

**Oracle® Learning Management**

Implementation Guide

Release 11i

**Part No. B31216-01**

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Oracle Learning Management Implementation Guide, Release 11i

Part No. B31216-01

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Primary Author: Jeffrey Erickson, Hema Hardikar, Louise Barnfield

Contributing Author: Rajesh Sivanarayanan, Parampreet Kaur, Juliette Fleming, Louise Raffo, Mark Rowe

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## **Oracle Learning Management Implementation Guide, Release 11i**

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- Did you find any errors in the information?
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- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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# Preface

## Intended Audience

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

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

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

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

- The Oracle Applications graphical user interface.

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

See Related Information Sources on page viii for more Oracle Applications product information.

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## Structure

**1 Implementing Oracle Learning Management**  
**Oracle Learning Management Glossary**

## Related Information Sources

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

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

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

### **Guides Related to All Products**

#### Oracle Applications User's Guide

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

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

### **Guides Related to This Product**

#### Oracle Learning Management User Guide

Use Oracle Learning Management to accommodate your specific business practices.

#### OA Personalization Framework and OA Extensibility Framework

Learn about the capabilities of the 11.5.10 Framework technologies.

#### Oracle HR Intelligence Daily Business Intelligence for HRMS User Guide

This guide describes the dashboards and reports available for HR Line Managers, Chief HR Officer, Budget Managers, and Benefits Managers using Daily Business Intelligence for HRMS. It includes information on using parameters, how DBI for HRMS derives values, and how to troubleshoot dashboards and reports.

#### Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following

functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

#### Oracle E-Business Intelligence Daily Business Intelligence User Guide

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

#### Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

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

#### Oracle Human Resources Management Systems Payroll Processing Management Guide

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

#### Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

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

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

#### Oracle Human Resources Management Systems Implementation Guide

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

#### Oracle Human Resources Management Systems FastFormula User Guide

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

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

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

#### Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

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

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

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

#### Implementing Oracle Approvals Management

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

#### Oracle iRecruitment Implementation Guide

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

#### Oracle Time and Labor Implementation and User Guide

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

### **Installation and System Administration**

#### Oracle Applications Concepts

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

#### Installing Oracle Applications

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

#### Upgrading Oracle Applications

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

#### "About" Document

For information about implementation and user document, instructions for applying patches, new and changes setup steps, and descriptions of software updates, refer

to the "About" document for your product. "About" documents are available on *OracleMetaLink* for most products starting with Release 11.5.8.

### Maintaining Oracle Applications

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

### Oracle Applications System Administrator's Guide

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

### Oracle Alert User's Guide

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

### Oracle Applications Developer's Guide

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

### Oracle Applications User Interface Standards for Forms-Based Products

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

## **Other Implementation Documentation**

### Oracle Applications Product Update Notes

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

### Oracle Workflow Administrator's Guide

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

### Oracle Workflow Developer's Guide

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

### Oracle Workflow User's Guide

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

### Oracle Workflow API Reference

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

### Oracle Applications Flexfields Guide

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

### Oracle eTechnical Reference Manuals

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

### Oracle Applications Message Manual

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

## **Do Not Use Database Tools to Modify Oracle Applications Data**

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

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

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

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

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# Implementing Oracle Learning Management

## Implementing Oracle Learning Management

Implementation takes place after a successful installation of the application, and describes the process you follow to configure Oracle Learning Management (OLM) to meet your own specific business needs.

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

### Making Decisions

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

You must make two key implementation decisions:

- Do you plan to integrate OLM with Oracle Human Resources now or in the future? Doing so can change the way in which you hold information about internal learners and instructors. It also has implications if you are developing the competency approach.
- Do you plan to hold financial information (about resource costs and enrollment charges) in OLM? What kind of arrangement do you need? Do you need an interface between OLM 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?
  - Both online and offline courses, or just offline courses?
- If you have purchased the license to run online courses, to be viewed in the Web-based player, how should you organize your online content such as modules and tests?
- What information do you need to record about learners, instructors, customers and suppliers? For internal learners 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? Are you enabling telesales by integrating with Oracle Order Management?
- How do you want to organize your budgeting?
- Where do you teach? What is the maximum number of learners allowed in each room (and therefore on each class 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? Do you want to record these competencies automatically for each learner, 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)? If so, you should run the integration with Oracle Order Management.
- Which of your users should access which parts of OLM? What are the roles within your training department? Which roles need full or restricted access?
- What kind of facilities and resources do classes need? What skills do instructors require to teach this course? Where do your instructors come from--internal sources or an external supplier?
- 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 class scheduling and enrollment management. Then later you could add resource management and competency management to the basic implementation. In a third stage, if you supply training externally, you could implement the integration with Oracle Order Management, to support inventory, telesales, invoicing, and payments.

## Implementation Checklist

Use the following checklist to record which parts of Oracle Learning Management 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.

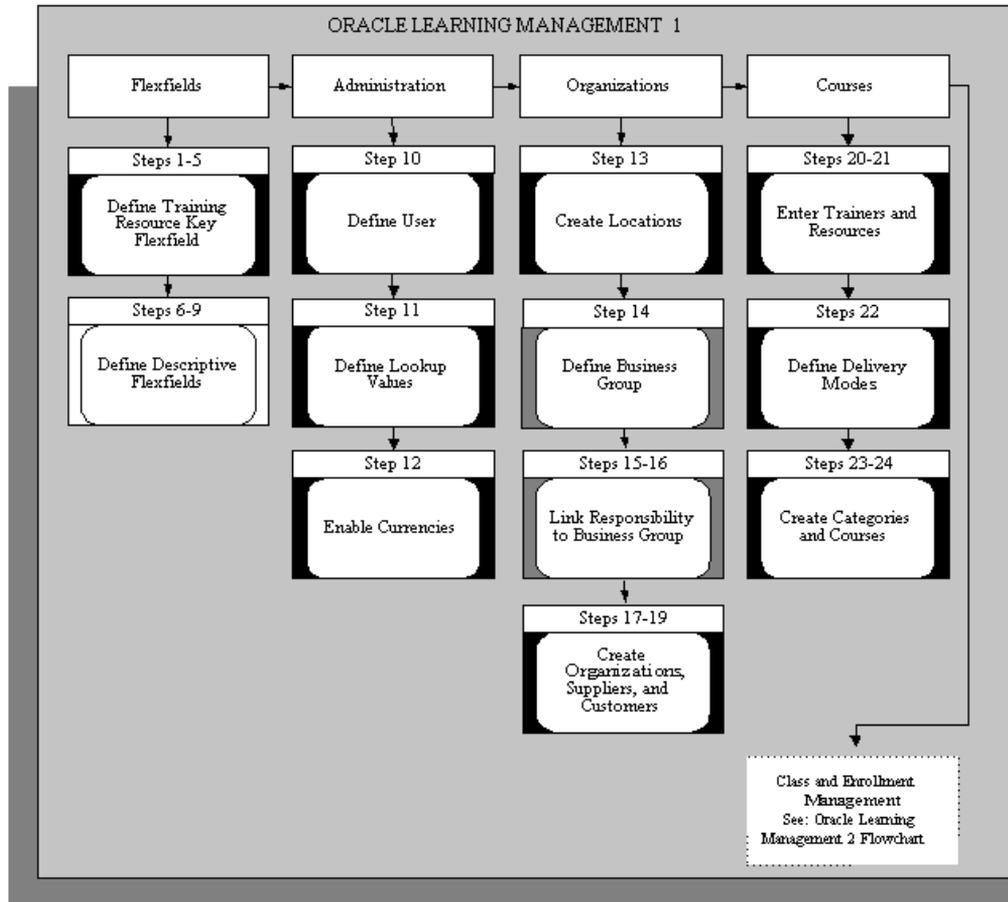
- Flexfields (Required)  
Define key and descriptive flexfields.
- Administration (Required)  
Define currencies, lookups, and a primary user.
- Organizations (Required)  
Define Business Groups and create other organizations.
- Courses and Resources (Required)

- Define courses and resource structures.
- Class and Enrollment Management (Required)  
Define enrollment and class status types.
- Content Management (Optional)  
Set up and manage content and content servers.
- Pricing and Financial Relationships (Required)  
Define finance headers and lines for each financial transaction, and set pricing for courses.
- Reports, Letters, and Folders (Required)  
Create reports, letters, and configurable folders.
- Security (Required)  
Set menu, enrollment, and user security. Set user profiles.
- Self-Service Enrollment and Training Administration (Optional)  
Set up self-service class enrollments and automatic finance transfer and waitlisting processes.
- Audit Requirements (Optional)  
Set up the audit process.
- Online Help Configuration (Optional)  
Localize Oracle Applications Help.
- Oracle Order Management for OLM (Optional)  
Set up the integration between Oracle Order Management and OLM.

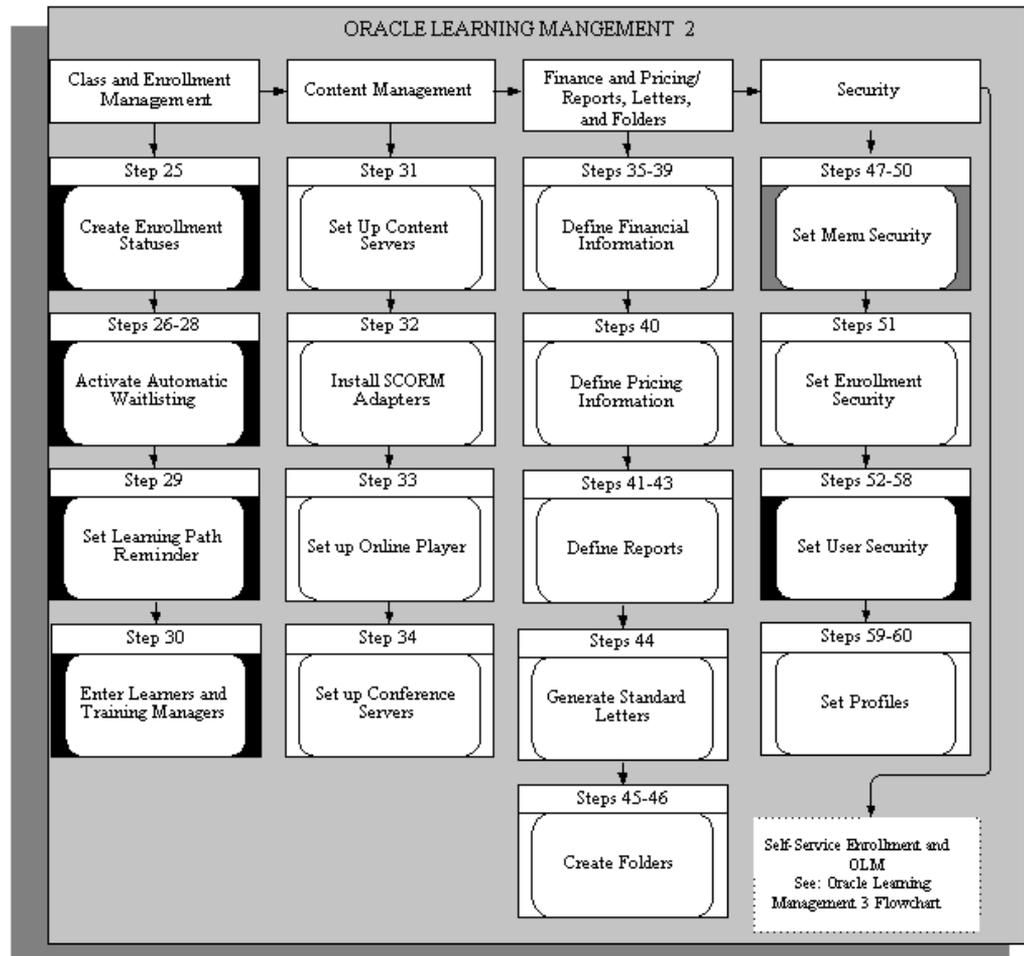
## Implementation Flowchart

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. The following flowchart depicts the implementation steps, what you can set up and the sequence that you should follow. Refer to the legend in the last graphic titled ORACLE LEARNING MANAGEMENT 3 to identify the required and the optional implementation steps in the flowchart.

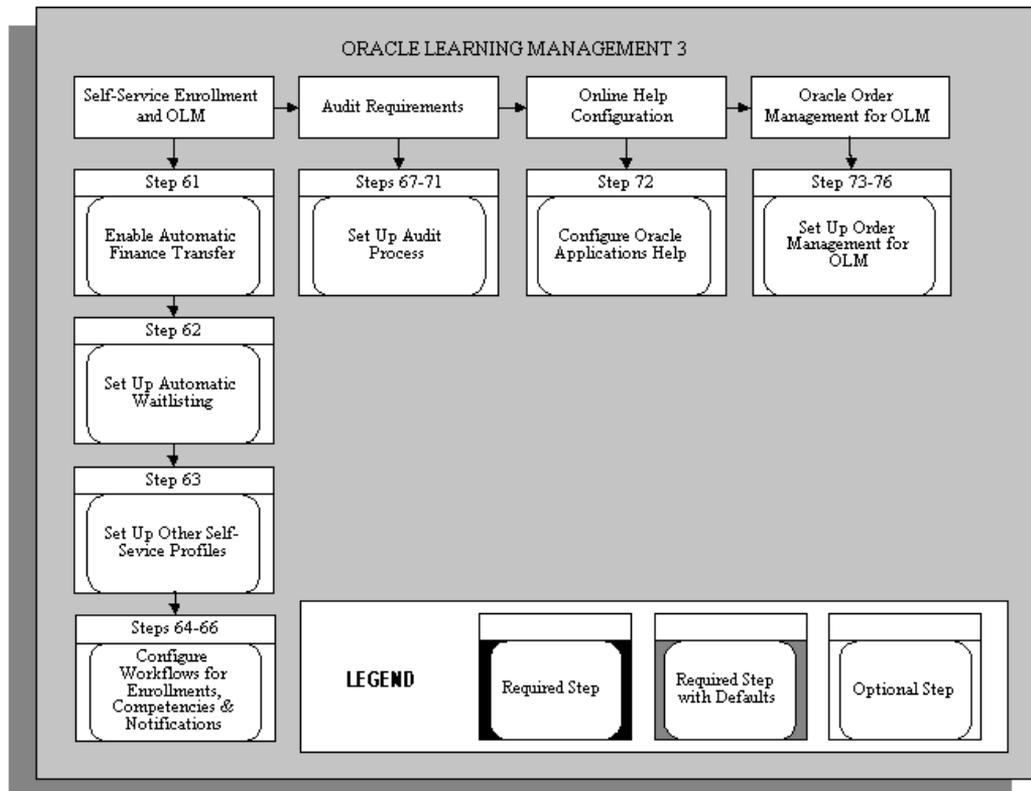
**Implementation Flowchart I**



**Implementation Flowchart II**



### Implementation Flowchart III



## 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 pages, windows, or processes you must use.

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

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

This document breaks the steps into the following sections:

Key Flexfields, page 1-7

Descriptive Flexfields, page 1-8

Administration, page 1-10

Organizations, page 1-11

Courses, page 1-11

Class and Enrollment Management, page 1-13

Content Management, page 1-15

Pricing and Financial Relationships, page 1-16

Reports, Letters, and Folders, page 1-18  
Security, page 1-19  
Self-Service Enrollment and OLM, page 1-22  
Audit Requirements, page 1-23  
Online Help Configuration, page 1-24  
Oracle Order Management for OLM, page 1-25

## Key Flexfields

The System Administrator usually performs the key flexfield steps. 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 OLM, you must define the Training Resource Key Flexfield structure.

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.

### *Training Resources Key Flexfield*

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

**Important:** Do not use the seeded resource structures provided by the application. Build new structures as detailed below.

### **Step 1: Define Training Resource Flexfield Value Sets *Required Step***

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 Application 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.

**Caution:** You must set at least one segment to Required.

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 Application 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 Application 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. Oracle Learning Management 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 Application 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, *Oracle Learning Management User Guide*

## Descriptive Flexfields

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

See Descriptive Flexfields, *Oracle Learning Management User Guide*

**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 Oracle Learning Management 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 6: 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 7: Define Flexfield Value Sets

Create Value Sets as you created them in Step 1.

See *Defining Value Sets, Oracle System Administrator User Guide*

Use the Value Sets window.

#### Step 8: 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 is 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 9: 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 System Administrator usually performs the administration steps. Sign on to the system using your System Administrator username and password. Contact your DBA if you do not know this information.

### Step 10: Define User for Implementation

Before you can access any of the OLM pages or windows you must create a new Application User with access to the default responsibility (Oracle Learning Management Administrator) supplied with the application. You must also attach this responsibility to a role (see the step Configure Role-Based Access Control under Security, page 1-19).

**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 System Administrator User Guide*

### Step 11: Define Lookup Values

Lookups supply many of the lists of values in OLM.

Implementation steps that require lookups are:

- Define Resource Types, page 1-8
- Create Class Statuses, *Oracle Learning Management User Guide*
- Create Booking Priorities, page 1-13
- Define New Finance Line Types, page 1-16
- Set Up Content Servers, page 1-15

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, *Oracle Learning Management User Guide*

### Step 12: 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, *Oracle Learning Management User Guide*

## Organizations

### Step 13: 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 OLM users.

Use the Location window.

See Creating Locations, *Oracle Learning Management User Guide*

### Step 14: Define a 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, *Oracle Learning Management User Guide*.

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 Administration, page 1-10

If you are implementing OLM without full 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, *Oracle Learning Management User Guide*

### Step 15: 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.

### Step 16: 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.

### Step 17: Create Organizations

Organizations represent the functional, management, or reporting groups that exist within a business group.

The only organizations you need to define for OLM are your internal training departments.

**Note:** OLM 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, Oracle Learning Management User Guide*

### Step 18: Create Suppliers

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

You must define supplier names before you can enter resources in OLM. 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, Oracle Learning Management User Guide*

### Step 19: Create Customers

You need only set up customers for external organizations who enroll learners in your classes. If you want to hold price information for internal learner 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, Oracle Learning Management User Guide*

### Step 20: Enter Trainers (Instructors)

To enable instructors (trainers) to use Instructor self-service, you must enter instructors as people before you can select them as resources.

See *Resource Creation, Oracle Learning Management User Guide*

### Step 21: Enter Resources

Use the Resources page to enter specific instructors, rooms, and equipment.

See *Resource Creation, Oracle Learning Management User Guide*

## Courses

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

You can group courses into categories. You can record the resources required to run a course and the competencies it is expected to provide learners.

### Step 22: Define Delivery Modes

To each course you assign one of four types of delivery mode (online synchronous, offline synchronous, online asynchronous, or offline asynchronous). You must create one mode of each type you plan to use.

Use the Setup tab.

### Step 23: Create Categories

Create at least one catalog category, to hold all of your business group's courses, offerings, classes, and learning paths.

*Best Practice:* Because your root-level category (the top category in the catalog) is tied directly to your business group, we recommend that you name your root category with the name of your business group.

Use the Catalog tab.

### Step 24: Create Courses

Define courses that you (or other suppliers) make available to learners. You may enter some or all of these courses later.

Use the Catalog tab.

## Class and Enrollment Management

### Class and Enrollment Statuses

#### Step 25: Create Enrollment Statuses

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

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

*Best Practice:* Because considerable functionality underlies each enrollment status, be sure that your names for each status do not depart too much from the original meaning.

Use the Enrollment Statuses page under the Setup tab.

See *Class and Enrollment Status Setup, Oracle Learning Management User Guide*

### Automatic Waitlisting

#### Step 26: Create Booking Priorities

If you have not created your booking priorities already, define booking priorities as values for the Lookup Type PRIORITY\_LEVEL (under application Oracle Human Resources). OLM 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.

The following table offers suggested values:

<b>Booking Priority</b>	<b>Booking Priority Meaning</b>
1	Very High
2	Moderate
3	Low
4	Very Low

Use the Application Utilities Lookups window.

See Adding Lookup Types and Values, *Oracle Learning Management User Guide*

#### **Step 27: Set Up Enrollment Justifications**

Set up justifications that learners, managers, and administrators can use to determine the order to use in filling vacancies from the waiting list. You must connect each justification to a priority level.

Use the Enrollment Justifications page under the Setup tab.

See Priority Levels and Justifications, *Oracle Learning Management User Guide*

#### **Step 28: Define Automatic Waitlist Enrollments Profile Options and Concurrent Program**

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

Use the System Profile Options window.

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

To view definitions of the OLM profile options, see Profile Options, *Oracle Learning Management User Guide*

To trigger automatic enrollments off the waitlist, you must set the Cancel Enrollment concurrent program to run frequently, as often as every five to ten minutes all day, every day.

Use the Submit a New Request window (select Submit Report under Reports and Other Requests).

#### **Step 29: Set Learning Path Reminder Concurrent Programs to Run Regularly *Required Step***

To send learning path completion target reminders to subscribers, you must set two concurrent programs--Send Learning Path Completion Target Notifications and Send Learning Path Component Completion Target Notifications--to run regularly, at least once a day.

Use the Submit a New Request window (select Submit Report under Reports and Other Requests).

#### **Learners and Training Managers**

### Step 30: Enter Learners and Training Managers

To enter your learners and training managers:

- Enter your employees so you can enroll them as learners. Use the HR People window.
- Enter learners as customer contacts if external learners also attend your classes. You can use the Customers window, or you can enter learners 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 courses.

## Content Management

### Step 31: Set Up Content Servers *Optional Step*

Defining a content server is not mandatory. OLM can play content associated with any URL, which can refer to a third-party web server, or your own web server, inside or outside a firewall.

However, the additional step of defining one or more content servers within OLM enables learning administrators to transfer content files to the server through the OLM interface, with no requirement for an ftp server, using the Upload and Import utilities.

To define a content server, you must set up a servlet container, such as Apache and ApacheJserv, and then register the content server in OLM.

**Important:** Oracle recommends that you install content servers only on an Apache or Oracle Application Server installation outside your Oracle E-Business Suite installation.

To use a content server protocol other than ftp, http, or https, you must add the new protocol value to the Content Server Protocol Types lookup.

**Note:** OLM does not support secure servers.

See Content Servers, *Oracle Learning Management User Guide*

### Step 32: Install SCORM Adapters *Optional Step*

To enable SCORM-compliant content to communicate correctly with OLM, you must install and register one or more SCORM adapters, to handle the SCORM CMI calls in your content.

See SCORM Adapters, *Oracle Learning Management User Guide*

### Step 33: Set Up Online Player *Optional Step*

To keep the online player session alive for a certain period, without timing out, you should set the OTA\_PLAYER\_TIMEOUT\_MINUTES and OTA\_PLAYER\_PING\_INTERVAL profile values.

Use the System Profile Options window.

See System Profile Values Window, *Oracle Applications System Administrator User Guide*

To view definitions of the OLM profile options, see Profile Options, *Oracle Learning Management User Guide*

You must grant permissions in your Java Policy file to enable learners to play SCORM courses and log the SCORM debugging information that appears in the Java console to their local files, using Netscape 7, IE 6+, Mozilla, and Firefox browsers. See *Online Player Setup, Oracle Learning Management User Guide*

#### **Step 34: Set Up Conference Servers *Optional Step***

You must set up a conference server to deliver online synchronous classes. A conference server integrates your application with Oracle Web Conferencing (OWC). Using this integration, you can deliver online synchronous classes as Web conferences.

Use the Setup page to create a conference server. To set up a conference server, you must specify the server URL, which OLM uses to make appropriate calls to OWC. and the Site ID and the Authentication Token, which are authentication parameters to connect to the OWC server. You can obtain these values from the OWC administrator.

### **Pricing and Financial Relationships**

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 OLM and your financial system. See *Define Interface to Financials Systems*, page 1-16

#### **Financial Information**

#### **Step 35: Create Alternative Financial Implementation**

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

#### **Step 36: Define New Finance Line Types**

OLM 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, Oracle Learning Management User Guide*

#### **Step 37: Define Interface to Financials System**

You can design an interface to transfer finance headers and lines to your payables and receivables systems. This interface can check the following information, held in OLM, 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 class
  - Prepayment, meaning an invoice should be issued before the class

- 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 OLM:

- 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 OLM. However, you can cancel it (or individual finance lines) and issue a new header to supersede it.

### Step 38: Set Up Cross-Charging

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

Setting up cross-charging of enrollments takes three steps:

1. Map accounting fields between OLM and General Ledger.  
See Setting Up Cross-Charge Accounting, *Oracle Learning Management User Guide*
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 OLM 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 (accessed from the Submit Report item in the navigator).

See Submitting a Request, *Oracle Applications System Administrator Guide*

### Step 39: Create Finance Headers

To record a monetary amount against an 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.

Use the Finance Headers window.

See *Creating a Finance Header, Oracle Learning Management User Guide*

### **Pricing Information**

#### **Step 40: Define Price Lists**

A price list is a catalog of courses 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 course types (perhaps targeting different audiences). Administrators can select a standard price from a price list when they schedule classes.

Use the Price Lists window.

See *Creating a Price List, Oracle Learning Management User Guide*

## **Reports, Letters, and Folders**

You can configure standard reports, write new reports, create letters, and create folders.

#### **Step 41: Use Standard Reports or Write New Reports**

OLM 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 42: 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 that users can submit 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 Guide*

#### **Step 43: 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 Guide*

### **Standard Letters**

#### **Step 44: Generate Letters Using Web Application Desktop Integrator (Web ADI)**

You can also use the HRMS Web Application Desktop Integrator (Web ADI) to generate form letters you can send to learners.

See *Data Download and Upload Using Web ADI Overview, Oracle HRMS Configuring, Reporting, and System Administration Guide*

### **Folders**

OLM includes several folder windows:

- 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 45: 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 System Administrator User Guide*

#### **Step 46: 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 User Guide*

## **Security**

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

Each user accesses OLM through a responsibility, such as Learning Administrator or Oracle Learning Management 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 47: 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, Oracle HRMS Configuring, Reporting, and System Administration Guide*

#### **Step 48: 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 applications. Any upgrades overwrite these defaults.

Use the Form Functions window.

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

#### **Step 49: Define Menus**

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

Use the Menus window.

**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 should add either the Global or the Local Organization Hierarchy window.

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

#### **Step 50: Set Up Financial Security**

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

Use the Menus window.

See *Setting Up Financial Security, Oracle Learning Management User Guide*

#### **Enrollment Security**

#### **Step 51: Set Up Enrollment Status Security**

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

Use the Define Enrollment Status Exclusions window.

See *Setting Up Enrollment Status Security, Oracle Learning Management User Guide*

## User Security

### Step 52: Configure Role-Based Access Control (RBAC) *Optional Step*

OLM delivers a variety of roles, permissions, and permission sets that you can use to grant administrators and other users their ability to view and edit various functions.

For general information regarding RBAC, see Role Based Access Control (RBAC), *Oracle Applications System Administrator's Guide–Security*

To configure RBAC, see Creating and Updating Roles, *Oracle Applications System Administrator's Guide–Security*

### Step 53: Configure HR Security *Optional Step*

To control administrators' ability to view and select learners outside of specified organizations, you can implement the HRMS Security Groups Enabled security model. If you (or your HR implementation) choose not to enable security groups, each administrator can view and select only learners from within their top-level organization, usually their business group.

See Security Models, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

### Step 54: 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 Defining a Request Security Group, *Oracle Applications System Administrator User Guide*

### Step 55: 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.

OLM already delivers several predefined responsibilities. To modify these responsibilities, you should copy them and use the copies.

Use the Responsibilities window.

See Responsibilities Window, *Oracle Applications System Administrator User Guide*

### Step 56: Establish Organization Security

Set up organization security to enable only those users who belong to the sponsoring organization to update and delete classes, to enroll learners in those classes, and to update the enrollment.

See Organization Security, *Oracle Learning Management User Guide*

### Step 57: 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 are then associated with the Application username.

Use the Users window.

See Users Window, *Oracle Applications System Administrator User Guide*

### **Step 58: Associate Employees to Usernames**

If you use Oracle HR and want to restrict who can update or delete certain classes, you must create one FND\_USER for every employee who uses OLM. The user can update or delete only those classes that his or her organization administers. This security applies both to the class itself and to all enrollments in the class.

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 User Guide*

#### **Profile Options**

### **Step 59: Define 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 System Profile Values Window, *Oracle Applications System Administrator User Guide*

To view definitions of the OLM profile options, see Profile Options, *Oracle Learning Management User Guide*

### **Step 60: Define OLM Project Accounting Integration**

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

Use the System Profile Options window.

See System Profile Values Window, *Oracle Applications System Administrator User Guide*

To view definitions of the OLM profile options, see Profile Options, *Oracle Learning Management User Guide*

## **Self-Service Enrollment and OLM**

To support self-service enrollments for managers and workers, you need to set several profile options.

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

See Implementation Steps (SSHR), *Oracle HRMS Implementation Guide*

### **Step 61: Set Up Automatic Finance Transfer**

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

To enable OLM 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: SS Automatic Transfer to GL profile to Yes.

See Profile Options, *Oracle Learning Management User Guide*

### **Step 62: Set Up Automatic Waitlisting**

If you have not already done so, 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 Class
- OTA: Waitlist Sorting Criteria

See Profile Options, *Oracle Learning Management User Guide*

### **Step 63: Set Up Other Self-Service Profiles**

If you have not already done so, you must set several other profile options. Note that some profiles are optional.

- OTA: Automatic Creation of Finance Headers and Lines
- OTA: Automatic Finance Header Approval
- OTA: Automatic Transfer to GL
- OTA: Default Training Administrator
- OTA: Minimum Hours to Cancel for Free
- OTA: Read-only Enrollment Message

See Profile Options, *Oracle Learning Management User Guide*

### **Step 64: Configure Enrollment Workflow Approval *Optional Step***

By default, OLM uses dynamic workflow to govern class enrollments. To use standard workflow or to disable workflow entirely, use the Form Functions window. Query the function OTA\_LEARNER\_HOME\_SS, and set the &pApprovalMode parameter to "Y" (to use standard workflow), "N" (to disable workflow), or "YD" (to re-enable dynamic approval).

See Workflow Notifications, *Oracle Learning Management User Guide*

### **Step 65: Configure Automatic Competency Profile Update *Optional Step***

You can choose to enable and configure automatic updates to a learner's competency profile.

See Configuring Competency Update Automation, *Oracle Learning Management User Guide*

### **Step 66: Define the Name Format in Notifications *Optional Step***

Define the way a person's name appears in your workflow notifications.

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

## **Audit Requirements**

### **Step 67: 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 68: Define Audit Installations**

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

Use the Audit Installations window.

See Audit Installations Window, *Oracle Applications System Administrator User Guide*

#### **Step 69: 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 User Guide*

#### **Step 70: 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 Groups Window, *Oracle Applications System Administrator User Guide*

#### **Step 71: Activate AuditTrail Update Tables Process**

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

Use the Submit Requests window.

See Submitting a Request, *Oracle Applications System Administrator User Guide*

## **Online Help Configuration**

#### **Step 72: Configure Oracle Applications Help**

Oracle Applications Help for OLM 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, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

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 System Administrator Guide*

## Oracle Order Management for OLM

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

OLM-specific setup steps appear here and are detailed in Using OLM with OM, *Oracle Learning Management User Guide*. For generic OM, Advanced Pricing, and Inventory setup steps, consult the user guides or online help for those products.

### Step 73: Set Up OM for OLM

For OM to recognize OLM courses, you must set up an OLM-specific Unit-of-Measure Class and two Units of Measure (UOMs). To transfer financial information to Accounts Receivable, you must set up OLM-specific transaction types. If you want to enable direct access from the OLM Enrollment Details window to the OM Sales Order window, you must add two form functions to the OLM menu of the responsibility to which you wish to grant access.

Use the UOM Classes and Define Transaction Types windows.

See Setting up Order Management for OLM, *Oracle Learning Management User Guide*

### Step 74: Place Courses in Inventory

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

See Placing Items in Inventory, *Oracle Learning Management User Guide*

### Step 75: Set Up Price Lists and Formulas

Oracle Advanced Pricing requires you to set up price lists and pricing formulas. As a prerequisite, you must set up (or verify) an Oracle Pricing descriptive flexfield.

See Creating Price Lists for OLM Classes, *Oracle Learning Management User Guide*

For additional instructions, see Overview of Price Lists, *Oracle Pricing User Guide* and Overview of Formulas, *Oracle Pricing User Guide*

### Step 76: Link inventoried courses to OLM

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

Use the OLM Legacy Courses window.

See Linking Courses to Order Management, *Oracle Learning Management User Guide*

## Implementation Steps for Organization Training Plans

To implement organization training plans you must complete two additional implementation steps.

### Step 1: Include Training Plans in the Navigator *Required Step Required Step*

From the system administrator responsibility, add the OLM Training Plans associated submenu to the menu.

Use the Menus window.

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

### Step 2: Create Required Measurement Types

Open the Training Plan Measurement Types window.

Set up training plan measurement types, *Oracle Learning Management User Guide* to satisfy your budgeting and costing requirements.

Set up five additional measurement types needed by the supplied reports:

- *Estimated salary per category* records the estimated salary per hour of each employee category. You must enter only one value for each employee category. If you enter more than one value, only the first value will be used. Add the following values:
  - Unit must be Money
  - Budget Level must be Plan
  - Cost Level must be None
- *Estimated delegates per category* records the estimated number of delegates from each employee category who will attend a course or class. If you are budgeting at course level, the value you enter against this measurement type should be the total number of delegates estimated to be attending the course, not the number per class. Add the following values:
  - Unit must be Integer
  - Budget Level must be either Course or Class
  - Cost Level must be None
- *Estimated number of classes* records the estimated number of classes to be run for each course. You can omit this measurement type if you are budgeting at the class level. Add the following values:
  - Unit must be Integer
  - Budget Level must be Course
  - Cost Level must be None
  - Allow multiple values check box must not be checked
- *Estimated hours duration of class* records the estimated number duration of each class. If you are budgeting at course level, the value you enter against this measurement type should be the average estimated duration of each class, not the total. Add the following values:
  - Unit must be Number
  - Budget Level must either be Course or Class
  - Cost Level must be None
  - Deselect the Allow multiple values check box

- *Actual hours duration of class* records actual hours that a class lasted. Add the following values:
  - Unit must be Number
  - Cost Level must be Delegate

You must set up the Estimated delegates per category and Estimated hours duration of class measurement types both at course level, or both at class level.

## 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 OLM and your accounting system.

### Define an Accounting Flexfield Structure

If you intend to use OLM to transfer cross charges for internal learners 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 OLM 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 Learning Management requires the valid combinations to exist, and therefore cannot enter new values upon data entry in the OLM 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**

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

**Table B-5 Cost Center Segment**

<b>Flexfield Qualifier</b>	<b>Check the Enable Box:</b>
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**

<b>Value Set</b>	<b>Code</b>	<b>Description</b>	<b>Budget- ingQualifier</b>	<b>Posting Qualifier</b>	<b>Account Type Qualifier</b>
COTA_COM PANY	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 OLM Accounting flexfield.

Navigate to the Define Key Flexfield Segments window, and query the OLM 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. OLM 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, *Oracle Learning Management User Guide*

### Step 7: Define a Set of Books

See Defining a Set of Books, *Oracle Learning Management User Guide*

### Step 8: Choose the Set of Books

See Choosing the Set of Books, *Oracle Learning Management User Guide*

### Set Financials and System Options

### Step 9: Define Financials Options

See Defining Financials Options, *Oracle Learning Management User Guide*

### Step 10: Define System Options

See Defining System Options, *Oracle Learning Management User Guide*

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# Glossary

## **Asynchronous**

An attribute of Delivery Mode, to define learning that does not require a time, place, or live instructor. Asynchronous learning is also known as self-paced learning. Asynchronous learning can be either online, such as a recorded seminar or other self-paced web content, or offline, such as a book or a CD-ROM

See also Delivery Mode, page Glossary-3

## **Attended**

A status that verifies that a learner has participated in a synchronous offering. For online offerings, the application can capture the change in status; for offline offerings, an instructor can record the change in status.

## **Blended Learning**

The ability to employ multiple delivery modes in delivering a single piece of learning or a series of learning events. Blended learning describes both the ability to deliver a single piece of learning through multiple modes, and the ability to construct a series of learning events that employ different delivery modes.

## **Catalog**

What the learner sees when browsing through available courses and learning paths. You can divide the Oracle Learning Management (OLM) catalog into categories to facilitate the learners' search for related learning. The single catalog organizes and displays all learning, regardless of delivery mode.

## **Catalog Category**

A subdivision of the catalog. You create categories to organize courses in the catalog, and to help learners search for related learning. You can create a hierarchy of categories, and a course can be a part of more than one category.

## **Catalog Prerequisites**

Courses and competencies that a learner must or should complete before enrolling in a given class. Mandatory prerequisites prevent learners from enrolling in the class, while advisory prerequisites merely inform the learner of courses they should take or competencies they should acquire prior to enrollment.

## **Chat**

A scheduled live discussion that enables learners and instructors to exchange messages online. You can create a chat within a category or for a specific class.

**Class**

The entity that is an individual instance of an offering, and in which learners enroll, typically for synchronous offerings. For each class, you can create multiple sessions.

See Session, page Glossary-6

**CMI Adapter**

See SCORM Adapter, page Glossary-6

**CMI Objectives**

Data elements contained in AICC content to enable greater content tracking. As part of the AICC specification, you can import CMI Objectives contained in a learning object. You can also view the CMI Objectives contained in a learning object post import.

**Competency**

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

**Completed**

A status that indicates a learner has taken the course. The completed status depends on the delivery mode of the offering: for online asynchronous offerings, Completed is when the learner has played the offering, dependent on the type of tracking; for offline asynchronous offerings, it is when the learner has read a book or other offline material; for offline or online synchronous offerings it is when the learner has attended the class.

**Content**

A piece of online learning material that is delivered to the learners through offerings.

**Content Folder**

An organizing container for online learning objects. You set up content folders to reflect the structure of your content, for example, by subject matter, curriculum, or learner job roles. You create content folders and sub folders to organize and group related learning objects.

See also Learning Object, page Glossary-4

**Content Location**

A URL that identifies and locates your physical content that is located on a content server, either an external server or an OLM content server.

**Content Tree**

The content hierarchy consisting of content folders, its sub folders, learning objects and tests.

See also Learning Object, page Glossary-4, Test, page Glossary-6

**Course**

A catalog entity that is described by attributes such as objectives and learner competencies. It is the entity that defines and describes the learning, without specifics such as content and delivery mode which are defined in the offering. An offering is a child of a course.

**Cross Charge**

The transfer of the cost of training fees or resources between organizations, departments, or cost centers within an enterprise.

**Customer Restricted**

Offerings or classes that are restricted to one or more customers (learner or customer/order priced).

**Delivery Mode**

Identifies the style in which learning is delivered. Delivery modes are either synchronous (real time) or asynchronous (self-paced), and either online (viewed through the player) or offline (such as a class in a classroom, or a book to be read). The four combinations are: online synchronous, online asynchronous, offline synchronous, and offline asynchronous. Once defined, customers can name the delivery modes whatever they wish, to describe their different styles of learning.

**Descriptive Flexfields**

A field that your organization configures to capture additional information required by your business but not otherwise tracked by Oracle Applications.

See also Key Flexfield, page Glossary-4

**Enrollment**

A status describing a learner's engagement with a learning catalog entity. For example, a learner must enroll in a class in order to access it. You must set appropriate learner access conditions for your offering or class to ensure that only specific learners enroll in the class.

**Enrollment End**

Date by which an offering or class no longer shows in the learner catalog. Learners cannot enroll after that date.

**Enrollment List**

List of enrollments against an offering or class.

**Enrollment Start**

Date on which an offering or class shows up in the learner catalog.

**Finance Header**

A record of a monetary amount against a learner enrollment or a resource booking. A finance header can consist of multiple finance lines.

**Finance Line**

An individual financial transaction within a finance header.

**Finance Total**

Total of finance lines against enrollment for a class. Finance can be of type Receivable or Cross Charge.

See also Finance Line, page Glossary-3, Cross Charge, page Glossary-3

**Flexfields (Key And Descriptive)**

Configurable additional data entry fields that are not predetermined by Oracle Applications. They are not altered by patch install or upgrades.

See also Key Flexfields, page Glossary-4, Descriptive Flexfields, page Glossary-3

**Forum**

A message board that learners and instructors use to post general learning topics for discussion. Users can subscribe to a forum and post topics and messages for discussion. You can create forums within a category or for a specific class.

**Instructor**

A person in charge of delivering a synchronous offering. Note that for backwards compatibility, "Trainer" is the predefined name of the resource type.

**Key Flexfield**

A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups.

See also Descriptive Flexfield, page Glossary-3

**Learner**

One who enrolls and takes up a course on OLM. There can be different types of learners: internal learners, or external learners such as customers and partners.

**Learner Access**

A definition of the list of learners who can access a catalog object. You can define learner access at the category, course, offering, and class levels. An object lower in the hierarchy derives access from the parent object (inherited access). For example, a course inherits access that is defined for the category above it. You cannot modify access inherited from another object.

**Learning Certification**

A catalog object that offers learners the opportunity to subscribe to and complete one-time and renewable certifications. The learning certification is primarily a container for a logical grouping of existing courses, with added attributes such as renewability and deadlines.

**Learning History**

The list of past courses a learner has taken that are captured on the system.

**Learning Object**

An entity that defines online course content within OLM. Learning objects provide the metadata to represent and describe the actual physical content located on the content server. You can structure online content as a hierarchy of learning objects, to be delivered as a single offering. OLM automatically tracks learner progress at the learning object level.

**Learning Path**

A sequence of two or more courses that enables tracking of learner progress against a higher level learning objective than is associated with an individual course. A learning path can be created by a learner, manager, or administrator.

**LMS Administrator**

A role of a user in the system. This is the role of a user who is tasked with managing the system, entering and maintaining data, and handling the setup related tasks.

**Location**

The physical address of a particular class or other.

**Manager**

The manager to whom one or more learners report.

**Offering**

An entity under a course. Attributes such as delivery mode, language, and content define offerings. An offering consists of one or more classes.

See also Synchronous, page Glossary-6

**Offline**

Learning that a learner can complete while not logged into the learning management system. Examples include instructor led training in a classroom, paper-based study, or CD-ROM offerings.

**Online**

Learning for which the learner must log into the learning management system to participate. Online learning content is delivered and tracked by the learning management system.

**Player**

The functionality within the learning management system that delivers online content.

**Price**

The price at which a class is charged for attendance. The price can be overwritten by administrators and is not relevant if OM is used.

**Proficiency Level**

The perceived level of expertise of a person in a competence, in the opinion of the assessor, over a given period. For example, a person may demonstrate the communication competence at Expert level.

**Question Bank**

A storage of questions that are used in one or more tests.

**Resource**

A person or object that is necessary to deliver a class, for example, a named instructor or a specific classroom required for a synchronous offline offering. In OLM, you create resource types and define the resources that are available for each resource type.

**Room**

The physical room identifier where a class takes place.

**Schedule**

A list of learning, and associated dates, that is due to take place for a learner or for an instructor.

**SCORM Adapter**

A set of files enabling communication between your content and OLM when your content contains SCORM CMI calls, and when your content is outside the Oracle domain. With the SCORM adapter, the content can successfully communicate tracking information to the learning management system irrespective of the content location. The SCORM adapter files reside on the same content server as your content.

**Session**

A catalog entity that is a subset of a class. Used when a single synchronous class meets at more than one time, or in more than one location, on more than one date, or with more than one instructor.

**Successfully Completed**

A learner has successfully completed a class when the learner is verified as not only having attended or attempted the offering, but having demonstrated competency sufficient to achieve the competencies associated with the course.

**Synchronous**

An attribute of delivery mode for learning that requires a time, place, or live instructor. Synchronous learning can be either online, such as a live web seminar, or offline, such as an instructor led class in a physical room.

See also Delivery Mode, page Glossary-3

**Test**

A grouping of questions taken from question banks and delivered through the player. Tests are designed to test explicit knowledge, skill level, and/or ability of a learner.

See also Question Bank, page Glossary-5

**Trainer**

A predefined resource type. The Trainer resource type is named for backward compatibility. However, the application refers to the resources of this type as instructors.

**Training Center**

A place where learning occurs, or a hierarchy used for reporting on classes and resources.

**Transcript**

An official report that shows whether a learner has completed, attended, or failed a class. Transcript covers for instance one larger goal such as a degree or comprehensive goal that perhaps could be attained through successfully completing a learning path.

**Web Conference**

An entity that you use to deliver online synchronous classes and record these classes for on-demand playback. You can create a Web conference for an online synchronous

class or enter recorded Web conference information for the class to associate it with a recorded Web conference.



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