Oracle® Learning Management

Implementation Guide

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Learning Management Implementation Guide.*

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

- The principles and customary practices of your business area
- Oracle Human Resources Management Systems (HRMS)

  Oracle HRMS is a major component of the Oracle E-Business Suite of applications. If you are unfamiliar with Oracle HRMS, then Oracle suggests that you attend one or more of the Oracle HRMS training classes available through Oracle University.
- The Oracle Applications graphical user interface

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

See Related Information Sources on page x for more Oracle E-Business Suite product information.

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Related Information Sources

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, it is advised that you reference other user guides and implementation guides when you set up and use Oracle HRMS.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Oracle Application Framework Personalization Guide

This guide covers the design-time and run-time aspects of personalizing applications built with Oracle Application Framework.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides

information on creating custom reports on flexfields data.

Guides Related to This Product

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide

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

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

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

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

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

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

Oracle Human Resources Management Systems Window Navigation and Reports Guide

This guide lists the default navigation paths for all windows and the default reports and

processes as they are supplied in Oracle HRMS.

Oracle Performance Management Implementation and User Guide

Learn how to set up and use performance management functions. This includes setting objectives, defining performance management plans, managing appraisals, and administering questionnaires.

Oracle Succession Planning Implementation and User Guide

Learn how to set up and use Succession Planning functions. This includes identifying succession-planning requirements, using talent profile, organization chart, suitability analyzer, and performance matrices.

Oracle Human Resources Management Systems Approvals Management Implementation Guide

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications.

Oracle iRecruitment Implementation and User Guide

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

Oracle Learning Management Implementation Guide

Learn how to implement and configure Oracle Learning Management (OLM).

Oracle Learning Management User Guide

Use Oracle Learning Management to accomplish your online and offline learning goals.

Oracle Time and Labor Implementation and User Guide

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

Oracle Labor Distribution User Guide

Learn how to maintain employee labor distribution schedules, distribute pay amounts, encumber (commit) labor expenses, distribute labor costs, adjust posted labor distribution, route distribution adjustment for approval, and manage error recovery processes. You also learn how to set up effort reporting for Office of Management and Budget (OMB) compliance.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

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

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

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

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

1

Implementing Oracle Learning Management

Implementing Oracle Learning Management

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

Making Decisions

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

You must make two key implementation decisions:

- Do you plan to integrate OLM with Oracle Human Resources now or in the future? Doing so can change the way in which you hold information about internal learners and instructors. It also has implications if you are developing the competency approach.

- Do you plan to hold financial information (about resource costs and enrollment charges) in OLM? What kind of arrangement do you need? Do you need an interface between OLM and your own financial system to trigger customer invoices if you run external courses, or cross-charge other departments if you run internal courses?

Other decisions you need to make include:

- Is your enterprise planning to run
    - External training courses only?
    - Both internal and external training courses?
    - Internal training courses only?

    - Both online and offline courses, or just offline courses?

- If you have purchased the license to run online courses, to be viewed in the Web-based player, how should you organize your online content such as modules and tests?

- What information do you need to record about learners, instructors, customers and suppliers? For internal learners you may already have gathered a large amount of information (especially if you run Oracle HR). What further information do you need to record?

- What is your enrollment procedure? What are the stages each student goes through from enrollment to completion of the course? Do you want to link these stages (statuses) to standard letters? Are you enabling telesales by integrating with Oracle Order Management?

- How do you want to organize your budgeting?

- Where do you teach? What is the maximum number of learners allowed in each room (and therefore on each class in each room)? How do you describe each location? Are some of these external to your organization and supplied by an external supplier? How are you going to organize locations, training centers, and resource revenues?

- What are the qualifications, skills, and expertise your courses offer? Do you want to record these competencies automatically for each learner, once they have completed a course?

- Do you have any special agreements with customers, if you run external courses? Do you want to give special discounts to customers who book many places on courses or groups of courses (packages)? If so, you should run the integration with Oracle Order Management.

- Which of your users should access which parts of OLM? What are the roles within your training department? Which roles need full or restricted access?

- What kind of facilities and resources do classes need? What skills do instructors require to teach this course? Where do your instructors come from--internal sources or an external supplier?

- How do you want to organize your resource categories? What information do you want to store for each resource type? Where and how do you want to hold trainer data?

- What type of development events do you want to record?

You can adopt a staged approach to implementation, by focusing only on the essential

areas of the system. For example, you could begin by implementing class scheduling and enrollment management. Then later you could add resource management and competency management to the basic implementation. In a third stage, if you supply training externally, you could implement the integration with Oracle Order Management, to support inventory, telesales, invoicing, and payments.

Implementation Checklist

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

❒ Flexfields (Required)

Define key and descriptive flexfields.

❒ Administration (Required)

Define currencies, lookups, and a primary user.

❒ Organizations (Required)

Define Business Groups and create other organizations.

❒ Courses and Resources (Required)

Define courses and resource structures.

❒ Class and Enrollment Management (Required)

Define enrollment and class status types.

❒ Content Management (Optional)

Set up and manage content and content servers.

❒ Pricing and Financial Relationships (Required)

Define finance headers and lines for each financial transaction, and set pricing for courses.

❒ Reports, Letters, and Folders (Required)

Create reports, letters, and configurable folders.

❒ Security (Required)

Set menu, enrollment, and user security. Set user profiles.

❒ Self-Service Enrollment and Training Administration (Optional)

Set up self-service class enrollments and automatic finance transfer and waitlisting

processes.

- ❒ Audit Requirements (Optional)

  Set up the audit process.

- ❒ Online Help Configuration (Optional)

  Localize Oracle Applications Help.

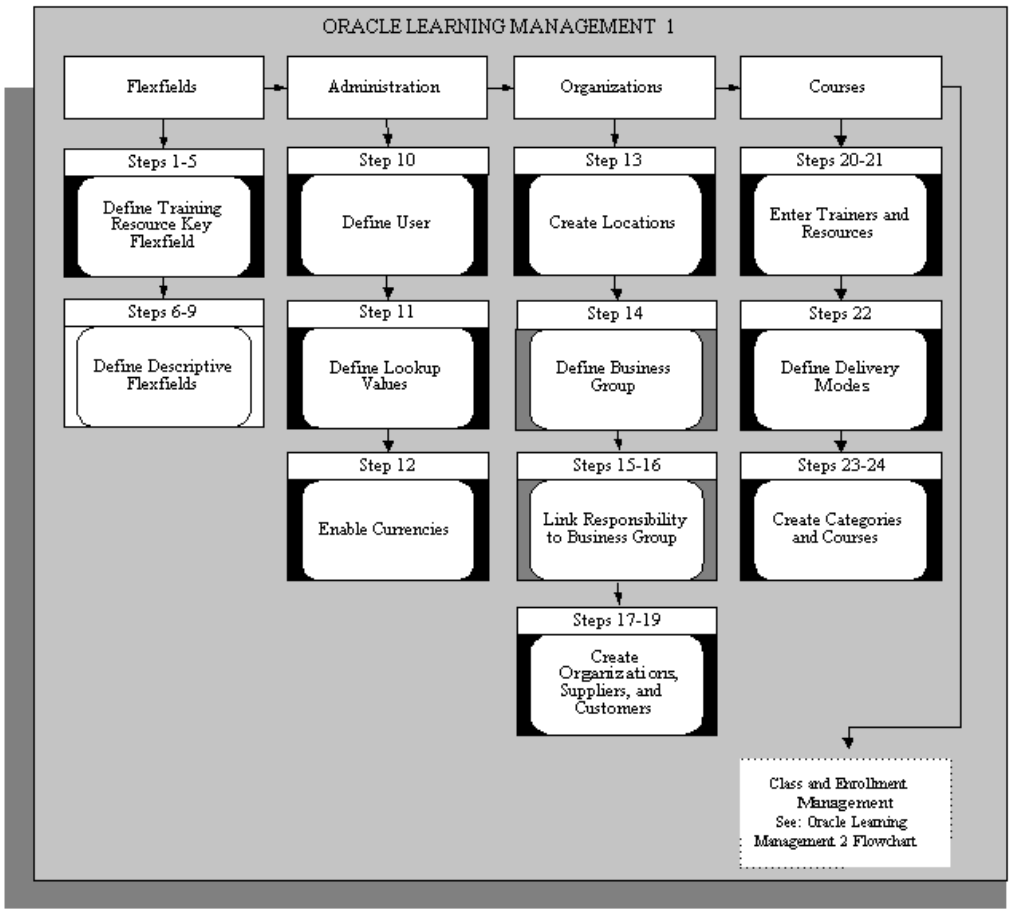
- ❒ Oracle Order Management for OLM (Optional)

  Set up the integration between Oracle Order Management and OLM.

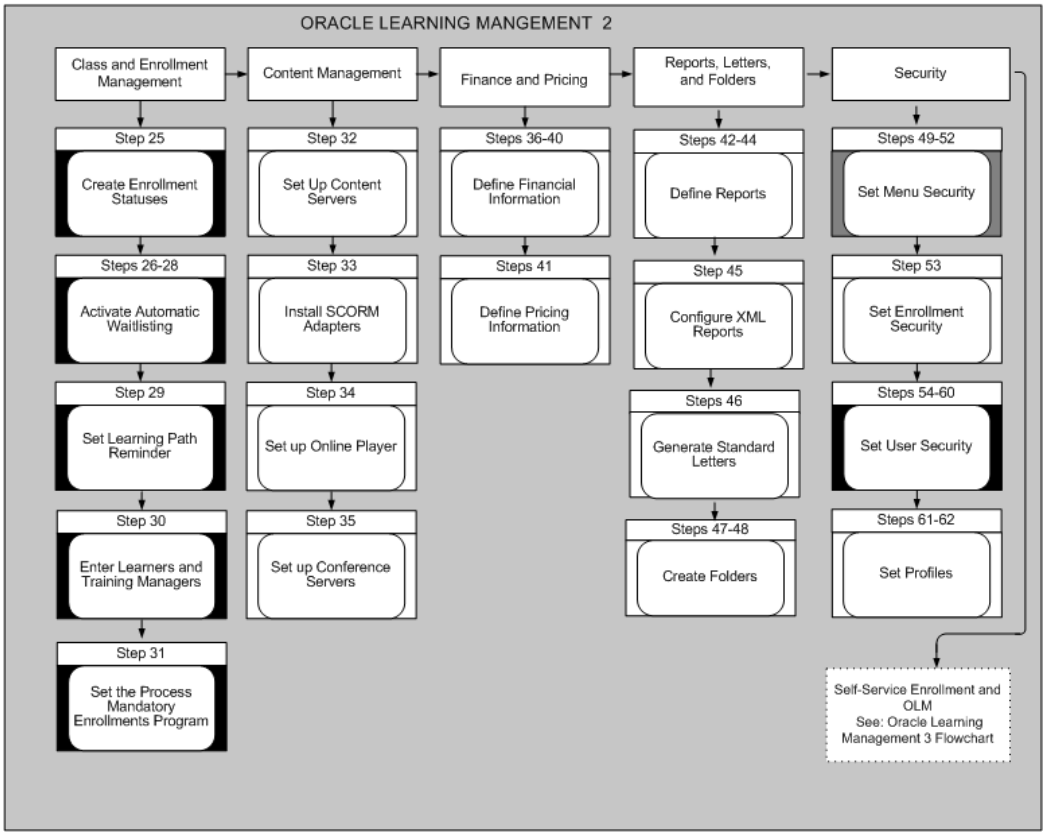
Implementation Flowchart

Some of the steps outlined in this section are Required, and some are Optional. Required with Defaults means that the setup functionality comes with predefined, default values in the database; however, you should review those defaults and decide whether to change them to suit your business needs. If you want or need to change them, you should perform those setup steps. You need to perform Optional steps only if you plan to use the related feature or complete certain business functions. The following flowchart depicts the implementation steps, what you can set up and the sequence that you should follow. Refer to the legend in the last graphic titled ORACLE LEARNING MANAGEMENT 3 to identify the required and the optional implementation steps in the flowchart.

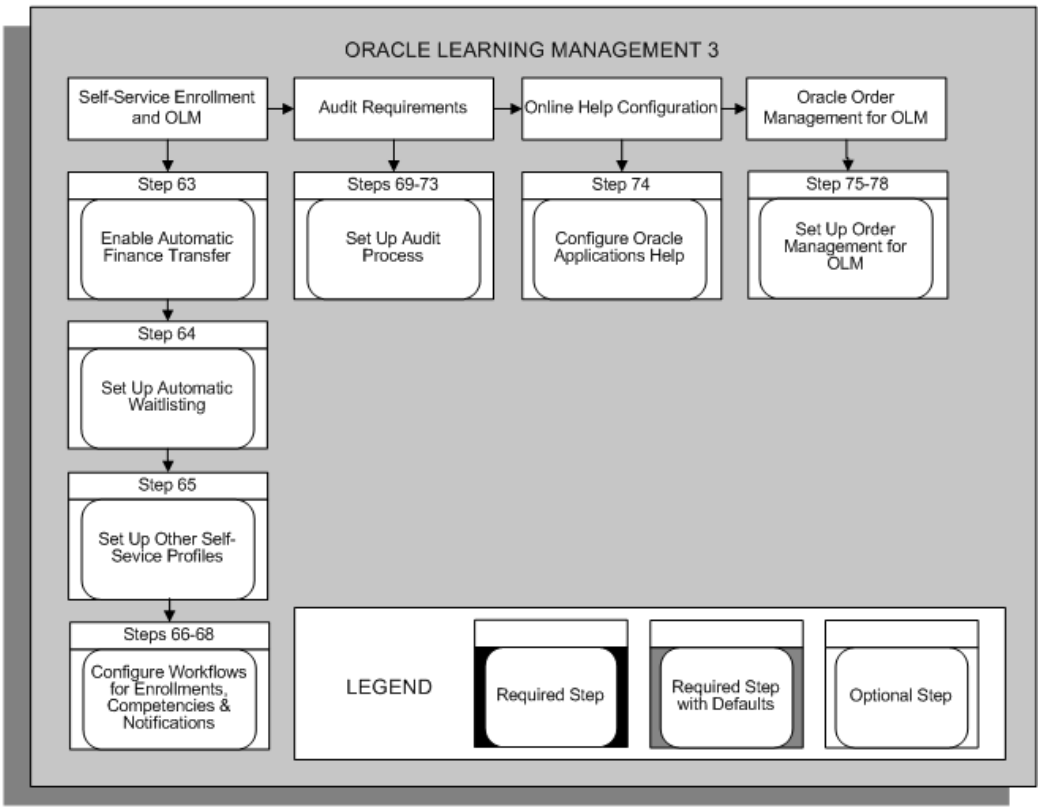
Implementation Flowchart I



Implementation Flowchart II



Implementation Flowchart III



Implementation Steps

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

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

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

This document breaks the steps into the following sections:

Key Flexfields, page 1-8

Descriptive Flexfields, page 1-10

Administration, page 1-11

Organizations, page 1-14

Courses, page 1-14

Class and Enrollment Management, page 1-17

Content Management, page 1-21

Pricing and Financial Relationships, page 1-24

Reports, Letters, and Folders, page 1-26

Security, page 1-28

Self-Service Enrollment and OLM, page 1-32

Audit Requirements, page 1-36

E-Signatures in OLM, page 1-37

Online Help Configuration, page 1-38

Oracle Order Management for OLM, page 1-38

Setup Steps for My Learning (OTA_LEARNER_MENU), page 1-39

Key Flexfields

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

Before you use OLM, you must define the Training Resource Key Flexfield structure.

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

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

Training Resources Key Flexfield

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

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

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

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

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

Different segments of a single flexfield or segments of any other flexfield can share

Value Sets.

Use the Value Set window.

See Defining Value Sets, *Oracle E-Business Suite Flexfields Guide*

Step 2: Define Training Resource Flexfield Segments

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

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

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

Use the **Key Flexfield Segments** window.

See Defining Key Flexfield Structures, *Oracle E-Business Suite Flexfields Guide*

Step 3: Define Segment Values

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

Use the **Segment Values** window.

See Defining Segment Values, *Oracle E-Business Suite Flexfields Guide*

Step 4: Freeze and Compile Your Resource Flexfield Structure

Freeze your Resource Flexfield definition. Navigate to the **Key Flexfield Segments** window. Check the Freeze Flexfield Definition box and save your changes. Oracle Learning Management now freezes and compiles your Resource Flexfield definition. Compiling the flexfield definition enables the Resources Flexfield window with the defaults, values, and rules that you have defined.

Use the **Key Flexfield Segments** window.

See Defining Key Flexfield Structures, *Oracle E-Business Suite Flexfields Guide*

Step 5: Define Resource Types

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

Use the Application Utilities Lookups window

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

Descriptive Flexfields

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

See Descriptive Flexfields, *Oracle Learning Management User Guide*

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

For each descriptive flexfield, specify:

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

You can define two types of descriptive flexfield Segments:

- **Global Segments**

  Segments always appear in the flexfield window.

- **Context-Sensitive Segments**

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

  > **Note:** Often you can choose between using a code, a 'base-table' field, and a field that contains a meaning or description. You should always use base-table fields as reference fields for Context-Sensitive segments. These fields usually have the same name as the column in the base table.
  >
  > Some of the Standard Reports supplied with Oracle Learning Management include descriptive segment values. If you follow this suggestion, these reports will be able to use the prompts you define; otherwise they will apply a generic prompt to the data.

Step 6: Register a Reference Field

If you want to use a reference field from the same block on the window to provide the context automatically for context-sensitive segments, you must register this field. Use

the *Application Developer* responsibility to update the definition of the descriptive flexfield.

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

Use the **Descriptive Flexfields** window.

Step 7: Define Flexfield Value Sets

Create Value Sets as you created them in Step 1.

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

Use the Value Sets window.

Step 8: Define Descriptive Flexfield Segments

Define the segments of your descriptive flexfield for each Context.

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

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

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

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

Use the Descriptive Flexfield Segments window.

See Defining Descriptive Flexfield Structures, *Oracle E-Business Suite Flexfields Guide*

Step 9: Define Flexfield Segment Values

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

Use the **Segment Values** window.

See Defining Segment Values, *Oracle E-Business Suite Flexfields Guide*.

Administration

The System Administrator usually performs the administration steps. Sign on to the

system using your System Administrator username and password. Contact your DBA if you do not know this information.

Step 10: Define User for Implementation

Before you can access any of the OLM pages or windows you must create a new Application User with access to the default responsibility (Oracle Learning Management Administrator) supplied with the application. You must also attach this responsibility to a role (see the step Configure Role-Based Access Control under Security, page 1-28).

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

See: OLM Roles, Permission Sets, and Permissions, page 1-41

Use the Users window.

See Users Window, *Oracle System Administrator User Guide*

Step 11: Create Administrator Groups

Use the Administrator Access Control feature to determine who can view and work with a specific category and content. Using administrator groups, you can control administrators' access to OLM data. You can define administrator control at the catalog category level or content folder level. Only administrators belonging to a specific administrator group can access the catalog objects belonging to that category or the content objects belonging to that content folder.

The **Administrator Group** field that enables learning administrators to select the administrator group when creating categories or folders is hidden by default. If you want to use the Administrator Access Control feature, then you must display the **Administrator Group** field on the following pages using personalization:

- **Create Category**
- **Create Folder**
- **View Category**
- **View Folder**

Remove the Restriction on Access to a Category to make it Available to all Administrators

If access to a category is restricted using an administrator group, then this restriction can be removed by the learning administrator, who can access that particular category. After restrictions are placed on access to a category, there may be business requirements to make the category and content within the category available to all administrators. In such a scenario, the learning administrator can remove the restriction by selecting the

Remove Administrator Group check box in the **Update Category** page. If the learning administrator selects the Remove Administrator Group check box and clicks Apply, a concurrent program runs in the background that removes the association between category and administrator group. The category and the content within the category then become accessible to all administrators. The **Remove Administrator Group** check box is displayed only for the topmost category associated with the administrator group. This check box is not displayed for categories within the topmost category.

See: Administrator Groups, *Oracle Learning Management User Guide*

Step 12: Define Lookup Values

Lookups supply many of the lists of values in OLM.

Implementation steps that require lookups are:

- Define Resource Types, page 1-9
- Create Class Statuses, *Oracle Learning Management User Guide*
- Create Booking Priorities, page 1-17
- Define New Finance Line Types, page 1-24
- Set Up Content Servers, page 1-21

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

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

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

Use the **Application Utilities Lookups** window.

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

Step 13: Enable Currencies

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

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

Use the **Currencies** window.

See Enabling Currencies, *Oracle Learning Management User Guide*

Organizations

Step 14: Create Locations

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

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

Use the Location window.

See Creating Locations, *Oracle Learning Management User Guide*

Step 15: Define a Business Group

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

As you create or choose your business group you should decide whether to implement your business group as global or local, *Oracle Learning Management User Guide*.

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

See Administration, page 1-11

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

Use the Organization window.

See Creating a Business Group, *Oracle Learning Management User Guide*

Step 16: Link Responsibility to Business Group

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

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

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

From the System Administrator responsibility, use the **Responsibilities** window.

Step 17: Select a New Responsibility

In the **System Profile Values** window, select this new responsibility, query the HR:

Business Group option, and enter the name of your business group.

Use the **System Profile Values** window.

Step 18: Create Organizations

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

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

> **Note:** OLM includes a predefined list of Organization Classifications. These values are defined for the lookup type ORG_CLASS, and provide options for all users of the Organization window.
>
> In the Application Utilities Lookups window, you can disable the Lookup values you do not want to use.

Use the **Organization** window.

See Creating a Training Organization, *Oracle Learning Management User Guide*

Step 19: Create Suppliers

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

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

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

Use the **Create Supplier** page of Oracle Payables application. See: *Entering Suppliers Manually*, *Oracle Payables User's Guide*

Step 20: Create Customers

You need only set up customers for external organizations who enroll learners in your classes. If you want to hold price information for internal learner enrollments, you must also create at least one internal customer.

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

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

Use the Create Customer page of Oracle Receivables application. See: *Creating a Customer*, *Oracle Receivables User Guide*

Step 21: Enter Trainers (Instructors)

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

See Resource Creation, *Oracle Learning Management User Guide*

Step 22: Enter Resources

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

See Resource Creation, *Oracle Learning Management User Guide*

Courses

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

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

Step 23: Define Delivery Modes

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

Use the Setup tab.

Step 24: Create Categories

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

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

Use the **Catalog** tab.

Step 25: Create Courses

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

Use the **Catalog** tab.

Class and Enrollment Management

Class and Enrollment Statuses

Step 26: Create Enrollment Statuses

OLM provides the following predefined enrollment status types:

- **Requested**
- **Waitlisted**
- **Placed**
- **Attended**
- **Cancelled**
- **Pending Signature/Evaluation**

You can define more than one enrollment status for each enrollment statuses type, but you can have one, and only *one*, default status for each type. OLM uses the default enrollment status to indicate the enrollment status for learners. Use the **Enrollment Statuses** page under the Setup tab.

If you are using the Evaluation functionality, then you can create a default enrollment status, for example, Pending Evaluation using the Pending Signature/Evaluation enrollment status type. For more information, see: Evaluation for Courses and Classes, *Oracle Learning Management User Guide*

If you are using the electronic records and electronic signatures (ERES) functionality, then you can create a default enrollment status, for example, Pending Signature using the Pending Signature/Evaluation enrollment status type. For more information, see: Electronic Records and Electronic Signatures (ERES) in OLM, *Oracle Learning Management User Guide*

If you are using both the Evaluation and electronic records and electronic features, then you create a default enrollment status, for example Pending Signature and Evaluation using the Pending Signature/Evaluation enrollment status type.

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

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

Automatic Waitlisting

Step 27: Create Booking Priorities

If you have not created your booking priorities already, define booking priorities as values for the Lookup Type PRIORITY_LEVEL (under application Oracle Human

Resources). OLM uses the actual codes to define the booking priority, so you need to enter numbers, rather than characters, as the lookup codes. The smaller the number, the higher the priority.

The following table offers suggested values:

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

Use the **Application Utilities Lookups** window.

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

Step 28: Set Up Enrollment Justifications

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

Use the **Enrollment Justifications** page under the **Setup** tab.

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

Step 29: Define Automatic Waitlist Enrollments Profile Options and Concurrent Program

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

Use the **System Profile Options** window.

See Setting Profile Options, *Oracle E-Business Suite Setup Guide*

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

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

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

Step 30: Set Learning Path Reminder Concurrent Programs to Run Regularly *Required Step*

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

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

Step 31: Schedule the Class Reminder Notification Program to Run Regularly *Optional Step*

To send reminder notifications to learners about the class start, schedule the Class Reminder Notification concurrent program to run regularly. Learning administrators can set the "Remind Before Class Start" field to determine when reminders are sent. For more information, see Offerings, *Oracle Learning Management User Guide* and Classes, *Oracle Learning Management User Guide*.

Step 32: Display the Unsubscribe and Unenroll Button *Optional Step*

Learning administrators can use the **Unsubscribe and Unenroll** button in the Subscriptions page to unsubscribe learners from a learning certification and unenroll them from all classes of courses in the learning certification. When you unsubscribe and unenroll learners, OLM unenrolls learners only from those classes in which they have enrolled through the learning certification subscription. If learners are mandatorily enrolled in a class, then when you unsubscribe and unenroll learners from the learning certification, OLM does not unenroll learners from mandatorily enrolled classes. If learners had manually enrolled in classes before subscribing to the certification, then when you unsubscribe and unenroll learners from the learning certification, OLM does not unenroll learners from such classes. For more information, see Learning Certifications , *Oracle Learning Management User Guide*

By default, the **Unsubscribe and Unenroll** button is not displayed on the Subscriptions page (ListOfCertEnrMaintainPG) or on the Enrollments and Subscriptions (LrnrEnrollmentListPG) page. This button is displayed only if you grant the Update Enrollment function (OTA_ENR_UPDATE) to the Edit Enrollment permission set (OTA_ENR_EDIT_DS).

To display the **Unsubscribe and Unenroll** button:

1. Navigate to the System Administrator responsibility.
2. Open the **Menus** window.
3. Search for the Edit Enrollment permission set by entering OTA_ENR_EDIT_DS in the Menu field or Edit Enrollment in the User Menu Name field.
4. Add the Update Enrollment (OTA_ENR_UPDATE) function.
5. Select the **Grant** check box to grant this function to the permission set.

Step 33: Display the Priority Column *Optional Step*

The Priority column in the Search results table on the following pages displays the learners' waitlist priority:

- Enrollment and Subscription (LrnrEnrollmentListPG)
- Enrollments page for a class (ListOfEnrollmentsMaintainPG)

See Enrollment Basics, *Oracle Learning Management User Guide* for information about setting priority levels.

To display the **Priority** column:

1. Navigate to the **Enrollment and Subscription** page.
2. Scroll to the Search results table.
3. Click Personalize Enrollments. The Personalize Region: Enrollments page appears.
4. Scroll to **Message Styled Text: Priority**.
5. Click the Personalize icon. The Personalize Message Styled Text: Priority page appears.
6. In the Personalization Properties table, scroll to the **Rendered** property. The default value is false.
7. Set the value to true ror the appropriate level.
8. Click **Apply** and then **Return to Application**.

The Search results table displays the Priority column.

Step 34: Display the Class Type Column *Optional Step*

The Class Type column on the following pages is hidden by default.

- Learning Administrator Interface

  Bulk Enroll: Selected Learners
  (/oracle/apps/ota/admin/enrollment/webui/SelectedLearnersPG)

- Learner Interface

  Learning Certification
  (/oracle/apps/ota/learner/certification/webui/LearnerCertDetailsPG)

To enable administrators and learners to view the class type, use the OAF Personalization feature to display the Class Type column.

Step 35: Enter Learners and Training Managers

To enter your learners and training managers:

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

Step 36: Set the Process Mandatory Enrollments Program *Required Step*

To process mandatory enrollments for a class, you must set the Process Mandatory Enrollments Program to run frequently as required. This program verifies mandatory enrollments and enrols new learners who meet the enrolment criteria.

Use the **Submit Request** window (select Submit Report under Reports and Other Requests) to schedule or run the program.

See: Learner Access, *Oracle Learning Management User Guide*

See:Running the Process Mandatory Enrollments Program, *Oracle Learning Management User Guide*

Step 37: Enable the Export of Class Schedules *Optional Step*

Learners and instructors can export class schedule details such as class time, class start and end dates to the calendar application that they use. Using the Personalization function, you can enable the Export feature on the following pages to help users download class schedules to their calendar application:

- Instructor Home
- Learner Home
- Enrollment Notification

For information on how to configure the Export feature, refer to this note on My Oracle Support: *Configuring the iCalendar Export Feature in Oracle HRMS Applications*, Note ID: 761563.1

Content Management

Step 38: Set Up Content Servers *Optional Step*

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

outside a firewall.

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

See Content Servers, *Oracle Learning Management User Guide*

For more information, see My Oracle Support document, *Oracle Learning Management Content Server Installation & Configuration on WebLogic Server - Release 12.1 and 12.2*, document ID 2016176.1.

Step 39: Install SCORM Adapters *Optional Step*

To enable SCORM 1.2 or SCORM 2004 Edition 4 compliant content to communicate correctly with OLM, you must install and register SCORM adapters, to handle the SCORM CMI calls in your content. Oracle provides *two separate* adapters one for SCORM 1.2 and one for SCORM 2004 Edition 4 specifications. You can download the SCORM adapter files from My Oracle Support document 1631724.1, *How to Install SCORM Adapter* .

For installation steps and other information, see the README.txt file included in the relevant zip files.

For more information, see: *Deploying e-Learning Content on Oracle Learning Management*, on My Oracle Support document: 308703.1

See SCORM Adapters, *Oracle Learning Management User Guide*

Step 40: Use Oracle WebCenter Content (OWCC) as a Content Server for OLM *Optional Step*

Oracle WebCenter Content (OWCC) can now be used as a content server for Oracle Learning Management (OLM).

When OWCC, formerly Oracle Universal Content Management, is integrated with OLM, learning administrators can:

- Access OWCC from OLM.
- Associate existing content on OWCC with a learning object in OLM.
- Import SCORM or AICC compliant content to OWCC.
- Upload content to OWCC from within OLM.

To use an Oracle WebCenter Content server as a content server for OLM, complete the following steps:

1. Install Oracle WebCenter Content and ensure that installation is correct and complete.
2. Set up steps required on the Oracle WebCenter Content server to integrate Oracle Learning Management (OLM) with Oracle WebCenter Content. Refer to the Note

ID 1552750.1 on My Oracle Support

This document provides details of the steps required for setting up the content server to integrate with OLM.

- Creating folders in the Oracle WebCenter Content Contribution Folder.
- Importing and deploying the Oracle WebCenter Content Component to unzip the content.
- Creating a web folder.

Note: In the Create Content Server and Update Content Server pages, the check box name 'UCM Content Server' is synonymous with Oracle WebCenter Content server. If required, using personalization feature, you can change the check box name.

Step 41: Set Up Online Player *Optional Step*

To keep the online player session alive for a certain period, without timing out, you should set the OTA_PLAYER_TIMEOUT_MINUTES and OTA_PLAYER_PING_INTERVAL profile values.

Use the **System Profile Options** window.

See Setting Profile Options, *Oracle E-Business Suite Setup Guide*

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

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

To avoid IE browser compatibility issues while playing SCORM-based content, set the OTA: IE Document Mode for Player profile option. Before setting the profile option value, check with your SCORM content developers about IE compatible browser versions for the online content. See Profile Options, *Oracle Learning Management User Guide* for more information.

Step 42: Set Up Conference Servers *Optional Step*

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

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

connect to the OWC server. You can obtain these values from the OWC administrator.

Pricing and Financial Relationships

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

If you want to use these finance headers to trigger the creation of invoices and payments in your financial system, you must design an interface to transfer the information you require between OLM and your financial system. See Define Interface to Financials Systems, page 1-24

Financial Information

Step 43: Create Alternative Financial Implementation

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

Step 44: Define New Finance Line Types

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

Use the **Application Utilities Lookups** window.

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

Step 45: Define Interface to Financials System

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

- The status of the header (for example, Awaiting Transfer)
- The status of individual finance lines on the header
- The type of finance header (Payable, Receivable, Cost Transfer, or Cancellation) and the subtype for Receivable headers:
  - Standard, meaning an invoice should be issued after the class
  - Prepayment, meaning an invoice should be issued before the class
  - Prepurchase Payment, meaning an invoice should be issued immediately for unspecified enrollments

- Prepurchase Use, meaning no invoice should be issued because the enrollment cost is being deducted from a prepurchase payment

- The cancellation flag on a header or line
- The authorization flag on a header
- The header payment method
- Any other information you have defined in the Additional Finance Information descriptive flexfield

Your interface can return the following information to OLM:

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

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

Step 46: Set Up Cross-Charging

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

Setting up cross-charging of enrollments takes three steps:

1. Map accounting fields between OLM and General Ledger.

   See Setting Up Cross-Charge Accounting, *Oracle Learning Management User Guide*

2. Set up the Create Cross Charging GL Lines for Transfer concurrent process.
3. Set up the Create Journal Entries process in GL.

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

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

Use the **Submit a New Request** window (accessed from the Submit Report item in the navigator).

See Running Reports and Programs, *Oracle E-Business Suite User's Guide*

Step 47: Create Finance Headers

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

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

Use the **Finance Headers** window.

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

Pricing Information

Step 48: Define Price Lists

A price list is a catalog of courses and the prices at which they are available between certain dates. You can define any number of price lists--for example, for different seasons or for different course types (perhaps targeting different audiences). Administrators can select a standard price from a price list when they schedule classes.

Use the **Price Lists** window.

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

Reports, Letters, and Folders

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

Step 49: Use Standard Reports or Write New Reports

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

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

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

> **Additional Information:** See also My Oracle Support Knowledge Document 2277369.1, *Oracle E-Business Suite Support Implications for Discoverer 11gR1*.

Step 50: Register Reports as Concurrent Programs

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

time.

Use the **Concurrent Programs** window.

See Concurrent Programs Window, *Oracle E-Business Suite Setup Guide*

Step 51: Define Report Sets

You can define sets of reports:

- To restrict user access to specific reports

  A set of reports can be linked to a responsibility.

- To simplify requesting a report

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

Use the **Request Set w**indow.

See Defining Request Sets, *Oracle E-Business Suite Setup Guide*

Standard Letters

Step 52: Configure XML Reports, if required

OLM provides the following predefined XML reports to report on certifications, chats, forums, and course evaluation:

- OLM Forum Report
- OLM Chat Report
- OLM Certification Report
- OLM Course Evaluation Report
- OLM Learning Path Report

You can customize the XML reports using the supplied data definition source files and sample RTF templates. Use Oracle Business Intelligence (BI) Publisher to customize reports.

See: Customizing Report Templates, page 1-64

Step 53: Generate Letters Using Web Application Desktop Integrator (Web ADI)

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

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

Folders

OLM includes several folder windows:

- Resources Booked
- Customers Summary
- Suppliers Summary

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

Step 54: Define Standard Folders

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

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

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

See Customizing the Presentation of Data, *Oracle E-Business Suite User's Guide*

Step 55: Enable or Disable User Folder Customization

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

Use the **System Profile Values** window.

See Setting Profile Options, *Oracle E-Business Suite Setup Guide*

Security

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

Each user accesses OLM through a responsibility, such as Learning Administrator or Oracle Learning Management Administrator. The responsibility controls:

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

- The reports the user can run

See: OLM Roles, Permission Sets, and Permissions, page 1-41

Step 56: Disable the Multiple Forms Feature

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

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

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

Step 57: Define Menu Functions

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

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

Use the **Form Functions** window.

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

Step 58: Define Menus

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

Use the **Menus** window.

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

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

Step 59: Set Up Financial Security

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

Use the **Menus** window.

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

Enrollment Security

Step 60: Set Up Enrollment Status Security

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

Use the **Define Enrollment Status Exclusions** window.

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

User Security

Step 61: Configure Role-Based Access Control (RBAC) *Optional Step*

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

For information regarding RBAC, see Role Based Access Control (RBAC), *Oracle E-Business Suite Security Guide*

Step 62: Configure HR Security *Optional Step*

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

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

Step 63: Define Report Security Groups

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

Use the **Request Groups** window.

See Defining Request Security, *Oracle E-Business Suite Security Guide*

Step 64: Define Responsibilities

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

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

Use the Responsibilities window.

See Responsibilities Window, *Oracle E-Business Suite Security Guide*

Step 65: Establish Organization Security

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

See Organization Security, *Oracle Learning Management User Guide*

Step 66: Define Every User of the Application

You should define every user of the application with a unique username and password. You can give the same responsibility to many different users, but any data changes are then associated with the Application username.

Use the **Users** window.

See Users Window, *Oracle E-Business Suite Security Guide*

Step 67: Associate Employees to Usernames

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

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

Use the **Users** window.

See Users Window, *Oracle E-Business Suite Security Guide*

Profile Options

Step 68: Define Profile Options

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

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

Use the **System Profile Values** window.

See Setting Profile Options, *Oracle E-Business Suite Setup Guide*

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

Step 69: Define Learner Groups *Optional Step*

Administrators can group learners based on their common interests or job

responsibilities. Grouping users simplifies user management and makes it easier to assign learner access and to enroll users in training. To group internal learners, you can use any of the following grouping criteria: individual learners, assignments (organization, position, job), eligibility profiles, and other learner groups.

See: Learner Groups, *Oracle Learning Management User Guide*

To use the eligibility profile criteria to manage learner access, you must create relevant derived factors and eligibility profiles in OLM. Derived factors and eligibility profiles are business group specific. Instead of using different responsibilities associated with different business groups, OLM enables administrators to first select a business group to create derived factors and eligibility profiles. If enterprises use the concept of a global business group by defining the OTA: Global Business Group profile option, then administrators can select a business group to create derived factors and eligibility profiles in the appropriate business group.

See: Using Eligibility Profiles to Define Learner Access to Catalog Objects, *Oracle Learning Management User Guide*

For information on creating a global business group, see: Creating a Business Group, *Oracle Learning Management User Guide*

If enterprises do not define the OTA: Global Business Group profile option, then administrators do not get an option to select the business group to create derived factors and eligibility profiles. OLM creates these components in the business group that the administrator logs in.

Step 70: Define OLM Project Accounting Integration

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

Use the **System Profile Options** window.

See Setting Profile Options, *Oracle E-Business Suite Setup Guide*

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

Self-Service Enrollment and OLM

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

The Oracle SSHR guide includes all generic self-service setup steps.

See Implementation Steps for SSHR, *Oracle SSHR Deploy Self-Service Capability Guide*

Step 71: Set Up Automatic Finance Transfer

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

To enable the automatic transfer of finance headers to GL, you must set the OTA: SS

Automatic Transfer to GL profile to Yes.

See Profile Options, *Oracle Learning Management User Guide*

Step 72: Set Up Automatic Waitlisting

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

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

See Profile Options, *Oracle Learning Management User Guide*

Step 73: Set Up Other Self-Service Profiles

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

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

See Profile Options, *Oracle Learning Management User Guide*

Step 74: Configure Enrollment Workflow Approval *Optional Step*

By default, OLM uses dynamic workflow to govern class enrollments. To use standard workflow or to disable workflow entirely, use the Form Functions window. Perform the following steps:

- Query the function OTA_LEARNER_HOME_SS, and set the &pApprovalMode parameter to "Y" (to use standard workflow), "N" (to disable workflow), or "YD" (to re-enable dynamic approval).
- Query the function OTA_LEARNER_HOME_PARMS, and set the &pApprovalMode parameter to "Y" (to use standard workflow), "N" (to disable workflow), or "YD" (to re-enable dynamic approval).

See Workflow Notifications, *Oracle Learning Management User Guide*

Step 75: Display the Oracle Approvals Management (AME) Review Region in the OLM Transaction Review Page
Optional Step

Oracle Approvals Management (AME) is a web-based application that is integrated with Oracle Workflow and enables you to define business rules to control your approvals processes.

You can display the AME review region in the Review page of the following OLM transactions and use AME's Dynamic approvals feature.

- **Learners request enrollment**

  Set the pAMETranType=OTA parameter to the OTA_LEARNER_HOME_SS (Enroll in Learning) function. You can select any one of the values for the pApprovalMode parameter:

Parameter	Parameter	Parameter
pApprovalMode=YD	pApprovalMode=Y	pApprovalMode=N
The Review page displays the AME Approval Region with Add Adhoc Approver section.	The Review page displays the AME Approval Region without the Add Adhoc Approver section.	Indicates that there is no approval process and it is self enrollment.

- **Learners subscribe to certification**

  Set the pAMETranType=OTA parameter to the OTA_LEARNER_HOME_SS (Enroll in Learning) function. You can select any one of the values for the pApprovalMode parameter:

Parameter	Parameter	Parameter
pCertApprovalMode=YD	pCertApprovalMode=Y	pCertApprovalMode=N
The Review page displays the AME Approval Region with Add Adhoc Approver section.	The Review page displays the AME Approval Region without the Add Adhoc Approver section.	Indicates that there is no approval process and it is self subscription.

If the pAMETranType parameter is not set to any value, the Review page displays the SSHR review region.

To meet your business needs, you can add additional rules, conditions, or attributes within the delivered Learning Management (OTA) transaction type, or you can define a custom transaction type. For more information on configuring AME rules, conditions, and attributes, see: *Oracle Approvals Management Implementation Guide*

Note

To support external approvers (people with Person Type of Contact) and Oracle Applications (FND) users as approvers for certain transactions, OLM uses the Notification Process for Approvers and Notifiers (HR_NOTIFICATION_PRC) workflow process for the following OLM processes:

- Class Enrollment (OTA_LNR_TRNG_APPROVAL_JSP_PRC)
- Certification Subscription (OTA_CERT_APPROVAL_JSP_PRC)
- External Learning (OTA_EXT_LRNG_JSP_PRC)
- Competency Update (OTA_COMPETENCE_UPDATE_JSP_PRC)

These processes are delivered with the HRSSA workflow item.

Step 76: Display Details of Approved or Rejected Transactions in FYI Notifications *Optional Step*

Notification recipients can view transaction changes on the FYI Notification page after the following transactions are either rejected or approved:

- Learner's enrollment in a class

  For example, a learner can view class details in the FYI notification after a manager approves the learner's enrollment in class.

- Learner's enrollment in external learning
- Updates to a learner's competencies
- Learner subscription to certification

To enable recipients to view details on the FYI Notification page, set the *pFyiNtfDetails* parameter to Y for the OTA_LEARNER_HOME_SS (Enroll in Learning) function.

If the pFyiNtfDetails parameter is set to Y, then learners receive the FYI notification from Oracle SSHR instead of OLM. This FYI notification contains all the details.

Step 77: Configure Automatic Competency Profile Update *Optional Step*

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

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

Step 78: Calculate the End Dates of Learner Competencies Automatically

When defining a competency in Oracle HRMS, users can specify the Renewal Period and Unit fields to indicate when the competency must be reassessed. In OLM, administrators can configure the application to update, automatically or with approval,

learners' personal competency profiles after they have completed classes successfully. When a learner completes a course that has competencies defined with renewal period and renewal period unit, OLM uses the renewal information (renewal period and renewal period unit) to calculate the end date of the learner's competencies. Set the OTA: Allow Competency Update with Renewal Period profile option to use the renewal period and units information to automatically calculate end date of learners competencies.

> **Note:** OLM calculates end dates only if you use the predefined values that Oracle delivers for the Frequency lookup. The Renewal Period field uses the Frequency lookup values. If you use custom values to populate the Renewal Period, then the end date will be blank or not populated.

Step 79: Define the Name Format in Notifications *Optional Step*

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

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

Audit Requirements

Step 80: Estimate File Sizing and Management Needs

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

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

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

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

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

Step 81: Define Audit Installations

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

Use the **Audit Installations** window.

See Audit Installations Window, *Oracle E-Business Suite Security Guide*

Step 82: Define Audit Tables and Columns

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

Use the **Audit Tables** window.

See Audit Tables Window, *Oracle E-Business Suite Security Guide*

Step 83: Define Audit Groups

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

Use the **Audit Groups** window.

See Audit Groups Window, *Oracle E-Business Suite Security Guide*

Step 84: Activate AuditTrail Update Tables Process

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

Use the **Submit Requests** window.

See Running Reports and Programs, *Oracle E-Business Suite User's Guide*

Electronic Signatures and Electronic Signature Records in OLM

Step 85: Enable the Electronic Signatures and Electronic Records (ERES) Functionality in OLM *Optional Step*

Oracle E-Records is a configurable framework for secure capture, storage, inquiry, and printing of electronic records and electronic signatures (ERES) in compliance with government regulations.

OLM uses the electronic records and electronic signatures (ERES) functionality of Oracle E-Records to enable organizations meet legislative compliance, such as the United States Food and Drug Administration (US FDA) Code of Federal Regulations (CFR) Title 21 Part 11, otherwise known as 21 CFR Part 11.

Using the electronic records and electronic signatures functionality, you can obtain electronic signatures for the following business transactions:

- Administrator updates a course description.
- Administrator or instructor changes the enrollment status of a learner.
- Learner completes a course.

You can use the Oracle E-Records Evidence Store to query electronic records and esignatures.

See: Setting up the Electronic Signatures and Electronic Records (ERES) Functionality in OLM, page 1-66

Online Help Configuration

Step 86: Configure Oracle Applications Help

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

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

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

See Customizing Oracle E-Business Suite Help, *Oracle E-Business Suite Setup Guide*

Oracle Order Management for OLM

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

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

Step 87: Set Up OM for OLM

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

Use the **UOM Classes** and **Define Transaction Types** windows.

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

Step 88: Place Courses in Inventory

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

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

Step 89: Set Up Price Lists and Formulas

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

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

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

Step 90: Link inventoried courses to OLM

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

Use the **OLM Legacy Courses** window.

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

Setup Steps for My Learning (OTA_LEARNER_MENU)

From R12.2.4, the default Learner Self-Service responsibility (OTA_LEARNER_DIRECT_ACCESS) presents a new learner UI through My Learning (OTA_LEARNER_MENU).

> **Important:** The pre R12.2.4 Learning menu is renamed as Learning (old) (OTA_LEARNER_DIRECT_ACCESS_DTLS).

Step 91: Regenerate Hyperlinks to use My Learning (OTA_LEARNER_MENU) after Setting the Value for the 'pLearnerHomeFunc' Parameter of OTA_ADMIN_CATALOG and OTA_ADMIN_CONTENT_SS Functions *Required Step*

Administrators can generate hyperlinks to courses, offerings, and classes to share with learners. For the Learning (old) (OTA_LEARNER_DIRECT_ACCESS_DTLS) submenu functions, the 'pLearnerHomeFunc' parameter value is defined as OTA_LEARNER_HOME_SS, which is the home function.

- Catalog Administration (OTA_ADMIN_CATALOG) function:

  Web HTML Call

  OA.jsp?
  page=/oracle/apps/ota/admin/catalog/webui/CatalogPG&OAHP=OTA_ADMIN_AP
  P LICATION_MENU&OASF=OTA_ADMIN_CATALOG&
  OAPB=OTA_PRODUCT_BRANDING&;
  pLearnerHomeFunc=OTA_LEARNER_HOME_SS

- Content Administration (OTA_ADMIN_CONTENT_SS) function:

  Web HTML Call

  OA.jsp?
  page=/oracle/apps/ota/admin/content/webui/ContentPG&OAHP=OTA_ADMIN_A

PP LICATION_MENU&OASF=OTA_ADMIN_CONTENT_SS&
OAPB=OTA_PRODUCT_BRANDING&;
pLearnerHomeFunc=OTA_LEARNER_HOME_SS

When administrators generate hyperlinks for courses, offerings, and classes, the URL points to the Learning (old) pages as the generated hyperlinks store learner home function name

To use the My Learning (OTA_LEARNER_MENU) pages, the 'pLearnerHomeFunc' parameter value must be set as OTA_LEARNER_HOME_REDEFINED_SS, for the following functions:

- OTA_ADMIN_CATALOG
- OTA_ADMIN_CONTENT_SS

OTA_LEARNER_HOME_REDEFINED_SS is the home function of the new Learner UI. Administrators must regenerate hyperlink after making changes to the pLearnerHomeFunc parameter in OTA_ADMIN_CATALOG and OTA_ADMIN_CONTENT_SS for existing the classes and courses.

Using this definition, hyperlinks can be generated at course, offering and class level. As the My Learning UI does not have offering details page, offering hyperlinks will be redirected to course details page.

> **Important:** If customers are not planning to use the My Learning learner UI delivered with R12.2.4, then they must make sure that 'pLearnerHomeFunc' function parameter value is set to OTA_LEARNER_HOME_SS.

Display the Learning (old) menu, if required

R12.2.4 provides a new learner submenu My Learning with significant UI changes. The pre R12.2.4 Learning submenu is renamed as Learning (old) and from R12.2.4, this menu is hidden by default.

If customers want to continue to use the Learning (old) menu, then they must complete the following steps to display the Learning (old) menu to learner:

- Add prompts to the submenu 'Learning' under the menu 'Learner Self-Service'.
- Add prompts to the functions 'Learner Home' and 'External Learning' under the menu 'Learning Management for Managers' respectively.
- Make sure that 'pLearnerHomeFunc' function parameter value is set to OTA_LEARNER_HOME_SS.

Step 92: Set an Encryption Key to Load the OLM New Learner Interface Successfully *Required Step*

If the My Learning Home page (Navigation: Learner Self-Service > My Learning >

Learner Home) includes the learner's picture, the home page displays an error and does not load. To resolve the issue and to load the My Learning Home page, OLM customers must set an encryption key given in the following document on My Oracle Support:

Setting an Encryption Key to Avoid Issues with Loading the New Learner Interface in Oracle Learning Management R12.2.4 Document: 1903910.1

OLM Roles, Permission Sets, and Permissions

This topic describes the supplied Oracle Learning Management roles, permissions, permission sets, menus, and grants.

Step 1: Configuring Role-Based Access Control for OLM *Required Step*

To configure Role-Based Access Control for OLM effectively, you must be aware of the following issues:

- You must not change the supplied roles themselves; copy them and use the copies
- You must not change the Role Code prefix of UMX| (including the "pipe" character)
- Never grant a role direct access to permissions; always use permission sets
- As other Oracle Applications in your enterprise may use RBAC, it is a good idea to prefix your grants and sets with OLM or some other unique identifier
- You must not combine function security (menu access) and data security (view and edit capability) in the same permission set

Roles

The following roles are supplied under application "Learning Management" and role category of "Training":

Role Code	Display Name
UMX|OTA_LRNG_ADMIN	Learning Administrator
UMX|OTA_LRNG_AST_ADMIN	Learning Assessment Administrator
UMX|OTA_LRNG_CTG_ADMIN	Learning Catalog Administrator
UMX|OTA_LRNG_CNT_ADMIN	Learning Content Administrator
UMX|OTA_LRNG_ENR_ADMIN	Learning Enrollment Administrator

Role Code	Display Name
UMX|OTA_LRNG_FIN_ADMIN	Learning Finance Administrator
UMX|OTA_LRNG_INS_UPD_ENR	Learning Instructor – Update Enrollment Status
UMX|OTA_LRNG_RES_ADMIN	Learning Resource Administrator
UMX|OTA_LRNG_STP_ADMIN	Learning Setup Administrator

Permissions

The following permissions are form functions of the type "Subfunction":

S. No.	Function	User Function Name	Description
1	OTA_CTG_CREATE	Create Category	Permission for creating categories.
2	OTA_CTG_DELETE	Delete Category	Permission for deleting categories.
3	OTA_CTG_UPDATE	Update Category	Permission for updating categories.
4	OTA_CTG_VIEW	View All Categories	Permission for viewing categories.
5	OTA_ACT_CREATE	Create Course	Permission for creating courses.
6	OTA_ACT_DELETE	Delete Course	Permission for deleting courses.
7	OTA_ACT_UPDATE	Update Course	Permission for updating courses.
8	OTA_ACT_VIEW	View Course	Permission for viewing courses.

S. No.	Function	User Function Name	Description
9	OTA_ACT_GENERATE_URL	Course Generate Hyperlink	Permission for generating a url for courses.
10	OTA_OFF_CREATE	Create Offering	Permission for creating offerings.
11	OTA_OFF_DELETE	Delete Offering	Permission for deleting offerings.
12	OTA_OFF_UPDATE	Update Offering	Permission for updating offerings.
13	OTA_OFF_VIEW	View Offering	Permission for viewing offerings.
14	OTA_OFF_GENERATE_URL	Offering Generate Hyperlink	Permission for generating a url for offerings.
15	OTA_EVT_CREATE	Create Class	Permission for creating classes.
16	OTA_EVT_DELETE	Delete Class	Permission for deleting classes.
17	OTA_EVT_UPDATE	Update Class	Permission for updating classes.
18	OTA_EVT_VIEW	View Class	Permission for viewing classes.
19	OTA_EVT_GENERATE_URL	Class Generate Hyperlink	Permission for generating a url for classes.
20	OTA_SSN_CREATE	Create Session	Permission for creating sessions.
21	OTA_SSN_DELETE	Delete Session	Permission for deleting sessions.
22	OTA_SSN_UPDATE	Update Session	Permission for updating sessions.

S. No.	Function	User Function Name	Description
23	OTA_SSN_VIEW	View Session	Permission for viewing sessions.
24	OTA_LPS_CREATE	Create Learning Path	Permission for creating learning paths.
25	OTA_LPS_DELETE	Delete Learning Path	Permission for deleting learning paths.
26	OTA_LPS_UPDATE	Update Learning Path	Permission for updating learning paths.
27	OTA_LPS_VIEW	View Learning Path	Permission for viewing learning paths.
28	OTA_LOF_CREATE	Create Folder	Permission for creating folders.
29	OTA_LOF_DELETE	Delete Folder	Permission for deleting folders.
30	OTA_LOF_UPDATE	Update Folder	Permission for updating folders.
31	OTA_LOF_VIEW	View All Folders	Permission for viewing folders.
32	OTA_LOF_IMPORT	Import Folder	Permission for importing folders.
33	OTA_LOF_EXPORT	Export Folder	Permission for exporting folders.
34	OTA_LOF_UPLOAD_FILE	Upload File for Folder	Permission to upload files for folders.
35	OTA_LOS_CREATE	Create Learning Object	Permission for creating learning objects.
36	OTA_LOS_DELETE	Delete Learning Object	Permission for deleting learning objects.

S. No.	Function	User Function Name	Description
37	OTA_LOS_UPDATE	Update Learning Object	Permission for updating learning objects.
38	OTA_LOS_VIEW	View Learning Object	Permission for viewing learning objects.
39	OTA_LOS_IMPORT	Import Learning Object	Permission for importing learning objects.
40	OTA_LOS_EXPORT	Export Learning Object	Permission for exporting learning objects.
41	OTA_LOS_UPLOAD_FILE	Upload File for Learning Object	Permission to upload files for learning objects.
42	OTA_QBK_CREATE	Create Question Bank	Permission to create question banks.
43	OTA_QBK_DELETE	Delete Question Bank	Permission to delete question banks.
44	OTA_QBK_UPDATE	Update Question Bank	Permission to update question banks.
45	OTA_QTI_LOAD	Load QTI	Permission to load QTI
46	OTA_SCORM_LOAD	Load SCORM	Permission to load SCORM
47	OTA_TST_CREATE	Create Test	Permission for creating tests.
48	OTA_TST_DELETE	Delete Test	Permission for deleting tests.
49	OTA_TST_UPDATE	Update Test	Permission for updating tests.
50	OTA_TST_VIEW	View Test	Permission for viewing tests.

S. No.	Function	User Function Name	Description
51	OTA_TST_IMPORT	Import Test	Permission for importing tests.
52	OTA_TST_EXPORT	Export Test	Permission for exporting tests.
53	OTA_TSR_CREATE	Create Resource	Permission for creating resources
54	OTA_TSR_UPDATE	Update Resource	Permission for updating resources
55	OTA_TSR_DELETE	Delete Resource	Permission for deleting resources
56	OTA_TRB_CREATE	Create Resource Booking	Permission for creating resource booking
57	OTA_TRB_UPDATE	Update Resource Booking	Permission for updating resource booking
58	OTA_TRB_DELETE	Delete Resource Booking	Permission for deleting resource booking
59	OTA_TFH_CREATE	Create Finance	Permission for creating finance
60	OTA_TFH_UPDATE	Update Finance	Permission for updating finance
61	OTA_TFH_DELETE	Delete Finance	Permission for deleting finance
62	OTA_NHS_CREATE	Create External Learning	Permission for creating external learning
63	OTA_NHS_UPDATE	Update External Learning	Permission for updating external learning
64	OTA_NHS_DELETE	Delete External Learning	Permission for deleting external learning

S. No.	Function	User Function Name	Description
65	OTA_CRT_VIEW	View Certification	Permission for viewing certifications
66	OTA_CRT_CREATE	Create Certification	Permission for creating certifications
67	OTA_CRT_UPDATE	Update Certification	Permission for updating certifications
68	OTA_CRT_DELETE	Delete Certification	Permission for deleting certifications
69	OTA_CFR_VIEW	View Category Forum	Permission for viewing category forums
70	OTA_CFR_CREATE	Create Category Forum	Permission for creating category forums
71	OTA_CFR_UPDATE	Update Category Forum	Permission for updating category forums
72	OTA_CFR_DELETE	Delete Category Forum	Permission for deleting category forums
73	OTA_CCH_VIEW	View Category Chat	Permission for viewing category chats
74	OTA_CCH_CREATE	Create Category Chat	Permission for creating category chats
75	OTA_CCH_UPDATE	Update Category Chat	Permission for updating category chats
76	OTA_CCH_DELETE	Delete Category Chat	Permission for deleting category chats
77	OTA_EFR_VIEW	View Category Forum	Permission for viewing category forums
78	OTA_EFR_CREATE	Create Category Forum	Permission for creating category forums

S. No.	Function	User Function Name	Description
79	OTA_EFR_UPDATE	Update Category Forum	Permission for updating category forums
80	OTA_EFR_DELETE	Delete Category Forum	Permission for deleting category forums
81	OTA_ECH_VIEW	View Class Chat	Permission for viewing class chats
82	OTA_ECH_CREATE	Create Class Chat	Permission for creating class chats
83	OTA_ECH_UPDATE	Update Class Chat	Permission for updating class chats
84	OTA_ECH_DELETE	Delete Class Chat	Permission for deleting class chats
85	OTA_ENR_BULK	Bulk Enrollment	Permission to do bulk enrollments for class and subscriptions for learning paths and certifications
86	OTA_ENR_CREATE	Create Enrollment	Permission to create enrollments for class and subscriptions for learning paths and certifications
87	OTA_ENR_DELETE	Delete Enrollment	Permission to delete enrollments from class and subscriptions from learning paths and certifications
88	OTA_ENR_UPDATE	Update Enrollment	Permission to update enrollments for class and subscriptions for learning paths and certifications
89	OTA_INSTR_ENR_UPDATE	Instructor Update Enrollment	Permission for allowing instructors to update class enrollments

S. No.	Function	User Function Name	Description
90	OTA_SRB_VIEW	View Supplemental Resource Booking	Permission to view supplemental resource bookings

Note: Complete the following steps to grant functions to the permission sets:

1. Log in to the System Administrator responsibility.
2. Open the Menus window.
3. Search for the required permission set.
4. Add the relevant function.
5. Select the Grant check box to grant a function to a permission set.

Menus

Menus are available for consolidating permissions on objects as well as for providing access to functions. Permission Sets and Function Sets are created as menus of type Data Security.

The two types of menus for security are:

- One containing permissions (actions that can be performed on an object). The menu name follows the convention: **OTA_<action/object>_DS**

  Data security policies are applied to this permission set when the grant is being created for the role. For this reason, it is imperative that the permissions belong to one single object type. For example, the View Category permission cannot be in the same permission set as View Course Permission, or data security policies applied to categories do not work.

- The UIs/pages that are accessible to the user. This menu uses the following conventions:

  Menu Name: OTA_<action/object>_UI

  User Menu Name: <menu name> UIs

Thus separate grants have been (and must be) created for the UI menus and Permission set menus.

OTA_ADMIN_TOP_MENU

Prompt	Function
Catalog Administration	Catalog Administration
Resources	List of Resource Definitions
Resource Bookings	List of All Resource Bookings
Learner Enrollments and Subscriptions	List of Learner Enrollments
Learning History	List of External Learnings
Content Administration	Content Administration
Cost Transfer Finance Headers	List of Finance Headers
Setup Administration	Setup Administration List

OTA_ILEARNING_ADMIN_TOP_MENU

Prompt	Function
Catalog Administration	Catalog Administration
Resources	List of Resource Definitions
Resource Bookings	List of All Resource Bookings
Learner Enrollments and Subscriptions	List of Learner Enrollments
Learning History	List of External Learnings
Content Administration	Content Administration
Cost Transfer Finance Headers	List of Finance Headers
Setup Administration	Setup Administration List

Prompt	Menu
Enrollments	Manage Learning Management Enrollment Forms UIs
Resources	Manage Learning Management Resource Forms UIs

OTA_ADMIN_FINANCE_TAB Menu

User Menu Name: OTA Finance Tab for Self-Service Administrator

Menu Type: HTML Tab

Prompt	Submenu
Headers	OTA Finance Header Sub Tab for Self Service Administrator

A similar structure has been created for Finance Headers, Resources, and Learner Tabs.

OTA_ADMIN_APPLICATION_MENU

Prompt	Submenu
Resources	OTA Resources Tab for Self-Service Administrator
Learner	OTA Learner Tab for Self-Service Administrator
Content	OTA Content Tab for Self-Service Administrator
Finance	OTA Finance Tab for Self-Service Administrator
Setup	OTA Setup Tab for Self-Service Administrator

Permission Sets

The following permission sets are available:

S.No	Menu	User Menu Name
1	OTA_CTG_VIEW_DS	View Category

S.No	Menu	User Menu Name
2	OTA_CTG_EDIT_DS	Edit Category
3	OTA_ACT_VIEW_DS	View Course
4	OTA_ACT_EDIT_DS	Edit Course
5	OTA_ACT_GENERATE_URL_DS	Generate Course Hyperlink
6	OTA_OFF_VIEW_DS	View Offering
7	OTA_OFF_EDIT_DS	Edit Offering
8	OTA_OFF_GENERATE_URL_DS	Generate Offering Hyperlink
9	OTA_EVT_VIEW_DS	View Class
10	OTA_EVT_EDIT_DS	Edit Class
11	OTA_EVT_GENERATE_URL_DS	Generate Class Hyperlink
12	OTA_SSN_EDIT_DS	Edit Session
13	OTA_SSN_VIEW_DS	View Session
14	OTA_LPS_VIEW_DS	View Learning Path
15	OTA_LPS_EDIT_DS	Edit Learning Path
16	OTA_CRT_VIEW_DS	View Certification
17	OTA_CRT_EDIT_DS	Edit Certification
18	OTA_CCH_VIEW_DS	View Category Chat
19	OTA_CCH_EDIT_DS	Edit Category Chat
20	OTA_CFR_VIEW_DS	View Category Forum

S.No	Menu	User Menu Name
21	OTA_CFR_EDIT_DS	Edit Category Forum
22	OTA_ECH_VIEW_DS	View Class Chat
23	OTA_ECH_EDIT_DS	Edit Class Chat
24	OTA_EFR_VIEW_DS	View Class Forum
25	OTA_EFR_EDIT_DS	Edit Class Forum
26	OTA_LOF_VIEW_DS	View Folder
27	OTA_LOF_EDIT_DS	Edit Folder
28	OTA_LOF_LOAD_DS	Load Folder
29	OTA_LOS_VIEW_DS	View Learning Object
30	OTA_LOS_EDIT_DS	Edit Learning Object
31	OTA_LOS_LOAD_DS	Load Learning Object
32	OTA_TST_VIEW_DS	View Test
33	OTA_TST_EDIT_DS	Edit Test
34	OTA_TST_LOAD_DS	Load Test
35	OTA_QBK_EDIT_DS	Edit Question Bank
36	OTA_TFH_EDIT_DS	Edit Finance Header and Line
37	OTA_TRB_EDIT_DS	Edit Resource Booking
38	OTA_TSR_EDIT_DS	Edit Resource Definition
39	OTA_SRB_VIEW_DS	View Supplemental Resource Booking
40	OTA_ENR_EDIT_DS	Edit Enrollment

S.No	Menu	User Menu Name
41	OTA_NHS_EDIT_DS	Edit External Learning
42	OTA_INSTRUCTOR_UPD_ENR_DS	Instructor Update Enrollment

The following permission sets are available to provide access to the UIs.

	Menu	User Menu Name
1	OTA_CATALOG_COMMON_UI	Catalog Common UIs
2	OTA_CATALOG_FORMS_UI	Manage Catalog Forms UIs
3	OTA_CATALOG_MANAGE_UI	Manage Catalog UIs
4	OTA_CATALOG_VIEW_UI	View Catalog UIs
5	OTA_CTG_COMMON_UI	Category Common UIs
6	OTA_CTG_VIEW_UI	View Category UIs
7	OTA_CTG_MANAGE_UI	Manage Category UIs
8	OTA_CTG_LA_VIEW_UI	View Category Learner Access UIs
9	OTA_CTG_LA_MANAGE_UI	Manage Category Learner Access UIs

10	OTA_ACT_COMMOM_UI	Course Common UIs
11	OTA_ACT_VIEW_UI	View Course UIs
12	OTA_ACT_MANAGE_UI	Manage Course UIs
13	OTA_ACT_LA_VIEW_UI	View Course Learner Access UIs
14	OTA_ACT_LA_MANAGE_UI	Manage Course Learner Access UIs
15	OTA_ACT_COMP_MANAGE_UI	Manage Course Competency UIs
16	OTA_OFF_COMMON_UI	Offering Common UIs
17	OTA_OFF_VIEW_UI	View Offering UIs
18	OTA_OFF_MANAGE_UI	Manage Offering UIs
19	OTA_OFF_LA_VIEW_UI	View Offering Learner Access UIs
20	OTA_OFF_LA_MANAGE_UI	Manage Offering Learner Access UIs
21	OTA_EVT_COMMON_UI	Class Common UIs

22	OTA_EVT_VIEW_UI	View Class UIs
23	OTA_EVT_MANAGE_UI	Manage Class UIs
4	OTA_EVT_LA_VIEW_UI	View Class Learner Access UIs
25	OTA_EVT_LA_MANAGE_UI	Manage Class Learner Access UIs
26	OTA_EVT_SSN_MANAGE_UI	Manage Session UIs
27	OTA_LPS_COMMON_UI	Learning Path Common UIs
28	OTA_LPS_VIEW_UI	View Learning Path UIs
29	OTA_LPS_MANAGE_UI	Manage Learning Path UIs
30	OTA_LPS_LA_VIEW_UI	View LP Learner Access UIs
31	OTA_LPS_LA_MANAGE_UI	Manage LP Learner Access UIs
32	OTA_LPS_COMP_MANAGE_UI	Manage LP Competency UIs
33	OTA_CCH_COMMON_UI	Category Chat Common UIs

34	OTA_CCH_LA_MANAGE_UI	Manage Category Chat Learner Access UIs
35	OTA_CCH_LA_VIEW_UI	View Category Chat Learner Access UIs
36	OTA_CCH_MANAGE_UI	Manage Category Chat UIs
37	OTA_CCH_VIEW_UI	View Category Chat UIs
38	OTA_ECH_COMMON_UI	Class Chat Common UIs
39	OTA_ECH_MANAGE_UI	Manage Class Chat UIs
40	OTA_ECH_VIEW_UI	View Class Chat UIs
	OTA_CFR_COMMON_UI	Category Forum Common UIs
42	OTA_CFR_LA_MANAGE_UI	Manage Category Forum Learner Access UIs
43	OTA_CFR_LA_VIEW_UI	View Category Forum Learner Access UIs

44	OTA_CFR_MANAGE_UI	Manage Category Forum UIs
45	OTA_CFR_VIEW_UI	View Category Forum UIs
46	OTA_EFR_COMMON_UI	Class Forum Common UIs
47	OTA_EFR_MANAGE_UI	Manage Class Forum UIs
48	OTA_EFR_VIEW_UI	View Class Forum UIs
49	OTA_CRT_COMMON_UI	Learning Certification Common UIs
50	OTA_CRT_COMP_MANAGE_UI	Manage Learning Certification Competency UIs
51	OTA_CRT_LA_MANAGE_UI	Manage Learning Certification Learner Access UIs
52	OTA_CRT_LA_VIEW_UI	View Learning Certification Learner Access UIs
53	OTA_CRT_MANAGE_UI	Manage Learning Certification UIs

54	OTA_CRT_VIEW_UI	View Learning Certification UIs
55	OTA_NHS_MANAGE_UI	Manage External Learning UIs
56	OTA_NHS_VIEW_UI	View External Learning UIs
57	OTA_LA_MANAGE_UI	Manage Learner Access UIs
58	OTA_LA_VIEW_UI	View Learner Access UIs
59	OTA_COMP_MANAGE_UI	Manage Competency UIs
60	OTA_CONTENT_COMMON_UI	Content Common UIs
61	OTA_CONTENT_VIEW_UI	View Content UIs
62	OTA_CONTENT_LOAD_UI	Load Content UIs
63	OTA_CONTENT_MANAGE_UI	Manage Content Uis
64	OTA_LOF_VIEW_UI	View Folder UIs
65	OTA_LOF_MANAGE_UI	Manage Folder UIs
66	OTA_LOF_LOAD_UI	Load Folder UIs

67	OTA_LOS_VIEW_UI	View Learning Object UIs
68	OTA_LOS_MANAGE_UI	Manage Learning Object UIs
69	OTA_LOS_LOAD_UI	Load Learning Object UIs
70	OTA_LOS_PREREQ_MANAGE_UI	Manage Learning Object Prerequisites UIs
71	OTA_QBK_MANAGE_UI	Manage Question Bank UIs
72	OTA_TST_VIEW_UI	View Test UIs
73	OTA_TST_MANAGE_UI	Manage Test UIs
74	OTA_TST_LOAD_UI	Load Test UIs
75	OTA_TST_PREREQ_MANAGE_UI	Manage Test Prerequisites UIs
76	OTA_RESOURCE_FORMS_UI	Manage Resource Forms UIs
77	OTA_RESOURCE_VIEW_UI	View Resource UIs
78	OTA_RESOURCE_MANAGE_UI	Manage Resource UIs
79	OTA_TSR_VIEW_UI	View Resource UIs

80	OTA_TSR_MANAGE_UI	Manage Resource UIs
81	OTA_TRB_VIEW_UI	View Resource Booking UIs
82	OTA_TRB_MANAGE_UI	Manage Resource Booking UIs
83	OTA_CTG_TRB_VIEW_UI	View Catalog Resource Bookings UIs
84	OTA_ENROLLMENT_FORMS_UI	Manage Enrollment Forms UIs
85	OTA_ENROLLMENT_VIEW_UI	View Enrollment UIs
86	OTA_ENROLLMENT_MANAGE_UI	Manage Enrollment UIs
87	OTA_CTG_ENR_MANAGE_UI	Manage Catalog Enrollments UIs
88	OTA_CTG_ENR_VIEW_UI	View Catalog Enrollments UIs
89	OTA_ENR_MANAGE_UI	Manage Learner Enrollment UIs
90	OTA_ENR_VIEW_UI	View Learner Enrollment UIs

91	OTA_FINANCE_FORMS_UI	Manage Finance Forms UIs
92	OTA_FINANCE_VIEW_UI	View Finance UIs
93	OTA_FINANCE_MANAGE_UI	Manage Finance UIs
94	OTA_TFH_VIEW_UI	View Finance UIs
95	OTA_TFH_MANAGE_UI	Manage Finance UIs
96	OTA_SETUP_FORMS_UI	Manage Learning Setup Forms UIs
97	OTA_SETUP_COMMON_UI	Learning Setup Common UIs
98	OTA_SETUP_VIEW_UI	View Learning Setup UIs
99	OTA_SETUP_MANAGE_UI	Manage Learning Setup UIs
100	OTA_LM_ENROLLMENT_FORMS_UI	Manage Learning Management Enrollment Forms UIs
101	OTA_LM_ORGANIZATION_FORMS_UI	Manage Learning Management Organizations Forms UIs

102	OTA_LM_RESOURCE_FORMS_UI	Manage Learning Management Resource Forms UIs
103	OTA_ASMT_ADMIN_UI	Manage Assessment Administration UIs
104	OTA_ASMT_COMMON_UI	Assessment Administration Common UIs

Grants

Grants are supplied to enable all users who have the Learning Administrator or Learning Management Administrator responsibility to access OLM pages:

Grantee	Grant Name	Permission Set
Learning Catalog Administrator	OTA Manage Catalog UIs for Catalog Administration	Manage Catalog UIs
Learning Catalog Administrator	OTA Edit Learning Path for Catalog Administration	Edit Learning Path
Learning Catalog Administrator	OTA Edit Category for Catalog Administration	Edit Category
Learning Catalog Administrator	OTA Edit Course for Catalog Administration	Edit Course
Learning Catalog Administrator	OTA Edit Offering for Catalog Administration	Edit Offering
Learning Catalog Administrator	OTA Edit Class for Catalog Administration	Edit Class

Grantee	Grant Name	Permission Set
Learning Catalog Administrator	OTA Session Class for Catalog Administration	Edit Session
Learning Catalog Administrator	OTA Edit Learning Certification for Catalog Administration	Edit Learning Certification
Learning Catalog Administrator	OTA Edit Category Chat for Catalog Administration	Edit Category Chat
Learning Catalog Administrator	OTA Edit Category Forum for Catalog Administration	Edit Category Forum
Learning Catalog Administrator	OTA Edit Class Chat for Catalog Administration	Edit Class Chat
Learning Catalog Administrator	OTA Edit Class Forum for Catalog Administration	Edit Class Forum

Customizing Report Templates

OLM provides the following predefined XML reports to report on certifications, chats, forums, and course evaluation:

- OLM Forum Report
- OLM Chat Report
- OLM Certification Report
- OLM Course Evaluation Report

OLM provides the following predefined data definition source files and sample RTF templates for customizing these XML reports:

- OLM Forum Report
  - DataTemplate: OTAFRM.xml

    - Output RTF: OTAFRM.rtf

- OLM Chat Report
    - Data Template: OTACHT.xml
    - Output RTF: OTACHT.rtf
- OLM Certification Report
    - Data Template: OTACERT.xml
    - Output RTF: OTACERT.rtf
- OLM Course Evaluation Report
    - Data Template: OTAEVAL.xml
    - Output RTF: OTAEVAL.rtf
- OLM Learning Path Report
    - Data Template: OTALP.xml
    - Output RTF: OTALP.rtf

To customize the report details, you can create your own templates using Oracle XML Publisher.

> **Important:** You must create your own templates using the predefined templates as samples. Do not modify the predefined templates because your changes may be lost during an upgrade.

Step 1: Customizing Report Templates *Optional Step*

1. Create a new rich text or PDF format template.

   Using a predefined report template as a sample, create a new report template and save it as a rich text or PDF format files.

   For guidelines on creating template files, see: *Creating an RTF Template* and *Creating a PDF Template*, *Oracle XML Publisher Report Designer's Guide*

2. Create template definitions.

   Using a predefined template definition as a sample, create a new template definition in the Template Manager for your template design files. When you create a template definition in the Template Manager, you register and upload your

template design files.

See: *Creating the Template* in the *Oracle XML Publisher Administration and Developer's Guide*

Setting up the Electronic Records and Electronic Signatures (ERES) Functionality in OLM

This topic explains how to enable the electronic records and electronic signatures functionality of Oracle E-Records in OLM.

For more information about Oracle E-Records, see: *Oracle E-Records Implementation Guide*

To enable the electronic records and electronic signatures functionality in OLM, you work with the following responsibilities:

- System Administrator
- Workflow Administrator Event Manager
- Approval Management Administrator
- Approval Management Business Analyst
- ERES Administrator

Step 1: Enable the Profile Option for Electronic Records and Signatures

Using the System Administrator responsibility, set the EDR: E-records and E-signatures (EDR_ERES_ENABLED) profile option value to Yes in the System Profile Values window. You can set this profile option at: Site level, Organization level, or User level.

Step 2: Enable the Electronic Signature Workflow Events and Subscriptions

Complete the following steps using the Workflow Administrator Event Manager responsibility.

1. Select the Business Events function.
2. Search for OLM events using the oracle.apps.ota% search criteria.

   OLM provides the following events to support electronic signatures:

   oracle.apps.ota.catalog.course.update (OLM ERES Course Update)

   oracle.apps.ota.enr.statupd (OLM ERES Enrollment Update)

   oracle.apps.ota.learner.content (OLM ERES Learner Course Completion)

   oracle.apps.ota.enr.massupd (OLM ERES Enrollment Mass Update)

oracle.apps.ota.enr.interevent (OLM ERES Inter Enrollment Mass Update)

Each event has a subscription.

3. Enable events and subscriptions.

Step 3: Enable E-record Required and E-signature Required Variables for OLM

Complete the following steps using the ERES Administrator responsibility:

1. Click the Setup function. The Configuration Variables page appears. OLM provides approval transaction types for each of the workflow events:

   OLM ERES Course Updates (oracle.apps.ota.catalog.course.update)

   OLM ERES Enrollment Updates (oracle.apps.ota.enr.statupd)

   OLM ERES Learner Course Completion (oracle.apps.ota.learner.content)

   OLM ERES Enrollments Mass Update (oracle.apps.ota.enr.massupd)

   OLM ERES Inter Enrollment Mass Update Transaction (oracle.apps.ota.enr.interevent)

2. Search for each transaction using the Transaction Name, for example, OLM ERES Course Updates.

   OLM provides default values for the following variables:

   - E-record Required (**N**)
   - E-signature Required (**N**)
   - E-signature Mode (**SHORT**)
   - E-record Style Sheet (style sheets are different for different transactions)
   - E-record Style Sheet Version (**1.0**)

3. Update the E-record Required and E-signature Required variables to Y for each of the transaction types to enable ERES in OLM.

   Note: For the OLM ERES Inter Enrollment Mass Update Transaction, update the E-record Required variable. The E-signature Required variable does not apply to this transaction.

4. Provide the electronic signature, if the EDR: E-records and E-signatures profile option is set to Yes.

For electronic signature transactions, OLM uses the following predefined style sheets to display record in the E-Record tabbed region of the E-signatures page:

- otalrnxsl.xsl for OLM ERES Learner Course Completion
- otaenrxsl.xsl for OLM ERES Enrollment Updates
- otaenrinterxsl.xsl for OLM ERES Inter Enrollment Mass Update Transaction
- otaenrmsupdxsl.xsl for OLM ERES Enrollments Mass Update
- otaactxsl.xsl for OLM ERES Course Updates

If you want to use different e-record formats, then you must create style sheets according to your business requirements. Specify the new style sheet in the Update Transaction Variable page for a transaction.

For information on how to create and use style sheets, refer to the *Oracle XML Publisher Report Designer's Guide* and *Oracle E-Records Implementation Guide*

Step 4: Set up the Enrollment Status for Electronic Signatures in OLM

OLM provides the predefined Pending Signature/Evaluation enrollment status type. If you want to use the electronic signatures and electronic records functionality, then you must create an enrollment status, for example, Pending Signature using the predefined Enrollment Status Type.

Alternate Financial Implementation Steps

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

Define an Accounting Flexfield Structure

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

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

Step 1: Define Accounting Flexfield Value Sets

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

The attributes of the Value Set control the type of values that can be entered, and how

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

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

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

- Company
- Account
- Cost Center

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

Table B-1 Value Sets

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

Use the Value Sets window.

See Defining Value Sets, *Oracle E-Business Suite Flexfields Guide*

Step 2: Define Accounting Flexfield Segments

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

> **Note:** You must not check the Allow Dynamic Inserts box. Oracle Learning Management requires the valid combinations to exist, and therefore cannot enter new values upon data entry in the OLM Finance windows.

Table B-2 Accounting Flexfield

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

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

Table B-3 Company Segment

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

Table B-4 Account Segment

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

Table B-5 Cost Center Segment

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

Use the Key Flexfield Segments window.

See Defining Key Flexfield Structures, *Oracle E-Business Suite Flexfields Guide*

Step 3: Define Accounting Flexfield Segment Values

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

Table B-6 Accounting Flexfield Segment Values

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

Use the Segment Values window.

See Defining Segment Values, *Oracle E-Business Suite Flexfields Guide*

Step 4: Uncheck Dynamic Inserts on OTA Accounting Key Flexfield

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

Navigate to the Define Key Flexfield Segments window, and query the OLM

Accounting key flexfield structure.

Uncheck the Dynamic Inserts box.

Use the Key Flexfield Segments window.

See Defining Key Flexfield Structures, *Oracle E-Business Suite Flexfields Guide*

Step 5: Freeze and Compile Your Accounting Flexfield Structure

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

Use the Key Flexfield Segments window.

See Defining Key Flexfield Structures, *Oracle E-Business Suite Flexfields Guide*

Step 6: Create a Calendar

See Creating a Calendar, *Oracle Learning Management User Guide*

Step 7: Create a Ledger

See Creating a Ledger, *Oracle Learning Management User Guide*

Step 8: Define a Ledger Set

See Defining a Ledger Set, *Oracle Learning Management User Guide*

Step 9: Define Financials Options

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

Step 10: Define System Options

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

Glossary

Asynchronous

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

See also Delivery Mode, page Glossary-3

Attended

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

Blended Learning

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

Catalog

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

Catalog Category

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

Catalog Prerequisites

Courses and competencies that a learner must or should complete before enrolling in a given class. Mandatory prerequisites prevent learners from enrolling in the class, while

advisory prerequisites merely inform the learner of courses they should take or competencies they should acquire prior to enrollment.

Chat

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

Class

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

See Session, page Glossary-7

CMI Adapter

See SCORM Adapter, page Glossary-7

CMI Objectives

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

Competency

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

Completed

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

Content

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

Content Folder

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

See also Learning Object, page Glossary-5

Content Location

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

Content Tree

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

See also Learning Object, page Glossary-5,Test, page Glossary-7

Course

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

Cross Charge

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

Customer Restricted

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

Delivery Mode

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

Descriptive Flexfields

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

See also Key Flexfield, page Glossary-

Enrollment

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

Enrollment End

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

Enrollment List

List of enrollments against an offering or class.

Enrollment Start

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

Finance Header

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

Finance Line

An individual financial transaction within a finance header.

Finance Total

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

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

Flexfields (Key And Descriptive)

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

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

Forum

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

Instructor

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

Key Flexfield

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

See also Descriptive Flexfield, page Glossary-3

Learner

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

Learner Access

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

Learning Certification

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

Learning History

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

Learning Object

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

Learning Path

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

LMS Administrator

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

Location

The physical address of a particular class or other.

Manager

The manager to whom one or more learners report.

Offering

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

See also Synchronous, page Glossary-7

Offline

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

Online

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

Player

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

Price

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

Proficiency Level

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

Question Bank

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

Resource

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

Room

The physical room identifier where a class takes place.

Schedule

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

SCORM Adapter

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

Session

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

Successfully Completed

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

Synchronous

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

See also Delivery Mode, page Glossary-3

Test

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

See also Question Bank, page Glossary-

Trainer

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

Training Center

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

Transcript

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

Web Conference

An entity that you use to deliver online synchronous classes and record these classes for on-demand playback. You can create a Web conference for an online synchronous class or enter recorded Web conference information for the class to associate it with a recorded Web conference.

A

Instructions for Restarting Concurrent Programs with a Manual Restart Mode in Oracle Learning Management

For Oracle E-Business concurrent programs, the **Restart Mode** attribute indicates how a program can be restarted in case of system failure.

The Restart Mode can be one of four values:

- Resumable: This program can be automatically restarted and can resume its processing at the point where it left off before the system failure.
- Restartable: This program can be automatically restarted but will go back to the beginning of its processing.
- Manual: An administrator must perform manual steps to restart this program. Product-specific documentation lists the steps required to restart any shipped programs with a Manual restart mode.
- Unknown: It is unknown whether this program can be restarted automatically or not. This value is the initial default setting.

> **Important:** The Restart Mode for Oracle-provided programs should not be modified. If it were to be modified, the value may be overwritten without warning by future Oracle EBS software updates.

For more information about the Restart Mode, see the *Oracle E-Business Suite Setup Guide*.

For the following Oracle Learning Management concurrent programs with a Restart Mode of **Manual**, an administrator must perform the steps specified prior to restarting the program following a system failure.

1. Process Eligibility Profiles for Learner Groups

2. Process Eligibility Profile for Learner Group Multi Threaded
3. Process Mandatory Enrollment Multi-Threaded
4. Process Bulk Enrollments
5. Process Mandatory Enrollments
6. Class Scheduler

The manual restart steps are as follows:

1. Create a service request for data cleanup.
2. After data cleanup completes, rerun the program.

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