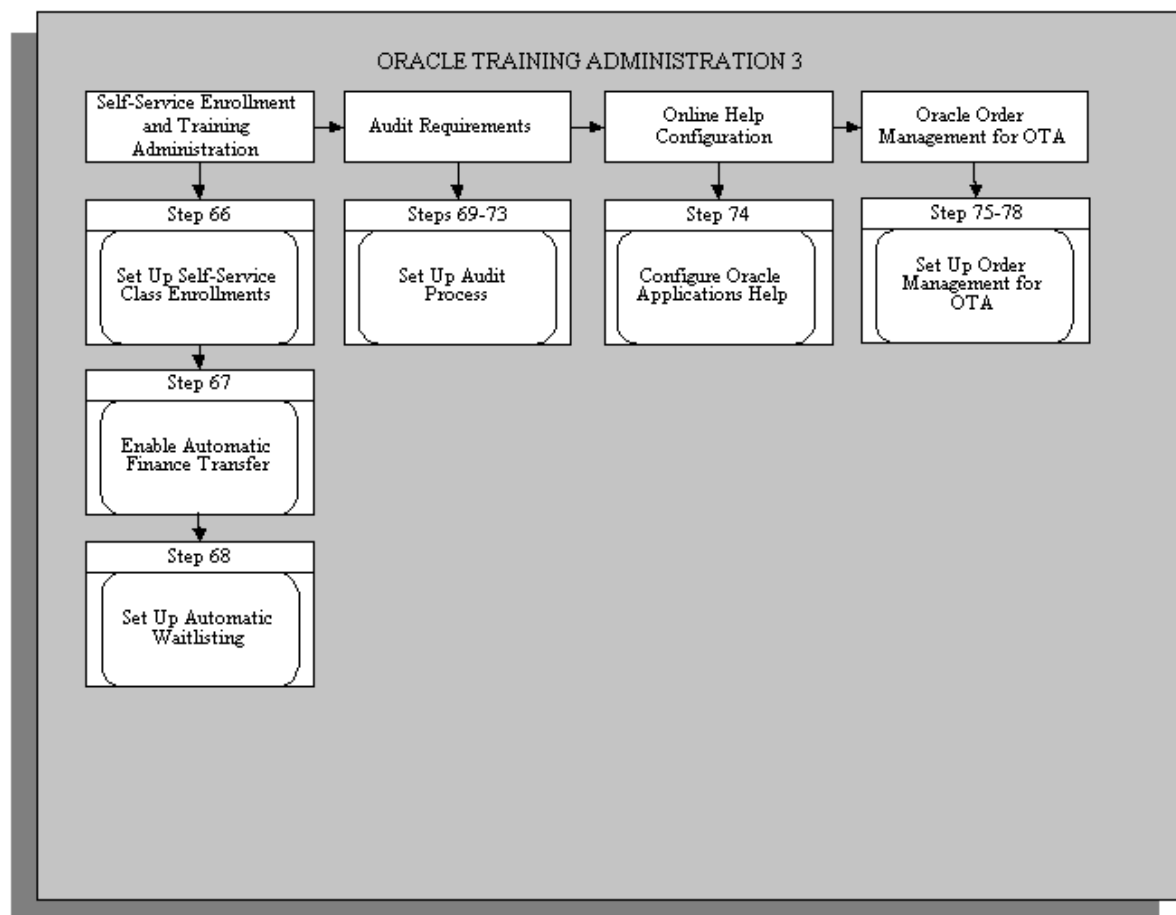


Figure 1 – 3 Implementation Flowchart for Oracle Training Administration 3



CHAPTER

2

Implementation Steps

Implementation Steps

This section expands the implementation steps in the checklist and summarizes what you can set up and the sequence you should follow. Each step identifies the windows or processes you must use.

Each section begins with a *product combination matrix* that tells you which steps you must implement and which are optional, given the combination of products you have installed. Unlisted steps do not apply to the product combination in that row, so you need not (or cannot) complete them.

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

Key Flexfields

OTA installed with...	required steps	optional steps
HR	Step 1–Step 7	Step 8–Step 12
no HR	all	none

The key flexfield steps are usually performed by the System Administrator. Sign on to the system using your System Administrator username and password. Contact your DBA if you do not know this information.

Before you use OTA, you define two Key Flexfield structures:

- Training Resource (required)
- Personal Analysis (optional for HR users)

Note: If you run both Oracle HR and OTA, and you want to hold the qualifications, attributes, and knowledge that students attain by attending training activities as competencies, you do not need to define the Personal Analysis flexfield. If you run only OTA, or if you want to hold the qualifications, attributes, and knowledge as skills, you must define the Personal Analysis flexfield.

If you do not run Oracle Financials, you also need to define an accounting flexfield (See: Appendix B, Alternate Financial Implementation Steps). If you run Oracle Financials, the flexfield already exists.

Before you begin your implementation of these key flexfields you must clearly specify your requirements.

Define Training Resources Key Flexfield

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

Step 1 Define Training Resource Flexfield Value Sets

If you want to validate (restrict) the values that a user can enter for any segment you must define a specific Value Set.

The attributes of the Value Set control the type of values you can enter, how many characters each segment can hold, and how the values are to be validated.

Different segments of a single flexfield or segments of any other flexfield can share Value Sets.

Use the Value Set window.

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

Step 2 Define Training Resource Flexfield Segments

Define a structure for each resource type. The structure for the Venue resource type must be called Venue, the structure for the Trainer resource type must be called Trainer, and so on.

You must check the Allow Dynamic Inserts box. If you do not check the box, you cannot create new resource name combinations in the Resources window.

Use the Key Flexfield Segments window.

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

Step 3 Define Segment Values

If you have chosen Independent or Dependent validation for a Value Set used by a Resource Flexfield Segment, you must define your list of valid values for the Value Set.

Use the Segment Values window.

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

Step 4 Freeze and Compile Your Resource Flexfield Structure

Freeze your Resource Flexfield definition. Navigate to the Key Flexfield Segments window. Check the Freeze Flexfield Definition box and save your changes. OTA now freezes and compiles your Resource Flexfield definition. Compiling the flexfield definition enables the Resources

Flexfield window with the defaults, values, and rules that you have defined.

Use the Key Flexfield Segments window.

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

Step 5 Define Resource Types

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

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values, *Using Oracle Training Administration*

Step 6 Enter Trainers

Depending on how you have set up the Training Resource key flexfield structure for the Trainer resource type, you may need to enter trainers on the system before you can select them as resources.

See: Creating and Entering Training Resources, *Using Oracle Training Administration*

Step 7 Enter Resources

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

Use the Resources window.

See: Entering Resources, *Using Oracle Training Administration*

Define Personal Analysis Key Flexfield

The Personal Analysis Key Flexfield holds skill types to record the qualifications, skills, and experience that students can expect to attain by attending training courses. Each type of information is defined as a separate *Structure* of the flexfield. Typical examples include foreign language skills and professional qualifications.

You need to design a Personal Analysis Flexfield Structure for each Special Information Type you want to hold in OTA. Each structure must include:

- The Structure Name and the number of Segments.
- The Flexfield Segment Names, Order, and Validation Options.
- The Flexfield Value Sets to be used and any lists of values.

Note: You can use skill types in Oracle HR to record the skills held by employees and applicants and the skill requirements of jobs and positions if you are not using the competence approach. If you run Oracle HR and OTA, and you are using the competence approach, you do not *need* to define the Personal Analysis flexfield.

You can, however, set up other structures of the Personal Analysis key flexfield to record other special personal information in Oracle Human Resources.

Step 8 Define Personal Analysis Flexfield Value Sets

Create Value Sets as you created them in Step 1.

Use the Value Sets window.

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

Step 9 Define Personal Analysis Flexfield Segments

Define a structure for your Personal Analysis Flexfield. You use this structure to enter details in the Special Information Types window.

You must check the Allow Dynamic Inserts box. If you do not check the box, you cannot enter new details in the Skill Provisions window (or the Special Information window in Oracle Human Resources).

Use the Key Flexfield Segments window.

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

Step 10 Define Segment Values

If you have chosen Independent or Dependent validation for a Value Set used by a Personal Analysis Flexfield Segment, you must define your list of valid values for the Value Set.

Use the Segment Values window.

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

Step 11 Freeze and Compile Your Personal Analysis Flexfield Structure

Freeze your flexfield definition. Navigate to the Key Flexfield Segments window. Check the Freeze Flexfield Definition box and save your changes.

Use the Key Flexfield Segments window.

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

Step 12 Register Special information Types for the Business Group

After you have defined your Personal Analysis Flexfield Structures you must link them to your Business Group.

For each information type, select one or more categories to control on which windows the information type is visible. The categories you see depend upon which products you have installed:

- *Job* for Job Skill Requirements (only if HR installed)
- *Position* for Position Skill Requirements (only if HR installed)
- *Skills* for use in OTA to record the skills provided by training activities
- *Other* for miscellaneous special information types in Oracle Human Resources (only if HR installed)
- *ADA* for use only in the US, for special information types set up to record information about employees with disabilities.
- *OSHA* for use only in the US, for a special information type set up to record information about employees' work-related injuries or illnesses.

Descriptive Flexfields

OTA installed with...	required steps	optional steps
all	none	all

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

See: Descriptive Flexfields, *Using Oracle Training Administration*

Note: The descriptive flexfield is defined at the level of the base-table, so any window that uses the base-table displays the same descriptive flexfield segments.

For each descriptive flexfield, specify:

- The Context and the number of Segments for each Context
- The Flexfield Segment Names, Order, and Validation Options
- The Flexfield Value Sets to be used and any lists of values

You can define two types of descriptive flexfield Segments:

- **Global Segments**

Segments always appear in the flexfield window.

- **Context-Sensitive Segments**

Segments appear only when a defined context exists. You can prompt a user to enter the context, or you can provide the context automatically from a reference field in the same block.

Note: Often you can choose between using a code, a 'base-table' field, and a field that contains a meaning or description. You should always use base-table fields as reference fields for Context-Sensitive segments. These fields usually have the same name as the column in the base table.

Some of the Standard Reports supplied with OTA include descriptive segment values. If you follow this suggestion, these reports will be able to use the prompts you define; otherwise they will apply a generic prompt to the data.

Step 13 Register a Reference Field

If you want to use a reference field from the same block on the window to provide the context automatically for context-sensitive segments, you must register this field. Use the *Application Developer* responsibility to update the definition of the descriptive flexfield.

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

Use the Descriptive Flexfields window.

Step 14 Define Flexfield Value Sets

Create Value Sets as you created them in Step 1.

Use the Value Sets window.

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

Step 15 Define Descriptive Flexfield Segments

Define the segments of your descriptive flexfield for each Context.

- Use Global Context to define any segments that always appear in the flexfield window.
- Enter your own Context Name to define segments that appear only for that context.

Uncheck the Override Allowed box, then freeze and compile your descriptive flexfield definitions.

Note: If you define a segment as 'Required', it will be required for every record on the system. You can encounter two common problems:

- If you define a 'Required' segment after you have entered records: existing records have no value in this segment and the system prompts you with an error when you query an existing record.
- Some descriptive flexfields appear in more than one block.

Use the Descriptive Flexfield Segments window.

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

Step 16 Define Flexfield Segment Values

If you have chosen Independent validation for a Value Set used by a descriptive flexfield Segment, you must define a list of valid values for the Value Set.

Use the Segment Values window.

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

Administration

The administration steps are usually performed by the System Administrator. Sign on to the system using your System Administrator username and password. Contact your DBA if you do not know this information.

OTA installed with...	required steps	optional steps
all	all	none

Step 17 Define User for Implementation

Before you can access any of the OTA windows you must create a new Application User with access to the default responsibility (Oracle Training Administration GUI) supplied with the application.

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

Use the Users window.

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

Step 18 Define Lookup Values

Lookups supply many of the lists of values in OTA.

Implementation steps that require lookups are:

- Step 5, Define Resource Types: page 2 – 5
- Step 27, Define Activity Categories: page 2 – 15
- Step 33, Create Event Statuses: page 2 – 17
- Step 34, Create Booking Priorities: page 2 – 17
- Step 39, Define New Finance Line Types: page 2 – 19

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

Lookup Values are the valid entries that appear in the list of values.

You can add new Lookup Values at any time. You can set the *Enable Flag* for a Value to No, so that it no longer appears in the list of values, or you can use the Start and End Dates to control when a value appears in a list.

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values, *Using Oracle Training Administration*

Step 19 Enable Currencies

Oracle Applications predefine all major currencies using the ISO standard codes for currencies. However, you must enable the specific currencies you want to use for your base currency, or for any price or budget information.

The 'base currency' is the default currency used by your Business Group.

Use the Currencies window.

See: Enabling Currencies, *Using Oracle Training Administration*

Organizations

OTA installed with...	required steps	optional steps
HR	Step 20, Step 24–Step 26 (use HR business group)	Step 21–Step 23
no HR	Step 20, Step 24–Step 26 (use supplied business group)	Step 21–Step 23
any other products	Step 20, Step 24–Step 26	Step 21–Step 23

Step 20 Create Locations

Create each work location used by your enterprise. Multiple organizations can share a single location and address.

Note: Because other Oracle applications share locations, some of the fields in the Location window are disabled for OTA users.

Use the Location window.

See: Creating Locations, *Using Oracle Training Administration*

Step 21 Define Business Group

The Business Group is the highest-level organizational unit in Oracle HRMS, and all other information you enter belongs to a Business Group.

As you create or choose your business group you should decide whether to implement your business group as global or local.

See: Organization Definitions, *Using Oracle Training Administration*

If you are implementing Oracle Human Resources, use your HR Business Group, which enables you to share data on people, organizations, locations, and skills across the applications. Before you can define a Business Group for Oracle HR, you must define five Key Flexfields.

See: Implementation Steps: Administration, *Oracle HRMS Implementation Guide*

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

Use the Organization window.

See: Creating a Business Group, *Using Oracle Training Administration*

Step 22 Link Responsibility to Business Group

If you are using the setup Business Group and default responsibility, you can omit this step and the following step.

If you use more than one Business Group you must set up a separate responsibility and user profile for each group.

First create a new responsibility. Copy the supplied default responsibility if you want the new responsibility to use the predefined menus.

From the System Administrator responsibility, use the Responsibilities window.

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

Step 23 Select a New Responsibility

In the System Profile Values window, select this new responsibility, query the HR:Business Group option, and enter the name of your Business Group.

Use the System Profile Values window.

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

Step 24 Create Organizations

Organizations represent the functional, management, or reporting groups that exist within a Business Group.

If you are implementing Oracle HR, refer to your HR documentation for information about how HR uses organizations.

If you are not implementing Oracle HR, the only organizations you need to define are your internal training departments.

Note: OTA includes a predefined list of Organization Classifications. These values are defined for the Lookup Type ORG_CLASS, and provide options for all users of the Organization window.

In the Application Utilities Lookups window, you can disable the Lookup values you do not want to use.

Use the Organization window.

See: Creating a Training Organization, *Using Oracle Training Administration*

Step 25 Create Suppliers

Suppliers are the internal or external agencies who provide training events or resources for training (such as venues and equipment).

You must define supplier names before you can enter resources in OTA. If you want to create finance headers for payments to suppliers, you must also enter supplier addresses and contacts.

If you do *not* run Oracle Financials, before you create suppliers you must undertake the implementation steps detailed in Appendix B, Alternative Financial Implementation Steps. If you already run Oracle Financials, the data you require is already set up for you.

Use the Suppliers window.

See: Creating a Supplier, *Using Oracle Training Administration*

Step 26 Create Customers

If you are *not* implementing Oracle HR, you must set up as customers all the organizations (internal and external) for which you run events and enroll students.

If you are implementing Oracle HR, you need only set up customers for external organizations who enroll students in your events. If you want to hold price information for internal student enrollments, you must also create at least one internal customer.

For each customer, you must create at least one address and contact.

If you do *not* run Oracle Financials, before you create customers you must undertake the implementation steps detailed in Appendix B, Alternative Financial Implementation Steps. If you already run Oracle Financials, the data you require is already set up for you.

Use the Customers window.

See: Creating a Customer, *Using Oracle Training Administration*

Training Activities

OTA installed with...	required steps	optional steps
all	all	none

You define activity types and versions to represent the training courses and other developmental opportunities you make available to students. You can use versions to maintain a history of changes to an activity type over time, or to maintain multiple concurrent versions that differ, for example, in delivery method or language.

You can group activities into categories. You can record the resources required to run an activity and the skills it is expected to provide students.

Step 27 Define Activity Categories

You use activity categories to group activities into delivery methods (classroom-based or self-paced, for example), programs (for scheduling), discount packages, and classifications (for reporting purposes).

First you must define the categories as values for the Lookup Type `ACTIVITY_CATEGORY`.

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values, *Using Oracle Training Administration*

Step 28 Define Activity Category Usages

Then select these categories in the Category Usages window and define how you will use each by selecting one or more usages (Classification, Delivery Method, Discount Package, Program).

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

Use the Category Usages window.

See: Categorizing Activities, *Using Oracle Training Administration*

Step 29 Create Activities

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

Use the Activities window.

See: Creating an Activity, *Using Oracle Training Administration*

Step 30 Categorize Activities

You can select multiple activity categories for each activity version, to group the version into programs, packages, and classifications. Enter or query the activity in the Activities window and choose the Categories button.

Use the Enter Categories window.

See: Categorizing Activities, *Using Oracle Training Administration*

Step 31 Enter Resources Required for an Activity

You can create a resource checklist for each activity. The checklist details the resources that are required or useful to run the activity and the quantity that should be booked. Enter or query the activity in the Activities window and choose the Resources button.

Use the Resource Usages window.

See: Entering Resources Required for an Activity, *Using Oracle Training Administration*

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

Event and Enrollment Management

OTA installed with...	required steps	optional steps
HR	Step 32–Step 36	none
no HR	Step 32–Step 35; Step 37	none
any other products	all except Step 36 or Step 37	none

Event and Enrollment Statuses

Step 32 Create Enrollment Statuses

Name the five predefined enrollment status types during: Requested, Waitlisted, Placed, Attended, and Cancelled.

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

Use the Enrollment Statuses window.

See: Creating Enrollment Statuses, *Using Oracle Training Administration*

Step 33 Create Event Statuses

Create event statuses types as values for the Lookup Type EVENT_USER_STATUS.

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values, *Using Oracle Training Administration*

Automatic Waitlisting

Step 34 Create Booking Priorities

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

For example:

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

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values, *Using Oracle Training Administration*

Step 35 Define Automatic Waitlist Enrollments Profile Options

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

Use the System Profile Options window.

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

Students and Training Managers

Step 36 Enter Students And Training Managers (HR)

If you are implementing Oracle HR:

- Enter your employees so you can enroll them as students. Use the HR People window.
- Enter students as customer contacts if external students also attend your events. You can use the Customers window, or you can enter students directly from the Enrollments window as you enter enrollments.
- Enter training managers as employees or external person types. Use the HR People window. You can then associate training managers with training activities.

Step 37 Enter Students And Training Managers (no HR)

If you are *not* implementing Oracle HR:

- Enter students as customer contacts. You can use the Customers window, or you can enter students directly from the Enrollments window as you enter enrollments.
- Enter Training Managers using the Enter Person window.

Pricing and Financial Relationships

OTA installed with...	required steps	optional steps
Oracle Financials	Step 40	Step 39, Step 41–Step 44
no Oracle Financials	Step 38, Step 40	Step 39, Step 41–Step 44
Oracle Order Management	none	Step 39
any other products	none	Step 39–Step 44

You enter each financial transaction with a customer or supplier as a finance line. Each finance line belongs to a finance header, which holds the payment currency and the name, address, and contact information for the customer or supplier.

If you want to use these finance headers to trigger the creation of invoices and payments in your financial system, you must design an interface to transfer the information you require between OTA and your financial system. See: Step 40.

Financial Information

Step 38 Create Alternative Financial Implementation

If you do *not* run Oracle Financials, you must undertake the implementation steps detailed in Appendix B, Alternative Financial Implementation Steps. If you already run Oracle Financials, the data you require is already set up for you.

Step 39 Define New Finance Line Types

OTA predefines three finance line types: enrollment charge, prepurchase charge, and supplier payment. You can define additional types (such as accommodation charges) as values for the Lookup Type FINANCE_LINE_TYPE.

Use the Application Utilities Lookups window.

See: Adding Lookup Types and Values, *Using Oracle Training Administration*

Step 40 Define Interface to Financials System

You can design an interface to transfer finance header and lines to your payable and receivables systems. This interface can check the following information, held in OTA, to decide whether to transfer a finance header or line, according to your own business rules:

- The status of the header (for example, Awaiting Transfer)

- The status of individual finance lines on the header
- The type of finance header (Payable, Receivable, Cost Transfer, or Cancellation) and the subtype for Receivable headers:
 - Standard, meaning an invoice should be issued after the event
 - Prepayment, meaning an invoice should be issued before the event
 - Prepurchase Payment, meaning an invoice should be issued immediately for unspecified enrollments
 - Prepurchase Use, meaning no invoice should be issued because the enrollment cost is being deducted from a prepurchase payment
- The cancellation flag on a header or line
- The authorization flag on a header
- The header payment method
- Any other information you have defined in the Additional Finance Information descriptive flexfield

Your interface can return the following information to OTA:

- The status of the header (Successful Transfer or Unsuccessful Transfer)
- An external reference, date, message, and a paid flag

When a header has the status Successful Transfer, it cannot be updated within OTA. However, you can cancel it (or individual finance lines) and issue a new header to supersede it.

Step 41 Set Up Cross-Charging

If you plan to debit cost centers for internal training, you must enable cross-charging.

Setting up cross-charging of enrollments takes three steps:

1. Map accounting fields between OTA and General Ledger.
See: Setting Up Cross-Charge Accounting, *Using Oracle Training Administration*
2. Set up the Create Cross Charging GL Lines for Transfer concurrent process.
3. Set up the Create Journal Entries process in GL.

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

If you do not use Oracle GL, you can still set up a flexible Chart of Accounts and enter your transactions against it using the Finance Headers window. You transfer the finance headers and lines through the Open Interface tables, and import the data into the General Ledger of choice. You run the Journal Import Concurrent Program to import the data into Oracle General Ledger.

Use the Submit a New Request window

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

Step 42 Create Finance Headers

To record a monetary amount against a student enrollment or a resource booking, you must select a finance header. You can create the finance header when you enter the enrollment or booking.

However, you may be recording internal monetary transfer amounts for budgeting or costing purposes only. In this case, you might decide to create, during implementation, one default receivable finance header and one payable header for all your finance lines.

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

Use the Finance Headers window.

See: Creating a Finance Header, *Using Oracle Training Administration*

See: Creating a Prepurchase Payment Finance Header, *Using Oracle Training Administration*

Pricing Information

Step 43 Define Price Lists

A price list is a catalog of activities and the prices at which they are available between certain dates. You can define any number of price lists—for example, for different seasons or for different categories of activity (perhaps targeting different audiences). Users can select a standard price from a price list when they schedule events. They can also base enrollment agreements on a price list.

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

Use the Price Lists window.

See: Creating a Price List in Money, *Using Oracle Training Administration*

See: Creating a Price List in Training Units, *Using Oracle Training Administration*

Step 44 Define Discount And Prepurchase Agreements

If you want to discount the standard price of events, or all prices on a price list, you can set up discount agreements for one customer or all customers. You can also set up prepurchase agreements, where a customer buys a certain amount or value of training in advance.

Use the Enrollment Agreements window.

See: Enrollment Agreements, *Using Oracle Training Administration*

Reports, Letters, and Folders

OTA installed with...	required steps	optional steps
any	none	all

Reports

Step 45 Use Standard Reports or Write New Reports

OTA includes several standard reports, written using Oracle Reports and registered as concurrent programs with the Standard Requests Submission (SRS) feature of Oracle Applications.

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

If you run Oracle Discoverer, you can choose from a number of ready-to-use reports.

Step 46 Register Reports as Concurrent Programs

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

Use the Concurrent Programs window.

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

Step 47 Define Report Sets

You can define sets of reports:

- To restrict user access to specific reports
A set of reports can be linked to a responsibility.
- To simplify requesting a report

You can run a report set in one request, rather than requesting each report one by one.

Use the Request Set window.

See: Defining Request Sets, *Oracle Applications System Administrator's Guide*

Standard Letters

Step 48 Set Up Application Data Exchange (ADE)

Application Data Exchange (ADE) enables you to export information from your database to other applications.

You can also use ADE to launch another application within Oracle HRMS or OTA. Applications launch and run in another window on your desktop.

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

Step 49 Generate Letters Using ADE

You can use standard letters to help you to manage enrollments. You issue standard letters to applicants or students, triggered by changes in assignment or enrollment status.

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

Folders

Oracle Training Administration includes five folder windows:

- Enrollment Summary
- Search for Event
- Resources Booked
- Customers Summary
- Suppliers Summary

You can define standard folders in each of these windows, and you can choose which users can create their own customized folders.

Step 50 Define Standard Folders

Each of the folder windows includes a supplied default folder that displays all records and a subset of the available fields. You can adapt these folders to create one or more folders in each window, with your choice of:

- Fields and field labels
- Records, defined by a query
- Record sorting, using up to three sort fields
- Field formatting, including column order and width

Each folder is either private to one user or available to all users who have access to the window. You must select a default folder for each window.

See: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

Step 51 Enable or Disable User Folder Customization

If you want users to be able to define their own customized folders, set the user profile option Flexview: Allow Customization to Yes.

Use the System Profile Values window.

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

Security

OTA installed with...	required steps	optional steps
HR	Step 52, Step 61	all others
no HR	Step 52, Step 61	Step 53–Step 60, Step 64–Step 65
Project Accounting	Step 52, Step 61, Step 65	all others
any other products	Step 52, Step 61	all others

Setting up security is normally a task for your System Administrator.

Each user accesses OTA through a responsibility, such as Training Manager or Bookings Administrator. The responsibility controls:

- The windows the user can access
- Whether the user can add and edit data, or only view it
- Whether the user has access to all the regions and fields on a window
- The reports the user can run

Menu Security

Step 52 Disable the Multiple Forms Feature

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

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

See: Disabling Multiple Forms, *Configuring, Reporting, and System Administration in Oracle HRMS*

Step 53 Define Menu Functions

Menus are composed of submenus and form functions. All Oracle Applications include default functions and menus to give you access to all of the available windows.

Note: You should not modify the default functions and menus supplied with the system. Any upgrades overwrite these defaults.

Use the Form Functions window.

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

Step 54 Define Menus

The default menu gives you access to *all* of the supplied submenus and functions. If you want to rearrange the menus and add submenus for new functions you have defined, you should create your own menu.

Use the Menu window.

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

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

Step 55 Set Up Financial Security

Set up financial security if you want to restrict who can enter, update, and delete financial information.

Use the Menu window.

See: Setting Up Financial Security, *Using Oracle Training Administration*

Enrollment Security

Step 56 Set Up Enrollment Status Security

You can prevent users of a responsibility from entering or updating enrollments with certain enrollment statuses. Use the Booking Status Exclusions window to select the responsibility and the enrollment statuses that users of this responsibility cannot select.

Use the Enrollment Status Exclusions window.

See: Setting Up Enrollment Status Security, *Using Oracle Training Administration*

Step 57 Configure Enrollments Windows

You can configure the Enrollments windows in the following ways:

- Which windows (Enrollment Summary, Enrollment Detail, and Search for Event) appear by default when users choose the Enrollments menu option
- Which regions of the Enrollment Detail window are displayed
- Whether users can enter employee enrollments, customer enrollments, or both in the Enrollment windows

Use the Form Functions window.

See: Configuring Functions, *Using Oracle Training Administration*

User Security

Step 58 Define Report Security Groups

You can define the groups of standard reports and processes that a user can run from the Submit Requests window. Each responsibility can access one report group.

Use the Request Groups window.

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

Step 59 Define Responsibilities

Define responsibilities to bring together all of your security definitions: a data group, a main menu, and a report security group. You can exclude particular submenus or functions of the main menu to hide them from users of this responsibility.

Use the Responsibilities window.

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

Step 60 Assign User Assignments to a Responsibility

Set up organization security to enable only those users who belong to the sponsoring organization to update and delete events and to enroll students onto those events and update the enrollment.

Use the Scheduled Event and Programs windows.

See: Organization Security, *Using Oracle Training Administration*

Step 61 Define Every User of the Application

You should define every user of the application with a unique username and password. You can give the same responsibility to many different users, but any data changes will be identified by the Application Username.

Use the Users window.

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

Step 62 Set Up Organization Security and Associate Employees to Usernames

If you use Oracle HR and want to restrict who can update or delete certain events, you must create one FND_USER for every employee who uses OTA. The user can update or delete only those events that his

or her organization administers. This security applies both to the event itself and to all enrollments in the event.

To associate an employee with a user name, enter the employee's user name in the User Name field then select the employee from the list in the Employee field.

Use the Users window.

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

Competencies and Skills Activation

Step 63 Define Functions to Implement the Competence Approach

If you have installed Oracle Human Resources and OTA, and you are implementing the competence approach, you can use competencies, skills, or a mixture of both.

To use competencies, you must activate the Competencies buttons on the Activities window by entering COMPETENCIES=YES in the Parameters field of the Form Functions window (the default is no). You can disable the Skills button by entering SKILLS=NO (the default is yes).

You can also allow specific users to add the competencies delivered by the activity to a student's Competence Profile after the student has completed the training event.

Use the Form Functions window.

See: Defining Functions, *Using Oracle Training Administration*

Profiles

Step 64 Define HR User Profile Options

You must define the HR:Business Group profile option for every new responsibility. The default value is the setup Business Group.

In addition, you may want to set other profile options for responsibilities or even for an individual user.

Use the System Profile Values window.

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

Step 65 Define OTA Project Accounting Integration

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

Use the System Profile Options window.

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

Self-Service Enrollment and Training Administration

OTA installed with...	required steps	optional steps
Oracle Self-Service HR	all	none
no Oracle Self-Service HR	none	none
any other products	none	none

If you are using Oracle Self-Service Human Resources to provide self-service enrollments and training administration for managers and employees, you need to perform the setup steps for Self-Service Enroll in a Class and set several user profiles.

The Self-Service HR implementation guide includes all generic SSHR setup steps.

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

Step 66 Set Up Self-Service Class Enrollments

See: Setting Up Enroll in a Class, *Using Oracle Training Administration*

Step 67 Set Up Automatic Finance Transfer

To enable OTA to create finance headers and lines automatically, you must set the OTA: Automatic Creation of Finance Headers and Lines profile to Yes.

To enable OTA to process these automatically created finance headers and lines, you must set the OTA: Automatic Finance Header Approval profile to Yes.

To enable the automatic transfer of finance headers to GL, you must set the OTA: SSHR Automatic Transfer to GL profile to Yes.

See: User Profiles, *Using Oracle Training Administration*

Step 68 Set Up Automatic Waitlisting

If you have not already done so in Step 35, you must enable automatic waitlisting by setting several profile options:

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

See: User Profiles, *Using Oracle Training Administration*

Audit Requirements

OTA installed with...	required steps	optional steps
all	none	all

Step 69 Estimate File Sizing and Management Needs

Auditing the actions of users records all transaction details, including 'before' and 'after' details as well as who made the change and when.

With one significant exception, enabling Audit does not noticeably decrease the performance of the system. Users will not be aware of any extra delay in committing their transactions.

However, in normal use the auditing of data can soon generate large volumes of audit data that, even when stored in a compressed format, will continue to grow in size until you reach the limits imposed by your environment. If you reach the limits during active use then users will be unable to use the system until you remedy the problem.

You are strongly advised to consider the scope of your audit activities and how you will use the data you accumulate. You should also consider how often you will report on the audit data, and when you will archive and purge your audit data.

If you need more advice you should contact your Oracle Support representative.

Step 70 Define Audit Installations

If you have installed more than one Oracle Application you can audit across multiple installations. For OTA you should enable auditing for the OTA user and the APPLSYS user.

Use the Audit Installations window.

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

Step 71 Define Audit Tables and Columns

You can define the level of audit detail, including the individual fields of each record that you want to audit.

Use the Audit Tables window.

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

Step 72 Define Audit Groups

You can define one or more Audit Groups. You might find this useful if you have more than one Oracle Application installed.

Use the Audit Groups window.

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

Step 73 Activate AuditTrail Update Tables Process

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

Use the Submit Requests window.

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

Online Help Configuration

OTA installed with...	required steps	optional steps
all	none	Step 74

Step 74 **Configure Oracle Applications Help**

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

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

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

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

Oracle Order Management for OTA

OTA installed with...	required steps	optional steps
Oracle Order Management	all	none
any other products	none	none

OTA's linkage with Oracle Order Management (OM) enables training service providers to manage the ordering and pricing of events through a standard interface. Providers use the OM interface to manage the event inventory, enrollment, and invoicing processes for external customers. OM generates invoices and bills the customers through its interface with Oracle Accounts Receivable.

OTA-specific setup steps appear here. For generic OM, Advanced Pricing, and Inventory setup steps, consult the user guides or online help for those products.

Step 75 Add the Units Of Measure for OTA

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

Use the UOM Classes window.

See: Setting up Order Management for OTA, Using OTA with OM, *Using Oracle Training Administration*

Step 76 Place Activities in Inventory

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

See: Placing Items in Inventory, Using OTA with OM, *Using Oracle Training Administration*

Step 77 Set up Price Lists and Formulas

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

See: Overview of Price Lists and Overview of Formulas, *Using Oracle Advanced Pricing*

Step 78 Link inventoried activities to OTA

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

Use the OTA Activities window.

See: Linking Activities to Order Management, Using OTA with OM,
Using Oracle Training Administration

APPENDIX

A

Default Menus

Default Navigation Menus for Oracle Training Administration

This appendix shows you the default menu path for every window in Oracle Training Administration. Your system administrator can define new menus appropriate to the responsibilities at your site.

The first section shows the structure of the default menus for the default responsibility. The second section is arranged alphabetically by window title and shows how to find each window.

MENU ENTRY		DESCRIPTION
Enrollments		Enroll students and customers on events
	Student	Create and maintain student enrollments
	Customer	Create and maintain customer enrollments for restricted events
	Enrollment Summary	View summary of student enrollment
Activities		Create and maintain activities
Events		Create, maintain, and search for events
	Scheduled	Create and maintain scheduled events based on activities
	Programs	Create and maintain programs of multiple events
	Development	Create and maintain development events
	One-Time	Create and maintain one-time events
	Event Search	Search for an event
Training Record	Additional Training	Create, maintain and search for additional training
Resources		Define resources and administer bookings
	Definitions	Create and maintain resources
	Bookings	Administer resource bookings
	Resources Booked	View resources booked for an event
Finance		Create and maintain finance details, price lists, and enrollment agreements
	Headers and Lines	Create and maintain finance headers and lines
	Price Lists	Create and maintain price lists for activities
	Enrollment Agreements	Create and maintain discounts and prepurchase agreements
Letters		Define and administer standard letters
	Definitions	Associate letter types with enrollment statuses
	Requests	Request a mail merge file for standard letters

MENU ENTRY		DESCRIPTION
Personal Information		Create and maintain people and personal information
Organizations		Create and maintain customers, suppliers, and training organizations
	Customers	Create and maintain customers
	Suppliers	Create and maintain suppliers of activities and resources
	Training Organizations	Create and maintain organizations and Business Groups
	Locations	Create and maintain locations for organizations
	Hierarchy	View and maintain local or global organization hierarchy
Setup		Create and maintain reference information
	Enrollment Statuses	Create and maintain enrollment statuses
	Category Usages	Specify use of activity categories for programs, packages, and reporting
	Skill Types	Enable skill types and specify their usage
	Lookups	Create and maintain values and meanings for Lookups
	Personal Profile Options	Review your personal profile options
	Enrollment Status Exclusions	Prevent users from a responsibility from entering enrollments of a certain status
	Cross-Charge Accounting	Create and maintain cross-charge accounting information
	Mapping of Competencies and Languages	Map competencies to languages
Customer and Supplier		Alternate financial setup
	Calendar	Create a calendar to define an accounting year and periods
	Set of Books	Define the functional currency, account structure and accounting calendar for each company or group of companies
	Choose Set of Books	Define the accounting practices to follow for that set of books
	Financials Options	Define financials options
	System Options	Define system options

MENU ENTRY		DESCRIPTION
Reports		
	Submit Report	Submit and run reports
	View Report	View reports online

Windows and their Navigation Paths

The following list shows the default navigation paths for all the windows in Oracle Training Administration. The responsibility that you use determines which of these windows you can use and how you access them. Your system administrator sets up navigation menus for your responsibility.

Activities

- Choose Activities in the Navigator.

Additional Training

- Choose Training Record -> Additional Training in the Navigator.

Assignments for Restricted Event (Oracle HR users only)

1. Choose Events -> Scheduled in the Navigator.
2. Enter or query an event and check the Restricted box.
3. Choose the Assignments button.

Availability

1. Choose Resources -> Bookings in the Navigator.
2. Select a Resource Type and enter a date in the From field.
3. Choose the Availability button.

Book Required Resources

1. Choose Resources -> Bookings in the Navigator.
2. Check the Use Event check box.
3. Choose the Book Required button.

Book Resources

- Choose Resources -> Bookings in the Navigator.

Business Group Information

1. Choose Organizations -> Training Organizations in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button.

Calendar

- Choose Customer and Supplier -> Calendar in the Navigator.

Category Usages

- Choose Setup -> Category Usages in the Navigator.

Change Price List Dates

1. Choose Finance -> Price Lists in the Navigator.
2. Query the price list in the Price List window
3. Choose the Change Dates button.

Change Prices for Entries Within a Price List

1. Choose Finance -> Price Lists in the Navigator.
2. Query the price list on which you want to change prices.
3. Choose the Change Prices button.

Checklist

1. Choose Resources -> Bookings in the Navigator.
2. Query a scheduled event in the Search for Event window.
3. Check the Use Event check box in the Book Resources window.
4. Choose the Show Checklist button.

Choose Set of Books

- Choose Customer and Supplier -> Choose Set of Books in the Navigator.

Competencies

1. Choose Activities in the Navigator.
2. Enter or query an activity.
3. Choose the Competencies button.

Copy Activity

1. Choose Activities in the Navigator.
2. Enter or query an activity.
3. Choose the Copy Objects button.

Copy Template

1. Choose Enrollments -> Student in the Navigator.
2. Choose the Functions button and select Template.

Cross-Charge Accounting

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

Customer Addresses

1. Choose Organizations -> Customers in the Navigator.
2. Enter or query a customer.
3. Choose the Open button.

Customers

- Choose Organizations -> Customers in the Navigator.

Customers for Restricted Event

- Choose Enrollments -> Customer in the Navigator.

Development Events

- Choose Events -> Development in the Navigator.

Enrollment Agreements

- Choose Finance -> Enrollment Agreements in the Navigator.

Enrollment Detail

- Choose Enrollments -> Student in the Navigator.

Enrollment Mass Update

1. Choose Enrollments -> Student in the Navigator.
2. Query the enrollments to update.
3. Choose the Mass Update button in the Enrollment Summary window.

Enrollment Status Exclusions

- Choose Enrollment Status Exclusions -> Setup in the Navigator.

Enrollment Status History

1. Choose Enrollments -> Student in the Navigator.

2. Query the event for which to view enrollments.
3. Choose the History button in the Enrollment Detail window.
4. Select Enrollment Status History.

Enrollment Statuses

- Choose Setup -> Enrollment Statuses in the Navigator.

Enrollment Summary

- Choose Enrollments -> Enrollment Summary in the Navigator.

Enter Categories

1. Choose Activities in the Navigator.
2. Enter or query an activity.
3. Choose the Categories button.

Enter Person

- Choose Personal Information in the Navigator.

Extend a Price List

1. Choose Finance -> Price Lists in the Navigator.
2. Query the price list you want to extend.
3. Choose the Copy List button.

Event Categories

1. Choose Events -> Scheduled in the Navigator.
2. Enter or query an event.
3. Choose the Categories button.

Event Sessions

1. Choose Events -> Scheduled in the Navigator.
2. Enter or query an event.
3. Choose the Sessions button.

Event Status Change

1. Choose Events -> Scheduled in the Navigator.
2. Enter or query an event.

3. Choose the Change Status button.

Finance Lines

1. Choose Finance -> Finance Headers and Lines in the Navigator.
2. Enter or query a finance header.
3. Choose the Finance Lines button.

Financials Options

- Choose Customer and Supplier -> Financials Options in the Navigator.

Find Events

1. Choose Events -> Event Search in the Navigator.
2. Choose the Find button on the Toolbar.

Header (Finance)

- Choose Finance -> Headers and Lines in the Navigator.

Header Cancellation (Finance)

1. Choose Finance -> Headers and Lines in the Navigator.
2. Query the header in the Finance Header window.
3. Choose the Cancel Invoice button.

Header Re-creation (Finance)

1. Choose Finance -> Headers and Lines in the Navigator.
2. Query a header in the Finance Header window that has the status Successful Transfer.
3. Choose the Cancel/Recreate button.

Header Reinstatement (Finance)

1. Choose Finance -> Headers and Lines in the Navigator.
2. Query the header in the Finance Header window.
3. Choose the Reinstate button.

Letter Definitions

- Choose Letters -> Definitions in the Navigator.

Letter Requests

- Choose Letters -> Requests in the Navigator.

Location

- Choose Organizations -> Locations in the Navigator.

Lookups

- See Lookup Codes

Lookup Codes

- Choose Setup -> Lookup Codes in the Navigator.

Mapping Competencies to Languages

- Choose Setup -> Mapping of Competencies to Languages

One-Time Events

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

Organization

- Choose Organizations -> Training Organizations in the Navigator.

Organization Hierarchy

- Choose Organizations -> Hierarchy in the Navigator.

Personal Information (Oracle HR users only)

1. Choose Personal Information in the Navigator.

Personal Profile Values

- Choose Setup -> Personal Profile Options in the Navigator.

Prepurchased Amount

1. Choose Finance -> Enrollment Agreements in the Navigator.
2. Enter or query a prepurchase agreement.
3. Choose the Finance button.

Price Lists

- Choose Finance -> Price Lists in the Navigator.

Programs

- Choose Events -> Programs in the Navigator.

Program Default Events

1. Choose Events -> Programs in the Navigator.
2. Enter a title to identify the program.
3. Select a category of activities.
4. Select a status.
5. Check the Restricted check box to restrict enrollments to internal students, otherwise, leave the box unchecked.
6. Select the price basis for the program:
7. Enter the price basis details.
8. Save your work.
9. Choose the Defaults button.

Program Default Event Edit

1. Choose Events -> Programs in the Navigator.
2. Query the event to edit.
3. Choose the Defaults button.

Request Letter

- Choose Letters -> Requests in the Navigator.

Resource

- Choose Resources -> Definitions in the Navigator.

Resource Usages

1. Choose Activities in the Navigator.
2. Enter or query an activity.
3. Choose the Resources button.

Resources Booked

- Choose Resources -> Resources Booked in the Navigator.

Resources Search

1. Choose Resources -> Bookings in the Navigator.

2. Query a scheduled event in the Search for Event window.
3. Check the Use Event check box in the Book Resources window.
4. Choose the Resource Search button.

Scheduled Event

- Choose Events -> Scheduled in the Navigator.

Search for Event

- Choose Events -> Event Search in the Navigator.

Set of Books

- Choose Customer and Supplier -> Set of Books in the Navigator.

Setup Options

1. Choose Enrollments -> Student in the Navigator.
2. Choose the Functions button and select Setup Options.

Skill Provisions

1. Choose Activities in the Navigator.
2. Enter or query an activity.
3. Choose the Skills button.

Special Information Types

- Choose Setup -> Skill Types in the Navigator.

Submit a New Request

1. Choose Processes and Reports -> Submit Processes and Reports in the Navigator.
2. Select Single Request or a Request Set.

Suppliers

1. Choose Organizations -> Suppliers in the Navigator.
2. Choose the Open button.

Suppliers Summary

- Choose Organizations -> Suppliers in the Navigator.

System Options

- Choose Customer and Supplier -> System Options in the Navigator.

Training History

1. Choose Enrollments -> Student in the Navigator.
2. Query the student for which to view training history.
3. Choose the History button in the Enrollment Detail window.
4. Select Training History.

APPENDIX

B

Alternate Financial
Implementation Steps

Alternate Financial Implementation Steps

If you do not run Oracle General Ledger, you must define an accounting flexfield structure, create a set of books, and set several options. This process activates your Suppliers and Customers windows and assists you in transferring costs between OTA and your accounting system.

Define an Accounting Flexfield Structure

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

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

Step 1 Define Accounting Flexfield Value Sets

If you want to validate the values which a user can enter for any segment you must define a specific Value Set.

The attributes of the Value Set control the type of values that can be entered, and how many characters each segment can hold. The attributes of the Value Set also control how the values are to be validated.

Value Sets can be shared by different segments of the same flexfield, or by segments of any other flexfield.

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

- Company
- Account
- Cost Center

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

Table B–1 Value Sets

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

Use the Value Sets window.

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

Step 2 Define Accounting Flexfield Segments

Define a structure for your Accounting Flexfield which contains the segments you want to use. Name your structure something like OTA Accounting Flexfield, for example. You can then distinguish this structure from the Accounting Flexfield structure used by Oracle Financials. This may be useful if your enterprise later buys Oracle Financials and you want to set up full accounting functionality.

Note: You must not check the Allow Dynamic Inserts box. Oracle Training Administration requires the valid combinations to exist, and therefore cannot enter new values upon data entry in the OTA Finance windows.

Table B–2 Accounting Flexfield

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

You must enter flexfield qualifiers for each segment, to identify which segment appears on each window.

Table B–3 Company Segment

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

Table B–4 Account Segment

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

Table B–5 Cost Center Segment

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

Use the Key Flexfield Segments window.

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

Step 3 Define Accounting Flexfield Segment Values

As you have chosen Independent validation for the Value Sets used by a Accounting Flexfield Segment, you must define your list of valid values for the Value Sets.

Table B–6 Accounting Flexfield Segment Values

Value Set	Code	Description	Budgeting Qualifier	Posting Qualifier	Account Type Qualifier
COTA_COMPANY	000	Company 000	Yes	Yes	N/A
COTA_ACCOUNT	000	Account 000	Yes	Yes	Liability
COTA_COST_CENTER	000	Account 000	Yes	Yes	Liability

Use the Segment Values window.

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

Step 4 Uncheck Dynamic Inserts on OTA Accounting Key Flexfield

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

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

Uncheck the Dynamic Inserts box.

Use the Key Flexfield Segments window.

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

Step 5 Freeze and Compile Your Accounting Flexfield Structure

You are now ready to freeze your Accounting Flexfield definition. Check the Freeze Flexfield Definition box and save your changes. OTA freezes and compiles your Accounting Flexfield definition. Compiling the flexfield definition enables the Accounting Flexfield window with the defaults, values, and rules that you have defined.

Use the Key Flexfield Segments window.

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

Create a Calendar and Set of Books

Step 6 Create a Calendar

See Creating a Calendar: page B – 7

Step 7 Define a Set of Books

See Defining a Set of Books: page B – 8

Step 8 Choose the Set of Books

See Choosing the Set of Books: page B – 9

Set Financials and System Options

Step 9 Define Financials Options

See Defining Financials Options: page B – 10

Step 10 Define System Options

See Defining System Options: page B – 12

Creating a Calendar

Use the Calendar window to create a calendar for use by supplier and customer windows.

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

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

► **To create a calendar:**

1. Enter a name for the calendar; for example, **OTA Calendar**.
2. Enter a description for the calendar.
3. Enter a period prefix; for example, **OTA**.
4. Enter the period type, typically **Year**.
5. Enter the four-digit year.
6. Enter the quarter, **1, 2, 3, or 4**.

OTA 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. They are not used by OTA.

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. OTA does not use some of the fields in this form.

► **To define a set of books:**

1. Name the set of books; for example, **OTA set of Books**.
2. Enter a short name for the set of books; for example, **OTA**.
3. Enter a description for the set of books.
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 previously created; for example, **OTA Calendar**.

Entering Closing Information

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

Entering Journaling Information

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

Note: These accounts are for reference only. They are not used by OTA.

Choosing the Set of Books

Use the Choose Set of Books window to choose the set of books to use.

► **To choose a set of books:**

1. Select the set of books you previously created, for example, **OTA set of Books**.
OTA 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. OTA does not use some of the fields in this form.

► **To define financials options:**

1. Choose the Accounting tabbed region (if not already displayed).

Entering Accounting Information

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

Entering Supplier–Entry Information

4. Select any invoice match option from the list.
5. Select the Supplier Numbers of Automatic as the entry and Numeric as the type from the lists.

Entering Supplier–Payables Information

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

Entering Supplier–Purchasing Information

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

Entering Human Resources Information

10. Enter a business group; for example, **OTA DEMO Business Group**.
11. Select Home in the Expense Reimbursement Address region.

12. Select Automatic as the payment method.
13. Enter 5 in Next Automatic Number.
14. Save your work.

Defining System Options

Use the System Options window to set up your system options.

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

► **To define system options:**

1. Ensure that the Accounting tabbed region is displayed.

Accounting Information

2. Enter **Cash Basis** as the accounting method.
3. Enter **OTA set of Books** as the name.
4. Select zeros (000.000.000) in the following fields:
 - Finance Charge Activity
 - Realized Gains Accounts
 - Realized Losses Account
 - Tax Account
5. Leave the default number of days per posting cycle as they are.

Tax Information

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

Transaction and Customer Information

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

Miscellaneous Information

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

Glossary

A

Activity Any educational offering that is designed to improve a student's qualifications, competencies, or experience. Examples: a training course, on-the-job training, structured work experience. An activity defines what a supplier can offer, but it has no dates attached. An activity is a version of an activity type. See also: *Scheduled Event*.

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

Appraisal A 'superset' of recording opinions and setting and achieving objectives, plans and so on. See also: *Assessment*.

Assessment An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job. See also: *Appraisal*.

B

Behavioral Indicators Characteristics that identify how a competence is exhibited in the work context. See also: *Proficiency Level*

Block The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next. See also: *Region, Field*.

Business Group The highest level organization in the Oracle HRMS system. A Business Group may correspond to the whole of your enterprise or to a major grouping such as a subsidiary or operating division. Each Business Group must correspond to a separate implementation of Oracle HRMS.

C

Category These enable you to group together activities that you want to schedule and administer as a program, or offer together as a discount package, or classify for reporting purposes. When you define a category, you can specify whether it can be used as a program, package, and/or classification. See also: *Program, Package*.

Competence Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competence can be a piece of knowledge, a skill, an attitude or an attribute.

Competence Profile Where you record applicant and employee accomplishments, for example, proficiency in a competence.

Competence Type A group of related competencies

D

Descriptive Flexfield A field that your organization can customize to capture additional information required by your business but not otherwise tracked by Oracle Applications. See also: *Key Flexfield*.

Development Event A mechanism for scheduling employee time and other resources required to develop new training activities or to enhance existing ones. You can attach a budget to a development event. See also: *Event*

Discount An agreement to supply student places on one or more events at a reduced price. The agreement may be restricted to one customer or open to all. It may be restricted to a maximum number of places. See also: *Enrollment Agreement*

E

Enrollment Agreement An agreement about the price or method of payment for one or more events. There are two types of agreement: discounts and prepurchase agreements. See also: *Discount*, *Prepurchase Agreement*.

Event When you are ready to take enrollments or make resource bookings, you create an event. An event is a specific instance of an activity, scheduled to run on given dates, or a one-time event, which is not related to an activity. See also: *Scheduled Event*, *One Time Event*, *Development Event*.

F

Field A view or entry area in a window where you enter, view, update, or delete information. See also: *Block*, *Region*.

Finance Header This records the status of a financial transaction with a particular customer or supplier. There are three types of finance header: payable, receivable, and cancellation. You can transfer it to your finance system to trigger the creation of an invoice or payment, or the cancellation of an existing invoice or payment. You can associate one or more finance lines with each header. See also: *Finance Line*.

Finance Line This records a sum of money to pay a supplier, or to charge a customer for an enrollment, or to deduct from the balance of a prepurchase agreement. See also: *Finance Header*.

Folder A special block or window whose field and record layout you can customize. You can identify a folder block by the Open Folder icon in the upper left corner. You can save your customized field and record layout as a new folder.

Form A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components. See also: *Block*, *Region*, *Field*.

K

Key Flexfield A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such a resource. See also: *Descriptive Flexfield*.

L

Lookup Types Categories of information, such as nationality, address type and enrollment status, that have a limited list of valid values. You can add values to some Lookup Types.

M

Menus You set up your own navigation menus, to suit the needs of different users.

O

One Time Event Any event for which you want to record basic information and enrollments, but which you do not need to define as an activity. Typically, this is an event that you do not expect to run more than once. See also: *Event, Activity*.

P

Package A group of activities that may be the subject of an enrollment agreement. See also: *Enrollment Agreement*

Personal Competence Profile See: *Competence Profile*.

Prepurchase Agreement A customer contracts to purchase a certain amount of training, measured in money or training units, on activities listed on a price list. This type of agreement may also incorporate a percentage discount. See also: *Training Unit*.

Price List A catalog of activities and the prices at which they are available between certain dates. A price list either details prices in monetary terms (in a certain currency) or in training units. See also: *Training Unit*.

Proficiency Level A system for expressing and measuring how a competence is exhibited in the work context. See also: *Behavioral Indicators*.

Program A group of events that you schedule together. Students enroll on the program and you can charge them for the program as a whole rather than individual events. See also: *Event*.

R

Region A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window. See also: *Block, Field*.

Report Parameters Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

Report Security Group A list of reports and processes that can be submitted by holders of a particular responsibility. See also: *Responsibility*.

Report Set A group of reports and concurrent processes that you specify to run together.

Resource Any facility, person, or equipment that you need to book to run an event. Two special resource types in Oracle Training Administration are trainers and venues.

Responsibility A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities. See also: *User Profile Options*, *Report Security Group*.

Restricted Event A scheduled event on which only selected customers or selected employees can enroll. You select valid customers by name and valid employees by organization, job, or position. See also: *Scheduled Event*.

S

Scheduled Event A specific instance of an activity on which students can enroll and for which you can book resources. See also: *Event*, *Activity*.

Session A unit of time within an event for which you can independently book resources. For example, you might divide a one day event into four two hour sessions, and a five week evening course into five evening sessions.

Special Information Types Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

T

Tabbed regions Parts of a window that appear in a stack so that only one is visible at any time. You click on the name of the region to pop up a list of the other regions in the stack. Select the name of a region to bring it to the top of the stack.

Third Party Contact An agency that places enrollments for students employed by other customers. You create a third party contact as a customer.

Training Unit Any user-defined expression of the cost of a training activity. For example, a customer might buy 100 hours of trainer time using a prepurchase agreement. This agreement must be based on a price list that expresses the cost of activities in trainer time. You might define the training unit as Half an Hour, so that a full day activity costs 16 training units. See also: *Prepurchase Agreement*

U

User Profile Options Features that enable system administrators and users to tailor Oracle Applications to their exact requirements. See also: *Responsibility*

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