



Siebel Training Guide

Version 7.8

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What's New in This Release

What's New in Siebel Training Guide, Version 7.8

Table 1 lists changes in this version of the documentation to support Release 7.8 of the software.

Table 1. New Product Features in Siebel Training Guide, Version 7.8

Topic	Description
Enabling and Specifying Just-in-Time Training on page 43	This new feature adds Web-based training courses for end users to take when their workload permits.
Chapter 10, "Setting Up a Training and Curriculum Catalogs"	This new feature adds training and curriculum catalogs that allow course, product and curriculum visibility based on account, group, user or organization.
Automating Waitlist Management on page 94	This new features allows automated waitlist notification. As the enrollments change, the administrator can use the Enrollment view to see the current enrollment status.
Synchronizing Enrollment Status on page 94	This new feature uses the Update Seats function to synchronize the seats and the waitlisted number with the enrollment status.
Canceling Training Enrollments on page 104	This new feature allows an attendee to receive a Class Cancellation Email if automatic email notification was set up.
Viewing My Training Enrollments Information on page 132	This new feature adds Distance Learning and Instructor-Led training classes as an activity to a user's calendar.
Appendix D, Siebel Training Processes	Removed the appendix and added the content to: <ul style="list-style-type: none">■ Chapter 5, "Setting Up Training Courses."■ Chapter 7, "Importing an AICC or SCORM Course."

2

Getting Started with Siebel Training

This chapter covers how to get started with Siebel Training and discusses the installation, configuration, and administrative setup tasks required. It includes the following topics:

- [Siebel Training Installation and Configuration Overview on page 12](#)
- [Administrator Setup Tasks on page 13](#)
- [Setting Up Automatic Training Notification Messages on page 14](#)
- [Verifying and Activating Training Workflow Processes on page 14](#)
- [Configuring Workflow Policies for Training Email Notification on page 15](#)
- [Configuring the Email Driver and Notification Templates for Training on page 16](#)
- [Customizing the Training User Interface on page 18](#)
- [Navigating to Training Administration Screens on page 19](#)
- [Setting Up a Delegated Training Administrator on page 20](#)

Siebel Training Installation and Configuration Overview

Siebel Training can be deployed:

- In conjunction with another Siebel application, such as Employee Relationship Management, Sales, Call Center, Service, Marketing, and Siebel Partner Manager
- As a stand-alone application and as a partner application using the Partner Portal

Most Siebel Training software is installed as part of your Siebel Server installation. Your unique license key allows access to Siebel Training along with your other Siebel software applications. The *Siebel Server Installation Guide* for the operating system you are using describes how to create the Siebel Administrator account that is used to perform the administrator tasks described in this guide. Siebel Training uses Siebel Workflow to control enrollment processes, and it integrates with Siebel eSales to control order management processes.

Administrators typically use the following process steps when installing and configuring Siebel Training:

- 1** Install and test a standard Web server.
For more information on installing and testing a Web server, see the *Siebel Server Installation Guide* for the operating system you are using.
- 2** Verify that you have a supported database server ready to work with your Siebel software.
- 3** Install the Siebel Gateway Name Server.
- 4** Install the Siebel Server.
- 5** If AICC or SCORM courses are to be imported, perform AICC or SCORM setup tasks.
For more information, see [Preparing for AICC and SCORM Course Import on page 57](#).
- 6** Set up the Training Web site.

When your Siebel software has been installed, configured, and tested, you can set up your Training Web site.

Administrator Setup Tasks

As a training administrator, you may perform the tasks listed in [Table 2](#) using administration screens.

Table 2. Administrative Setup Tasks for Siebel Training

Administrative Task	Description	For More Information
Set up Siebel Workflow processes and policies.	Verify and activate, if necessary, workflow processes, and configure workflow policies for Training email notification.	Verifying and Activating Training Workflow Processes on page 14 Configuring Workflow Policies for Training Email Notification on page 15 Appendix A, "Siebel Training Workflow Processes" <i>Siebel Business Process Designer Administration Guide</i>
Set up Siebel Training communications drivers and email templates.	Configure the communications driver profile, and associate the email templates with the profile.	Setting Up Automatic Training Notification Messages on page 14 Configuring the Email Driver and Notification Templates for Training on page 16 <i>Siebel Communications Server Administration Guide</i> <i>Siebel System Administration Guide</i>
Review and modify LOVs as needed.	Review and expand the lists of values (LOVs) before you begin to set up your Training Web site. Navigate to the Applications Administration screen, and choose the List of Values view to review and add values.	Appendix B, "Lists of Values (LOVs) for Training" <i>Applications Administration Guide</i>
(Optional) Edit eai.cfg and set system preferences.	If AICC or SCORM courses are to be launched, edit the eai.cfg file, and set system preferences for training.	Preparing for AICC and SCORM Course Import on page 57
(Optional) Create predefined queries (PDQs).	Create predefined queries for Siebel Training.	<i>Applications Administration Guide Fundamentals</i>
(Optional) Create a delegated administrator.	Set up a user to enroll other users in training through a nonadministrative view.	Setting Up a Delegated Training Administrator on page 20 <i>Applications Administration Guide</i>

Setting Up Automatic Training Notification Messages

You can set up automatic email notification messages for confirmations, notifications, and reminders, including:

- Confirmation that a user has successfully used Training to register for a self-paced course.
- Confirmation that a user has successfully used Training to register for an Instructor-Led or Distance Learning class.
- An email notification is sent out to all people on the waitlist when a space becomes available in the last 24 hours before a class starts. Class Enrollment is on first-come, first-served basis.
- Class cancellation notification that is sent to the user if the class is canceled, the administrator cancels the class, or the user cancels the class.
- Class logistics notification that is sent to the user if the administrator changes any class details, such as dates, times, location, or room.
- Notification that a class is full and the user has been placed on the waiting list.
- Reminder that a class for which the user is registered starts in a few days.

For these messages to be sent automatically, Siebel Training must be configured to work with Siebel Workflow and Siebel Communications Server.

These configuration tasks include:

- [Verifying and Activating Training Workflow Processes on page 14](#)
- [Configuring Workflow Policies for Training Email Notification on page 15](#)
- [Setting System Preferences for Calendar Activities on page 16](#)
- [Configuring the Email Driver and Notification Templates for Training on page 16](#)

For more information on these topics, see [Appendix A, "Siebel Training Workflow Processes,"](#) *Siebel Business Process Designer Administration Guide*, *Siebel Communications Guide*, and *Siebel Communications Server Administration Guide*.

Verifying and Activating Training Workflow Processes

Siebel Training uses Siebel Workflow to control enrollment processes, and Training also integrates with Siebel eSales to control order management processes.

Workflow processes are created using the Process Designer in Siebel Tools. See [Appendix A, "Siebel Training Workflow Processes"](#) for a list of required workflows. For information on creating and managing workflow processes, see *Siebel Business Process Designer Administration Guide*.

Perform the steps in the following procedures to verify the status of Training workflow processes, and activate the processes, if necessary.

To verify the Training workflow processes are active

- 1 Navigate to the Administration - Business Processes screen > Workflow Deployment view.
- 2 In the Active Workflow Processes list, query for the workflow processes, and then verify that the Deployment Status is Active.

To activate the Training workflow processes

- 1 Navigate to the Administration - Business Process screen > Workflow Deployment view.
- 2 In the Repository Workflow Processes list, query for the inactive workflow process, and then click Activate.

For more information on creating, activating and managing workflow processes, see *Siebel Business Process Designer Administration Guide*.

Configuring Workflow Policies for Training Email Notification

If email notification will be used for Siebel Training, you must log in to the application (for example, ERM Administration) and make sure the expiration date for the workflow policies are later than the current date.

To configure workflow policies for email notification

- 1 Navigate to the Administration - Business Process screen > Policies view.
- 2 In the Policies List, query for the eTraining Policy Group.

Ten policies are returned:

- eTraining Course Confirmation Email
 - eTraining Class Confirmation Email
 - eTraining Class Reminder Email
 - eTraining Class Waitlist-Open Email
 - eTraining Class Waitlist-Pending Email
 - eTraining Class Waitlist-Pending Time Limit
 - eTraining Admin Class Cancellation Email
 - eTraining Class Cancellation Email
 - eTraining Class Waitlisted Email
 - eTraining User Class Cancellation Email
- 3 For each policy, change the Expiration date to a date in the future.
 - 4 Activate the following workflow processes:

- Course Confirmation Email (Training)
- Class Confirmation Email (Training)
- Class Reminder Email (Training)
- Class Waitlisted Email (Training)
- eTraining Class Cancellation Email
- eTraining Admin Class Cancellation Email
- eTraining User Class Cancellation Email
- eTraining Class Logistics Email

Setting System Preferences for Calendar Activities

If training courses are to be added as an activity to a users calendar, you must enable the system preferences.

- 1 Navigate to the Administration - Application screen > System Preferences view.
- 2 In the System Preferences list, query for the records, as shown in the following table.

Query for....	And...
Training: Employee Calendar	Verify that it is set to TRUE. Creates an activity in the employee's Siebel Calendar.
Training: Customer Calendar	Set to TRUE. Creates an activity in the customer's Siebel Calendar.
Training: Partner Calendar	Set to TRUE. Creates an activity in the partner's Siebel Calendar

Configuring the Email Driver and Notification Templates for Training

If email notification will be used for training, you must:

- Verify that the Training Email Notification templates are set up correctly by specifying two parameters in the third-party registration driver profile
- Then, associate the templates to the driver profile

For more information on working with drivers and communications templates, see *Siebel Communications Guide*.

To configure the third-party registration communications driver

- 1** Log into the application (for example, ERMAAdmin) as the administrator.
- 2** Navigate to the Administration - Communications screen > Communications Drivers and Profiles.
- 3** In the Communications Drivers list, query for Internet SMTP/POP3 Server, and then select the Profiles view tab.
- 4** In the Profiles list, select Third Party Registration Profile, and specify the parameters for this profile. The following values provided are examples, for more information, see *Siebel Communications Guide*:
 - SMTP Server: <smtp server name>
 - POP3 Server: <pop server name>
 - POP3 Account Name: <Account name>
 - POP3 Account Password: <Account password>
 - From Address: <Email address for Siebel application or to a configured email address>

NOTE: For UNIX, add Siebel Server: <Siebel server name>
- 5** Save the modified profile.

To associate email templates with the third-party registration profile

- 1** Navigate to the Administration - Communications screen > All Templates view.
- 2** In the Templates list, query for *eTraining*.

The query returns these templates:

 - Class Confirmation Email Package (eTraining)
 - Class Reminder Email Package (eTraining)
 - Class Waitlist-Open Email Package (eTraining)
 - Class Waitlist-Pending Email Package (eTraining)
 - Class Waitlisted Email Package (eTraining)
 - Course Confirmation Email Package (eTraining)
 - Third Party Registration Approve Email Package (eTraining)
 - eTraining Admin Class Cancellation Email
 - eTraining Class Cancellation Email
 - eTraining Class Logistics Email
 - eTraining User Class Cancellation Email
- 3** In the Templates list, select a template, and click the Advanced view tab.
- 4** In the form, select Third Party Registration Profile in the Delivery Profile field.
- 5** Repeat [Step 3](#) and [Step 4](#) for each of the templates.

Running GenTrig and WorkMon After Restarting the Server

After you set up the communications driver profile for training, and restart the Siebel Server, you must rerun two server tasks, GenTrig and WorkMon, in `srvrmgr` for Class Confirmation Email, Class Waitlisted Email and Course Confirmation Email. Before you run the server tasks, make sure that Workflow Management and the training component groups are enabled.

After the student registers for a class, the class confirmation email is sent. The reminder email is sent 10 days before the class begins. Use the Duration field in the eTraining Class Reminder Email workflow policy (Administration - Business Process screen > Policies List view) to change the number of days before the email is sent. Any time a policy is changed, the triggers need to be regenerated.

For example, the student registers for a class that starts in three days. The first email the student gets is the class confirmation email and then, after workmon is run in Batch Mode, the class reminder email is sent to the student.

NOTE: These server tasks must be rerun each time the Siebel Server is restarted.

To run GenTrig and WorkMon

- 1 Connect to `srvrmgr`, navigate to `$siebsrvr\bin`, and use the command:

```
"srvrmgr /g gtwsrvr /s siebsrvr /e siebel /u user /p password"  
"start task for comp Gentrigr with Exec="TRUE", PrivUser="your_privilege_username",  
PrivUserPass="your_password"  
"list task for comp gentrig"
```

For "your_privilege_username," use the same format as your password.

- 2 If the status is Completed, run workmon:

```
"start task for comp workmon with SleepTime=10, Groupname="eTraining Group",  
RetryInterval=1, ActionInterval=1"  
"list task for comp workmon"
```

If the status is Running, email notification setup is completed.

- 3 Run the workmon task in Batch Mode again for Class Reminder Email:

```
"start task for comp workmon with SleepTime=10, Groupname="eTraining Group",  
RetryInterval=1, ActionInterval=1, BatchMode=TRUE"
```

Customizing the Training User Interface

You can customize Siebel Training to change the look and feel of your Siebel Training Web site. Using Siebel Tools, you can:

- Modify Web templates
- Change colors
- Modify the behavior caused by clicking a button
- Add or removing applets

- Change controls
- Make fields in forms required
- Deploy Siebel Training without using frames

See *Configuring Siebel Business Applications* for information on customizing the user interface.

Navigating to Training Administration Screens

Most Siebel Training administration tasks are performed using the Training Administration screens described in [Table 3](#).

Table 3. Training Administration Screens

Screen	Description
All Enrollments	Shows all course enrollments.
Class Details	Shows class details such as location, class schedule, and so on.
Course Details	Shows detailed information about the courses.
Curriculum Enrollments	Shows the enrollments associated with curriculums.
Curriculums	Shows curriculum-related details. Curriculums are a set of courses that fulfill a specific educational requirement.
Test Questions	Provides multiple question formats for skill testing that can be associated with tests.
Test Results	Shows test results.
Tests	Provides a list of skill tests used to determine if the training user has mastered the material presented in the course.
Training Library	Used to store training materials and files related to courses and curriculums.

As an administrator, to navigate to a training administration screen, you must log in to the Siebel application that is licensed to include Training Administration screens. These screens may be included in Siebel Sales, Siebel Call Center, Siebel Service, Siebel Partner Manager, Siebel Marketing, and Siebel ERM (Employee Relationship Management Administration). For basic information about using Siebel applications, see *Fundamentals*.

To navigate to a Training Administration screen

- 1 Start the Siebel application that is licensed to include Training Administration screens.
- 2 From the application log-in screen, enter the appropriate administrator information in the User ID and Password fields.

- 3 Navigate to the Administration - Training screen to display the list of links to individual training administration screens and views.
- 4 Click the link for the screen or view you want to use.

Setting Up a Delegated Training Administrator

The Delegated Administrator feature allows managers and other designated users, who are not training administrators, to enroll other users in training. Using the Enroll Others functionality, the delegated administrator can enroll any contact in a course. Enrollment is not limited to direct or indirect reports.

Related Topic

[Enrolling Students \(Delegated Administrator\) on page 103.](#)

To set up a nonmanagerial employee as delegated administrator

- 1 Navigate to the Administration - User screen > Users view.
- 2 In the Users list, query for the user you want to designate as delegated administrator.
- 3 Select the employee record, and in the Miscellaneous section of the detail form, make sure the Training Delegation check box is selected.

To verify that the employee has delegated administrator visibility

- 1 Log in to Siebel Training, using the ID of the end user you designated as delegated administrator.
- 2 From the Home Page, navigate to Find Training > All Training, and verify that in the list of courses, you have access to Enroll Others hyperlink.

3

Setting up Training Regions and Locations

This chapter covers how to create and update location records and logical regions. It includes the following topics:

- [Process of Defining Training Regions and Locations on page 22](#)
- [Defining Regions on page 22](#)
- [Creating a Hierarchy of Regions on page 22](#)
- [Defining Training Locations on page 23](#)
- [Defining Classroom Characteristics and Resources on page 24](#)
- [Specifying Hotels Located Near a Training Location on page 24](#)
- [Adding Links to a Training Location on page 25](#)
- [Assigning a Class to a Training Location on page 25](#)
- [Resolving Scheduling Conflicts at a Location on page 26](#)

Process of Defining Training Regions and Locations

The following list shows the procedures that administrators typically perform to set up training locations. Your company may follow a different process according to its business requirements.

To set up training regions and locations, perform the following procedures:

- 1 [Defining Regions on page 22](#)
- 2 [Creating a Hierarchy of Regions on page 22](#)
- 3 [Defining Training Locations on page 23](#)
- 4 [Defining Classroom Characteristics and Resources on page 24](#)
- 5 [Specifying Hotels Located Near a Training Location on page 24](#)
- 6 [Adding Links to a Training Location on page 25](#)
- 7 [Assigning a Class to a Training Location on page 25](#)
- 8 [Resolving Scheduling Conflicts at a Location on page 26](#)

Defining Regions

You can define logical regions for training, and each region can be associated with multiple locations. Locations can likewise be associated with multiple regions for reporting purposes. In addition, a region can be associated with another region to create a parent-child relationship.

This task is a step in [Process of Defining Training Regions and Locations on page 22](#).

To define a region

- 1 Navigate to the Administration - Location screen > Regions view.
- 2 In the Regions list, create a new record.
- 3 In the region record, set Type to Training Region and Status to Active.
- 4 Complete the remaining fields.

Creating a Hierarchy of Regions

The administrator can create a hierarchy of regions. For example, the administrator might set up a parent region called Eastern United States and then associate child regions called MidAtlantic, Southeast with the parent region.

This task is a step in [Process of Defining Training Regions and Locations on page 22](#).

To create subregions for a region

- 1 Navigate to the Administration - Location screen > Regions view.
- 2 In the Regions list, create a new record and complete the fields, or if you had created it previously, query for the region.
- 3 Click the Sub Regions view tab and create a record.
- 4 In the subregion record, set the Type field to Training Regions, and set the Status field to Active.
- 5 Complete the remaining fields.

Defining Training Locations

You can provide detailed information about training locations for Instructor-Led classes. Location information might include the following:

- Address of each training location, which includes directions for reaching each training location.
- Individual classrooms available within each training location, showing available seating, equipment, and other classroom-specific resources.
- Information about hotels that are located near training locations.
- Links to maps and other helpful information.

This task is a step in [Process of Defining Training Regions and Locations on page 22](#).

To add a location record

- 1 Navigate to the Administration - Location screen > Locations view.
- 2 In the Locations list, create a new record, and complete the fields.

NOTE: The Time Zone on the Location form is linked to the Start Date, End Date, and Time for the class. By selecting the Time Zone, then the Start Time and End Time for the class are set to the time zone you selected.

Defining Classroom Characteristics and Resources

Use the following procedures to define a training classroom, and specify its characteristics and resources. Typical classroom resources might include projectors, whiteboards, printers, flip charts, and so on.

This task is a step in [Process of Defining Training Regions and Locations on page 22](#).

To assign a classroom and specify the classroom characteristics

- 1 Navigate to the Administration - Location screen > Locations view.
- 2 In the Locations list, select the location of the classroom, and click the Rooms view tab.
- 3 In the Rooms list, create a new record, and complete the fields.

To specify classroom resources

- 1 Navigate to the Administration - Location screen > Locations view.
- 2 In the Locations list, select the location of the classroom, and click the Rooms view tab.
- 3 In the Rooms list, select the room, and then scroll down to the Equipment list.
- 4 In the Equipment list, create a new record, and then complete the text fields to detail an available resource.

Repeat this procedure for each classroom resource.

Specifying Hotels Located Near a Training Location

Information about hotels located near the selected training facility is made available to potential trainees. Before you begin, make sure each hotel is entered as a location record.

This task is a step in [Process of Defining Training Regions and Locations on page 22](#).

To specify hotels located near a training location

- 1 Navigate to the Administration - Location screen > Locations view.
- 2 In the Locations list, select the location of the training facility, and click the Hotels view tab.
- 3 In the Hotels list, create a new record, and choose a hotel listing.
- 4 Repeat [Step 3](#) for each additional hotel you want to associate with the selected location.

Adding Links to a Training Location

You can specify links to information, such as maps to the training location, that students can use when evaluating training options.

This task is a step in [Process of Defining Training Regions and Locations on page 22](#).

To add links to a training location

- 1 Navigate to the Administration - Location screen > Locations view.
- 2 In the Locations list, select the location of the training facility, and click the Links view tab.
- 3 In the Links list, create a new record, and name the link.

Some fields are described in the following table.

Field	Comments
Type	Select the type of link that is being defined.
URL	Enter URL information.
Status	Set the status to Active.

Assigning a Class to a Training Location

From the Locations screen, you can associate a predefined class to the location. You can also associate a new class with a training location, provided that the training location information is defined within your Training system before you create the class.

This task is a step in [Process of Defining Training Regions and Locations on page 22](#).

To assign or modify an existing class to a training location

- 1 Navigate to the Administration - Location screen > Locations view.
- 2 In the Locations list, select the location, and click the Scheduled Classes view tab.
- 3 In the Scheduled Classes list, you can do the following:
 - Create a new record, and choose a class.
 - Select the session, and in the Room field, select a location.

NOTE: You can change times and dates by navigating to the Administration - Training screen > Class Details view.

Resolving Scheduling Conflicts at a Location

You can verify that there are no scheduling conflicts for a location and classroom using the Scheduled Classes view, and if conflicts exist, change times and dates as needed.

This task is a step in [Process of Defining Training Regions and Locations on page 22](#).

To check for location and room and reschedule conflicts

- 1 Navigate to the Administration - Location screen > Locations view.
- 2 In the Locations list, select the location, and then click the Scheduled Classes view tab.
- 3 In the Scheduled Classes list, verify that classes are not scheduled to use the same room at the same time.

NOTE: You may find it helpful to sort the records by Start or by Room. Click the up arrow or down arrow in the header of the column to sort in ascending or descending order.

- 4 If there is a conflict, select the class that needs to be rescheduled or relocated, and click Start Date.
- 5 Click the More Info view tab, and change the values as desired in the Start Date, End Date, Start Time, and End Time fields.

4

Adding Materials to a Training Library

This chapter describes how to use the Training Library, which is included with Siebel Training, to store files that are related to the courses and curriculum paths you offer. The Training Library can store many types of files, in formats that include .pdf, .xls, .doc, and .ppt. Users can view these files, which may include reading material, self-paced learning topics, training presentations, curriculum guides, course syllabus information, audio and video clips, and other training information.

Training library items are also listed in the Literature screen with Literature Type set to Training Literature. However, it is strongly recommended that you always administer training library items from the Training Library screen. For more information on Literature, see *Applications Administration Guide*.

This chapter covers the following topics:

- [Process of Adding Materials to a Training Library on page 28](#)
- [Adding Files or URLs to the Training Library on page 28](#)
- [Changing the URL in a Training Library Record on page 29](#)
- [Downloading a Training Library File on page 29](#)

Process of Adding Materials to a Training Library

The following list shows the procedures that administrators typically perform when adding and modifying training library materials. Your company may follow a different process according to its business requirements.

Administrator Procedures

To set up the Training Library, the administrator typically performs the following tasks:

- 1 [Adding Files or URLs to the Training Library on page 28](#)
- 2 [Changing the URL in a Training Library Record on page 29](#)
- 3 [Downloading a Training Library File on page 29](#)

Adding Files or URLs to the Training Library

You can add reference materials associated with the training course to the Training Library.

NOTE: You can also add new materials by navigating to the Course Details view, clicking the Links view, and scrolling down to the Materials list. Items created here are visible in the Training Library.

This task is a step in [Process of Adding Materials to a Training Library on page 28](#).

To add files or URLs to the Training Library

- 1 Navigate to the Administration - Training screen > Training Library view.
- 2 In the Training Library list, you can create a new record by clicking:
 - New File
 - New URL
- 3 Enter a title for the Training file or URL, and complete the remaining fields.

NOTE: You can use the Training Library views to administer any new literature item created using the associated applet.

Some fields are described in the following table.

Field	Comments
Auto Update	When it is selected, this check box indicates that the library file is automatically updated as changes to the file occur.
Distribution Method	Intended method for distributing the file, such as email, direct mail, and so on. For informational purposes only.

Field	Comments
Expiration	A date after which the file automatically becomes unavailable to Training Library end users. An expired file listing is visible to administrators, but not to end users.
Internal	If the check box is selected, then the item is available only to employees.
Launch	Intended method by which the material is launched, for example in-line, new window, and so on. For informational purposes only.
Local	Selecting this check box indicates that the file resides on a local file system.
Organization	The document ownership. This value facilitates inquiries about updates or other maintenance.
Release	The date when the item becomes visible and available to end users. Before this date, only administrators see the listing and can access the item. Useful for preventing distribution before appropriate conditions are met.

- 4 Any new literature item created using the associated applet can be administered using the Training Library views.

Changing the URL in a Training Library Record

Perform the steps in the following procedure to change the URL referenced in a training library record.

This task is a step in [Process of Adding Materials to a Training Library on page 28](#).

To change the URL in a training library record

- 1 Navigate to the Administration - Training screen > Training Library view.
- 2 In the Training Library list, query for the training library record, and add the new URL in the Attachments field.

Downloading a Training Library File

Perform the steps in the following procedure to save training materials from the Training Library list to your local drive.

This task is a step in [Process of Adding Materials to a Training Library on page 28](#).

To download training library materials

- 1 Navigate to the Administration - Training screen > Training Library view.

- 2 In the Training Library list, query for the training library record, and click the link in the Title field.

5

Setting Up Training Courses

This chapter describes how to add or modify a course and how to specify course details. A course is the main training element in Siebel Training and can be in any training format available, such as Instructor-Led classes, Web-based courses, course bundles, and so on.

This section covers the following topics:

- [Process of Setting Up Training Courses on page 31](#)
- [Example Process Flow for Setting Up Training Courses on page 33](#)
- [Adding or Modifying a Training Course on page 35](#)
- [Specifying Training Course Details on page 39](#)
- [Specifying Training Course Topics on page 40](#)
- [Specifying Training Course Objectives on page 41](#)
- [Specifying Training Skills on page 41](#)
- [Specifying Prerequisites and Related Courses on page 42](#)
- [Listing Training Course Materials on page 42](#)
- [Defining Course Launching Links on page 43](#)
- [Enabling and Specifying Just-in-Time Training on page 43](#)
- [Associating Categories with the Course on page 45](#)
- [Creating Training Bundles on page 45](#)
- [Training for Customers and Partners on page 46](#)

Process of Setting Up Training Courses

The following list shows the procedures that administrators typically perform to set up training courses. For more information, see [Example Process Flow for Setting Up Training Courses on page 33](#). Your company may follow a different process according to its business requirements.

Administrator Procedures

To set up courses, the administrator typically performs the following tasks:

- 1 [Adding or Modifying a Training Course on page 35](#)
- 2 [Specifying Training Course Topics on page 40](#)
- 3 [Specifying Training Course Objectives on page 41](#)
- 4 [Specifying Training Skills on page 41](#)

- 5** [Specifying Prerequisites and Related Courses on page 42](#)
- 6** [Listing Training Course Materials on page 42](#)
- 7** [Defining Course Launching Links on page 43](#)
- 8** [Associating Categories with the Course on page 45](#)
- 9** [Creating Training Bundles on page 45](#)
- 10** [Enabling and Specifying Just-in-Time Training on page 43](#)

Example Process Flow for Setting Up Training Courses

Figure 1 illustrates a typical administrator process flow when setting up Siebel Training Courses.

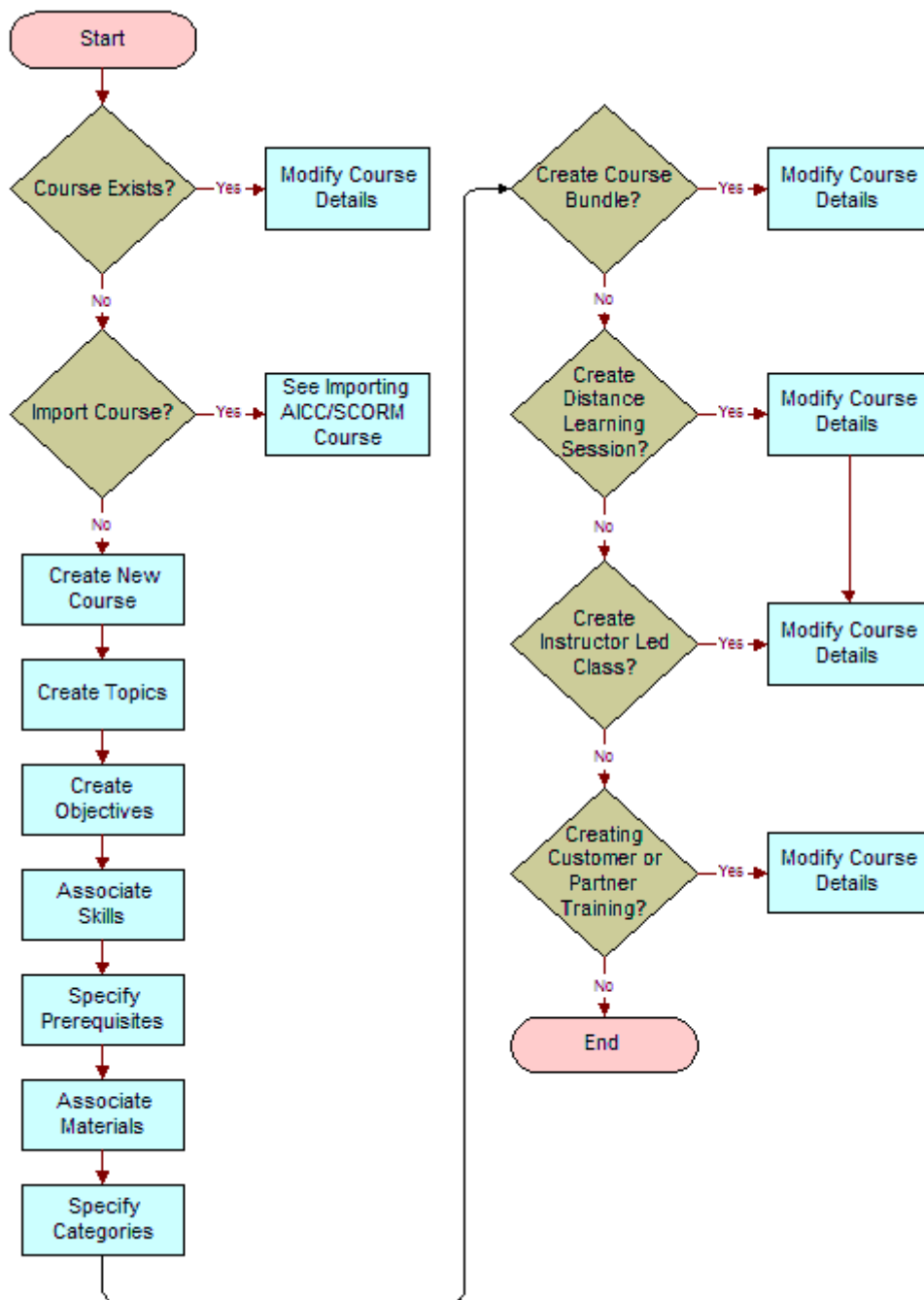


Figure 1. Administrator Process Flow for Course Setup

Administrator Process Flow for Course Setup

As Figure 1 shows, the administrator performs the following steps:

- 1 Determines if the course exists, and if so, modifies course details.
- 2 Determines if an AICC/SCORM course should be imported.
- 3 Creates new courses.
- 4 Creates topics for the courses.
- 5 Creates course objectives.
- 6 Associates skills with the courses.
- 7 Specifies course prerequisites.
- 8 Associates materials with each course.
- 9 Creates course categories.
- 10 If course bundles are required, creates training bundles.
- 11 If Distance Learning sessions are required, specifies link information.
- 12 If Instructor-Led classes are required, specifies the class schedule.
- 13 If customer or partner training is being developed, sets up course pricing.

Adding or Modifying a Training Course

Before Training Web site end users can learn about a course that your organization offers, you must add a listing for the course. You can modify a course listing at a later time, if you choose. For more information about importing and setting up an AICC- or SCORM-compliant course, see [Chapter 7, "Importing an AICC or SCORM Course."](#)

Some of the available course setting values depend on records in the Administration - Data > List of Values list. List of Values (LOV) setting names are mentioned throughout the Training administrative procedures in this guide.

For information about:

- Editing lists of values to make additional values available, see *Applications Administration Guide*.
- LOVs specific to Siebel Training, see [Appendix B, "Lists of Values \(LOVs\) for Training."](#)

This task is a step in [Process of Setting Up Training Courses on page 31](#).

To add or modify a course

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, create a new record or select an existing course, and complete the fields.

- 3 Scroll down to the Description field, and enter a detailed description of the course.

Some of the fields are described in the following table.

Field	Comments
Admin Notes	Use this text field to enter administrative notes about the course. The notes are not visible to the end user.
Access Period (Days)	<p>Number of days the course may be accessed. The value in this field is used to manage how long users have access to Web-based training courses. For example, if this value is set to 90 days, a user can take and retake the course an unlimited number of times for 90 days after the registration date. After the access period, the user will have a record of the course in the user's transcript, but will not be able to launch the course, unless the user re-enrolls in the course.</p> <p>The Registration date (the date when the user enrolls), plus the Access Period, equals the number of days the end user will have access to the course.</p>
Accrue Units	<p>Select the check box to allow units to accrue as part of student transcript or as part of a curriculum.</p> <p>The check box is unselected by default.</p>
Waitlist Limit	<p>Select the check box to manage the waitlist to unlimited size or Max Size, depending on user-defined criteria. If a waitlist is not allowed, then overflow enrollees receive a message that the class is full and class enrollment is no longer allowed.</p> <p>The value in this field only applies to classes. You can adjust the value in the detail form for the course.</p>
Auto Confirm	<p>Select the check box to allow administrators to manage restricted-enrollment courses and classes.</p> <p>When this check box is not selected, enrollment defaults to Pending Approval status until administrator confirms enrollment. The default value is selected.</p>
Code	Required value, does not have to be unique. This field is used for internal identification.
Days	The duration of the course in days.

Field	Comments
Expiration	<p>Expiration date for the course. Typically used for Web-based courses.</p> <p>If a date is:</p> <ul style="list-style-type: none"> ■ Specified, then no associated class sessions can be held later than this date. Sessions are removed from the catalog. ■ Not specified, then the course does not expire. <p>If the course is self-paced, then the course cannot be run later than this date.</p> <p>If you specify a value, be sure to choose a future date. Using a past date or today's date prevents the course from appearing in end-user screens.</p>
External ID	An identifier used when tracking third-party courses.
Featured Training	When selected, the check box flags the course as a featured course on the Training home page.
Completion Criteria	<p>Determines criteria for defining course completion. The values are Test Based, Launch Based, or Lesson Based.</p> <p>Typically, this is set to Test Based so that the course is complete after a test is taken and passed. For an AICC or SCORM course, completion criteria defaults to Lesson Based. The values are: Test Based, Launch Based, and Lesson Based.</p> <p>Setting the Completion Criteria to Test Based sets the enrollment status to:</p> <ul style="list-style-type: none"> ■ Completed-Passed. If the enrollee passes all the tests within the maximum allowed test attempts ■ Completed-Failed. If the enrollee fails all tests, or does not pass at least one test within the max attempts <p>NOTE: For Instructor-Led and Distance-Learning courses, please review the course Completion Criteria. Setting the criteria to Test Based can affect the status of the registration because the student could try the test before attending the class.</p>

Field	Comments
Format	<p>The medium in which the course is delivered.</p> <p>The values are Instructor-Led, Web-based, Distance Learning, CD-ROM, Exam, Third-party, Document, Bundle, Subscription, Recorded Event, and Competency.</p> <p>If the format is:</p> <ul style="list-style-type: none"> ■ Instructor-Led or Distance Learning, the administrator must set up a Class Schedule. For more information, see Chapter 6, "Setting Up Class Schedules and Sessions." ■ Bundle, an administrator must add the courses to the bundle using the Course Details Bundled Courses view. For more information, see Creating a Training Catalog and Categories on page 87. ■ Web-based, an administrator must add course launching information. For more information, see Defining Course Launching Links on page 43. ■ CD-ROM, Exam, Third-party, Document, Competency, Subscription, or Recorded Event, then the course behaves the same as if the format were Web-based. These different values allow you to identify different types of asynchronous training for the user.
Hours	Numeric value that specifies the course length in hours.
Internal ID	An identifier used internally when tracking courses by a third-party provider.
Job Profiles	<p>Associates the course with one or more specific job roles. End users can then locate the course using a search by job role.</p> <p>For information on creating new job profiles, see <i>Siebel Employee Relationship Management Administration Guide</i>.</p>
Launch Type	<p>An attribute specifying the type of content that is launched.</p> <p>NOTE: This is only for AICC SCORM courses.</p>
Private	<p>Select for a catalog and all of its categories to be visible only to the access groups associated with the category.</p> <p>For the access groups functionality to work, the Private check box and the access groups need to be defined.</p>
Max. Attendees	Use to manage number of enrollments for a course. Typically used for Web-based courses where network bandwidth may be constrained.
Waitlist Count	Use this value to manage maximum number of waitlisted students enrolled for a course. The value in this field only applies to Class Schedules.
Message	Use this text field to communicate additional information to end users.
Organization	The company sponsoring or teaching the course, which may differ from course vendor. It can also specify the division within an organization for whom the course applies.

Field	Comments
Provider	General information about the provider for the course.
Rating	Popularity rating for the course. Manually specified by the administrator.
Sponsor	Attribute indicating the source of the course internally in an organization. Examples are Customer Education, End-User Education, and so on.
Status	<p>The current status of the course. A course must have Status set to Active to be listed on the Training Web site and allow registration. The default value is Inactive.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> ■ Active. The course is available to end users whose Access Group settings allow visibility. ■ Inactive. The course is not available to end users. ■ End of Life. The course was previously available, but now retired. It is not available to end users. ■ Pre-Release. The course is in development, and not available to end users. ■ Pending. The course is not available to end users. It was previously available, but now unavailable while the course is adjusted. ■ QA. The course is in quality assurance review, and not available to end users. ■ Near Term. The course is awaiting release date, and not available to end users.
Tests	<p>Associates one or more skills tests with the course.</p> <p>For information about creating skills tests, see Chapter 9, "Creating and Modifying Skills Tests."</p>

Specifying Training Course Details

After basic course information is set up, you can specify other course details such as Topics, Objectives, and so on. In addition to these sections, course details may include additional information, which you can access by clicking the appropriate view tab.

NOTE: For additional information on setting up Instructor-Led type courses, see [Chapter 6, "Setting Up Class Schedules and Sessions."](#)

Table 4 lists the view tabs and the links for more information:

Table 4. View Tabs and Links For More Information

Tab	For More Information see...
Topics	Specifying Training Course Topics on page 40
Objectives	Specifying Training Course Objectives on page 41
Skills	Specifying Training Skills on page 41
Associated Training	Specifying Prerequisites and Related Courses on page 42
Materials	Listing Training Course Materials on page 42
Course Launching	Defining Course Launching Links on page 43
Class Details	Adding and Modifying Class Details on page 48
Categories	Associating Categories with the Course on page 45
Add Enrollments	Adding and Viewing Course Enrollments on page 92
Partner Enrollments	Viewing Partner Enrollments on page 100
Bundled Courses	Creating Training Bundles on page 45
Just-in-Time	Enabling and Specifying Just-in-Time Training on page 43

NOTE: A class only needs to be defined if the course is being held at a specific time. Instructor-Led and Distance Learning type courses must have classes defined, but Web-based courses, CD-ROM courses, and exam courses do not need defined classes.

Specifying Training Course Topics

You may find it useful to list the topics that are covered in a particular training course. Topic information is visible to employees, partners, and customers, whenever the course status is set to Active, and the user views detailed course information.

When a topic has been specified for any course in the system, other courses may be associated with that topic.

NOTE: If you edit an existing topic record, the changes you make are effective for each course that is associated with that topic.

This task is a step in [Process of Setting Up Training Courses on page 31](#).

To specify course topics

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and then click the Topics view tab.

- 3 In the Topics list, create a new record, and select a topic.

Specifying Training Course Objectives

Training objectives are visible to employees, partners, and customers, whenever the course status is set to Active, and the end user views detailed course information.

When an objective has been linked to a course in the system, other courses may be associated with that objective.

NOTE: If you edit an existing objective record, changes you make are effective for any courses that are associated with that objective. Objectives are not related to Topics.

This task is a step in [Process of Setting Up Training Courses on page 31](#).

To specify course objectives

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and then click the Topics view tab.
- 3 Scroll down to the Objectives subview list, create a new record, and select an objective.

Specifying Training Skills

You may also find it useful to identify the skills that are achieved by completing a particular training course. Skills determined using Training are visible to employees, partners, and customers, whenever the course status is set to Active, and the end user views detailed course information.

Skills and ratings are defined using the Siebel Competency Management module. Specifying skills for a course allows administrators to set what skills will be acquired by learners who attend and successfully pass that course. For information on adding and changing skills and ratings, see *Performance Tuning Guide*.

When a skill has been listed for any course in the system, other courses may be associated with that skill.

NOTE: If you edit an existing skill record, any changes you make are applied to any courses that are associated with that skill.

This task is a step in [Process of Setting Up Training Courses on page 31](#).

To specify skills

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select a course, and click the Skills view tab.

- 3 In the Skills list, create a new record, and select the skill.

The Skill Description and Skill Rating Types fields are filled in with information from the selected skills.

- 4 In the Level field, select a rating.

Repeat the procedure to associate additional skills with the selected course.

Specifying Prerequisites and Related Courses

Some of the training courses you offer may be related to each other. For example, a course called Introduction to Web Design might be a prerequisite for a course called Intermediate Web Design. You can associate any other courses that are related to any course you offer, and whether each course is a prerequisite to the current course.

This task is a step in [Process of Setting Up Training Courses on page 31](#).

To specify prerequisite training

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and then click the Prerequisites view tab.
- 3 In the Prerequisites list, create a new record, and select a course.
- 4 In the Relationship Type field, select Prerequisite or Optional.

Repeat the procedure to associate additional courses with the selected course.

Listing Training Course Materials

For each course you offer, you can designate one or more files as course materials. Students can view these materials as part of their course work. The course material files are stored in the Training Library.

NOTE: You can create new training literature items from the Course Details view that can be administered using the Administration-Training screen > Training Library view.

You can place each file in the library ahead of time, as described in [Chapter 4, "Adding Materials to a Training Library,"](#) or you can add the file to the Training Library when you designate it as course material.

This task is a step in [Process of Setting Up Training Courses on page 31](#).

To list materials (training literature) for a selected course

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, click the Links view tab, and scroll down to the Materials list.

- 3 In the Materials list, create a new record, and select the literature item.

Defining Course Launching Links

If you are setting up a Distance-Learning session or a Web-based course, you can set up how to launch the course. Online classes in multiple formats may require different launching information for each format.

NOTE: This procedure is not required if you are importing an AICC or SCORM course. If a course is imported using AICC or SCORM, the lessons and associated URLs appear in the Lessons view.

This task is a step in [Process of Setting Up Training Courses on page 31](#).

To specify technical launching information for a Web-based course

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and click the Links view tab.
- 3 In the Links list, create a new record, and complete the fields.

Some of the fields are described in the following table.

Field	Comments
Label	The text that Training users see when they want to start the selected course. If you offer different versions of the course based on the speed of the attendee's network connection, include speed-identifying text in the label.
URL	The URL for the specific version of the course being launched, which is visible to attendees. Provide a URL for a self-paced (Web-based) course, or provide a URL address for the location of the file directory or specific course file.

Repeat this procedure to create additional records for different versions of the course.

Enabling and Specifying Just-in-Time Training

You can specify Web-based training courses for end users to take when their workload permits. For example, a call center agent could have a course assigned to take when call volumes permit. This task is a step in [Process of Setting Up Training Courses on page 31](#).

To enable Just-in-Time training

- 1 Navigate to Administration - Server Configuration screen > Enterprise view.
- 2 Click the Component Definitions view and query for the Call Center Object Manager (ENU).

- 3 Scroll down to the Component Parameters list and query for *Training*.
- 4 Enable the following parameters:
 - Application Enable Training Qu
This parameter enables Just-in-Time functionality.
 - Application Training Queue Upd
This parameter is the interval of user inactivity before the Just-in-Time dialog box appears.

To specify Just-in-Time training

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 Select a Web-based course with an Active status, and click the Just in Time view tab.
- 3 Scroll down to the Employees list, click Add User, and select a name.
- 4 Select the employee name, and click:
 - **Associate.** The employee name moves to the Status list with a Pending status. Click Assign to place the course in the employee's queue.
 - **Assign.** The employee name moves to the Status list with an Assigned status. The course is in the employee's queue.

When a course has been assigned to an employee, a Just-in-Time dialog box appears when the employee logs in to the Training site. The employee can accept or decline the training, and Siebel Training responds to these actions, as shown in the following table.

NOTE: Use the Course Details view > Just in Time view tab to view the number of invitations that an employee has accepted or declined for a course.

If...	Then...
The employee clicks Accept	<p>An enrollment record for the course is created. The employee has the number of days set in the Access Period (Days) field to complete the course.</p> <p>Siebel Training returns a response to the administrator that the course has been accepted.</p>
The employee clicks Decline	<p>The user has select a reason for declining the course. The choices are:</p> <ul style="list-style-type: none"> ■ Busy ■ Incorrect Assignment ■ Other <p>Siebel Training does not create an enrollment record.</p>

Associating Categories with the Course

In this task, the category must be created first, and then the course is associated with the category.

For information about creating catalogs, see [Creating a Training Catalog and Categories on page 87](#).

To associate categories by the course

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and click the Category view tab.
- 3 In the Category list, create a new record, and select the category for the course.

Creating Training Bundles

You can create any type of Web-based course or class as a training bundle. A training bundle can include supporting materials packaged and sold as one item, that have one enrollment and purchase process. However, bundles typically are priced independently. Examples of bundled products are packaged Web courses, pre-exams, CD-ROMs, workbooks, and videos.

This task is a step in [Process of Setting Up Training Courses on page 31](#).

To create training bundles

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, create a new record, and select Bundle as the Format.
- 3 Complete the remaining fields.

For more information, see [Adding or Modifying a Training Course on page 35](#).

To add the courses to the course bundle

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and click the Bundled Courses view tab.
- 3 In the Bundled Courses list, create a new record, and select the course.

Only Web-based courses appear in the Pick Course dialog box.

Repeat this procedure for each course you want to add to the bundle.

Training for Customers and Partners

When courses are used to sell training to customers and partners, you may need to perform additional activities to prepare the items for sale. [Table 5](#) describes what these activities might include.

Table 5. Sample Activities to Sell Training to Customers and Partners

This Activity...	Includes...
Adding prices to courses.	Creating price lists, course prices, pricing models, discounts, and so on.
Setting up access groups.	Creating access restrictions that define the audiences that can view certain training courses.
Setting up catalogs and categories.	Creating catalog structures and navigation paths to allow for course grouping and display.
Setting up parametric search.	<p>Creating a structure that allows users to search for products based on values of the attributes of those products.</p> <p>For example, searching by course format, location, price, and so on.</p>

For more information on these procedures, see *Siebel eSales Administration Guide*, *Pricing Administration Guide*, and *Product Administration Guide*.

6

Setting Up Class Schedules and Sessions

This chapter describes how to set up class schedules and sessions. Class schedules and sessions are created for training that is Instructor-Led, Distance Learning, seminars, brown-bag sessions, and so on. Each class is an instance of a course (child of a course record). Sessions are useful when you are segmenting a class into multiple events to provide more flexible scheduling of rooms and instructors.

This chapter covers the following topics:

- [Process of Setting Up Class Schedules and Sessions on page 47](#)
- [Scheduling Classes on page 47](#)
- [Adding and Modifying Class Details on page 48](#)
- [Scheduling Class Sessions on page 49](#)

Process of Setting Up Class Schedules and Sessions

The following list shows the procedures that administrators typically perform to set up classes and class sessions. Your company may follow a different process according to its business requirements.

Administrator Procedures

To set up classes and class sessions, perform the following tasks:

- 1 [Scheduling Classes on page 47](#)
- 2 [Adding and Modifying Class Details on page 48](#)
- 3 [Scheduling Class Sessions on page 49](#)

Scheduling Classes

If a course is offered at more than one time or more than one location, each offering of the course is called a *class*. You can schedule multiple sessions for a class. Each class session is identified by a unique numerical code.

You can schedule class sessions for the same day and the same time, but in different rooms. Instructors and students can be associated with a class. Though not required, class sessions allow for greater flexibility in managing time, room, and instructor changes that may occur during the course of a multiday classroom event.

This task is a step in [Process of Setting Up Class Schedules and Sessions on page 47](#).

To schedule classes for a course

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and then click the Class Schedule view tab.
NOTE: The Format drop-down list is a toggle that displays a list for Instructor-Led and Distance Learning classes and a form for non-Instructor-Led and Distance Learning classes.
- 3 In the Class Schedule list, create a new record, and complete the fields.
 If the fields do not appear, click the menu button in the Class Schedule form, and select Columns Displayed.
 Some of the fields are described in the following table.
NOTE: The format for the course must be Instructor-Led or Distance Learning. Do not create a new class schedule record for other formats such as Web-based formats.

Field	Comments
Status	Values are Active, Inactive, End of Life, Pre-Release, Pending, QA, Near Term, and Cancelled.
Taken	Number of seats in the class already taken by enrollees.
Open	Number of seats in the class still available for enrollees. Open seats are automatically calculated.
Access Group	Access groups determine course or product and curriculum visibility based on account, group, user, or organization.
Course Sponsor	Values are Customer Education, Employee Education, End User Education, and Technical Education.

Adding and Modifying Class Details

Using the Class Details view, you can add and modify information about classes such as the waitlist count, start and end time, and location.

This task is a step in [Process of Setting Up Class Schedules and Sessions on page 47](#).

To add and modify class details

- 1 Navigate to the Administration - Training screen > Class Details view.
- 2 In the Classes list, query for the class, and then click the More Info view tab.
- 3 In the More Info form, complete additional details for the class.

- 4 If you change information in the form, such as start and end time, each enrollee in the class receives the Class Logistics Change email informing them of the change.

For more information on setting up automatic email notification, see [Setting Up Automatic Training Notification Messages on page 14](#).

Scheduling Class Sessions

You can schedule multiple sessions for each class. A session is the period of time that the room and the instructor are engaged for a particular training event. A single class can have multiple sessions that can span various days. Similarly, a one-day class can have two sessions, one in the morning and one in the afternoon. Setup of sessions is not required for a training class unless the added scheduling flexibility is needed.

Before you schedule class sessions, define the relevant class information in the Classes view. For more information, see [Scheduling Classes on page 47](#).

This task is a step in [Process of Setting Up Class Schedules and Sessions on page 47](#).

To schedule class sessions for a class

- 1 Navigate to the Class Details view, and select the class for which you want to schedule sessions.
- 2 Click the Sessions view tab, and in the Sessions list, create a new record.
- 3 In the session record, enter Start Time and End Time values for the session.

4 In the Classes list, click Create Sessions.

Class sessions are created automatically, and class values are copied to session records.

If desired, use the Sessions view to change individual values for each session, for example location, classroom, start and end times, instructors, and so on.

The following table describes how class times are created if they are a range of hours on the same day, a range of days, or if the location time zone is different from the administrator's time zone.

If...	Then...
Class times are a range of hours on the same day, such as 9:00 A.M to 5:00 P.M.	The session is created with the same time range.
Class times are a range of days, such as Monday 3:00 to Friday 2:00.	The session is created with start and end time using the following exception values: <ul style="list-style-type: none"> ■ M 3:00 P.M.-11:59 P.M. ■ T 3:00 P.M.-11:59 P.M. ■ W 3:00 P.M.-11:59 P.M. ■ R 3:00 P.M.-11:59 P.M. ■ F 12:00 A.M.-2:00 P.M.
The time zone of the location is different from the time zone of the administrator who is creating the session.	The values are adjusted to reflect those in the location time zone.

7

Importing an AICC or SCORM Course

This chapter covers how to import an AICC or SCORM course. It includes the following topics:

- [About AICC and SCORM Standards on page 52](#)
- [The AICC Specification and Siebel Training on page 52](#)
- [The SCORM Specification and Siebel Training on page 54](#)
- [Scenario for Importing an AICC or SCORM Course on page 56](#)
- [Process of Importing an AICC or SCORM Course on page 56](#)
- [Preparing for AICC and SCORM Course Import on page 57](#)
- [API Adapter Cross-Server Security Issue on page 59](#)
- [Lesson Content and Siebel Training on the Same Server on page 59](#)
- [Lesson Content and Siebel Training on Different Servers on page 60](#)
- [Importing an AICC Course into Siebel Training on page 61](#)
- [Importing a Packaged SCORM Course into Siebel Training on page 62](#)
- [Importing an Unpackaged SCORM Course into Siebel Training on page 63](#)
- [AICC Course Launch Processes on page 64](#)
- [SCORM Course Launch Process on page 66](#)

About AICC and SCORM Standards

Siebel Training supports two major industry-recognized eLearning standards, AICC (Aviation Industry CBT Committee) and SCORM (Sharable Content Object Reference Model). Using AICC and SCORM standards, Siebel Training administrators can integrate sharable content objects, such as Web-based courses, live eLearning courses, and tests. AICC and SCORM support also allows the organization to track course metadata.

AICC

Initially developed by the aviation industry, AICC is now widely used as an eLearning standard across all industries. This standard provides guidelines for the development, delivery, and evaluation of CBT (computer-based training) and related training technologies.

For more information on AICC standards, refer to the AICC organization's Web site.

SCORM

The ADL (Advanced Distributed Learning) Initiative has published the SCORM (Sharable Content Object Reference Model specification), a set of interrelated technical specifications based on AICC and other industry standards to create one unified content model.

For more information on SCORM standards, refer to ADL Initiative's Web site.

The AICC Specification and Siebel Training

Siebel Training stores information about imported training content based on the AICC standard format and communicates with the content.

AICC specifications define the data structure for the course import, as well as the interaction for the run-time execution of the content. Siebel Training supports the following AICC requirements:

- Supports the AICC data model.
For more information, see [AICC Data Model Support on page 53](#).
- Exchanges run-time data with the launched content using HACP or API Adaptor protocols.
For more information, see [Run-Time AICC Data Exchange Using HACP or API Adapter Protocols on page 54](#).
- Meets AICC-specified requirements for importing files and populating fields.
For more information, see [Process of Importing an AICC or SCORM Course on page 56](#).

Related Topics

[AICC Course Launch Processes](#)

AICC Data Model Support

Siebel Training supports the AICC Level 1 data model, maintaining the course data structure for course import, URL creation, course launching, and tracking. As shown in [Figure 2](#), the course data structure includes the following principles:

- Lessons are learning objects or training content.
- Courses are groupings of one or many lessons.
- Lessons can be grouped into blocks.
- Only lessons can be launched and must be associated with a URL to launch in HTTP (Hypertext Transfer Protocol) Blocks and courses cannot be launched.

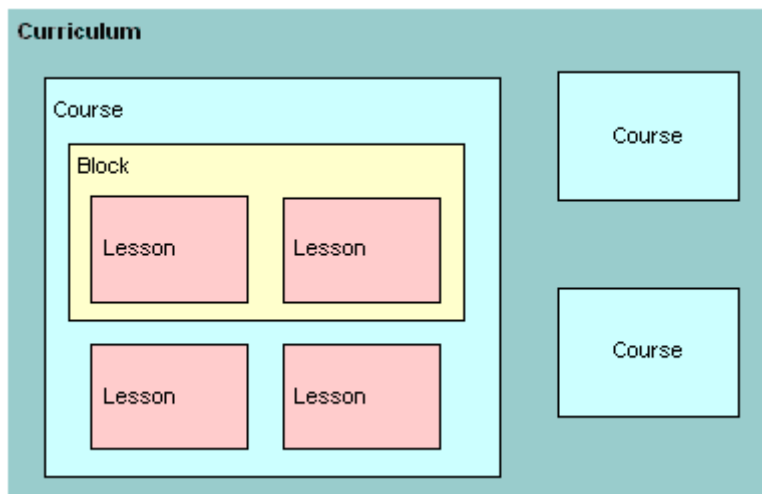


Figure 2. AICC Course Structure

Level 1 - Compliant Course Structure Defined

AICC defines Level 1-compliant course structure using the files shown in [Table 6](#).

Table 6. Level 1 - Compliant Course Structure

File	Description
CRS	This is the Course File, which contains information about the course as a whole, including the group of different lessons in the course's hierarchy.
AU	This is the Assignable Unit File, which provides information relating to the assignable units (AU) in the course. An AU file is the smallest element of instruction or testing to which a student may be routed, assigned, or tracked by Siebel Training.

Table 6. Level 1 - Compliant Course Structure

File	Description
DES	This is the Descriptor File, which gives a list of every course element in the course.
CST	This is the Course Structure File, which provides basic data on the structure of the course. NOTE: The CST file does not enforce prerequisites.

For AICC data file structure details and examples, see [Appendix C, "AICC and SCORM File Structure."](#)

Run-Time AICC Data Exchange Using HACP or API Adapter Protocols

Siebel Training exchanges run-time data with the launched AICC content using either of the following protocols:

- HACP, an HTTP (Hypertext Transfer Protocol)-based AICC Computer-Managed Instruction protocol
- API, the Application Program Interface adapter protocol

These launch protocols allow Siebel Training end users to click a link to launch the course content using HTTP to a specified URL.

During run time, Siebel Training interacts with the launched content to exchange specified data. This interaction causes data to be passed back and forth between the Siebel Training and the AICC-format content, so that the course begins at the appropriate point when launched, and data, such as test results, can be stored in Siebel Training when the user has completed the course.

The SCORM Specification and Siebel Training

The SCORM standard mandates that learning resources be reusable and interoperable across multiple Learning Management Systems (LMS), such as Siebel Training.

For this to be possible, there must be a:

- Common way to start learning resources
- Common mechanism for learning resources to communicate with an LMS
- Predefined language or vocabulary forming the basis of the communication

These three aspects of the SCORM run-time environment are Launch, Application Program Interface (API), and Data Model.

Related Topics

[SCORM Course Launch Process](#)

SCORM Run-Time Data Exchange Using API Adapter Protocol

As shown in Figure 3, in the SCORM run-time environment Siebel Training launches the Sharable Content Object (SCO), which is a collection of one or more assets.

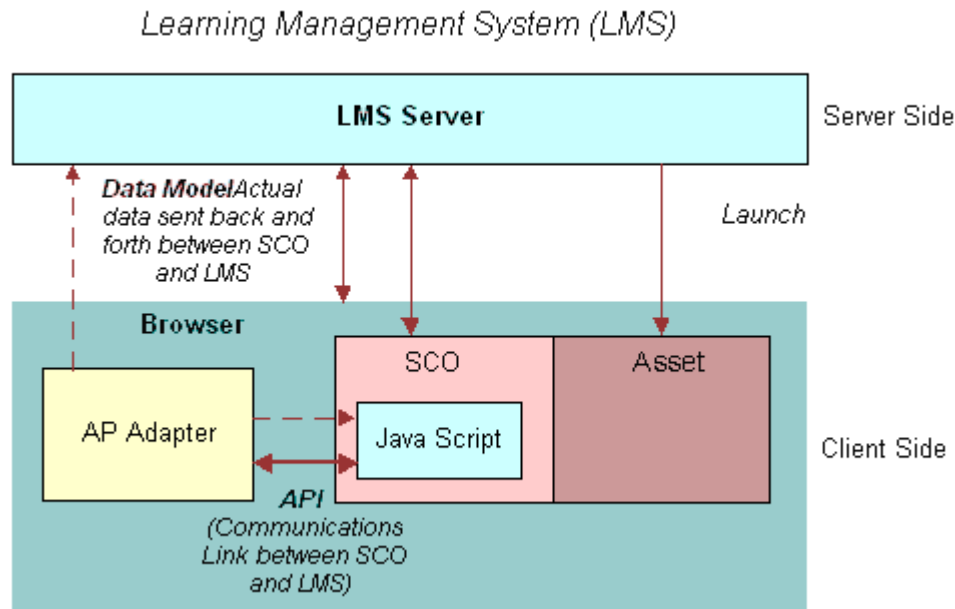


Figure 3. SCORM Run-Time Environment

About the Launch Mechanism

The Launch mechanism presents a common way for the LMS to start Web-based learning resources. This mechanism defines the procedures and responsibilities for the establishment of communication between the delivered learning resource and the LMS. The communication protocols are standardized through the use of a common API.

The API is the communication mechanism used to inform the LMS of the state of the learning resource (for example, initialized, finished, or in an error condition). It is also used to get and set data (score, time limits, and so on) between the LMS and the Sharable Content Object (SCO).

Data Model and Asset Defined

A *Data Model* is a standard set of data elements used to define the information being communicated, such as, the status of the learning resource. In its simplest form, the data model defines elements that both the LMS and SCO are expected to know about. The LMS must maintain the state of required data elements across sessions, and the learning content must use only these predefined data elements if reuse across multiple systems is to occur.

Assets are electronic representations of media text images, sound, Web pages, assessment objects, or other pieces of data that can be delivered on the Web client. Some examples of assets are HTML, WAV, GIF, and XML files or JavaScript functions, which include a specific launchable asset that uses the SCORM run-time environment to communicate with Siebel Training.

Although the SCO typically uses JavaScript to talk to the API adapter, it is not a requirement. Siebel Training launches the SCO and API adapter, and the API adapter communicates with the SCO.

Scenario for Importing an AICC or SCORM Course

This scenario provides an example of a process performed by an administrator who is importing an AICC or SCORM course. Your company may follow a different process according to its business requirements.

The training administrator at a large company needs to import an AICC and a SCORM course. The administrator navigates to the Administration - Training screen's Course Details view, selects the appropriate import course command from the menu, specifies the course location, and then clicks Import.

The training data from the imported course is brought into Siebel Training as well as lesson-specific information. The administrator reviews the information, and then enters additional information for the imported course. The administrator then clicks the Lessons tab to make lesson modifications as needed.

After the edits are complete, the administrator sets the course status to Active to publish the course in the training catalog.

Process of Importing an AICC or SCORM Course

The following list shows the procedures that administrators typically perform when importing an AICC or SCORM course into Siebel Training. Your company may follow a different process according to its business requirements.

To import AICC/SCORM courses into Siebel Training, the administrator performs the procedures in the following list:

- 1 Browses directories to locate AICC or SCORM files.

- 2 Imports the files into the Learning Management System (LMS) by performing the following procedures:
 - a [Preparing for AICC and SCORM Course Import on page 57](#)
 - b [Importing an AICC Course into Siebel Training on page 61](#)
 - c [Importing a Packaged SCORM Course into Siebel Training on page 62](#)
 - d [Importing an Unpackaged SCORM Course into Siebel Training on page 63](#)

The following system processes occur:

- The LMS imports the files and creates the file structure.
 - The data is stored in the Siebel database.
 - The LMS populates the relevant fields.
- 3 Edits the course details and adds additional information.
 - 4 Reviews the end user performance data.

Preparing for AICC and SCORM Course Import

After the Training application is installed and configured, the training administrator must perform three additional tasks to enable AICC or SCORM course import. These tasks, which must be performed one time only and do not need to be repeated for each import, are:

- 1 [Editing the eai.cfg File for AICC or SCORM Courses.](#)
- 2 Verifying that the Enterprise Application Integration (EAI) component group is enabled.

For more information on enabling EAI component groups, see *Transports and Interfaces: Siebel Enterprise Application Integration*.

- 3 [Setting System Preferences for Training.](#)

Editing the eai.cfg File for AICC or SCORM Courses

During Siebel Server installation, the EAI components that AICC or SCORM uses are automatically enabled. However, you must edit the eai.cfg file so that the named subsystem used to route AICC or SCORM requests is identified for EAI HTTP Transport.

In eai.cfg, add following two lines in the [HTTP Services] section:

```
LMSAPI = LMSAPI
```

```
HACP = HACP
```

For more information on configuration files and working with server component and component groups, see *Siebel System Administration Guide*.

Setting System Preferences for Training

Perform the following steps to set system preferences for Training.

- 1 Navigate to the Administration - Application screen > System Preferences view.
- 2 In the System Preferences list, query for the necessary records, as shown in the following table:

Query for...	And...
Training: EAI HTTP Password	Enter a valid password in the System Preference Value field in the Training: EAI HTTP Password record.
Training: EAI HTTP User Name record	Enter a valid user name in the System Preference Value field.
Training: Lesson Adaptor URL record	<p>Edit the value in the System Preference Value field so that it includes the LMS prefix, as the following example shows:</p> <p>LMS/LmsLessonAdapter.html</p>
Training: EAI HTTP Server	<p>Specifies the server that AICC/SCORM-compatible content uses for eAI communication.</p> <p>If set to:</p> <ul style="list-style-type: none"> ■ Default, then the URL of the current Siebel Server is used (For example, if the Siebel URL is http://siebelserver/erm_enu, the EAI URL is http://siebelserver/eai_enu) ■ Defaultsecure, then the URL of the secure Siebel Server is used ■ An explicit URL, this URL must be a complete beginning of a URL, for example, http://theeaiserver/eai_enu
Training: Lesson Security	<p>Allowed values: PIN (the default) and blank</p> <p>Specifies the method of lesson security used to validate eAI requests from AICC/SCORM-compatible lesson content.</p> <p>If set to PIN, the launched AICC lesson is supplied a PIN number that it must use to interact with the Siebel application.</p>
Training: SCORM Import Path	Valid path to the directory in the server where you should unzip the SCORM package file.
Training: SCORM Import URL	URL corresponding to the location of course files.

For more information on system preferences, see *Applications Administration Guide*.

API Adapter Cross-Server Security Issue

The AICC and SCORM learning content integration standards include methods that allow lesson content to interact with a learning management system (LMS), such as Siebel Training.

One of the integration methods for AICC—and the only one for SCORM—requires the use of an API adapter object, which the lesson content uses to communicate with Siebel Training. This API adapter object is typically a Java applet or ActiveX control in one frame of a multiframe HTML window, and the lesson content (in another frame) typically locates and interacts with this object through the use of JavaScript.

However, because of security risks, Web browsers by default do not allow executable code in one HTML frame to access another frame, whose contents may have come from a different Web server (cross-frame scripting).

There are several ways to address this limitation, and the solution varies according to the customer's requirements.

Some alternatives are:

- Place lesson content on the same server as Siebel Training. For more information, see [Lesson Content and Siebel Training on the Same Server on page 59](#).
- Place lesson content on a different server from Siebel Training and modify the Siebel lesson adapter, and the lesson content files, to address the cross-frame scripting limitation. For more information, see [Lesson Content and Siebel Training on Different Servers on page 60](#).

NOTE: There may be other alternatives that work for specific customer installations. Contact Siebel Customer Support to discuss other alternatives.

Lesson Content and Siebel Training on the Same Server

A method used as a solution to the API adapter cross-server security issue is to place the lesson content on the same Web server as the Siebel Training application. How this placement is accomplished depends on the Web server being used and the lesson content itself. This approach is preferred because it is the simplest.

Example of Placing Lesson Content and Siebel Training on Same Server

For this example, assume that you have an AICC course and its import files (AU, and so on), that you are using Microsoft IIS as the Web server for the Siebel Training, and that Siebel Training is accessible at the URL `http://myserver/erm_enu`.

The administrator uses the Internet Services Manager application to create a new virtual directory (in this case named SampleContent), and then establishes content properties. Figure 4 shows the Internet Services Manager Sample Content Properties screen that you can use to set sample content properties.

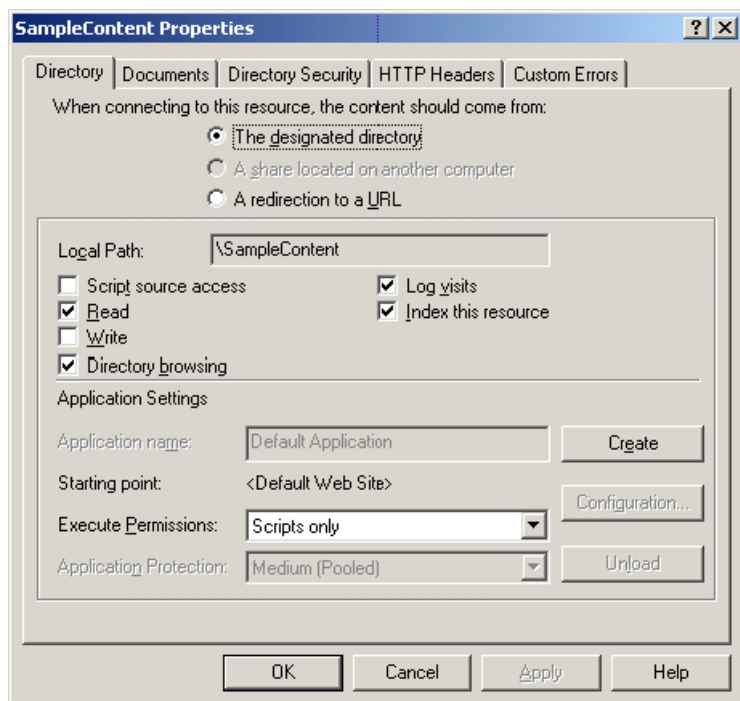


Figure 4. Sample Content Properties for the Virtual Directory

The administrator then places the AICC files in a subdirectory of the SampleContent virtual directory called TestAICC, so that the files are accessible using a URL similar to the following:

`http://myserver/SampleContent/TestAICC.`

Assuming the AICC import files have been set up properly with this URL and that the course is imported and activated, when a user registers for the course and launches a lesson within the course, the lesson content is loaded from the URL `http://myserver/SampleContent/TestAICC`. Because this is the same server name (*myserver*) as the Siebel application, the lesson content can access the API adapter without error.

Lesson Content and Siebel Training on Different Servers

You can use an alternative method to address the API adapter cross-server security issue when the lesson content is hosted on a server other than the LMS server.

NOTE: Placing the lesson content and Siebel Training on the same server is preferred (see [Lesson Content and Siebel Training on the Same Server on page 59](#)), because using the method described in this section requires modification of lesson content files.

The two servers must still be in the same second-level domain for this approach to work. For example, Siebel Training could be located at `erm.mycompany.com`, and the lesson content could be located at `lcms.mycompany.com`. This approach does not work if the second-level domains are different (for example, `mycompany.com` and `yourcompany.com`). For hostnames in country-specific top-level domains, the names to the third level must match, for example. `erm.myplace.co.uk` and `lcms.myplace.co.uk`.

Files That Must be Modified

For Siebel Training and the lesson content to interact in this way, two sets of files must be modified:

- The Siebel API adapter wrapper files
- The lesson content API locator files

The Siebel API adapter wrapper is implemented in these three files:

- `<applicationRoot>/LMS/LmsLessonAdapter.html`
- `<applicationRoot>/LMS/LmsScripts.html`
- `<applicationRoot>/LMS/LmsEmpty.html`

Example File Path

For example, the file path might be `erm_enu/LmsLessonAdapter.html`.

In each of these files, there are JavaScript *if (false)* statements that are clearly commented in this way:

```
// Change to 'true' for cross-server hosting.  
  
if (false)  
{
```

Change each of the false statements to true. There are a total of four instances that should be changed (one each in `LmsLessonAdapter.html` and `LmsEmpty.html` and two in `LmsScripts.html`).

NOTE: Whatever scripts or code the lesson content uses to locate the API adapter, the scripts or code must also be changed in a similar way to set the domain property to the same domain. The set of changes should be done if the lesson content requires the changes. Contact the lesson content vendor for details.

Importing an AICC Course into Siebel Training

Perform the steps in the following procedure to import an AICC course into Siebel Training.

This task is a step in [Process of Importing an AICC or SCORM Course on page 56](#).

To import an AICC course

- 1** Navigate to the Administration – Training screen > Course Details view.
- 2** In the Courses list, click the menu button, and choose Import AICC.
- 3** In the Import from AICC dialog box, enter the URL corresponding to the location of the files in the URL of the AU file field.
- 4** In the Launch Type field, specify the protocol for the course you are importing, and click Import. The Import dialog closes, and the Course Details view shows a single record.
NOTE: AICC does not provide a method to specify the run-time protocol in the imported files. The administrator must determine which protocol is correct before importing the course. In the majority of cases, AICC files use the HACP protocol.
- 5** Verify the course information, and click the Lessons view tab.
NOTE: Completion Criteria should be set to Launch Based.
- 6** In the Lessons list, verify that all imported lessons appear and that the field values match the information in the imported files.
 - The field is blank if the data is not present in the original file.
 - The Status field value for each lesson should be Active.
 - The URL field value is the URL value specified in the import file.
- 7** (Optional) If the course is for credit, set the Units field in the Course More Info form to a nonzero value.
- 8** In the course record, change the value in the Status field from Inactive to Active.
Changing the status to Active allows course enrollment.

Importing a Packaged SCORM Course into Siebel Training

Perform the steps in the following procedure to import a packaged SCORM-format course into Siebel Training.

This task is a step in [Process of Importing an AICC or SCORM Course on page 56](#).

To import a packaged SCORM course into Siebel Training

- 1** Navigate to the Administration – Training screen > Course Details view.
- 2** From the Courses list, click the menu button, and choose Import Packaged SCORM.
- 3** In the Import from packaged SCORM dialog box, click Browse to navigate to the location of the SCORM package, and then click Open.
The full file name appears in the Zip file field in the dialog box.

- 4 In the Unzip target location field, enter the path to the directory where the file should be unzipped. The preference values can be edited, if necessary.

NOTE: This path must be a file path on the server. For example, C:\Inetpub\wwwroot\SampleImport\testImport.

Although the system preference values are set at the system level, you can edit the values when importing the file. For information on setting the system preferences, see [Setting System Preferences for Training on page 58](#).

- 5 In the URL of target location field, enter the URL to the same location specified in [Step 4](#), and click Import.
- 6 Verify that all imported course files are extracted from the zipped file in the installation directory. Examine the installation directory and verify that all files are extracted from the imported ZIP file.
- 7 Modify the course information as needed, and, if the course is for credit, set the Units field in Course More Info form to a nonzero value.

NOTE: Completion Criteria should be set to Launch Based.

- 8 Set the status to Active.

Importing an Unpackaged SCORM Course into Siebel Training

Before you import an unpackaged SCORM course, the SCORM content must be placed on the Web server from which it is launched. The SCORM content to be imported includes the imsmanifest.xml file.

This task is a step in [Process of Importing an AICC or SCORM Course on page 56](#).

To import an unpackaged SCORM course

- 1 Navigate to the Administration – Training screen > Course Details view.
- 2 In the Courses list, click the menu button, and choose Import Unpackaged SCORM.
- 3 In the Import from unpackaged SCORM dialog box, enter the URL to the imsmanifest.xml file location in the URL of IMS Manifest File field.

The location of the imsmanifest.xml file identifies the location of other resources so that lessons launch properly.
- 4 Click Import.

All of the courses specified in the imsmanifest.xml file are imported.
- 5 In the Courses view, verify the course information and modify the values in the fields, if desired.
- 6 Click the Lessons view tab, and in the Lessons and Lessons Data lists, verify that all imported lessons appear and that the field values match the information in the imported files.

- The field is blank if the data is not present in the original file.
 - The Status field value for each file should be Active.
 - The URL field value is a calculated field based on the input value in the Import Directory field of the Import dialog box, and the URL <resource> element in the imsmanifest.xml file.
- 7 In the course record, change the value in the Status field from Inactive to Active.
- Changing the status to Active allows course enrollment.

AICC Course Launch Processes

Figure 5 illustrates the system processes that occur when an AICC course is launched.

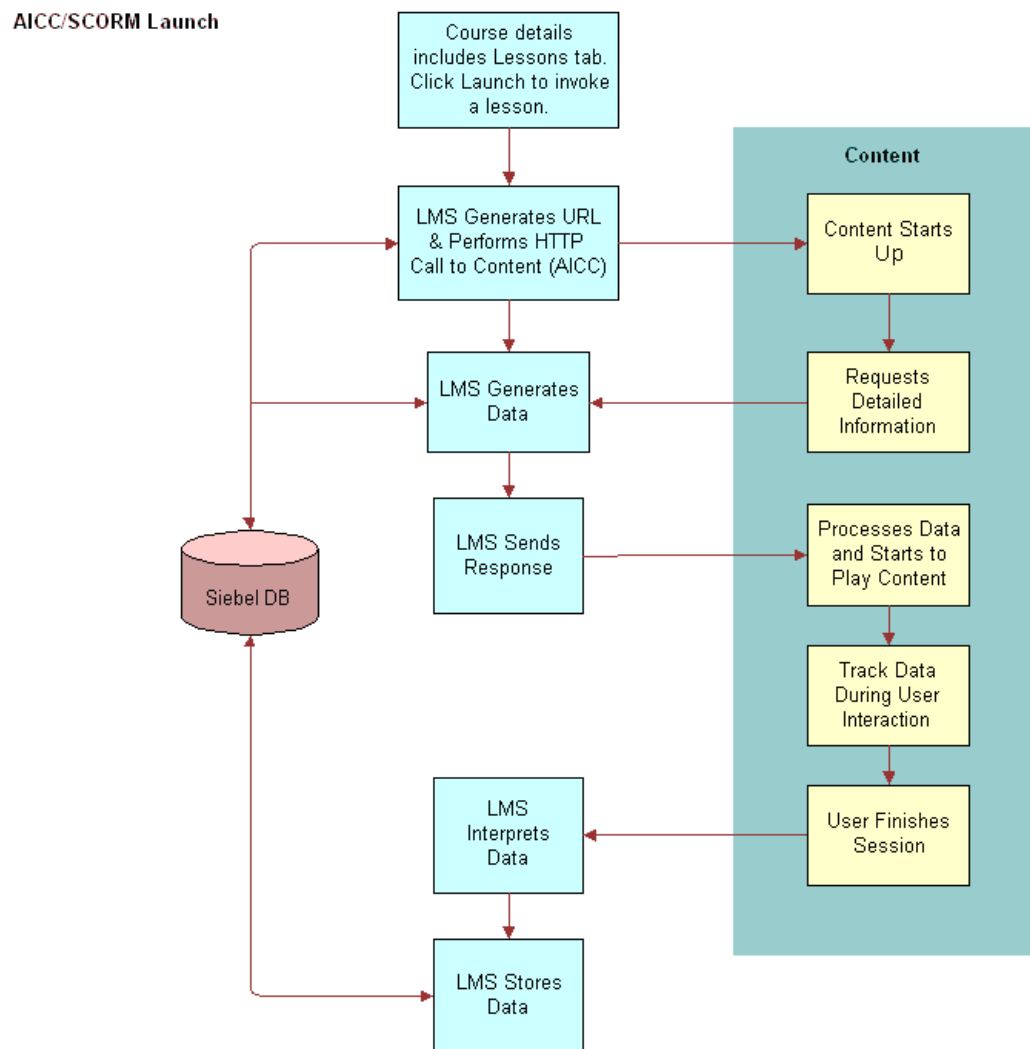


Figure 5. AICC Course Launch System and Content Processes

AICC Course Launch System and Content Processes

As [Figure 5](#) shows, the following processes occur when launch is clicked from the Course Details Lesson view:

- 1** The Learning Management System (LMS) generates the URL, and performs an HTTP (Hypertext Transfer Protocol) call to the Content system.
- 2** Content starts up and sends a request for detailed information.
- 3** The LMS generates data. Based on what Content is requesting (name and value pairs), Siebel Training responds with the data from the Siebel database.
- 4** The LMS sends the response. Based on the information gathered, Training sends the information back as HTTP.
- 5** Content processes the data and starts to play the training content.
- 6** Contact tracks data as the user interacts with the training content.
- 7** When the user finishes a session, the LMS interprets and stores the data. Training receives the Content information, interprets the information, and maps it to the database.

SCORM Course Launch Process

Figure 6 illustrates the system processes that occur when a SCORM course is launched.

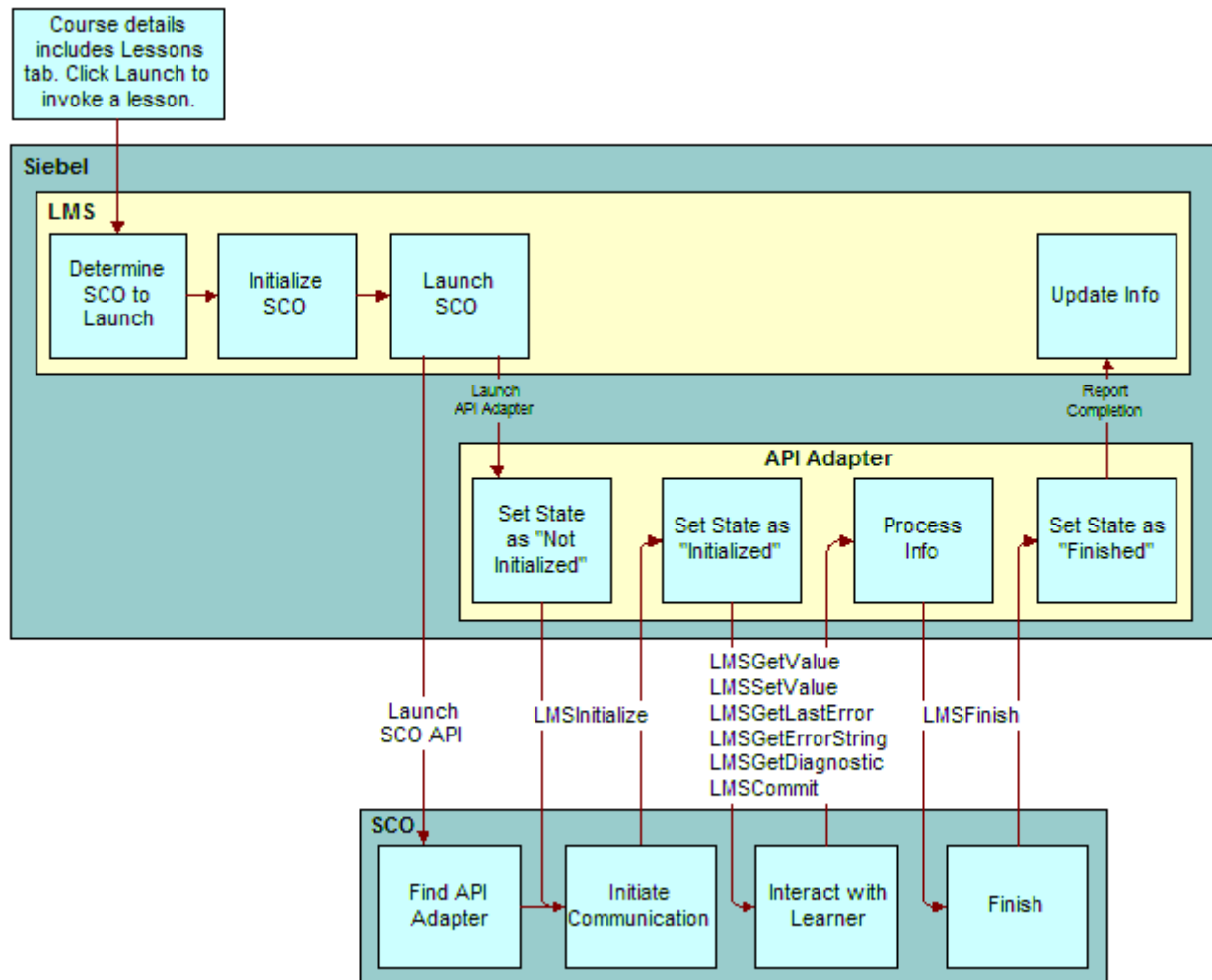


Figure 6. SCORM Course Launch

SCORM Course Launch

As Figure 6 shows, the following processes occur when launch is clicked from the Course Details Lesson view:

- 1 The LMS determines the SCO course to launch, initializes the SCO, and launches the course.
- 2 The API adapter is initialized and processes information. The LMSInitialize API initializes the communication between the SCO and API Adapter. When the student launches the course, the SCO (the course) finds the API Adapter, and initiates the communication with the API Adapter.

- 3 SCO sends information to the LMS. In some cases, the SCO will need to send information to the LMS about the learner's status. For example, if the student finishes the course, the LMS updates the status for this student.
- 4 The LMSFinish API completes the communication between the SCO and API Adapter. When the student has completed the course, the SCO lets the API adapter know that it is finished. SCO sends the LMSFinish API to communicate the completion.

8

Setting Up a Training Curriculum

This chapter describes how to add and modify curriculums and how to specify curriculum details. It includes the following topics:

- [Process of Setting Up a Training Curriculum on page 69](#)
- [Training Curriculum Elements on page 69](#)
- [Adding a Training Curriculum on page 70](#)
- [Specifying Training Curriculum Steps on page 72](#)
- [Specifying Courses for the Training Curriculum Steps on page 72](#)
- [Modifying Curriculum Records on page 73](#)
- [Viewing and Adding Training Curriculum Enrollments on page 73](#)
- [Specifying Training Curriculum Materials on page 74](#)
- [Releasing a Curriculum to Training Users on page 75](#)

Process of Setting Up a Training Curriculum

The following list shows the procedures that administrators typically perform when setting up a training curriculum. Your company may follow a different process according to its business requirements.

- [Adding a Training Curriculum on page 70](#)
- [Specifying Training Curriculum Steps on page 72](#)
- [Specifying Courses for the Training Curriculum Steps on page 72](#)
- [Modifying Curriculum Records on page 73](#)
- [Viewing and Adding Training Curriculum Enrollments on page 73](#)
- [Specifying Training Curriculum Materials on page 74](#)
- [Releasing a Curriculum to Training Users on page 75](#)

Training Curriculum Elements

A curriculum is a set of courses designed to fulfill a specific educational requirement such as a certification program or degree program.

Curriculums are predefined, ordered sequences of training elements. Each curriculum has a sequence of required steps. Each step can include one or more individual training elements (courses, events, exams, and so on), with specifications of how many elements are required to pass each step. This flexibility allows for electives (for example, taking three courses from a set of six) to be mixed with standard required elements. Each element and step can be individually weighted for tracking purposes.

Before Training users can enroll in a curriculum, you must provide detailed information about the curriculum and the courses included. Then, you can also specify literature materials that are associated with the curriculum itself, rather than being associated with individual courses. Curriculum materials and course materials are designated separately and are visible to training users using different views.

When you are satisfied with the details of the curriculum, you must release the curriculum to lock the content and make it available to users. Once released, curriculum details cannot be changed. Only the Access Group and Private Flag settings can be changed. End users can enroll in curriculum paths and can review their progress as they take successive courses within their career paths.

Adding a Training Curriculum

Perform the steps in the following procedure to add a curriculum to a training database. For information on establishing the courses that make up the curriculum, see [Specifying Courses for the Training Curriculum Steps on page 72](#).

This task is a step in [Process of Setting Up a Training Curriculum on page 69](#).

To add a curriculum

- 1 Navigate to the Administration - Training screen > Curriculums view.

- 2 In the Curriculum list, create a new record, and complete the fields for the new record. Some of the fields are described in the following table.

Field	Comments
Audience	<p>Choose an audience type in the Curriculum Audience dialog box. The values are:</p> <ul style="list-style-type: none"> ■ Alliance Partner ■ Customer ■ Channel Partner ■ Employee
Categories	<p>The curriculum category. Category examples are Communications Skills and Computer Science.</p> <p>Available values for Category are set in the TRAINING_CURR_CATEGORY_TYPE list of values.</p> <p>For more information about:</p> <ul style="list-style-type: none"> ■ Editing lists of values, see <i>Applications Administration Guide</i>. ■ Training-specific LOVs, see Appendix B, "Lists of Values (LOVs) for Training."
Check Transcript	Select this check box to automatically credit courses that users have completed as part of a curriculum, or to credit courses that users have previously taken.
Job Profiles	<p>Click the select button in this field to associate the course with one or more specific job roles.</p> <p>End users can locate the course using a search by job role.</p>
Max Points	An automatically calculated value that specifies the total number of points that can be obtained by completing the curriculum.
Min Points	An automatically calculated value that specifies the minimum number of points that can be obtained by completing the required portion of the curriculum.
Release	<p>Select this check box to lock the curriculum and make it available to end users.</p> <p>Administrators can edit a released curriculum by selecting Edit Curriculum from the curriculum menu.</p>
Type	<p>This field is used for informational purposes to indicate why courses in the curriculum are grouped together.</p> <p>The values are Course Bundle and Training Plan.</p>

Specifying Training Curriculum Steps

You can specify the series of steps that the training user must complete in a curriculum.

This task is a step in [Process of Setting Up a Training Curriculum on page 69](#).

To specify curriculum steps

- 1 Navigate to the Administration - Training screen > Curriculums view.
- 2 In the Curriculum list, select the curriculum that you added in [Adding a Training Curriculum on page 70](#), and then click the Curriculum Steps view tab.
- 3 In the Curriculum Steps list, create a new record, and complete the fields.

Specifying Courses for the Training Curriculum Steps

Perform the steps in the following procedure to designate the required courses for each step in the Training curriculum.

This task is a step in [Process of Setting Up a Training Curriculum on page 69](#).

To specify courses for the steps

- 1 Navigate to the Administration - Training screen > Curriculums view.
- 2 In the Curriculum list, select the curriculum, and then click the Curriculum Steps view tab.
- 3 In the Curriculum Steps list, select the step that you created in [Specifying Training Curriculum Steps on page 72](#).

The # of Required Courses field in the Curriculum Steps list determines how many courses are required to complete the step. If all of the courses are set to Optional, then any course is part of the step requirements.

For example, if in a step you want to specify that a user can complete three courses out of eight, then set the Min Points accordingly and leave the Required field in the Curriculum Courses list set to Optional for each course.

- 4 In the Curriculum Courses subview list, create a new record, and select a course.
- 5 In the Required field, select Optional or Required.

Curriculum courses that are defined as prerequisites allow you to select values of Optional or Prerequisite in the Required field.

- 6 (Optional) In the Points field, edit the point value for the course.

The default value for each course is 10 points.

- 7 Repeat [Step 4](#) through [Step 6](#) for each course you want to add to each curriculum step.

Modifying Curriculum Records

The following procedure describes how to modify curriculum records.

This task is a step in [Process of Setting Up a Training Curriculum on page 69](#).

To modify a curriculum record

- 1 Navigate to the Administration - Training screen > Curriculums view.
- 2 In the Curriculums list, select the curriculum record.
- 3 Click the More Info view tab, click the menu button, and select Edit Curriculum to unlock the fields.
- 4 Modify the values in the Audience, Categories, Check Transcript, Description, Job Profiles, Name, Release, Status, and Type fields if necessary.
- 5 Click the Curriculum Steps view tab and modify Min Points, if required.

NOTE: Only the Min Points field is editable. Max Points and Steps are calculated automatically when the Release flag is checked.

Viewing and Adding Training Curriculum Enrollments

Use the following procedures to view user enrollment details and add curriculum enrollments.

This task is a step in [Process of Setting Up a Training Curriculum on page 69](#).

To view curriculum enrollments

- 1 Navigate to the Administration - Training screen > Curriculums view.
- 2 In the Curriculum list, select the curriculum, and then click the Enrollments view tab.

Some of the fields are described in the following table.

Field	Comments
Depth	The student's depth score. This score is the calculated percentage value representing the sum of the points of the completed courses, divided by the value of minimum requirements and completion points.
Max Points	Maximum number of points obtained by completing all courses in the curriculum.

Field	Comments
Min Points	Minimum number of points required to complete the curriculum.
Progress	<p>Student's progress score.</p> <p>Progress scores are updated as users complete each step in the curriculum.</p> <p>The score is a calculated percentage value representing the minimum completion points (sum of the minimum step points), divided by the sum of the points of the completed courses and limited by the defined weight of the step.</p> <p>For example, for a step with a minimum point value of 40, the maximum point value for the step as applied to the progress value would be 40; any additional course points accrued beyond 40 would only apply to the Depth calculation.</p> <p>As a result, the progress calculation indicates how close an individual is to completing the minimum requirements for the curriculum. The Depth value indicates how completely the individual explored the curriculum.</p>

To add curriculum enrollments

- 1 Navigate to the Administration - Training screen > Curriculums view.
- 2 In the Curriculum list, select the curriculum, and then click the Enrollments view tab.
- 3 In the Enrollments list, click Add User, and select the name.

Specifying Training Curriculum Materials

Perform the steps in the following procedure to specify existing curriculum materials (literature), and to add new curriculum materials.

This task is a step in [Process of Setting Up a Training Curriculum on page 69](#).

To specify curriculum materials

- 1 Navigate to the Administration - Training screen > Curriculums view.
- 2 In the Curriculum list, select the curriculum, and then click the Materials view tab.
- 3 In the Materials list, create a new record, and select the literature item.

For more information about adding items to a dialog box list, see *Fundamentals*.

Repeat this procedure for each additional item you want to specify as curriculum materials.

For more information about literature items, see *Applications Administration Guide*.

Releasing a Curriculum to Training Users

A curriculum is not available to users until it is released by the administrator. Perform the steps in the following procedure to release a curriculum.

This task is a step in [Process of Setting Up a Training Curriculum on page 69](#).

To release a curriculum

- 1 Navigate to the Administration - Training screen > Curriculums view.
- 2 In the Curriculums list, select the curriculum you want to release.
- 3 Click the More Info view tab, select the Release check box.

This action locks the curriculum and makes it available to users.

NOTE: If a curriculum needs to be modified after it is released, see [Modifying Curriculum Records on page 73](#).

9

Creating and Modifying Skills Tests

This chapter covers how to create skills tests and perform assessments, how to add skills test questions and other elements, how to add or modify a skills test, and how to specify skills test details. It includes the following topics:

- [About Creating Skills Tests and Test Questions on page 78](#)
- [Process of Creating Skill Tests and Questions on page 79](#)
- [Creating Training Test Questions and Answers on page 79](#)
- [Creating and Verifying Training Question Pools on page 80](#)
- [Creating Headers and Footers for Training Test Elements on page 82](#)
- [Adding a Skills Test for Training on page 83](#)
- [Specifying Skills Test Details on page 85](#)

About Creating Skills Tests and Test Questions

Skills tests can include the following kinds of knowledge assessment methods:

- True-or-false questions
- Single-choice questions with one correct answer
- Multiple-choice questions with multiple correct answers
- Questions that require the student to type in a text answer
- Questions to which the student chooses a response from a numerical range

True-or-false, single-choice, multiple-choice, and range questions can be graded automatically within Training. Text answers must be read, evaluated, and graded by a person with administrator privileges. Questions with a range of responses are often used to allow the student to evaluate the effectiveness of the course or instructor and are not graded.

You can define stand-alone questions that can be used in multiple tests. Similarly, you can define stand-alone tests that are not associated with training courses, allowing you to associate a test with multiple courses. You also can define pools of questions from which individual test questions are randomly drawn each time a student takes the test.

Process of Creating Skill Tests and Questions

To create a skills test for a training course, the administrator typically performs the following procedures. Your company may follow a different process according to its business requirements.

- 1 [Creating Training Test Questions and Answers on page 79](#)
- 2 [Creating and Verifying Training Question Pools on page 80](#)
- 3 [Creating Headers and Footers for Training Test Elements on page 82](#)
- 4 [Adding a Skills Test for Training on page 83](#)
- 5 [Specifying Skills Test Details on page 85](#)

Creating Training Test Questions and Answers

The following procedures describe how to create a question that can later be associated with one or more skills tests and how to create an answer for each question.

This task is a step in [Process of Creating Skill Tests and Questions on page 79](#).

To create a question for use in skills tests

- 1 Navigate to the Administration - Training screen > Test Questions view.
- 2 In the Questions list, create a new record, complete the fields, and save the record.

Some of the fields are described in the following table.

Field	Comments
Type	<p>The type of question you are defining.</p> <p>This value is used to determine how the question appears, and what options are available. Choices include True or False, Text, Essay, Multiple Choice, Single Choice, Header, Range, Random Pool, Footer, Sub-Header, Ranged Response, and Survey.</p> <p>If you want to randomly draw a question from a pool, you must create a placeholder question by choosing the type Random Pool.</p>
Category	Use this field to indicate the general type of information sought in the question. The choices are All, Industry, Product, Job Role, and Organization.
Explanation	A text field optionally used to specify a single question pool to which the question belongs.

Field	Comments
Release	Select this check box to lock the test and release it to end users. After release, administrators have to create a new test version to change the test.
Admin. Notes	This field is not displayed to the user and allows the administrator to enter notes about the test for administrative purposes.

To create an answer to the question

- 1 Navigate to the Administration - Training screen > Test Questions view.
- 2 In the Questions list, select the question you created in [To create a question for use in skills tests on page 79](#), click the More Info view tab, and scroll down to the Answers list.
NOTE: The Release field check box should be selected after answers are created.
- 3 In the Answers list, create a new record:
 - In the Sequence field, a number is automatically entered.
 - In the Partial Value % field, enter a point value for the selected answer. For example, if two correct answers in a multiple choice should total 10 points, assign each answer a partial value of 50.
- 4 Repeat [Step 3](#) for each possible answer you want to appear to test takers.

You can sort records or use queries to find information of particular interest. To sort, click the menu button and select Advanced Sort.
- 5 If you remove an answer, thus leaving a gap in the sequence numbers, click Renumber.

Creating and Verifying Training Question Pools

Question pools are grouping of many questions that can then be randomly selected when a user takes a test. Questions can be shared among multiple pools, that is, a single question can be selected as part of any number of pools. You can also use one random pool many times in the same test, and you can create tests from various test questions and predefined question pools.

For example, if you want to create a test with 10 randomly selected questions, you can create 10 pools or create one pool and use it 10 times.

Table 7 describes considerations when creating a test with 10 randomly selected questions, and creating 10 pools, or creating one pool and using it 10 times.

Table 7. Question Pool Considerations

If...	Then...
You are using 10 different question pools.	Each pool should contain a unique set of questions.
You are developing one large question pool.	<ul style="list-style-type: none"> ■ Be sure to add enough questions to the pool to avoid duplicate questions. ■ Then, create a test that uses the same pool for every test question.

This task is a step in [Process of Creating Skill Tests and Questions on page 79](#).

To create a question pool

- 1 Create the individual questions for the pool. See [To create a question for use in skills tests on page 79](#).
- 2 Create and save an additional record in the Questions list with its Type set to Random Pool.
You do not need to specify answers for this question. It acts as a placeholder in tests, indicating that a randomly chosen question from the pool should be inserted at that point.
For more information, see [Creating Training Test Questions and Answers on page 79](#).
- 3 In the Questions list, select the question that you set to Random Pool, and click the Question Pool view tab.
NOTE: The release check box must be selected in the Question record for the question to be available for the Question Pool.
- 4 In the Question Pool list, create a new record, and select the question you want to include in the question pool.
- 5 Repeat [Step 4](#) for each additional question you want to place in the pool.

To verify that all questions for the pool appear in the list

- 1 In the Question list, select the any question whose type is Random Pool, and then click the Question Pool view tab.
- 2 In the Question Pool list, verify that all the questions for the pool appear in the list.

Training administrators can allow multiple questions from single-question pools. The test question sequence can be renumbered.

To create tests from various test questions and predefined pools

- 1 Navigate to the Administration - Training screen > Tests view.
- 2 In the Tests list, create a new record.
For information on completing the fields, see [Adding a Skills Test for Training on page 83](#).
- 3 In the Test Questions list, create a new record.
The Sequence field is automatically populated.
- 4 In the Question text field, select a question or a question pool question.
The remainder of the fields in the Test Questions record are completed, based on information provided when the selected question was created.
- 5 Repeat [Step 3](#) through [Step 4](#) for each question, or question pool question, you want to add to the test.

To view the answers for a question

- 1 In the Tests list, select the test, and then click the Test Questions view tab.
- 2 In the Test Questions list, select the question, and click the link in the Question Id field.
The answers display in the More Info form of Test Questions view.

To preview the finished test with questions

- 1 In the Tests list, select the test.
- 2 From the More Info form, click Preview.

Creating Headers and Footers for Training Test Elements

You can create a text header that can be included in a skills test as a title, a subtitle for a group of questions, or a generic visual separator between questions or question groups. You can also create a text footer, if desired.

This task is a step in [Process of Creating Skill Tests and Questions on page 79](#).

To create a header, subheader, and footer for use in skills tests

- 1 Navigate to the Administration - Training screen > Test Questions view.
- 2 In the Questions list, create a new record, and select Header in the Type field, and enter header text.
- 3 Click the More Info view tab, and select Release.
- 4 Repeat [Step 2](#) through [Step 3](#), selecting Sub Header, and then Footer from the Type field.

Adding a Skills Test for Training

You can add a skills test and then associate the skills test with one or more courses. For Instructor-Led type courses that have multiple class sessions, all class sessions of the course are automatically associated with the same test or tests.

This task is a step in [Process of Creating Skill Tests and Questions on page 79](#).

To add a skills test

- 1 Navigate to the Administration - Training screen > Tests view.
- 2 In the Tests list, create a new record.

Some of the fields are described in the following table.

Field	Comments
Display Title	A name you choose to identify the test.
Test Status	Use to indicate the status of the test and determine its availability. When value is Active, the test can be taken by any student enrolled in a course associated with the test.
Release	Select this check box to lock the test and release the test to end users. Administrators must create a new test version to change a test that is locked.
Header Text	Text to display in the header of the test.
Footer Text	Text to display in the footer of the test.
Test Type	The kind or purpose of the test. Typical values include Evaluation, Certification Exam, Course Survey, and Instructor Survey.
Associated Courses	One or more courses with which the test is associated. Students enrolled in these courses can access the test when the status of the test is active. Designate the main course associated with this test by using the Primary check box in the Selected box in the Training Course dialog box.
Time Limit (Minutes)	Amount of time a test taker may spend before submitting the test. Siebel Training does <i>not</i> enforce this time limit. You can manually verify how much time the test taker used by comparing starting and ending timestamps. If the test taker exceeded the time limit, you can manually change pass/fail results, but automatic scoring still takes place and displays its results as specified by the selected scoring method.

Field	Comments
Auto Grade	<p>Allows automatic scoring of tests.</p> <p>If this field is:</p> <ul style="list-style-type: none"> ■ Selected, the test taker's curriculum Weighted Completion value is automatically updated after the grading of any test that has no questions of type Text or Essay. ■ Cleared, or when a test contains Text or Essay questions, the test status is set to Pending for an administrator to grade. <p>After manually grading the test, the curriculum Weighted Completion value is updated when an administrator selects the Update Grade command from the Test Results form menu.</p>
Max Attempts	<p>Number of times a student may take the test.</p> <p>If you enter a value for Max Attempts that is greater than 1, then you should use extra care in selecting the value for the Scoring field. The Scoring field determines whether or not users can see correct answers to test questions after their first attempt to take the test.</p>
Partial Grade	<p>If this field is:</p> <ul style="list-style-type: none"> ■ Selected, then users receive partial credit for any multiple-choice test question for which they choose a correct response. ■ Cleared (normal method of use), then users get all multiple-choice selections correct or they get no points for the question.
Admin. notes	<p>This field is not displayed to the user and allows the administrator to put notes about the test for administrative purposes.</p>

Field	Comments
Review Score (%)	<p>Numeric value that sets the point at which users can see correct, graded test questions upon completion.</p> <p>If users:</p> <ul style="list-style-type: none"> ■ Fail, and the score is less than the % set by this value, then they see no test results. ■ Fail, and the score is greater than the % set by this value, then they see all test results and can tell which questions they missed (correct answers are not provided). ■ Pass, then they see all test results with correct answers.
Scoring Method	<p>The method used for grading the test results. The values are:</p> <ul style="list-style-type: none"> ■ No Score. Displays a test and calculates results, but does not compute a score or grade for the end user. Typically used for surveys or evaluations. ■ Standard. Displays number of points earned and pass-fail status. Allows the test taker to click the test name for details on correct answers to test questions. ■ Category. Grades tests using two methods—Standard and Category. With category scoring, each question is assigned a particular category, for example Product, Industry, and so on. Then, the results are calculated and reported to the user by category type. Users, managers, and administrators use this functionality to assess scoring trends and identify particular areas of user strengths and weaknesses. ■ Knowledge Check. Same as Standard scoring.

Specifying Skills Test Details

Before a student can take a skills test, you must specify the details of the test, including test questions, answers, and the number of points each answer is worth.

This task is a step in [Process of Creating Skill Tests and Questions on page 79](#).

To specify skills test details

- 1 Navigate to the Administration - Training screen > Tests view.
- 2 In the Tests list, select the test you created in [To add a skills test on page 83](#), and then click the link in the Display Title field.

The Tests form appears in the upper part of the screen, and in the lower part of the screen, two tabs appear: More Info and Test Questions.

- 3 In the Test Questions list, create a new record, and in the Question Text field, select a question or another test element, as described in the following table.

To...	Select...
Include a specific question in the test for every test taker.	The question.
Indicate that a question should be randomly drawn from a pool of questions for each separate test taker.	Select the placeholder record of the pool of questions.
Indicate header, subheader, or footer text.	Select a Question (with a value in the Type field) as a header, a subheader or footer.

Complete the remaining fields in the Test Questions record.

- 4 Repeat [Step 3](#) for each additional question or other element you want to include in the test.
- 5 Calculate the total number of points that test takers can earn if they answer all questions correctly.
- 6 Click the More Info view tab and, complete the following fields:
 - a In the Total Points field, enter the total number of points available in the test.
 - b In the Pass Score % field, enter the minimum number of points necessary to pass the test.
- 7 Click Preview to verify that your questions and answers appear correctly in a Web browser. The test text appears in a separate window.
- 8 After you have inspected the test, use the thread bar to return to the test.
- 9 When you are satisfied with all the attributes for the test, select the Release check box. Releasing the test locks the test attributes and makes the test available for use with courses.

10 Setting Up a Training and Curriculum Catalogs

This chapter describes how to set up training and curriculum catalogs and how to specify catalog visibility. It includes the following topics:

- [Process of Setting Up a Training and Curriculum Catalogs on page 87](#)
- [Creating a Training Catalog and Categories on page 87](#)
- [Assigning Courses to Categories on page 88](#)
- [Creating a Training Curriculum Catalog and Categories on page 88](#)
- [Setting Catalog Visibility on page 89](#)

For more information on creating catalogs, see *Siebel eSales Administration Guide*.

Process of Setting Up a Training and Curriculum Catalogs

The following list shows the procedures that administrators typically perform when setting up training and curriculum catalogs. Your company may follow a different process according to its business requirements.

The following list shows tasks administrators typically perform to set up a training and curriculum catalog:

- [Creating a Training Catalog and Categories on page 87](#)
- [Assigning Courses to Categories on page 88](#)
- [Creating a Training Curriculum Catalog and Categories on page 88](#)

For information on how the catalog visibility is controlled, see [Setting Catalog Visibility on page 89](#).

Creating a Training Catalog and Categories

Perform the steps in the following procedure to add a training catalog and curriculum categories to the training database. For information on establishing the courses that make up the curriculum, see [Specifying Training Curriculum Steps on page 72](#).

This task is a step in [Process of Setting Up a Training and Curriculum Catalogs on page 87](#).

To create a training catalog and catalog categories

- 1** Navigate to the Administration - Catalog screen > Catalog Administration view.
- 2** In the Catalogs list, create a new record, and perform the following steps:
 - a** Set the Catalog Type to Training.
 - b** Enter Effective Start Date and Effective End Date.
- 3** Drill down on the catalog name, and in the Categories list, create a new category, and complete any necessary fields.

Assigning Courses to Categories

You associate courses with categories using the Categories view. You can also perform this task from the Course Details view. In this task, the course is created first, and then you associate the category to the course.

This task is a step in [Process of Setting Up a Training and Curriculum Catalogs on page 87](#).

To associate courses and categories from the Categories view

- 1** Navigate to the Administration - Catalog screen > Catalog Administration view.
- 2** In the Catalogs list, query for the catalog, and then click the link in the Name field.
Click the arrow at the end of the row of links to expose additional links.
- 3** In the Categories form, click the Training link bar, create a new record, and query for the course.

Creating a Training Curriculum Catalog and Categories

You can create curriculums and a curriculum catalogs, and associate each with classes.

This task is a step in [Process of Setting Up a Training and Curriculum Catalogs on page 87](#).

To create training curriculum catalog and categories

- 1** Navigate to the Administration - Catalog screen > Catalog Administration view.
- 2** In the Catalogs list, create a new record, and perform the following steps:
 - a** Set the Catalog Type to Training Curriculum.
 - b** Enter Effective Start Date and Effective End Date.
- 3** Drill down on the catalog name, and in the Categories list, create a new category, and complete any necessary fields.

Setting Catalog Visibility

Table 8 describes how the catalog visibility is controlled at three levels: Catalog, Category, and the object at which it is supported. The Catalog and Category visibility is set up from the Administration - Catalog screen.

Table 8. Three Levels Controlling Catalog Visibility

If...	Then...
You want to set up catalog visibility from the catalog level.	<p>Drill down on the catalog name, and click the Access Groups view tab.</p> <p>This setting determines if a catalog is visible to a user.</p> <p>The Access Group view tab and the Private check box control catalog visibility on the Training Catalog page.</p>
You want to set up catalog visibility from the category level.	<p>Drilldown on the catalog name, and from the Categories view tab, click the Access Groups navigation bar.</p> <p>This setting determines if a catalog category is visible to the user.</p> <p>The Access Groups and the Private check box control Catalog Category visibility on the Training Catalog and drilldown pages.</p>
You want to set up training or training curriculum visibility.	The Access Groups field and Private Flag check box, which is defined from the Administration Training set of views, controls visibility after the catalog and catalog category visibility have been applied.

11 Managing Enrollments, Test Results, and Reports

This chapter covers how to work with enrollments, test results, and other information in the Siebel Training. It includes the following topics:

- [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#)
- [Adding and Viewing Course Enrollments on page 92](#)
- [Synchronizing Enrollment Status on page 94](#)
- [Automating Waitlist Management on page 94](#)
- [Viewing Enrollment Information for a Self-Paced Course on page 98](#)
- [Viewing Enrollment Information for a Scheduled Class on page 98](#)
- [Viewing All Course and Class Registration Information on page 99](#)
- [Viewing All Curriculum Enrollments Information on page 99](#)
- [Viewing Partner Enrollments on page 100](#)
- [Registering Training Customers on page 100](#)
- [Registering a Customer for a Self-Paced \(CD-ROM or Web\) Course on page 101](#)
- [Enrolling Groups for Self-Paced and Scheduled Classes on page 102](#)
- [Enrolling Students \(Delegated Administrator\) on page 103](#)
- [Canceling Training Enrollments on page 104](#)
- [Manually Viewing Skills Tests on page 106](#)
- [Manually Scoring Skills Tests Questions on page 106](#)
- [Generating Training Reports on page 107](#)

Process of Working with Enrollments, Cancellations, Test Results, and Reports

The following list shows the procedures that training administrators typically perform when working with enrollments, cancellations, test results, and reports. Your company may follow a different process according to its business requirements.

Administrator Procedures

To work with enrollments, cancellations, test results, and reports, perform the following tasks:

- 1 Adding and Viewing Course Enrollments on page 92
- 2 Synchronizing Enrollment Status on page 94
- 3 Automating Waitlist Management on page 94
- 4 Viewing Enrollment Information for a Self-Paced Course on page 98
- 5 Viewing Enrollment Information for a Scheduled Class on page 98
- 6 Viewing All Course and Class Registration Information on page 99
- 7 Viewing All Curriculum Enrollments Information on page 99
- 8 Viewing Partner Enrollments on page 100
- 9 Registering Training Customers on page 100
- 10 Registering a Customer for a Self-Paced (CD-ROM or Web) Course on page 101
- 11 Enrolling Groups for Self-Paced and Scheduled Classes on page 102
- 12 Enrolling Students (Delegated Administrator) on page 103
- 13 Canceling Training Enrollments on page 104
- 14 Manually Viewing Skills Tests on page 106
- 15 Manually Scoring Skills Tests Questions on page 106
- 16 Generating Training Reports on page 107

Adding and Viewing Course Enrollments

Use the procedures in this section to add enrollments to courses and scheduled classes, and to view current enrollments.

NOTE: Registered contacts who are not associated with an account cannot register for a class unless a system default price list is set up. For more information, see *Siebel eSales Administration Guide*.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports](#) on page 92.

To add enrollments to self-paced courses

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and then click the Add Enrollments view tab.
- 3 In the Add User list, click Add User, and select a contact.
- 4 Select the Override Prerequisites check box to override any conflicts that occur from adding a user who has not met the prerequisites.
- 5 Repeat steps [Step 3](#) to [Step 4](#) until you are done adding names.
NOTE: If the user being added by the administrator is not an employee, the Shopping Cart view appears. The remaining steps apply for nonemployee users.
- 6 In the Shopping Cart view, verify that the appropriate training charges appear, and then click Check Out.
- 7 Enter the enrolled user's credit card information and any other information, and then confirm the order.

To add enrollments to scheduled classes

- 1 Navigate to the Administration - Training screen > Class Details view.
- 2 In the Classes list, review the Start field dates, and select the class to which you want to add enrollments.
- 3 Click the Add Enrollments view tab, click Add User, and select a contact.
- 4 Select the Override Prerequisites check box to override any conflicts that occur from adding a user that has not met the prerequisites.
- 5 Repeat steps [Step 3](#) to [Step 4](#) until you are done adding names.
NOTE: If the user being added by the administrator is not an employee, a shopping cart view appears. The remaining steps apply for nonemployee users.
- 6 In the Shopping Cart view, verify that the appropriate training charges appear, and then click Check Out.
- 7 Enter the attendee credit card information and other information for which you are prompted, and confirm the order.

To view current enrollments

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and click the Class Details link.
- 3 In the Classes list, click the link in the Start field for the session.

The Enrollments list, showing enrolled students, appears.

NOTE: You can also view enrollments by navigating to the Administration - Training screen's All Enrollments view. For more information, see [Viewing All Course and Class Registration Information on page 99](#).

Synchronizing Enrollment Status

This procedure uses the Update Seats feature to synchronize the seats and the waitlisted number with the enrollment status.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

To synchronize enrollment status

1 Navigate to the Administration - Training screen > Class Details view.

2 In the Classes list, query for the class, and then click the Enrollments view tab.

The enrollments, seats taken, open seats, and waitlist seats, may be out of synchronization.

3 Click Update Seats to synchronize the seat counts.

The following table describes what happens after clicking Update Seats if there is someone on the waitlist and there is an open seat, or if there is an open seat, there are people on the waitlist, and there is less than 24 hours before the class starts.

If...	Then clicking Update Seats...
The Allow Waitlist and Automate Waitlist flags are selected, there is someone on the waitlist, and there is an open seat.	Puts the enrollee in Waitlist-Pending state and send them a notification email.
There is an open seat, there are people on the waitlist, and less than 24 hours before the class starts.	Puts the enrollee in Open-Waitlist mode.

Automating Waitlist Management

Use the procedures in this section to add enrollments to courses and scheduled classes, and to view current enrollments. As the enrollments change, the administrator can use the Enrollment view to see the current enrollment status.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

This topic includes the following procedures:

1 [Setting Up Training Workflows on page 95](#)

2 [Setting Up Courses and Classes for Waitlist Management on page 95](#)

3 [Viewing Enrollment Information for a Self-Paced Course on page 98](#)

4 [About Changing Enrollments and Monitoring Status on page 97](#)

Setting Up Training Workflows

The administrator must:

- Set up workflows for the eTraining Class Waitlist-Pending Email and the eTraining-Update Class Registration.
- Check the Workflow Policies and generate triggers for them.

For more information, see [Verifying and Activating Training Workflow Processes on page 14](#). The administrator is responsible for setting up two workflows.

- eTraining Class Waitlist - Pending Email
- eTraining - Update Class Registration

See [Verifying and Activating Training Workflow Processes on page 14](#).

Setting Up Courses and Classes for Waitlist Management

You can set the maximum number of attendees and the waitlist limit for each class.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

NOTE: Waitlist management is only appropriate for classes and not for self-paced courses.

To set up classes for waitlist management

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, create a new record, in the Format field select Instructor-Led, and then click the More Info view tab.
- 3 In the More Info view tab:
 - a Set the Max Attendees to the maximum number of seats in the class, for example 30.
 - b Make sure that Auto Confirm and Allow Waitlist are selected.
- 4 Click the Class Schedule view tab, create a new record, and enter a start date and end date.
- 5 Drill down on the start date, and in the Sessions list, create a new record.
- 6 Click the More Info view tab, set the Waitlist Count to number of students you want on the waitlist, Max Seats to the number to total seats in the class, and make sure Allow Cancel check box is selected.

NOTE: Max Seats and Waitlist Count only applies to classes and not to self-paced courses.

- 7 Use the thread bar to return to the Courses Class Schedule View, and set Status to Active.

Monitoring Class Enrollment

You can use the Enrollments view tab to monitor the seat availability in a class.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

To monitor class enrollment

- 1 Navigate to the Administration - Training screen > Class Details view.
- 2 Query for the class for which you want to monitor enrollments, and click Enrollments view tab.
- 3 To monitor the enrollment statuses and the seat availability, make the list active and press ALT+ENTER.

For information about what results when end users change their enrollment status and what appears in the Enrollment view, see [About Changing Enrollments and Monitoring Status](#).

About Changing Enrollments and Monitoring Status

Table 9 describes what appears in the Enrollment view when students change their class enrollment status.

Table 9. Changing Enrollments and Monitoring Status in the Enrollment View

If...	Then...	And the Enrollment View Shows...
A student cancels a Confirmed/Pending-Approval or Waitlist-Pending enrollment, there are others on the waitlist for the same class, and the class start time is more than 24 hours away.	<p>The next enrollment in the waitlist receives the Waitlist pending email.</p> <p>The user has 24 hours to respond to the email for the enrollment to be confirmed.</p> <p>NOTE: Use the Duration and Units fields in the eTraining Class Waitlist-Pending Time Limit workflow policy (Administration - Business Process screen > Policies List view) to change the time limit the user has to respond to the email. Any time a policy is changed, the triggers need to be regenerated.</p>	The original enrollment is canceled, and the enrollment status of the first student on the waitlist becomes Waitlist Pending.
A student cancels a Confirmed/Pending-Approval or Waitlist-Pending enrollment, there are others on the waitlist for the same class, and the class start time is less than 24 hours away.	The enrollment is canceled, and all the people on the waitlist go to the first-come, first-served/Open Waitlist state.	The available seat count goes up by one, and even those not on the waitlist can enroll in the class and get a confirmed enrollment.
The student receives the Waitlist Pending email, but lets the 24 hour response time lapse.	The enrollment is canceled and the next person on the waitlist receives the Waitlist Pending email.	The student's enrollment is canceled, and the status of the next person receives Waitlist-Pending status.
The student receives the Waitlist Pending email, and drops the class.	The enrollment is canceled and the next person on the waitlist receives the Waitlist Pending email.	The student's enrollment is canceled, and the first person on the waitlist receives waitlist-pending status.
The student receives the Waitlist Pending email, and enrolls in the class.	The student logs into Siebel Training and enrolls in the class.	The student's enrollment is confirmed, and the waitlist is decreased by one.

Table 9. Changing Enrollments and Monitoring Status in the Enrollment View

If...	Then...	And the Enrollment View Shows...
A waitlisted student drops the class.	The enrollment is canceled.	The student's enrollment is canceled, and the waitlist is decreased by one.
One of the confirmed enrollees drops the class, and there is no one on the waitlist.	The enrollment is canceled.	There are open seats in the class, and no one is on the waitlist.
The administrator enrolls in the class, and there is an open seat.	The enrollment is confirmed.	The Enrollment view shows that the administrator is enrolled.

Viewing Enrollment Information for a Self-Paced Course

You can view available information about persons who have registered for a self-paced course. A self-paced course, such as a Web-based course or a CD-ROM course, does not have classes.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

To view registration information for a self-paced course

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and click the link in the Name field.
- 3 Click the Enrollments view tab.

The Enrollment list includes information such as the names of course enrollees, the enrollment status and registration number, and so on.

Viewing Enrollment Information for a Scheduled Class

You can view enrollment information for a particular class of an Instructor-Led course. For information on adding enrollments, see [Adding and Viewing Course Enrollments on page 92](#).

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

To view registration information for a scheduled class

- 1 Navigate to the Administration - Training screen > Class Details view.

-
- 2 In the Classes list, select the class for which you want to view enrollment information, and click the Enrollments view tab.

The enrollment list appears, showing all enrollments for the selected class.

Viewing All Course and Class Registration Information

You can view enrollment information for all courses listed in the system, including classes.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

To view all course and class registration information

- 1 Navigate to the Administration - Training screen > All Enrollments view.
- 2 In the Enrollments list, sort records or use queries to find information of particular interest, and click the More Info view tab.

The Enrollments list shows:

- All registered participants and the classes for which they have registered.
- Information about all registration for all classes and courses in the system.

Some fields are described in the following table.

Field	Comment
Account	Click this link to drill down to the Account Detail for the student on the Contact view.
Account Site	Part of the user key for Accounts (accounts are unique by name and site); used to describe address; Account Location field in the Account BusComp.
Cancellation Billing Status	There are four status selections—Student Cancel Bill, Student Cancel No Bill, Admin Cancel Bill, and Admin Cancel No Bill.

-
-
- 3 Click the Tests Attempts view tab to review the tests attempted by each the enrollee.

Viewing All Curriculum Enrollments Information

You can also view information about all curriculum enrollments.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

To view all curriculum enrollments information

- 1 Navigate to the Administration - Training screen > Curriculum Enrollments view.

The Enrollments list shows all registered participants and the curriculum paths for which they have registered. You can sort records or use queries to find information of particular interest.

- 2 Click the Enrollment Steps view tab to review the steps and courses in the curriculum path completed by each the enrollee.

Viewing Partner Enrollments

The Partner Enrollments view is typically used for Siebel Training partner-specific deployments, but other users may find this information useful. Partner enrollments are also viewable from the Enrollment List.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

To view partner enrollments

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the course, and then click the Partner Enrollments view tab.

In the Partner Enrollments list, query to find the course for which you want to view partner enrollments, and review the records.

Registering Training Customers

Customers of an organization can use the same Training application to view, register, and purchase training. They can use their Web browsers to register for courses and classes at a Training Web site, and you can use administrative screens to register a student who has contacted your organization by telephone, fax, mail, or in person.

This topic includes the following procedures:

- [Registering a Customer for a Self-Paced \(CD-ROM or Web\) Course on page 101](#)
- [Registering a Customer for a Scheduled Class on page 102](#)
- [Enrolling Groups for Self-Paced and Scheduled Classes on page 102](#)

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

Registering a Customer for a Self-Paced (CD-ROM or Web) Course

You can register a customer for a self-paced course, such as a Web-based course or a CD-ROM course. The following procedure assumes that the prospective student is already listed as a contact.

This task is a step in [Registering Training Customers on page 100](#).

To register a customer for a self-paced course

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, select the self-paced course, and then click the course name.
- 3 In the Add User form, click Add User, select a name, and click Finish.

NOTE: If users have not met certain course prerequisites, a message appears indicating that prerequisite courses must be completed before this enrollment can be confirmed. Administrators can select the Override Prerequisites check box on the Add Enrollments view tab, and then click Finish to bypass all prerequisites and complete the current enrollment. Prerequisite override capability can be used for single or multiple enrollments.

The following table describes what happens if the user the administrator is adding is or is not an employee.

If...	Then...
The user being added by the administrator is an employee.	They are registered and added to the Enrollments view tab.
The user being added by the administrator is not an employee.	<p>The shopping cart appears.</p> <p>Verify that the appropriate training charges appear, and click Check Out.</p> <p>For more information on Shopping Cart functionality, see <i>Siebel eSales Administration Guide</i>.</p>

- 4 Click the Enrollments view tab.

A read-only value appears in the Status field for the attendee registered, reflecting the attendee's registration status.

NOTE: Users can edit and save quotes as well as add details to the order if necessary. For more information on quotes and orders, see *Product Administration Guide*.

Registering a Customer for a Scheduled Class

You can register a prospective student for a scheduled class of an Instructor-Led class. This procedure assumes that the prospective student is already listed as a contact in the contact table.

This task is a step in [Registering Training Customers on page 100](#).

To register a customer for a scheduled class

- 1 Navigate to the Administration - Training screen > Class Details view.
- 2 In the Classes list, select the class for which you want to view enrollment information.
- 3 Click the Add Enrollments view tab, click Add User, select a name, and click Finish.

NOTE: If users have not met certain course prerequisites, a message appears indicating that prerequisite courses must be completed before this enrollment can be confirmed. Administrators can select the Override Prerequisites check box on the Add Enrollments view tab, and then click Finish to bypass all prerequisites and complete the current enrollment. Prerequisite override can be used for single or multiple enrollments.

The following table describes what happens if the user the administrator is adding is or is not an employee.

If...	Then...
The user being added by the administrator is an employee.	They are registered and added to the Enrollments view tab.
The user being added by the administrator is not an employee.	<p>The shopping cart appears.</p> <p>Verify that the appropriate training charges appear, and click Check Out.</p> <p>For more information on Shopping Cart functionality, see <i>Siebel eSales Administration Guide</i>.</p>

- 4 Click the Enrollments view tab.

A read-only value appears in the Status field for the attendee registered, reflecting the attendee's registration status.

Enrolling Groups for Self-Paced and Scheduled Classes

You can register groups of students for a self-paced class and for a scheduled class of an Instructor-Led class. Members of the group should already be listed as contacts.

This task is a step in [Registering Training Customers on page 100](#).

To enroll multiple students at the same time

- 1** Navigate to the Administration - Training screen, and in the link bar, click one of the following links:
 - Course Details (for self-paced classes)
 - Class Details (for scheduled classes)
- 2** In the Courses or Classes list, select the course or class, and then click the Add Enrollments view tab.
- 3** Click Add User, select multiple users, and click Finish.
All the users selected are enrolled at the same time.

To cancel enrollments for a group of students

- 1** Navigate to the Administration - Training screen, and click the one of the following links:
 - Course Details (for self-paced classes)
 - Class Details (for scheduled classes)
- 2** In the Courses or Classes list, select the course or class, and click the Enrollments view tab.
- 3** In the Enrollments list, select one or more students.
- 4** From the application-level menu, choose Edit > Change Records.
- 5** In the Change Records dialog box, select Status as the field, and in the Value field, select a status such as Cancelled By Admin.
Email notifications are sent to the enrollee when the status changes to Cancelled or Cancelled By Admin.

To verify registration status for students

- 1** Navigate to the Administration - Training screen > Class Details view.
- 2** In the Classes list, select the class, and then click the Enrollments view tab.
The enrolled students should have a registration status of confirmed.

Enrolling Students (Delegated Administrator)

Managers, who have been assigned ERM Manager responsibility, and other users whose user profiles have the Training Delegation flag selected can access the Enroll Others link. When delegated administrators click the Enroll Others link, they automatically navigate to an enrollment view where the delegated administrator can enroll other students in courses. For instructions on how to assign a delegated administrator, see [Setting Up a Delegated Training Administrator](#).

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

To enroll students as a delegated administrator

- 1** From the Training home page, locate the course using the Find Training links or the Catalog screen.
- 2** From the Search Courses page, query for the course.
- 3** In the Course record, click the Enroll Others link.
- 4** Click Add User, select one or more users, and click Finish.
- 5** Click Enroll Current User to complete the enrollment for the selected user.

Enrollment checks are performed, and the user is added to the quote. The Shopping Cart view displays if the user being added is a nonemployee. Otherwise the user is enrolled automatically.

The Shopping Cart view includes line items for student names. Click the Delete button to remove a user from the quote or order.

- 6** (Optional) If there are other users to enroll in the course, click Add User and perform queries on any field in the Contacts list to find the next student to be enrolled.
- 7** After all students are added, complete the order if a shopping cart was created during the enrollment process.
 - You can review the quote and order details by navigating to the My Accounts screen and selecting either My Quotes or My Orders. Students, however, do not have access to QuoteOrder information.
 - Students on the order receive a course confirmation email and see confirmed or waitlisted enrollments in their My Media Training or My Live/Classroom Training lists.

Canceling Training Enrollments

The cancellation procedure differs, depending on whether a self-paced course or an Instructor-Led class is being canceled:

- For a self-paced course, use the Course Details screen.
- For an Instructor-Led class, use the Class Details screen.

NOTE: If an order containing training courses is canceled from the order management views, training enrollments are automatically canceled.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports](#) on page 92.

The effects differ whether a customer, employee, or administrator cancels an enrollment, as listed in [Table 10](#).

Table 10. Effects That Occur if a Customer, Employee, or Administrator Cancels an Enrollment

If...	Then...
A customer or employee cancels an enrollment for an Instructor-Led class.	The number of available seats in the class is automatically updated.
Administrator cancels an enrollment.	<p>The number of available seats in the class is automatically updated.</p> <p>You can use the Update Seats method to check the seat counts, if required.</p> <p>NOTE: Enrollments with orders associated with them, such as nonemployee customers, cannot be canceled by the end user. The administrator needs to cancel the associated order and calculate the refund as per their Order Entry modules and company policies.</p>

To cancel a course enrollment for an attendee

- 1 Navigate to the Administration - Training screen > Course Details view.
- 2 In the Courses list, query for the course, and then click the Enrollment view tab.
- 3 Select the enrollment record, and change the Status (for example, Pending, Confirmed) to Cancelled.
- 4 (Optional) If the course or class involved a fee, and if the enrollee's status was Confirmed, follow your organization's standard procedures for refunding any amount due.

To cancel a class enrollment and send an email to the attendee

- 1 Navigate to the Administration - Training screen > Class Details view.
- 2 In the Class Details list, query for the class, and then click the Enrollments view tab.
- 3 Select the enrollment record you want to cancel, change the Status to Cancelled By Admin, and in the Class list, click Update Seats.

Click the More Info view tab to note that the number of Open Seats has been recalculated.

The attendee receives the Admin Class Cancellation Email if automatic email notification was set up. For more information, see [Setting Up Automatic Training Notification Messages on page 14](#).
- 4 (Optional) If the class involved a fee, and if the enrollee's status was Confirmed, follow your organization's standard procedures for refunding any amount due.

Manually Viewing Skills Tests

The following procedure describes how to view skills test results.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

To manually view skills test results

- 1 Navigate to the Administration - Training screen > Test Results view.

Each Test Results list record shows the name of a person who took a test, the test that person took, the score, and other information.

- 2 The following table describes how to view a user's performance on a test.

If...	Then...
You want to view detailed information about a user's performance on a test.	<p>Select the appropriate record in the Test Results list, and click the Result Details view tab.</p> <p>The User Answers list, located below Results Details, shows the selected user's answers to the question.</p>
You want to view detailed information about the selected user's answers to a particular question.	<p>Select the question in the Result Details list, and then scroll down to view the User Answers and Answers lists.</p> <p>The Answers list shows the available answers for multiple-choice questions. Each correct answer is indicated by a check mark in the Correct field.</p>

Manually Scoring Skills Tests Questions

Automatically graded test scores and correct answers become available to students almost immediately after they submit their tests. For tests that include questions that must be manually graded, test scores become available to students shortly after grading is complete. [Table 11](#) describes scoring multiple choice, text, or essay type questions.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

For information about how students view test results, see [Reviewing Skills Test Results on page 139](#).

NOTE: When a student has passed all required tests for a course, that student's enrollment status for the course is automatically updated to Completed. If the student is enrolled in a curriculum that includes the course, the curriculum Weighted Completion value is updated when the course is completed. Use the Update Grade command when manually grading a test to make sure that the curriculum Weighted Completion value is updated correctly. Do not directly set the student's enrollment status to Completed.

Table 11. Viewing Skill Test Results and Manually Scoring Questions

If...	Then...
All the questions in the test are multiple choice.	A Siebel Training skills test can be scored automatically. In such a case, viewing skill test results is an option for the Training administrator.
A skills test includes Text or Essay type questions.	A person with administrator privileges for Training must evaluate a students' answers to those questions and assign appropriate scores.

To manually score skills test questions of type Text or Essay

- 1** Navigate to the Administration - Training screen > Test Results view.
- 2** In the Test Results list, select any test result record that you want to grade manually, and then click the Result Details view tab.
- 3** For each question that has the value of Essay or Text in the Type field:
 - a** Select the question in the Result Details list.
 - b** Compare the user's answers in the User Answers list with the correct answers in the Answers list.
 - c** In the Result Details list, enter the appropriate number in the Points field.
- 4** After you have finished assigning points to all questions that require manual scoring, click Update Grade in the Test Results form.
A new value reflecting the points manually assigned appears in the Points Received field.
- 5** Click the More Info view tab to return to the Tests Results list in order to grade another set of test answers.

Generating Training Reports

You can generate various Siebel Training reports to view information on enrollments, test results, materials, and so on. Access each report by navigating to a specific view from the Administration - Training screen, clicking the Reports icon on the toolbar, and then selecting the report.

When the report is generated, it appears in the Siebel Report Viewer window. After generating a report, you can view data on the screen, save the report data to disk, or print the report data. For more information on reports, see *Siebel Reports Administration Guide*.

This task is a step in [Process of Working with Enrollments, Cancellations, Test Results, and Reports on page 92](#).

[Table 12](#) describes the report and the view from which the report is accessed.

Table 12. Siebel Training Reports

Report	View	Description
Course List	Course Details	This report provides information about all the courses in the current query of the Courses list. It displays the same data as the Courses list, except that the Created By field is omitted.
Course Schedule	Course Details, Enrollments view tab	This report provides information about all the dates and times when a course is scheduled to be held. It displays selected fields from the Course form and the Class Schedule list.
Course Registration	Course Details, Enrollments view tab	This report provides information about students who are registered to attend a selected course. It displays selected fields from the Course form and the Class Registration list.
Curriculum Detail	Curriculums list	The Curriculum Detail report lists details on all the active and inactive courses in the Curriculum Path.
Curriculum Registrants	Curriculums, Enrollments view tab	The Curriculum Registrants report lists the individuals who are registered for any of the curriculum paths defined in the system. The report displays selected fields from the Curriculum form and the Enrollments list.
Skills Test Detail	Tests, Test Questions view tab	This report provides information about the selected skills test. In the Tests list, select the test and click the Test Questions view tab.
Training Library List	Training Library	This report provides a list of items in the Training Library.

Table 12. Siebel Training Reports

Report	View	Description
Class Registration	Class Details, Enrollments view tab	This report provides information about registrations for a particular class.
Curriculum Materials	Curriculums, Materials view tab	This report provides information about materials used in the curriculum.

Generating Reports Using Siebel Analytics

Additional Training reports can be generated through Siebel Analytics. Training reports available through Siebel Analytics include:

- Skill Test Detail
- Compliance
- Training Operations
- Training Performance

For further information on Training reports available using Siebel Analytics, see *Siebel Analytics User Guide*.

12 Accessing the Training Site

This chapter covers how to access and log in to Siebel Training. It includes the following topics:

- [Process of Accessing the Siebel Training Site on page 112](#)
- [Logging in for Enterprise Application End Users on page 112](#)
- [Siebel Training Web Site Login Methods on page 113](#)
- [Browsing a Training Site Anonymously on page 113](#)
- [Registering as a New User for Training on page 114](#)
- [Logging in with an Established User ID and Password on page 115](#)

Process of Accessing the Siebel Training Site

The following list shows the procedures that end users typically perform to access the Siebel Training site. Your company may follow a different process according to its business requirements.

To access Siebel Training, perform the procedures applicable to your situation:

- [Logging in for Enterprise Application End Users on page 112](#)
- [Browsing a Training Site Anonymously on page 113](#)
- [Registering as a New User for Training on page 114](#)
- [Logging in with an Established User ID and Password on page 115](#)

Logging in for Enterprise Application End Users

End users, employed by an organization that uses Siebel Training to conduct internal training programs, typically access Training screens through a Siebel employee application, such as Siebel Employee Relationship Management, Siebel Call Center or Siebel Sales, rather than through a separate Web site.

If Training screens are accessed from within another Siebel application, the end user may see that application's login prompts and home page, rather than the Training login prompts and home page.

The following procedure describes how end users can locate Training information when using a Siebel application.

This task is a step in [Process of Accessing the Siebel Training Site on page 112](#).

To locate Training screens within another Siebel application

- 1 Start your Siebel employee application and log in according to the procedures for that application.
- 2 Navigate to the Training screen.

The Training Home Page appears with a list of Training end-user links. For information about viewing the information available to you using the links, see [Chapter 13, "Finding and Viewing Training Information."](#)

- 3 Click the appropriate link to find training.

NOTE: If you use Training screens within the Siebel ERM (Employee Relationship Management), you may also be able to navigate to Training screens by clicking the Training screen tab. This is an alternative to using the Site Map.

Siebel Training Web Site Login Methods

A Siebel Training Web site provides information and services related to training. Any of the following methods can help users find the URL for an Training Web site:

- Web links from the corporate home page of the organization offering the training
- Advertisements or press releases from the organization offering the training
- Web searches
- Referral to the site by another person

The Siebel Training Web site provides different levels of visibility, depending on how the user accesses the site. Users can enter the Training site in the following ways:

- **Browsing a Training Site Anonymously.** Accessing the site's home page where training links appear, but the user cannot access other views.
- **Registering as a New User for Training.** Logging in as a newly registered Siebel user allows access to the other views in the Training site. Users who register using the Training application can use other Siebel applications.

For information about setting up user access for Siebel customer applications, see *Security Guide for Siebel Business Applications* and *Applications Administration Guide*.

- **Logging in with an Established User ID and Password.** Logging in as a previously registered Siebel user, with an established user ID, allows access to the other views in the Training site.

Browsing a Training Site Anonymously

Training users can browse the training site anonymously. This option provides access to the site's home page information, but anonymous users must register before they can sign up for any class or curriculum.

Siebel Training Web site visitors can view the following kinds of information without entering a user ID and password:

- **Home page and course descriptions.** Descriptions of top 10 new courses listed in the new Training section on the home page. This list is compiled automatically.

The courses that appear as Featured Training are those courses that are designated by the training administrator to appear as Featured Training.

- **Find Training page.** This page provides links to additional pages, which include the following lists:
 - All Training
 - Find Training By Classes
 - Find Training By Location
 - Find Training By Job Role
 - Find Training By Skills

- Find Curriculum Paths
- Find Curriculums Paths By Job Role

This task is a step in [Process of Accessing the Siebel Training Site on page 112](#).

To browse an Training site anonymously

- 1 Using your browser, enter the URL for the Training site, and navigate to the site.
- 2 Click the links in the Find Training section of the page.

Registering as a New User for Training

When the end user navigates to a Training Web site using a browser and a URL, a generic home page appears. The page displays login prompts in the User Log In area and contains numerous links to training information.

[Figure 7](#) shows the home page that appears after the training user enters the correct user ID and password.

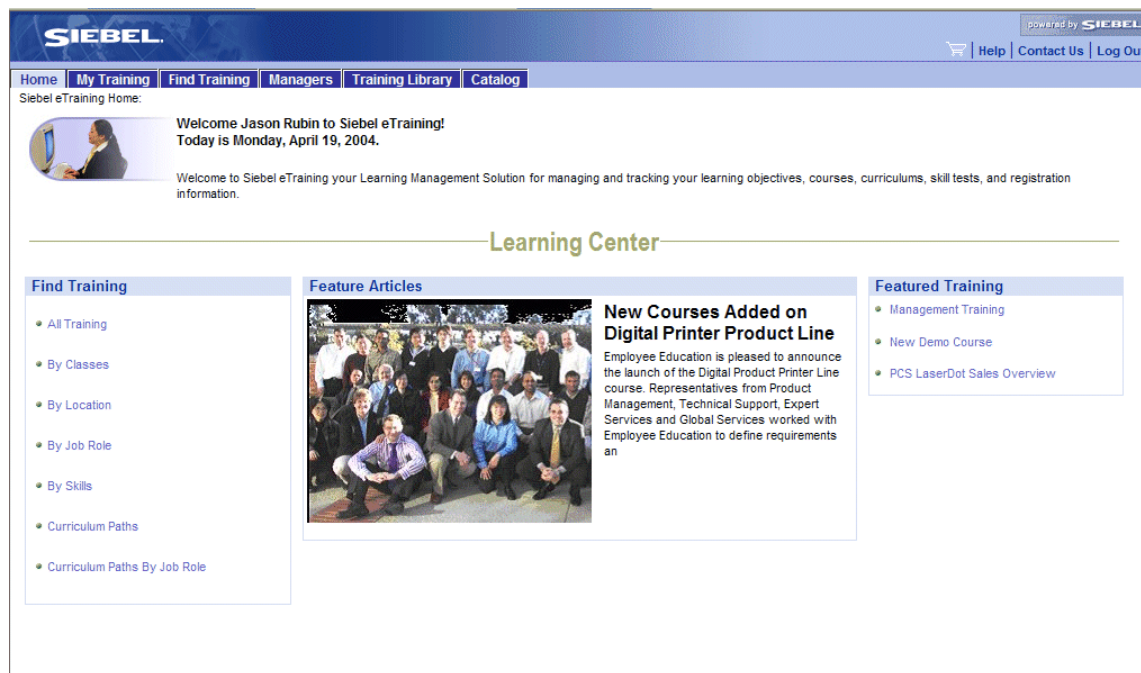


Figure 7. Home Page View for Registered Web User

This task is a step in [Process of Accessing the Siebel Training Site on page 112](#).

To register as a new user for training

- 1** Using your browser, enter the URL for the Training site, and navigate to the site.
- 2** Click the New User link in the User Login form.

A Personal Information form appears, prompting you to supply information about yourself, including a user ID that you will use in the future and a password to accompany that user ID.
- 3** Complete the fields in the Personal Information form, enter your user ID and password, and then click Next.

A Contact Information form appears, prompting you to supply your address and work phone number.
- 4** Complete the fields in the Contact Information form, and then click Next.

A Usage Terms form appears, containing license agreement information.
- 5** Read the license agreement, and then click I agree.

A Registration Confirmation message appears.
- 6** Click Finish to complete the new user registration process.

Logging in with an Established User ID and Password

If an end user logs in to a Training site with an established user ID and password, the user can:

- View information about training for which he or she has registered
- View the associated training materials
- Take skills tests associated with those courses

On the My Account page, users can update their profiles, and view saved quotes and orders. Users can also reorder items using a favorites list, templates, and orders.

This task is a step in [Process of Accessing the Siebel Training Site on page 112](#).

To log in using an established user ID and password

- 1** Using your browser, enter the URL for the Training site, and navigate to the site.
- 2** At the home page, enter your user ID and password.

A greeting appears, and My Training links become available for your use.

If you are using a Training Web site, a My Training tab appears near the top of the display. Depending on your assigned Siebel responsibility, a Managers tab (My Team's Training) may also appear.

For more information on how to find and view Training information, see [Chapter 13, "Finding and Viewing Training Information."](#)

13 Finding and Viewing Training Information

This chapter describes how end users can find training information on the Training Web site. It includes the following topics:

- [About the Training Learning Center on page 118](#)
- [Process of Finding Training on the Siebel Training Web Site on page 118](#)
- [Finding Available Training on page 119](#)
- [Accessing Just-in-Time Training on page 120](#)
- [Finding Available Curriculum Paths on page 121](#)
- [Reviewing the Steps for Each Curriculum on page 121](#)
- [Finding Training Library Materials on page 122](#)
- [Finding Training Materials for a Course or Curriculum on page 122](#)
- [Browsing the Siebel Catalog on page 123](#)
- [Assessing Skills and Development on page 123](#)

About the Training Learning Center

The Training Learning Center home page provides links that help the end user manage training activities.

The Learning Center page includes the following sections:

- **Navigation bar.** The navigation bar on the left side of the Training home page helps users navigate within the Training site. This navigation bar is visible regardless of what link the user is accessing. The following links are available on the left navigation bar:
 - Find Training
 - Training Catalog
 - Curriculum Paths
 - My Training
 - My Transcripts
 - Recommended Training
 - Training Library
 - My Team's Training
- **Feature Articles.** This section provides links to pertinent training-related news and updates to available training such as a new course, with prerequisites and contact information. The feature articles are created using Group News Administration.

For more information on creating Feature Articles, see *Siebel Content Publishing Guide*. If no feature articles are active, this section does not appear on the Training home page.
- **My Skills Development.** This section includes links that help the user navigate to:
 - My Recommended Training
 - My Skills Gaps
- **Featured Training.** This section provides links to new courses. The courses that appear in the list are the most recently created courses that are flagged as featured Training.

Process of Finding Training on the Siebel Training Web Site

The following list shows the procedures that end users typically perform to find training courses and manage training objectives. Your company may follow a different process according to its business requirements:

- 1 [Finding Available Training on page 119](#)
- 2 [Accessing Just-in-Time Training on page 120](#)
- 3 [Finding Available Curriculum Paths on page 121](#)
- 4 [Reviewing the Steps for Each Curriculum on page 121](#)

- 5 [Finding Training Library Materials on page 122](#)
- 6 [Finding Training Materials for a Course or Curriculum on page 122](#)
- 7 [Browsing the Siebel Catalog on page 123](#)
- 8 [Assessing Skills and Development on page 123](#)

Finding Available Training

Users can locate training by clicking the Find Training link in the left navigation bar, or by clicking a link in the Find Training section of the Learning Center home page.

The Find Training section includes links that automatically filter available training by the following criteria:

Click This Link...	To...
All Training	Search for specific training or view the entire training catalog.
By Classes	Search for specific Instructor-Led or Distance Learning classes or view the entire schedule.
By Location	Find a list of upcoming classes in your area. Using the list of training locations, the user can a schedule of training events by location.
By Job Role	View a list of courses appropriate to a job role. A list of training offerings appears, indicating the job profile for which each offering is appropriate.
By Skills	Search for courses needed to acquire specific skills.
Curriculum Paths	Search for a specific curriculum or view all curriculums. This link provides a list of predefined training paths for a variety of specialized needs. The user can search the list for a curriculum and then drill down on the curriculum name to show the Curriculum Details view.
Curriculum Paths By Job Role	View a list of curriculums by job role. This link displays a list of predefined training paths and indicates the job role for which each path is appropriate. In the Curriculums by Job Roles list, the user can: <ul style="list-style-type: none"> ■ Run a query ■ Sort the list by job role ■ Drill down on a curriculum name to display the Curriculum Details view

This task is a step in [Process of Finding Training on the Siebel Training Web Site on page 118](#).

To view available training

- 1** Log in to the Training site.
- 2** From the Learning Center home page, click one of the Find Training links to locate information about available training.
- 3** Using the Search form, search the list for Instructor-Led or media based courses of particular interest, or search for courses that have specific attributes.
- 4** In the results list, select a course, and then click the link in the Name field for more detailed information about the course.

Detailed information may include course objectives, topics to be covered, materials to be used, and information about other courses that are associated with the selected course.

If the course is Instructor-Led, users can view course detail information by clicking the name link or by clicking View Schedule.

Accessing Just-in-Time Training

A Just-in-Time training reminder automatically alerts users that training is assigned when the system notices a break in user activity. The administrator specifies this time interval by using the Application Training Queue Upd parameter, for more information, see [To enable Just-in-Time training on page 43](#).

For administration setup information, see [Enabling and Specifying Just-in-Time Training on page 43](#).

This task is a step in [Process of Finding Training on the Siebel Training Web Site on page 118](#).

To access Just-in-Time training

- 1** Log in to the Training site.

- 2 If the administrator has assigned Web-based training, then the Just-in-Time dialog box appears when the user accesses the Training site.

A response is returned in the Just-in-Time dialog box if the user clicks Accept or Decline, as shown in the following table.

NOTE: Users can return to the assigned Just-in-Time training by navigating to [Training > My Training > My Just in Time Training Courses](#).

If...	Then...
The user clicks Accept	Siebel Training creates an enrollment record for the course, and the Training Course Launch view appears in order to launch the course.
If the user clicks Decline	<p>The user has select a reason for declining the course. The choices are:</p> <ul style="list-style-type: none"> ■ Busy ■ Incorrect Assignment ■ Other <p>No enrollment record is created.</p>

Finding Available Curriculum Paths

End users can view training offerings that are grouped together into Curriculum Paths from the Learning Center page. Curriculum Paths allow the user to accomplish a specific educational goal, such as completing a professional certification or degree program.

This task is a step in [Process of Finding Training on the Siebel Training Web Site on page 118](#).

To view available curriculum paths

- 1 Log in to the Training site, and navigate to the Learning Center home page.
- 2 In the Find Training section, to find information about available curriculum paths, click either Curriculum Paths or Curriculum Paths By Job Role.
- 3 In either the Curriculums list or the Curriculums Paths By Job Role list, query for the curriculum, and then click the link in the curriculum Name field.

The Curriculum Details view provides curriculum details as well as two lists, Curriculum Steps, and Materials. End users can enroll in the Curriculum by clicking Enroll on the detail form. For more information, see [Enrolling in a Curriculum on page 134](#).

Reviewing the Steps for Each Curriculum

The Curriculum Steps list provides an ordered series of learning opportunities and allows end users to select optional coursework. Users may select only the minimum requirements for each step or choose to take all training included in the step.

This task is a step in [Process of Finding Training on the Siebel Training Web Site on page 118](#).

To view curriculum steps and requirements

- 1** Log in to the Training site, and navigate to the Training Learning Center.
- 2** In the Find Training section, click the Curriculum Paths link, and query for the curriculum.
- 3** In the curriculum record, click the link in the Name field, and do the following:
 - a** In the Curriculum Details form, note the number of required courses.
 - b** In the Curriculum Steps list, review the steps.

Finding Training Library Materials

Each Training Web site includes a Training Library that stores files related to the kinds of training and curriculum paths being offered. End users can view these files, which may include reading material, self-paced learning topics, training presentations, curriculum guides, course syllabus information, audio or video clips, or other training information.

This task is a step in [Process of Finding Training on the Siebel Training Web Site on page 118](#).

To view or download materials in the Training Library

- 1** Log in to the Training site.
- 2** Click the Training Library link on the navigation bar.
- 3** In the Training Library list, query for training materials.
- 4** In the training material record, click the link in the Name field, and select a method to view or download the training material.

NOTE: The Training Library stores a file in the file's original format. The appropriate application must be installed on your computer in order to open and view the file.

Finding Training Materials for a Course or Curriculum

End users can locate training library materials for courses or curriculums, by Instructor-Led classes, location, job roles, skills, and curriculum paths. The Materials list identifies the materials that are associated with the curriculum as a whole, rather than with individual courses in the curriculum.

This task is a step in [Process of Finding Training on the Siebel Training Web Site on page 118](#).

To view or download training library materials for a specific course or curriculum

- 1** Log in to the Training site, and navigate to the Learning Center home page.

- 2 In the Find Training section, click the Curriculum Paths link.
- 3 In the Curriculum Paths list, query for the curriculum, and click the link in the Name field.
Additional details about the course or the curriculum appear, including a Materials list, which specifies the training library items that are associated with the course or curriculum.
- 4 From the Curriculum Details form, scroll down to the Materials list.
- 5 In the Materials list, select the material record, and click the link in the Name field.
- 6 In the Training Library list, query for materials, and in the record, click the link in the Name field.
- 7 Select a method to view or download the training material.

Browsing the Siebel Catalog

End users can browse the Siebel Catalog to find training courses or curriculums. The Siebel Catalog offers customer and partner training in such areas as pricing, access control, and user interface options. For more information on setting up Siebel Catalog, see *Siebel eSales Administration Guide*.

This task is a step in [Process of Finding Training on the Siebel Training Web Site on page 118](#).

To browse the training and curriculum catalogs

- 1 Log in to the Training site, and click the Training Catalog link on the navigation bar.
The administration may have set up the catalog so the end user sees different categories of courses and curriculums. Users can drill down on these categories to locate the appropriate course or curriculum.
- 2 From the Catalog page, click a link to browse for training courses or curriculums.
- 3 From the Catalog Items page, you can click:
 - Show Details
 - Enroll or Enroll Others

Assessing Skills and Development

The My Skills Development section appears in the Learning Center page if Siebel Competency Management is installed as part of the Siebel application installation. The My Skills Development section includes links to My Recommended Training and My Skill Gaps pages:

- **My Recommended Training.** Allows the user to browse for suggested training associated with the user's job profile, and to browse training recommended for other job profiles designated as part of the user's career path.
- **My Skill Gaps.** Provides a summary of the job profile associated with the user, including job code details and job requirements. The following view tabs provide additional detail:
 - **Career Path Options.** This view lists the subsequent job profiles in the career path.

- **Competency Profile.** This list shows the skills or competencies required for the selected job profile.
- **Recommended Training.** This list shows the courses or skills that are recommended for the user to close the competency or skill gap for the selected job profile.

For more details on setting up and managing employee skills and competencies, see *Siebel Performance Management Guide*.

This task is a step in [Process of Finding Training on the Siebel Training Web Site on page 118](#).

Reviewing My Recommended Training and My Skill Gaps

Perform the steps in the following procedures to review recommended training and skill gaps.

To view My Recommended Training

- 1 Log in to the Training site.
- 2 From the Training Learning Center, click the My Recommended Training link in the My Skills Development section.

A list of courses appear that address the current skill gaps in the user's current job profile. After a user completes these courses, that user's skills are updated with the skill types and levels associated with each training course.
- 3 Click Browse Other Job Profiles to view other jobs in the established career path.

Users can assess current skill gaps against other job profiles and view recommended training.

To view My Skill Gaps

- 1 Log in to the Training site.
- 2 From the Training Learning Center, click the My Skills Gaps link in the My Skills Development section.
- 3 From the Career Management page, review the current job profile, job code details, and job requirements.
- 4 Scroll down and click the Competency Profile view tab.

The Competency Profile list shows the required competency levels and the skill gaps that are used to derive Recommended Training courses.
- 5 Click the Career Path Options view tab to view other career path options and skill gaps associated with the job profile.

Drill down on a different career profile to show the skill gaps and recommendations associated with the profile and the existing skills of the user.
- 6 Click the Recommended Training view tab to view recommended classes.

Drill down on a class name to show course details, topics, objectives, lessons, and so on.

14

Course Registration, Withdrawal, and Completion

This chapter covers how to register for, withdraw from, or complete a course in Siebel Training. It includes the following topics:

- [About Training Course or Class Registration on page 126](#)
- [Process of Registration, Withdrawal, and Completing Courses on page 126](#)
- [Registering for a Media-Based Course on page 127](#)
- [Registering for a Scheduled Class on page 128](#)
- [Submitting Third-Party Training Events for Manager Approval on page 130](#)
- [Using the Siebel Catalog to Register for Training on page 131](#)
- [Viewing My Training Enrollments Information on page 132](#)
- [Launching a Web-Based Course on page 133](#)
- [Enrolling in a Curriculum on page 134](#)
- [Viewing Progress Within a Curriculum on page 135](#)
- [Withdrawing from a Course, Class, or Curriculum on page 135](#)

About Training Course or Class Registration

A Training Web site may offer several different kinds of training, including traditional Instructor-Led classes and Web-based courses. If you use a Training Web site to register for training, the registration procedure varies slightly depending on the type of training you choose.

For registration, training offerings can be grouped as follows:

- **Media-Based training.** This type of training, including Web-based courses and CD-ROM courses, can be taken at any time until an optional Expiration Date or Access Period deadline.
- **Instructor-Led and Distance Learning courses.** These courses are offered at specific times and locations. For Distance Learning courses, times are specified but not locations, because the course is taught at a specific time using the Web.

Process of Registration, Withdrawal, and Completing Courses

The following list shows the procedures that end users typically perform when registering for, withdrawing from, and completing training courses. Your company may follow a different process according to its business requirements.

End-User Procedures

Perform the following steps to manage training enrollments and course completion:

- [Registering for a Media-Based Course on page 127](#)
- [Registering for a Scheduled Class on page 128](#)
- [Submitting Third-Party Training Events for Manager Approval on page 130](#)
- [Using the Siebel Catalog to Register for Training on page 131](#)
- [Viewing My Training Enrollments Information on page 132](#)
- [Launching a Web-Based Course on page 133](#)
- [Enrolling in a Curriculum on page 134](#)
- [Viewing Progress Within a Curriculum on page 135](#)
- [Withdrawing from a Course, Class, or Curriculum on page 135](#)

Registering for a Media-Based Course

Use the following procedure to register for any course that is not scheduled to take place at a particular time, such as a self-paced (Web-based or CD-ROM) course.

NOTE: Nonemployee contacts, who are not associated with an account, cannot register for a class unless a system default price list is set up. For more information, see *Siebel eSales Administration Guide*.

This task is a step in [Process of Registration, Withdrawal, and Completing Courses](#) on page 126.

To register for a media-based course

- 1 Log in to the Training Web site as a registered user or a new user.
- 2 From the Learning Center home page, click the All Training link in Find Training section.
For an explanation of other Find Training links, see [Chapter 13, "Finding and Viewing Training Information."](#)
- 3 If the course for which you want to register is not visible on the Courses list, search for it using the Search Courses form.

You can search for courses by the following criteria:

- Course Name
- Format (can be CD-ROM, Web-based, or Third-Party)
- Course Code
- Provider
- Units
- Hours
- Days
- Rating
- Language

- 4 In the course record, click Enroll.

If you are trying to register for a course that has prerequisites you have not fulfilled, then the following message appears:

Incomplete Prerequisites

The following prerequisites have not yet been completed. We suggest that you complete these pre-requisites prior to taking the course. You can enroll in the pre-requisite courses by clicking on the course name.

- 5 Click Check Out to display the Payment Method form, and enter your credit card and billing information.

If you have used the Shopping Cart before, your previously entered information may appear for you to edit or confirm.

- 6 Click Continue to display the Order Summary, verify that all the information is correct, and click Confirm Order.

If your registration is successful, you receive an email confirming your course enrollment.

- 7 Click Return to Home Page, and click View Your Course Schedule to display the My Courses list.

Registering for a Scheduled Class

If an Instructor-Led class is being offered at various times or locations, each offering of the course is called a *class* or *class session*. Registering for a scheduled class also applies to courses of type Distance Learning where the live Web class can be offered at various times.

Nonregistered contacts, who are not associated with an account, cannot register for a class unless a system default price list is set up. For more information, see *Siebel eSales Administration Guide*.

This task is a step in [Process of Registration, Withdrawal, and Completing Courses on page 126](#).

To register for a scheduled class

- 1 Log in to the Training site as a registered user or a new user.
- 2 From the Learning Center page, click the appropriate link in the Find Training section.

For an explanation of the Find Training links, see [Chapter 13, "Finding and Viewing Training Information."](#)

- 3 In the Courses list, click the name of the course for which you want to register.

If the course for which you want to register is not visible on the Courses list, you can search for it, using the Search Classes form and the following criteria:

- Course Name
- Format (can be Instructor-led, Distance Learning, or Third-Party)
- Instructor
- Course Code
- Provider
- Units
- Hours
- Days
- Rating
- Start Date

- End Date

4 Enroll for the class you want to take by either clicking:

- Enroll, or
- View Schedule, selecting the class, and clicking Enroll

The following table describes what happens after enrolling in the class if there is no fee for the training and there is space available in the class, there is no room in the class, there is a fee for the training and there is space available in the class, or how to register for more classes before paying.

If...	Then...
There is no fee for the training you have selected, and if space is still available.	<p>The registration process is complete and the following changes occur:</p> <ul style="list-style-type: none"> ■ The My Class Details view appears, and the registration number and a confirmed status for your registration are listed. ■ In the Course Links section, you can click the Course Launch button to begin the course immediately. ■ My Live/Classroom Training is updated to include a Confirmed status. <p>NOTE: If the administrator did not select the Auto-Confirm flag (check box cleared), then enrollment status is set to Pending-Approve. This functionality allows administrators to manually manage the enrollment.</p>
There is no room in the class (that is, if the maximum enrollment has already been reached).	Use the Add to Waitlist button to automatically be placed on a waiting list for any open spaces.
There is a fee for the training, and if space is still available.	<p>The Shopping Cart appears, containing information about the charge for the training.</p> <p>Go to Step 5.</p>
You want to register for more training before paying.	<p>Navigate to the appropriate screen and continue registering.</p> <p>Your registration status is Pending until you pay, then go to Step 5.</p>

5 Click Check Out to display the Payment Method form, and enter your credit card and billing information.

If you have used the Shopping Cart before, your previously entered information may appear for you to edit or confirm.

- 6 Click Continue to show the Order Summary, verify that all information is correct, and click Confirm Order.
- 7 Click Return to the Home Page, and then click View My Class Schedule to show the My Classes list.

The list that appears includes the training you selected, with the Status field set to Confirmed, showing that you have been registered for the training.

If your registration is successful, you automatically receive an email confirming your course enrollment. A reminder email is also sent three days before the course is scheduled to begin.

NOTE: Users can also view quote and order details from the My Account page. For more information, see *Siebel eSales Administration Guide*.

Submitting Third-Party Training Events for Manager Approval

The third-party training process allows organizations to track a student's progress that is taking a course outside the organization. Employees register for third-party classroom or media-based training using the following procedures:

- [Registering for a Media-Based Course on page 127](#)
- [Registering for a Scheduled Class on page 128](#)

Third-party training must be submitted to a manager for approval. Siebel Training is preconfigured to invoke a manager approval process for third-party training. Your company may follow a different process according to its business requirements.

Employees can enter third-party training records into their transcripts. This capability allows managers to approve, decline, or return the training records.

This task is a step in [Process of Registration, Withdrawal, and Completing Courses on page 126](#).

To submit third-party training events to a manager for approval

- 1 Log in to the Training Web site as a registered user or a new user.
- 2 On the Training home page, click the My Training link in the left navigation bar, and then click My 3rd-Party Training.
- 3 In the My 3rd-Party Training list, create a new record.
- 4 Click the select button in the Name field, select the course, and complete the remaining fields.
- 5 Click the link in the Registration # field, and verify that the information in the fields is correct.
- 6 Click Submit to route the course information to your manager for approval.

The status changes to Pending-Approve.

Using the Siebel Catalog to Register for Training

Use the Siebel Catalog to browse and purchase training from your company's Web site.

This task is a step in [Process of Registration, Withdrawal, and Completing Courses](#) on page 126.

To register for training using the Siebel Catalog

- 1** Log in to the Training Web site as a registered user or a new user.
- 2** From the Training home page, click the Training Catalog link in the left navigation bar.
- 3** Click a category link to navigate to a group of courses.
- 4** In the Items list, you can either click either of the following links:
 - Enroll

- Show Details to view more information about the course, and then click Enroll in the header.

The following table describes what happens after enrolling in the class if there is no fee for the training, there is a fee for the training, or how to register for more classes before paying.

If...	Then...
There is no fee for the training you have selected, the registration process is complete.	The Enrollment Details view appears. A registration number and a confirmed status for your registration are listed.
There is a fee for the training.	The Shopping Cart appears. If you want to register for more courses before paying, navigate to the appropriate screen and continue registering, or click Check Out. For more information on Shopping Cart functionality, see <i>Siebel eSales Administration Guide</i> . Your registration status is Pending until you pay.
You want to register for more courses before paying.	Navigate to the appropriate screen and continue registering. Your registration status is Pending until you pay. When you are ready to pay, click Check Out. For more information on Shopping Cart functionality, see <i>Siebel eSales Administration Guide</i> .

NOTE: Users can also view quote and order details from the My Account page. For more information, see *Siebel eSales Administration Guide*.

Viewing My Training Enrollments Information

Perform the steps in the following procedures to view the classes in which you have enrolled:

- To view My Training Enrollments information on page 133
- To view My Training enrollment information in the calendar on page 133

This task is a step in [Process of Registration, Withdrawal, and Completing Courses](#) on page 126.

To view My Training Enrollments information

- 1 Log in to the Training site as a registered user or a new user.
- 2 On the Training home page, click the My Training link in the left navigation bar.
- 3 Click the My Training Enrollments link.
The My Media Training and My Live/Classroom Training lists appear.
- 4 Locate course or class information by clicking either the Course field link or the Query button, as described in the following table.

Click...	To...
The link in the Course field for either My Media Training or My Live/Classroom Training.	<p>Navigate to My Course Details (media-based courses) or My Class Details (live/classroom classes).</p> <p>These views provide information on Topics, Objectives, Skills, Suggested Training, Tests and Evaluations, and Course Materials. My Live/Classroom Training also provides the Daily Schedule for the class selected.</p>
Query on either the My Media Training or My Live/Classroom Training lists.	<p>Search for course or class information by Course:</p> <ul style="list-style-type: none"> ■ Search My Media Training by Course, Format, Expires, or Status ■ Search My Live/Classroom Training by Course, Format, Date, Location, or Status

When you enroll in a Distance Learning or Instructor-Led training class, the class is added as activity to your calendar. Canceling an enrollment for a class removes the activity from the user's calendar.

To view My Training enrollment information in the calendar

- 1 Navigate to the Calendar screen > Monthly view tab.
- 2 Locate the course in the calendar.

The class is listed in the calendar with the start and end date in the user's time zone. If the activity spans multiple days, it is shown that way in the calendar. By drilling down on the class name, the Training > My Training view appears.

Launching a Web-Based Course

Siebel Training allows end users to start a registered Web-based course from Training screens.

This task is a step in [Process of Registration, Withdrawal, and Completing Courses on page 126](#).

To start a Web-based course from Training

- 1 Log in to the Training Web site with the user ID and password you used to register for the Web-based course.
- 2 On the Training home page, click the My Training link in the left navigation bar, and click the My Training Enrollments link.
- 3 In the My Media Training list, select the course, and then click the link in the Course field.
- 4 On the My Course Details form, click Course Launch.

The Enrollments Details view, which includes Lesson Launching, Test & Evaluations, and Materials lists appears.

If...	Then...
The course is AICC or SCORM.	<p>The course is launched from the Lessons list.</p> <p>The user selects a lesson and clicks Launch.</p> <p>NOTE: If the lesson is a block, then Launch is inactive as blocks are not launchable.</p>
The course is not an AICC- or SCORM-format course.	<p>From the Course list, select the option that best fits your situation.</p> <p>Depending on how the training organization has configured its system, the course may start immediately, or your browser may display a new page that provides start capabilities.</p>

Enrolling in a Curriculum

If a training user is seeking a professional certification or a degree that requires that the user take several training courses, the user can enroll in a curriculum which tracks progress. There is no fee associated with curriculum enrollment. However, the courses that make up the curriculum may have fees.

This task is a step in [Process of Registration, Withdrawal, and Completing Courses on page 126](#).

To enroll in a curriculum

- 1 Log in to the Training site as a registered user or a new user.
- 2 On the Training home page, and do the following:
 - Click Curriculum Paths
 - Click Curriculums By Job Role

- 3 Select the curriculum, and then click the link in the Name field.
The Curriculum Details view, which includes the Curriculum Steps list and the Materials list, appears.
- 4 Click Enroll.
The My Curriculums list appears, listing the curriculum you selected.

Viewing Progress Within a Curriculum

End users can view their progress towards completing the courses in a curriculum.

This task is a step in [Process of Registration, Withdrawal, and Completing Courses on page 126](#).

To view your progress within a curriculum

- 1 Log in to the Training Web site with the user ID and password you used when you enrolled in the curriculum.
- 2 Click the My Training link in the left navigation bar, and click the My Curriculums link.
- 3 In the My Curriculums list, select the curriculum, and then click the link in the Name field.

Withdrawing from a Course, Class, or Curriculum

This procedure describes how end-users can cancel registration for a course, class, or curriculum for which they are already registered.

This task is a step in [Process of Registration, Withdrawal, and Completing Courses on page 126](#).

NOTE: Many organizations specify the last date on which a cancellation is accepted. You cannot automatically cancel your registration after this date has passed. Instead you must obtain special approval from the instructor or training administrator to cancel your registration.

To cancel your registration for an upcoming course or class

- 1 Log in to the Training Web site with the user ID and password you used to register for the course or class.
- 2 On the Training home page, click the My Training link in the left navigation bar, and then click the link for My Training Enrollments.
The My Media Training and My Live/Classroom Training lists appear.
- 3 Click the link in the Course name for the course or class you want to drop.
A My Course Details or My Class Details form appears. The information about the selected course or class appears.

- 4 In the header, click Drop to withdraw.

Email notification is received only for class cancellation, not for Course Cancellation.

NOTE: If automatic email notification was set up, then the user receives the User Class Cancellation email confirming the class cancellation. For more information, see [Setting Up Automatic Training Notification Messages on page 14](#).

If...	Then...
Cancellation is allowed for the course or class at the time you click Drop. NOTE: Cancellation is not allowed for Confirmed Enrollments for customers if there is an order associated with it.	Your cancellation is accepted automatically, and the course or class no longer appears.
There is an order associated with the confirmed enrollment.	Cancellation is not allowed.
Cancellation is not allowed for the course or class at the time you intend to cancel (the cancellation deadline has passed).	The Drop button is not visible from the Course Details page. You can check the cancellation period for a class by viewing the Cancellation Deadline field in the Class Details view page. The Cancellation Deadline is the date on which users no longer have access to the Drop button for course cancellation.

To withdraw from a curriculum

- 1 Log in to the Training Web site.
- 2 On the Training home page, click the My Training link in the left navigation bar, and then click the My Curriculums link.
- 3 Query for the curriculum, and then click the link in the Name field.
- 4 On the My Curriculum Details form, click Drop.

The curriculum is removed from the My Curriculums list.

NOTE: If a user wants to enroll in a curriculum after canceling, that user must contact the training administrator to change the status from Cancelled to In Progress.

15 Taking Tests, Tracking Progress, and Viewing Transcripts

This chapter covers how an end-user can take tests, track progress, and view transcripts using Siebel Training. It also describes how managers can access a direct report's progress, and view and approve third-party training for employees. It includes the following topics:

- [Process of Taking Tests, Tracking Progress, and Viewing Transcripts on page 137](#)
- [Taking a Skills Test on page 138](#)
- [Reviewing Skills Test Results on page 139](#)
- [Checking the Transcript on page 139](#)
- [Assessing Training Progress of Employees on page 139](#)
- [Viewing and Approving Third-Party Training on page 141](#)

Process of Taking Tests, Tracking Progress, and Viewing Transcripts

The following list shows the procedures that end users typically perform when working with tests and transcripts. It also includes procedures that managers perform when assessing the progress of direct reports. Your company may follow a different process according to its business requirements.

End-User Procedures

- 1 [Taking a Skills Test on page 138](#)
- 2 [Reviewing Skills Test Results on page 139](#)
- 3 [Checking the Transcript on page 139](#)

Manager Procedures

- 1 [Assessing Training Progress of Employees on page 139](#)
- 2 [Viewing and Approving Third-Party Training on page 141](#)

Taking a Skills Test

When an end user takes a Training course or class, one or more skills tests may be required to determine whether the user has mastered the concepts presented in the course. The instructor may direct the student to take skills tests at a specific time, or the student may choose to take associated tests at a time that is convenient.

NOTE: Users may not be able to take a skills test more than once.

Skills tests can include:

- Multiple-choice questions with single or multiple correct answers
- True-or-false questions
- Questions for which you must supply a short text answer or a text essay

Multiple-choice questions and true-or-false questions are automatically graded immediately. An instructor or another individual in the training organization must grade questions that require the test takers to supply an answer.

This task is a step in [Process of Taking Tests, Tracking Progress, and Viewing Transcripts on page 137](#).

To take a skills test

- 1 Log in to the Training Web site.
- 2 Click the My Training screen tab, and then click the My Training Enrollments link.
Two sections appear on the page:
 - **My Media Training.** This section lists Web-based and CD-ROM-based courses.
 - **My Live/Classroom Training.** This section lists Instructor-Led classes.
- 3 Locate the course in the appropriate section list, and click the link in the Course field.
- 4 On the My Class Details page, scroll down to the Test & Evaluation list, and click the Take Test button for the appropriate test.

Multiple tests can be associated with one course or class.

- 5 In the Skills Test page, answer each test question, and then click Submit.

Test results may or may not be available for immediate viewing, depending on the kind of questions included in the test, and the type of scoring that the training administrator has set for the test. For example, test results for Web-based courses can be viewed a short time after clicking Submit.

If test results are not available within an expected amount of time, ask the instructor when the results are expected to be compiled.

Related Topic

[Reviewing Skills Test Results on page 139](#)

Reviewing Skills Test Results

After a user has completed a skills test, the user can view test results using the following procedure:

This task is a step in [Process of Taking Tests, Tracking Progress, and Viewing Transcripts on page 137](#).

To view the results of a skills test you have taken

- 1** Log in to the Training Web site.
- 2** Click the My Training link, and click the My Test Scores link.
- 3** In the My Test Scores list, query for the test, and review the information.
 - The Status field value can be Graded, Ungraded, or Pending.
 - If the value of the Status field is Pending, the test has been partially graded, but the point value may change after text and essay questions have been manually graded.

Checking the Transcript

End Users can view information about the training courses, classes, and tests they have completed.

This task is a step in [Process of Taking Tests, Tracking Progress, and Viewing Transcripts on page 137](#).

To view your transcript and descriptive information about a completed course or class

- 1** Log in to the Training Web site.
- 2** Click the My Training link, and then click the My Transcripts link.

The My Transcript list appears, showing all courses that were completed successfully.

For each course, other details are included such as the:

 - Format
 - Registration number
 - Dates on which the user enrolled and completed each course
 - Number of units earned
- 3** In the My Transcript list, click the link in the Registration # field to show details for the course.

Assessing Training Progress of Employees

Managers can use the Training Web site to view training-related progress information for direct reports, if the following conditions are met:

- The manager must be registered in the Siebel Training system with a Siebel responsibility that gives the manager access to the Training Managers screen.
- The Siebel position is set to show that the manager supervises other training users.

For general information about user access to Siebel applications, see *Security Guide for Siebel Business Applications*.

This task is a step in [Process of Taking Tests, Tracking Progress, and Viewing Transcripts on page 137](#).

Employee Training Information Available to Managers

Managers can view the following training information associated with direct reports:

- Information about the classes and courses in which employees have enrolled.
- Status of each enrollment (Confirmed, Pending, Waiting List, Cancelled, Completed, and so on).
- Scores for any skills tests taken by employees that are managed.
- Information about the curriculum paths in which direct reports have enrolled.
- Progress of the employees in the curriculum paths.

Viewing Employee Enrollments and Test Scores

The following procedure describes how to view information about employees that you manage.

To view employee enrollment information and test scores

- 1 Log in to the Training Web site.
- 2 On the left side on the page, click the My Team's Training link bar, and on the Direct Reports page, click the My Team's Enrollments link.
- 3 Select a record, and click the link in the Registration # field.

The following information appears:

- Description of the course or class associated with the selected enrollment.
- Information about tests associated with the course or class.
- The team member's scores for the tests.

Viewing Employee Curriculum Paths and Progress

The following procedure describes how a manager can view the curriculum progress of a direct report. A curriculum is a specific set of training offerings that address a particular goal, such as earning a certification or degree. Curriculum paths are established by the training organization.

To view curriculum information and progress for your employees

- 1 Log in to the Training Web site.

- 2 Click the My Team's Training link bar, and click the My Team's Curriculums link.

A summary of curriculum enrollment information for all direct reports appears.

- 3 In the My Team's Curriculums list, locate the curriculum enrollment, and click the link in the Name field.

The My Team's Curriculum Progress page appears, detailing the progress of the direct report in the selected curriculum. The details include:

- Status of the report's progress through the curriculum, such as Not Started, In Progress, or Completed.
- Weighted completion percentage, based on the number of curriculum steps or courses completed.
- Date the direct report enrolled in the curriculum.
- Date the direct report completed the curriculum, if applicable.

In addition, information appears about each course in the curriculum:

- The percentage weight given to the course in the curriculum.
- The direct report's status for the course, such as Confirmed, Cancelled, or Completed.

Creating Third-Party Training

Employees can create third-party training if the course does not exist.

This task is a step in [Process of Taking Tests, Tracking Progress, and Viewing Transcripts on page 137](#).

Related Topic

[Finding Available Training on page 119](#)

To create third-party training

- 1 Log in to Training Web site.
- 2 Click the My Training link bar, click the My 3rd Party Training link, and create a new record.
- 3 In the Pick Third Party Course list, click New, and create the course.
- 4 Complete the remaining fields as necessary.

Viewing and Approving Third-Party Training

Third-party training is training from a source other than what the organization has set up. Siebel Training allows employees to enroll in and track external training in the same system that hosts courses developed and deployed by the organization. Employees receive training credits for the third-party training, and managers can monitor and approve the third-party training.

This task is a step in [Process of Taking Tests, Tracking Progress, and Viewing Transcripts on page 137](#).

Related Topic

[Finding Available Training on page 119](#)

To view and approve enrollment information for direct reports

- 1** Log in to Training Web site.
- 2** Click the My Team's Training link bar, and click the My Team's 3rd Party Training link.
NOTE: Employees can create third-party training by clicking New and creating a new record.
- 3** Select the third-party enrollment record, and then click the link in the Name field.
- 4** View enrollment details for the course, and then click Approve or Decline.

The following table describes the consequences of clicking Approve or Decline.

If...	Then...
The manager clicks Approve.	The user's course status changes from Pending-Approve to Completed. The course becomes part of the user's transcript.
The manager clicks Decline.	The user's course status changes from Pending-Approve to Declined. The course becomes part of the user's transcript, but shows a status of Declined.

A

Siebel Training Workflow Processes

This appendix provides information on the workflow processes for Siebel Training. It includes the following topics:

- [Postinstallation Workflow Process Tasks on page 143](#)
- [Training Workflow Processes on page 143](#)
- [Additional Workflow Processes on page 145](#)

Postinstallation Workflow Process Tasks

The lists in [Training Workflow Processes on page 143](#) and [Additional Workflow Processes on page 145](#) show the preconfigured workflow processes that must be active to use Siebel Training. After installation is complete, administrators should perform the following tasks:

- 1 [Verifying and Activating Training Workflow Processes on page 14.](#)
- 2 [Configuring Workflow Policies for Training Email Notification on page 15.](#)

Training Workflow Processes

[Table 13](#) shows the eTraining workflow processes that must be activated. User Registration workflows are used for a standalone Training application.

Table 13. Training Workflow Processes

Process Name	Group
Class Confirmation Email (eTraining)	eTraining
Class Reminder Email (eTraining)	eTraining
Class Waitlist-Open Email (eTraining)	eTraining
Class Waitlist-Pending Email (eTraining)	eTraining
Class Waitlisted Email (eTraining)	eTraining
Course Confirmation Email (eTraining)	eTraining
eTraining - Approve Third Party Registration	eTraining
eTraining - Checkout Enrollment Process	eTraining
eTraining - Class Enrollment Process	eTraining
eTraining - Class Reg Enroll Process	eTraining

Table 13. Training Workflow Processes

Process Name	Group
eTraining - Course Enrollment Catalog Process	eTraining
eTraining - Course Enrollment Process	eTraining
eTraining - Course Reg Enroll Process	eTraining
eTraining - Decline Third Party Registration	eTraining
eTraining - Drop Class Process	eTraining
eTraining - Drop Course Process	eTraining
eTraining - Drop Enrollment Process	eTraining
eTraining - Goto Shopping Cart Process	eTraining
eTraining - Show Course Details Process	eTraining
eTraining - Third Party Registration - Submit	eTraining
eTraining - Update Class Registration	eTraining
eTraining Admin Class Cancellation Email	eTraining
eTraining Class Cancellation Email	eTraining
eTraining Class Logistics Email	eTraining
eTraining Enrollment Message Process	eTraining
eTraining Enrollment Process	eTraining
eTraining Leftover Course View	eTraining
eTraining User Class Cancellation Email	eTraining
Show Course Detail (Int Prod) Process	eTraining
Show Course Detail Add To Cart Process	eTraining
Show Course Detail Favorite List	eTraining
Show Course Detail Quote Comparison	eTraining
Show Course Detail Quote Template	eTraining

Additional Workflow Processes

Table 14 shows additional workflows that need to be enabled.

Table 14. Additional Workflow Processes

Process Name	Group
User Registration Forgot Password Process	User Registration
User Registration Initial Process	User Registration
User Registration Process	User Registration
User Registration SubProcess	User Registration
Credit Check - Orders	eSales
Credit Check - Quotes	eSales
Credit Check - Quotes (eSales)	eSales
eChannel Go to Current Quote View (eSales)	eSales
eSales - Add To Template Process	eSales
eSales - Approve Order Process	eSales
eSales - Authorize Order Process	eSales
eSales - Cancel Order Process	eSales
eSales - Checkout Process	eSales
eSales - Complete Checkout Process	eSales
eSales - Current User Type	eSales
eSales - Delete Old Anonymous Quotes	eSales
eSales - Display Error Process	eSales
eSales - Edit Quote Process	eSales
eSales - Enter Payment Details Process	eSales
eSales - Enter Shipping Details Process	eSales
eSales - Login View	eSales
eSales - Modify Order Process	eSales
eSales - Order Confirmation View	eSales
eSales - Order Quote Process	eSales
eSales - Power Customer Quotes View	eSales
eSales - Reject Order Process	eSales
eSales - Reorder Process	eSales

Table 14. Additional Workflow Processes

Process Name	Group
eSales - Reprice Process	eSales
eSales - Save Account Shipping Address	eSales
eSales - Save Cart Process	eSales
eSales - Save Credit Card	eSales
eSales - Save Shipping Address	eSales
eSales - Set Primary Account Address	eSales
eSales - Setting PO Status	eSales
eSales - Shopping Cart View	eSales
eSales - Silent Authorize Order Process	eSales
Send Order Accepted Email (eSales)	eSales
Send Order Awaiting Approval Email (eSales)	eSales
Send Order Failed Email (eSales)	eSales
Send Order Rejected Email (eSales)	eSales
Send Order Shipped Email (eSales)	eSales
Shipping Calculation Process	eSales
Check Eligibility & Compatibility - Default	Eligibility & Compatibility
Compatibility Multiple Popup Workflow	Eligibility & Compatibility
Product Compatibility - Default	Eligibility & Compatibility
PSP Driver Workflow Process	Pricer
Pricing Procedure - Bundle Discount	Pricer
Pricing Procedure - Calculate Net Price	Pricer
Pricing Procedure - Default	Pricer
Pricing Procedure - Service	Pricer
Pricing Procedure - Volume Discount	Pricer

B

Lists of Values (LOVs) for Training

This appendix describes lists of values (LOVs) that are specific to Siebel Training. You can modify these LOVs by navigating to the Administration - Data screen > List of Values view.

[Table 15](#) describes the purpose of each Training-specific LOV. See *Applications Administration Guide* for specific instructions on modifying or adding LOVs.

Table 15. Lists of Values for Siebel Training

LOV	Purpose
LOCATION_STATUS	Status of a location
LOCATION_URL_STATUS	Status for location links
LOCATION_URL_TYPE	Type of location link
TRAINING_ACTION_TYPE	Links for browsing and course enrollment
TRAINING_AUD_TYPE	Job roles for courses
TRAINING_CATEGORY_TYPE	Categories of your choosing that you can use to group training courses together as needed
TRAINING_CLASS_STATUS	Status of a particular class
TRAINING_COURSE_CRITERIA	How course completion is defined
TRAINING_COURSE_FORMAT	Type of course being taught
TRAINING_COURSE_LAUNCH_STATUS	Status of course launch links
TRAINING_COURSE_PERSON_STATUS	Status values for user enrollment
TRAINING_COURSE_REL	Relationships between associated courses
TRAINING_CRSE_AUD_TYPE	Audiences for courses
TRAINING_CRSE_LIT_REL	Course literature types
TRAINING_CRSE_SKILL_LEVEL	Skill levels
TRAINING_CRSE_STATUS	Status of the course
TRAINING_CURR_AUD_TYPE	Audiences for curriculum paths
TRAINING_CURR_CATEGORY_TYPE	Categories for curriculum paths
TRAINING_CURR_CRSE_TYPE	Relationship between the course and curriculum, such as optional or required
TRAINING_CURR_JOB_TYPE	Job roles for curriculum paths
TRAINING_CURR_LIT_REL	Curriculum literature types

Table 15. Lists of Values for Siebel Training

LOV	Purpose
TRAINING_CURR_PER_STATUS	Levels of completeness within curriculum paths
TRAINING_CURR_TYPE	Curriculum type
TRAINING_LOC_REGION	Regions for grouping training locations; useful for searches by location
TRAINING_LOC_ROOM_TYPE	Types of rooms where training may be held
TRAINING_LOC_TYPE	Types of venues where training may be held, such as training centers, convention centers, and hotels
TRAINING_QUES_CAT	Question categories
TRAINING_QUES_TYPE	Types of questions available for use in skills tests
TRAINING_REG_STATUS	Test results status values
TRAINING_STEP_PERSON_STATUS	Status for a curriculum step
TRAINING_TESTRUN_STATUS	Test completion status values
TRAINING_TEST_SCORING_TYPE	Test scoring methods
TRAINING_TEST_STATUS	Test status values
TRAINING_TEST_TYPE	Test types
TRAINING_AICC_EXPIRY_ACTION	Valid keywords for AICC time_limit_action field
TRAINING_AICC_SCORM_CREDIT	Valid keywords for AICC/SCORM credit field
TRAINING_AICC_SCORM_ENTRY	Valid keywords for AICC/SCORM status field flags
TRAINING_AICC_SCORM_STATUS	Valid keywords for AICC/SCORM status field
TRAINING_CRSE_CONTENT_TYPE	Training course content type
TRAINING_CRSE_LAUNCH_TYPE	Course launch type - launch or download
TRAINING_CRSE_SPONSOR	Training course sponsor within the organization
TRAINING_DISTRIBUTION_METHOD	Method of distribution for Training Library file
TRAINING_LESSON_LAUNCH_TYPE	Valid keywords for AICC/SCORM lesson launch types
TRAINING_LS_DATA_TYPE	Type code for AICC/SCORM data record containing comments
TRAINING_LS_RUNTIME_DATA_TYPE	Type code for AICC/SCORM data record containing lesson suspend data
TRAINING_TEST_QUES_STATUS	Status of test question
REGION_TYPE_CD	Type of region
REGION_STATUS_CD	Status of region

C

AICC and SCORM File Structure

This appendix provides information on the files that Siebel Training must access for AICC and SCORM course import. It includes the following topics:

- [CRS \(Course File\) on page 149](#)
- [AU \(Assignable Unit File\) on page 150](#)
- [DES \(Descriptor File\) on page 151](#)
- [CST \(Course Structure File\) on page 151](#)

Related Topics

[Chapter 7, "Importing an AICC or SCORM Course"](#)

CRS (Course File)

The CRS file contains information about the course as a whole, and defines the course. The course information must include all of the fields in the following list, except the optional fields.

This file contains the following information:

```
[Course]
Course_Creator
Course_ID
Course_System
Course_Title
Level
Max_Fields_CST
Total_AUs
Total_Blocks
Version
Max_Fields_ORT (optional)
Total_Complex_Obj (optional)
Total_Objectives (optional)

[Course Behavior]
Max_Normal

[Course Description]
```

Example CRS File

```
[Course]
Course_Creator = SmartForce
Course_ID =M097A03
Course_System = SmartForce Stylus
```

```

Course_Title =Microsoft Office 97: Advanced Access 97
Level = 1
Max_Fields_CST = 2
Total_AUs = 1
Total_Blocks = 1
Version = 3.01

[Course_Behavior]
Max_Normal = 1

[Course_Description]
To demonstrate how to create, run, and customize queries and macros in Access 97

```

AU (Assignable Unit File)

The AU file contains information relating to the assignable units (lessons) in the course. Each AU has its own record (row in the table). The information about the AU should be linked to the title and description.

AU File Fields

AU files have the fields in the following list. The fields that are designated as optional are not required to meet AICC compliance. Some AU files may not contain the optional fields.

```

System_ID
Command_Line
File_Name
Core_Vendor
Type (optional)
Max_Score (optional)
Mastery_Score (optional)
Max_Time_Allowed (optional)
Time_Limit_Action (optional)
System_Vendor (optional)

```

Example AU File

This example shows an AU called System_ID=A000:

```

[System_ID],["Type"],["Command_Line"],["File_Name"],["Max_Score"],["Mastery_Score"],["Max_Time_Allowed"],["Time_Limit_Action"],["System_Vendor"],["Core_Vendor"],["web_Launch"],
["AU_Password"]
["A0000"],["COURSE"],[""],["http://127.0.0.1/cbtlib/mo97a03/mo97a03.htm"],100,70,[""],[""],[""],[""],[""],[""],[""]

```

The example has the following attributes:

```

Type = COURSE
Command line = none
File Name = http://127.0.0.1/cbtlib/mo97a03/mo97a03.htm

```

Max Score = 100
 Mastery Score = 70
 Core Vendor = none

DES (Descriptor File)

The DES file contains a list of every course element in the course. For each AU that is included in the CST file, there must be a description for it in the DES file.

Each course element (Assignable Units) is defined in this file with the following attributes so that it can be associated with the information provide in the AU file:

System_ID
 Developer_ID
 Title
 Description (optional)

Example DES File

This example shows a course with four course elements. The first element is the AU with System_ID = A0000, which was defined in the AU file example and has the title Microsoft Office 97: Advanced Access 97:

```
"System_ID","Title","Description","Developer_ID"
"A0000","Microsoft Office 97: Advanced Access 97","To demonstrate how to create, run,
and customize queries and macros in Access 97","SF1_M097A03_A0000"
"J0100","Select queries","To introduce you to queries in general and select queries
in particular in Microsoft Access","SF1_M097A03_00100"
"J0200","Working with queries","To introduce you to total, crosstab, and action
queries","SF1_M097A03_00200" "J0300","Automating with macros
```

CST (Course Structure File)

The Course Structure file contains basic data on how the course is structured. Siebel Training uses the simplest structure of this file, which consists of only one or more Assignable Units (AUs).

Example CST File

In this example, the AU System ID = A000 is the only AU in this course. If there are multiple entries, the course has multiple AUs:

```
"block","member"
"root","A0000"
```


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